



# Housing Authority of the City of Pittsburgh

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**May 1, 2014**

## **Web Dynamic Portal Module**

**RFP#700-10-14**

### **ADDENDUM NO.4**

This addendum issued May 1, 2014 becomes in its entirety a part of the Request for Proposals RFP#700-10-14 as is fully set forth herein:

**Item 1:** Q: If we are an MBE, then we need only to solicit WBE participation, is that correct?

A: Yes that is correct.

**Item 2:** Q: *Each firm shall submit in writing to the Procurement Director/Contracting Officer to request additional information as follows:*

*1. Describe any items, information, reports or the like, if any, that the Proposer will require from the HACP in order to comply with the scope of Services.*

Please elaborate/provide the additional information as applicable about the - items, information, reports (referred above) as it stands today. Please also mention the approximate number of reports required for the future.

A: HACP anticipates 4 reports to start. As many as a dozen possible in the future

**Item 3:** Q: What are some of the products that were looked at for addressing the needs of this RFP?

A: This information will not be released as part of the RFP.

**Item 4:** Q: What are some of the issues in the current set up?

A: There is no existing set up

**Item 5:** Q: Will entity information interact with other forms in any way?

A: Only to the extent that they will be listed on the reports

**Item 6:** Q: Is there a known set of PDFs that need to be generated, or is it expected that HACP will be able to use the new system to create report layouts to match any arbitrary paper form that they might otherwise need, to fill out or ask clients to fill out? In general does HACP expect that it should have the ability to build custom reports on the fly, or will it want future report needs to be provided by developers as they arise?

A: HACP expects that the vendor will provide reports needed to monitor the operation of the site and the productivity of the outside counsel. HACP expects to have access to and information needed to create additional reports from the database using HACP provided reporting tools.

**Item 7:** Q: What is meant by "business entities"? Can HACP give examples of the sets of data expected to be associated with it? Can HACP differentiate between collecting and presenting business entity information & contact management or CRM system, or is that part of the project essentially asking for a highly customizable form of one of those solutions?

A: Business entities will most often be law firms

**Item 8:** Q: Does HACP anticipate that each form will be presented as a single page, or does it anticipate that there will be a desire for multi-page, guided progress data entry forms?

A: There may eventually be a desire for multi-page guided progress data entry forms

**Item 9:** Q: For form presentation, is the intent of the project to provide HACP with a completely drag and drop interface, or is it expected that HACP's presentation designers may need to use an HTML editor or some amount of direct html coding to refine the customized presentation of the forms?

A: Our assumption is that an adequate portal will may require vendor provided coding.

**Item 10:** Clarification: Scope of Work Revised is attached as Attachment A to this Addendum

**Item 11:** Clarification:

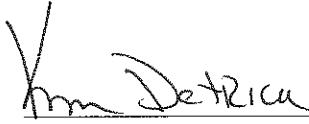
**Additional Pre-Submission Meeting Date:** May 8, 2014 at 10 am,

Location: 100 Ross St. 2<sup>nd</sup> Fl. Ste 200, Pittsburgh PA 15219

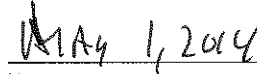
**Revised Question submission deadline Date:** May 9, 2014 at 2 pm

**Item 12:** The proposal due date is revised to May 16, 2014. The time and location remain unchanged at 2:00 PM at the HACP Procurement Dept., 100 Ross St. 2<sup>nd</sup> Floor, Suite 200, Pittsburgh, PA 15219.

**END OF ADDENDUM NO. 4**



Mr. Kim Detrick  
Contracting Officer



Date

Attachment A  
Revised Scope of Services (Section II)  
(RFP-700-10-14 Web Dynamic Portal Module)

## SECTION II

### SCOPE OF SERVICES REVISED

#### Introduction

The Housing Authority of the City of Pittsburgh is seeking the most qualified and responsive offeror to provide a web portal for the Legal Department of the City of Pittsburgh. The goals for the portal include:

- Management of Legal Case status and costs
- Sharing of documents between the HACP Legal department and outside counsel representing the Authority in various legal proceedings
- Communications between the HACP Legal department and outside council representing the authority
- Communications between the HACP Legal department and various HACP internal clients of the Legal department
- Management and status tracking of various Legal Department critical projects
- Summary and status reporting on cases and projects

The following is intended to provide understanding of the scope and function of the portal system. However, it is not a software specification intended to support coding and implementation. The Offeror should include services needed to completely define the system in the form and method used by the Offeror.

#### Roles

The successful system will differentiate between the following security levels

- System Administrator – with global access. Able to manage the set-up and security of the portal
- Legal Department Manager – Able to add instances of outside counsel. Able to add, maintain and view all cases and tasks.
- Legal staff(attorney) – with access to all of the legal department functions. Able to add, maintain and view all cases and tasks.
- Legal staff(support) – with access to a subset of legal department functions. Able to perform functions as assigned by the Legal Department attorneys.
- HACP department/community - Groups within the Housing Authority of the City of Pittsburgh who may have legal cases and tasks handled by the Legal Department.
- HACP department/community management – HACP staff members who supervise or are responsible for multiple departments or communities. Members of this role should be able to view and/or update legal cases and tasks representing any of the groups which they manage
- HACP department/community staff – HACP staff members who are responsible for a department or a community. Members of this role should be able to view and/or update legal cases and tasks assigned to the department or community of which they are a member. A HACP staff member may be assigned to more than one group.
- Outside Counsel (firm) – Law firm with which the Authority contracts to represent the Authority in litigation and other legal matters. Outside Council (firm) should have access to all legal cases assigned by the Authority to the firm.
- Outside Counsel (attorney/staff) – Will be assigned to a firm. Will access a subset of cases assigned to the firm up to all cases assigned to the firm. The attorney may be assigned read access to some cases and read/write access to others.
- Read-only access – Ability to provide authentication and read-only access to other interested party.

#### Interfaces

The successful system will have the following functions.

- A portal or content management module able to authenticate users, manage portal security, collect and format data for presentation to the web user, initiate e-mail messages, and other functions

needed to support the activities of the portal. The portal or content manager should be configurable such that its use can be extended to other departments and functions not considered in this RFP.

- The ability to import data from various external data sources. The import function may be created by defining a database structure where external applications may write required information. The portal will parse the data provided, produce a list of data exceptions, provide the ability for an authorized user to resolve any data exceptions reported, and import the data into the appropriate locations within the portal database.
- The ability to run queries against external SQL Databases or Database view referencing external SQL Databases and update internal fields based on the query.
- The ability to export data. The export function may be implemented by defining a database structure where the portal will locate data for export. The external application will be modified to read the database structure and indicate to the portal when the data has been received. The portal should be able to provide exported data to multiple external systems.
- Insert documents, extract documents, and generally take advantage of the functions provided by the DocuClass document management system. It is suggested that the Offeror contact Cima Software to determine the interfaces needed to support this function.
- Log significant portal events such as

Definitions:

1. Legal Case/Activity – the base unit of work for the Legal Department. The case may include but is not limited to, a grievance hearing, a court case, developing a contract, or a contract dispute. Base attributes for a case include Primary key, Count Case ID, Case Status, Proceedings stage, Court Ruling, opposing party, opposing party type, HACP Client ID, Court Docket, Court Judge, Jurisdiction of Court, Assigned Budget, Budget Adjustments, Funds Remaining, Estimated Settlement Amount, Actual Settlement Amount, Insurance Company, Insurance Coverage, Insurance Deductible, and Case Notes.
2. Legal Case Types – are classifications of a legal case. The attributes of the Legal Case apply to all Legal Case Type. However, each type has additional attributes. Legal Case Types include Contracts, Landlord/Tenant, Workers Compensation, Statutory Appeal, Human Resources, Bankruptcy, Insurance, grievance, and miscellaneous.

The following are examples of attributes specific to Legal Case Types.

The landlord/tenant case type attributes includes Unit Address, Site Location, and landlord/tenant specific comments.

The Workers Compensation case type attributes include employee insurance company, employee insurance coverage, contact name, contact phone, claim number, claim amount, employee attorney name, employee attorney phone, employee attorney e-mail and Workers Compensation specific comments.

The bankruptcy case type attributes include Chapter, bankruptcy Case Number, and Bankruptcy specific comments.

3. Law Firm – Both the Legal Department of the Housing Authority of the City of Pittsburgh and our outside counsel may be considered law firms. Law firm attributes include firm name, firm contact name, firm e-mail, firm contact phone, firm specific comments.
4. Attorney – An attorney handles cases. An attorney is a member of and assigned to a Law Firm. Attributes of an Attorney include Attorney name, Attorney phone number, Attorney e-mail, Attorney specialty, and Attorney specific comments.
5. Billing Invoice - Outside counsel perform tasks for the Authority for a fee. The billing sections of the portal track time and costs charged to the Authority to represent the Authority in a Legal Case/Activity. The Billing invoice provides a summary of a specific billing for a specific period for a specific Law Firm. Attributes of the Billing Invoice include Invoice number, Invoice Date, Invoice Firm, Invoice Total, and Invoice specific comments

6. Billing Line – Billing Lines show detail associated with a specific Billing Invoice. Attributes of the Billing Line include Line Number, Attorney Name, Legal Case/Activity, Description of billed activity, Number of Hours billed, Rate for Hours Billed, Costs Billed for activity, and Billing line specific comments.
7. Case Status – A Legal Case/Activity is either open or closed
8. Case Stage – Stages include, but are not limited to, filed, pending litigation, pending negotiation, in litigation, pending appeal, and under appeal.
9. Case/Activity Ruling – A Case/Activity may be Won, Lost, Split, or Settled
10. Party Type – A Party to the case may be Defendant or Plaintiff
11. Activity Status – a legal activity may be Pending, Dismissed or Closed

#### Functions of the Portal

The portal should be able to perform the following functions.

1. Create a Legal Case/Activity – The assigned member of the HACP Legal Department should be able to create a new case or activity using any of the following methods.
  - a. Manually create a new case/activity. The staff member selects the create new case/activity function and manually enters information needed to create the new case/activity.
  - b. Create a new case based on information imported from the Emphasys Elite system. The Emphasys Elite system tracks certain grievance and tenant actions to the point where the activity is passed to the Legal Department. The Emphasys Elite system will export data based on the interface defined by the Legal Portal. The user should be able to select a function to import a case based on information loaded from the Emphasys Elite Database. The user will be presented with a list of possible Legal Cases, will select the case to create. The system will fill attributes based on data available and allow user to add additional data or to change existing data.
  - c. Create a new case based on information imported from other data sources. This is similar to 1.b but data source is not a SQL Server database.
  - d. Create a new case based on an existing case. The user selects copy a case function and system will copy significant attributes of an existing case. The information is presented to the user who may edit the case information for the new case.
2. Display Cases/Activities – the system should, based on group and personal security display cases of interest to the user. The user may select a case or cases to display by requesting All Cases, Open Cases, Closed Cases, Open cases with late reporting, Open Cases approaching budget limits, cases with activity between dates, cases created between dates. Display page should be able to sort the result set by any column or set of columns as requested by the user.
3. Search for Cases – The user should be able to search for a case by Party, Attorney, Date, Docket #, or other significant information. The user should be able to search for cases based on data in the portal or information stored in the document management system.
4. Update and maintain cases – The user, based on authenticated group and security the user should be able to make changes and add information to the cases. The user should be able to do the following:
  - a. Correct information entered incorrectly when the case was created.
  - b. Add documents to a Legal Case/Activity – the user should be able to add electronic documents to the case and update document index and attribute information. The portal should accept both documents scanned and submitted to the portal and documents in standard document formats (i.e. .pdf, .xls, .xlsx, .doc, .docx, .odt, etc.)
  - c. Update the status and stage information associated with the case.
  - d. Add Legal Activity and billing activity to the cases
5. View and download case information and documents – The user should be able to view and download documents associated with the case
6. View/Print any case related data

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7. View/Print summary information showing number of cases/activities in each format, performance of Legal Firms and Attorneys, performance of the Legal Department, and current and historic workload.
8. Export data to external systems – The portal is not expected to write information into external systems. However, the portal should be able to define extract formats which will create SQL Tables, XML files, and .csv files containing data which can be imported into external systems.
9. Notification function – The system should be able to schedule and send notification (e-mail) to designated address(es) based on critical dates in Case/Activity definitions. The user should be able to identify to the system which Case/Activity dates should trigger notifications.

The Housing Authority of the City of Pittsburgh current technology infrastructure

The Authority operates an information technology infrastructure with attributes below:

- Microsoft Active Directory at functional level 2008 R2
- Microsoft Windows Server 2008 R2
- Microsoft SQL Server 2008 R2
- XenServer Virtual Host 6.2
- DocuClass document management system
- Emphasys Elite 1.9.3 MR2 Housing Authority administrative system
- Suse Linux