

**Oakland County  
Department of Information Technology  
Project Scope and Approach**

**Project Name: Probate Efiling**

**Project ID:DB8341PE**

|  |   |   |                                |
|--|---|---|--------------------------------|
| <b>Leadership Group: Courts/Justice Administration</b> |   |   |                                |
| <b>Department: Probate Court</b>                       |   | <b>Division: Probate Court Judicial Admin</b> |                                |
| <b>Project Sponsor: Rebecca Schnelz</b>                | <b>Date Requested: April 18, 2008</b>           | <b>PM Customer No. 341</b>                    |                                |
| <b>Request Type:</b>                                   | <i>New Development</i>                          | <i>Enhancement</i>                            | <i>Customer Support</i>        |
|  | <i>Planned System Maintenance or Upgrade</i>    |   |                                |
| <b>IT Team Name: Courts</b>                            |   | <b>IT Team No: B</b>                          |                                |
| <b>Project Manager/Leader: Rick Perry</b>              |   |   |                                |
| <b>Account Number:</b> 92198                           | <b>Account Description:</b> PC-E/MH SUPPORT-DEV | <b>Customer Name:</b>                         | Prob-Est/Mental Health Support |
| <b>Grant Funded?</b> No                                | <b>Mandate?</b>                                 | <b>No</b>                                     |                                |
|  | <b>Mandate Source:</b>                          |   |                                |

**Project Goal**

To implement for evaluation a pilot EDMS application that will interface with JIS/TCS so that workflow efficiency will increase and access to the Probate Court is enhanced.

The pilot would include two components:

- 1) Electronic Filing – would allow the court, attorneys and in pro per litigants to file and serve pleadings, notices, opinions, orders, and other court documents (E-documents) electronically via the Internet.
- 2) Electronic Management – would allow judges and court staff to electronically access, route, manage, and utilize E-documents.

**Business Objective**

To provide prototype e-filing integrated with JIS/TCS, financials, imaging systems and court procedures which will increase customer access to the court and streamline processing of files.

**Major Deliverables**

- A.** A vendor provided full service electronic filing application.
- B.** Full integration with TCS as much as possible

**Oakland County  
Department of Information Technology  
Project Scope and Approach**

**Project Name: Probate Efiling**

**Project ID:DB8341PE**

- C. Acceptance test plan and fully tested application by vendor
- D. Training and Documentation by vendor
- E. Source system consulting
- F. Project Management

**Approach**

Follow standard Project Management Methodology

**Benefits**

*See Return on Investment (ROI) Analysis Document*

**Impact**

**Number of Users      32 (County)**

**Divisions              Probate Court**

**Leadership Groups      Courts/Justice Administration**

**Risk**

**Business Environment**      medium – Project requires some changes to existing business practices

**Technical Environment**      medium – previous/y implemented technologies, new requirements

**Oakland County  
Department of Information Technology  
Project Scope and Approach**

**Project Name: Probate Efiling**

**Project ID:DB8341PE**

---

**Assumptions**

**Staffing** IT Staffing: resources will be available for the hours indicated per the attached project plan.

Other Staffing: additional staffing will be available as follows:

| <b><u>Role:</u></b> | <b><u>Name</u></b> | <b><u>Hours per Day</u></b> |
|---------------------|--------------------|-----------------------------|
| Project Sponsor:    | Rebecca Schnelz    | As Needed                   |

**Facilities**

- Courts Team Work Area
- 

**Technical**

- .net framework
- Wiznet

**Funding**

- Information Technolgy
- 

**Other**

- 
- 

**Priority**

TBD

**Constraints**

- 
-

**Oakland County  
Department of Information Technology  
Project Scope and Approach**

**Project Name: Probate Efiling**

**Project ID:DB8341PE**

---

**Exclusions**

- 
-

**Oakland County  
Department of Information Technology  
Project Scope and Approach**

**Project Name: Probate Efiling**

**Project ID:DB8341PE**

**PROJECT PHASE AUTHORIZATION**

|   |                                     |
|---|-------------------------------------|
| <b>Phase(s):</b>  |                                     |
| <b>Total Estimated Application Services</b>               | <b>Hours: 525 Cost: \$64,050.00</b> |
| <b>Total Estimated Technical Systems</b>                  | <b>Hours: Cost:</b>                 |
| <b>Total Estimated eGovernment Services</b>               | <b>Hours: Cost:</b>                 |
| <b>Total Estimated CLEMIS</b>                             | <b>Hours: Cost:</b>                 |
| <b>Total Estimated Internal Services</b>                  | <b>Hours: Cost:</b>                 |
| <b>IT Application Services Division Manager Approval:</b> | <b>Date:</b>                        |
| <b>IT Technical Systems Division Manager Approval:</b>    | <b>Date:</b>                        |
| <b>IT eGovernment Services Division Manager Approval:</b> | <b>Date:</b>                        |
| <b>IT CLEMIS Division Manager Approval:</b>               | <b>Date:</b>                        |
| <b>IT Internal Services Division Manager Approval:</b>    | <b>Date:</b>                        |
| <b>IT Management Approval:</b>                            |                                     |
| Approved:            Yes            No                    | <b>Date:</b>                        |
| Reason:   |                                     |
| <b>Project Sponsor Approval:</b>                          |                                     |
| Title:  | <b>Date:</b>                        |

**PROJECT SUMMARY**

|  |                                     |
|--|-------------------------------------|
| <b>Authorized Development (see above)</b>                  | <b>Hours: 525 Cost: \$64,050.00</b> |
| <b>Preliminary Estimated Development for Future Phases</b> | <b>Hours: Cost:</b>                 |
| <b>Grand Total Estimated Development</b>                   | <b>Hours: Cost:</b>                 |

**Oakland County  
Department of Information Technology  
Project Scope and Approach**

**Project Name: Probate Efiling**

**Project ID:DB8341PE**

**PROJECT COMPLETION AUTHORIZATION**

|  |       |
|--|-------|
| <b>Customer Acceptance of Product:</b> |       |
| Title:                                 | Date: |
| <b>Project Office Review:</b>          |       |
|  | Date: |

|              |               |                                    | Hours      | Cost               |  |
|--------------|---------------|------------------------------------|------------|--------------------|--|
|              |               |                                    |            |                    |  |
| <b>Phase</b> | <b>000000</b> | <b>PROJECT MANAGEMENT</b>          | <b>115</b> | <b>\$14,030.00</b> |  |
| <b>Phase</b> | <b>030000</b> | <b>BUSINESS AREA REQUIREMENTS</b>  |            |                    |  |
| <b>Phase</b> | <b>040000</b> | <b>BUSINESS SYSTEM DESIGN</b>      |            |                    |  |
| <b>Phase</b> | <b>050000</b> | <b>TECHNICAL DESIGN</b>            |            |                    |  |
| <b>Phase</b> | <b>060000</b> | <b>PROGRAMMING</b>                 | <b>410</b> | <b>\$50,020.00</b> |  |
| <b>Phase</b> | <b>070000</b> | <b>IMPLEMENTATION</b>              |            |                    |  |
| <b>Phase</b> | <b>080000</b> | <b>POST IMPLEMENTATION SUPPORT</b> |            |                    |  |
|              |               |                                    |            |                    |  |
|              |               |                                    | 525        | \$64,050.00        |  |
|              |               |                                    |            |                    |  |

# Information Technology Strategic Plan Alignment

## DB8341PE - Probate Efiling

### 3.1 - Provide an Enhanced Application Service Offering

- |  |   |
|--|---|
| 3.1.1 - Increase application integration through web services <input checked="" type="checkbox"/>                                | 3.1.5 - Improve the quality, reliability and availability of all applications <input type="checkbox"/>  |
| 3.1.2 - Research and develop a Constituent Relationship Management (CRM) strategy <input type="checkbox"/>                       | 3.1.6 - Increase the agility and responsiveness of business units by expanding customer analytics <input type="checkbox"/>  |
| 3.1.3 - Promote mobility and location integration in business applications <input type="checkbox"/>                              | 3.1.7 - Leverage the County's Internet presence and portal as a branded consolidated point of access to all County information and services through a web browser <input checked="" type="checkbox"/> |
| 3.1.4 - Utilize ecommerce platform to offset costs and expand product offerings to customers <input checked="" type="checkbox"/> | 3.1.8 - Centralize identity and access management for all applications and content <input type="checkbox"/>   |

### 3.2 - Enhance ability to provide effective and timely customer (County departments and CVTs) service

- |   |  |
|---|--|
| 3.2.1 - Implement a centralized service center strategy to provide a single point of contact <input type="checkbox"/>             | 3.2.4 - Provide a high-quality training program to empower employees through technology <input type="checkbox"/> |
| 3.2.2 - Implement the IT Infrastructure Library (ITIL) best practice framework for IT Service Management <input type="checkbox"/> | 3.2.5 - Develop a formalized customer communication plan <input type="checkbox"/>                                |
| 3.2.3 - Define a service and support strategy that clearly identifies the IT service provided <input type="checkbox"/>            | 3.2.6 - Build IT Staff expertise through professional development <input type="checkbox"/>                       |
|   | 3.2.7 - Expand capacity through ongoing organizational review and selective outsourcing <input type="checkbox"/> |

### 3.3 - Implement a Standardized Infrastructure Strategy

- |   |  |
|---|--|
| 3.3.1 - Deliver services using a shared technology infrastructure wherever possible <input type="checkbox"/>  | 3.3.5 - Establish support cost model and SLA for all offerings outside 3.3.4 <input type="checkbox"/>          |
| 3.3.2 - Implement a Microsoft infrastructure strategy <input type="checkbox"/>  | 3.3.6 - Improve service availability through network design and management strategies <input type="checkbox"/> |
| 3.3.3 - Implement a consolidated security strategy <input type="checkbox"/>   | 3.3.7 - Establish enhanced capacity planning and recovery management strategies <input type="checkbox"/>       |
| 3.3.4 - Establish a standard personal computing hardware and software product suite, SLA, and replacement schedule for all County personal computers <input type="checkbox"/> |  |

**Oakland County -- Probate Efilng**  
Return on Investment Analysis

Project Summary

| Description   | Year 1      | Year 2 | Year 3  | Year 4  | Year 5  | Year 6  | Total   |
|---|-------------|--------|---------|---------|---------|---------|---------|
| <b>Benefits/Savings:</b>  |             |        |         |         |         |         |         |
| Tangible Benefits Subtotal:   | 0           | 0      | 0       | 0       | 0       | 0       | 0       |
| Cost Avoidance Subtotal:  | 43,617      | 44,486 | 45,372  | 46,275  | 47,197  | 48,137  | 275,085 |
| <b>Costs:</b>   |             |        |         |         |         |         |         |
| Development Services Subtotal:  | 64,050      | 0      | 0       | 0       | 0       | 0       | 64,050  |
| Hardware Subtotal:  | 0           | 0      | 0       | 0       | 0       | 0       | 0       |
| Software Subtotal:  | 0           | 0      | 0       | 0       | 0       | 0       | 0       |
| Infrastructure Subtotal:  | 0           | 0      | 0       | 0       | 0       | 0       | 0       |
| Training Subtotal:  | 0           | 0      | 0       | 0       | 0       | 0       | 0       |
| Other Subtotal:   | 0           | 0      | 0       | 0       | 0       | 0       | 0       |
| <b>Annual Statistics:</b>   |             |        |         |         |         |         |         |
| Annual Total Savings  | 43,617      | 44,486 | 45,372  | 46,275  | 47,197  | 48,137  | 275,085 |
| Annual Total Costs  | 64,050      | 0      | 0       | 0       | 0       | 0       | 64,050  |
| Annual Return on Investment   | (20,433)    | 44,486 | 45,372  | 46,275  | 47,197  | 48,137  | 211,035 |
| Annual Costs/Savings Ratio  | 146.85%     | 0.00%  | 0.00%   | 0.00%   | 0.00%   | 0.00%   |         |
| <b>Project Cumulative Statistics:</b>   |             |        |         |         |         |         |         |
| Cumulative Total Savings  | 43,617      | 88,103 | 133,475 | 179,750 | 226,947 | 275,085 | 275,085 |
| Cumulative Total Costs  | 64,050      | 64,050 | 64,050  | 64,050  | 64,050  | 64,050  | 64,050  |
| Cumulative Return on Investment   | (20,433)    | 24,053 | 69,425  | 115,700 | 162,897 | 211,035 | 211,035 |
| Cumulative Cost/Savings Ratio   | 146.85%     | 72.70% | 47.99%  | 35.63%  | 28.22%  | 23.28%  | 23.28%  |
| Year Positive Payback Achieved  |             | Year 2 |         |         |         |         | Year 2  |
| State or Federal Mandate?   |             |        |         |         |         |         |         |
| <b>Signatures:</b>  |             |        |         |         |         |         |         |
| Benefits Reviewed By Project Sponsor  | Date: _____ |        |         |         |         |         |         |
| Costs (including IT Resources) Reviewed By Information Technology Project Manager | Date: _____ |        |         |         |         |         |         |
| Costs (including IT Resources) Reviewed By Technical Services Manager             | Date: _____ |        |         |         |         |         |         |

## Oakland County -- Probate Efiling

## Return on Investment Analysis

## Savings Detail

| Benefit/Savings Description  | Project Savings Category | Budget Category/Funding Source | Unit Desc | Units | Rate per Unit | Total Savings | Annual Multiplier |
|--|--------------------------|--------------------------------|-----------|-------|---------------|---------------|-------------------|
| 1. Reduction of Deputy Register II time reviewing documents presented for filing. 2 Deputy Register II x 2.5 days per wk x 52 weeks /4                   | Cost Avoidance           |                                | ANN       | 13    | 800           | 10,400        | 1.020             |
| 2. Reduction of Deputy Register II time posting documents. Deputy Register II x 33 hrs/wk x 52 weeks /4  | Cost Avoidance           |                                | ANN       | 429   | 20            | 8,580         | 1.020             |
| 3. Reduction in Deputy Register II time processing inquiries to chambers regarding disposition of documents. 3 hrs wk x 52 wks x 1 Deputy Register II /4 | Cost Avoidance           |                                | ANN       | 39    | 20            | 780           | 1.020             |
| 4. Reduction in Office Supervisor I time to dismantle, scan, and reassemble documents 3 hr/wk x 52 wks   | Cost Avoidance           |                                | ANN       | 39    | 22            | 858           | 1.020             |
| 5. Reduction in Student time filing documents - 6 hrs/week x 52 weeks  | Cost Avoidance           |                                | ANN       | 78    | 9             | 702           | 1.020             |
| 6. Reduction in Clerk time locating, pulling, and re-shelving files and documents for hearings and chambers  | Cost Avoidance           |                                | ANN       | 84    | 16            | 1,344         | 1.020             |
| 7. Reduction in paper for dispo sheets and bar code sheets. 6 cases at \$30/4  | Cost Avoidance           |                                | ANN       | 2     | 30            | 45            | 1.020             |
| 8. Reduction in toner cartridges used printing dispo sheets and bar code sheets  | Cost Avoidance           |                                | ANN       | 1     | 202           | 202           | 1.020             |
| 9. Postage savings in returning documents which are rejected /4  | Cost Avoidance           |                                | ANN       | 520   | 0.37          | 192           |                   |

## Oakland County -- Probate Efiling

## Return on Investment Analysis

## Savings Detail

| Benefit/Savings Description   | Project Savings Category | Budget Category/Funding Source | Unit Desc | Units | Rate per Unit | Total Savings | Annual Multiplier |
|---|--------------------------|--------------------------------|-----------|-------|---------------|---------------|-------------------|
| 10. Reduction in Supervisor I pulling files for mail processing - 1 Supervisor I x 4 hrs/week x 52 wks /4   | Cost Avoidance           |                                | ANN       | 52    | 22            | 1,144         | 1.020             |
| 11. Reduction in Deputy Register II time necessary to review and prep files for court hearings. 1 Deputy Register II x 4 hours/week x 52 weeks /4           | Cost Avoidance           |                                | ANN       | 52    | 20            | 1,040         | 1.020             |
| 12. Reduction in Deputy Register II time processing rejected pleadings for return mail. Deputy Register II time, 10.5 hrs/wk x 52 weeks /4                  | Cost Avoidance           |                                | ANN       | 137   | 20            | 2,730         | 1.020             |
|   |                          |                                |           |       |               | 0             |                   |
|   |                          |                                |           |       |               | 0             |                   |
|   |                          |                                |           |       |               | 0             |                   |
| <b>Benefits to judges' clerks, staff attorneys and office staff</b>   |                          |                                |           |       |               | 0             |                   |
|   |                          |                                |           |       |               | 0             |                   |
| 13. Reduction in clerk time handling paper documents, filing and retrieving files, prepping files for court. 1 Court Clerk x 6 hrs/wk x 52 wks              | Cost Avoidance           |                                | ANN       | 312   | 20            | 6,240         | 1.020             |
| 14. Efficiencies gained through streamlined processing of petitions, orders and other documents   | Cost Avoidance           |                                | ANN       | 208   | 20            | 4,160         | 1.020             |
| 15. Reduced traffic in chambers resulting from fewer couriers, attorneys resulting in fewer interruptions and less document handling. 5 hrs/week x 52 weeks | Cost Avoidance           |                                | ANN       | 260   | 20            | 5,200         | 1.020             |

**Oakland County -- Probate Efiling**

Return on Investment Analysis

Savings Detail

| Benefit/Savings Description  | Project Savings Category | Budget Category/Funding Source | Unit Desc | Units | Rate per Unit | Total Savings | Annual Multiplier |
|--|--------------------------|--------------------------------|-----------|-------|---------------|---------------|-------------------|
|  |                          |                                |           |       |               | 0             |                   |
|  |                          |                                |           |       |               | 0             |                   |
|  |                          |                                |           |       |               | 0             |                   |
| *Note: There are certain intangible benefits associated with implementing this project. A reduced wait time at the counter, more efficient tracking of documents, ease of access for customers and additional flexibility in scheduling employee duty assignments are all anticipated benefits leading to higher customer satisfaction and increased productivity. |                          |                                |           |       |               | 0             |                   |
|  |                          |                                |           |       |               | 0             |                   |
| *Note: Additional savings and benefits will accrue outside the six-year scope of the ROI analysis through reduction in time required to process files for destruction after the 7 year retention period.   |                          |                                |           |       |               | 0             |                   |
|  |                          |                                |           |       |               | 0             |                   |
|  |                          |                                |           |       |               | 0             |                   |

## Oakland County -- Probate Efiling

## Return on Investment Analysis

## Savings Detail

| Benefit/Savings Description  | Project Savings Category | Affects Project ROI? |    |    |    |    |    | Potential Savings Extensions |           |           |           |           |           |
|--|--------------------------|----------------------|----|----|----|----|----|------------------------------|-----------|-----------|-----------|-----------|-----------|
|  |                          | Y1                   | Y2 | Y3 | Y4 | Y5 | Y6 | Y1                           | Y2        | Y3        | Y4        | Y5        | Y6        |
| 1. Reduction of Deputy Register II time reviewing documents presented for filing. 2 Deputy Register II x 2.5 days per wk x 52 weeks /4                   | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 10,400.00                    | 10,608.00 | 10,820.16 | 11,036.56 | 11,257.29 | 11,482.44 |
| 2. Reduction of Deputy Register II time posting documents. Deputy Register II x 33 hrs/wk x 52 weeks /4  | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 8,580.00                     | 8,751.60  | 8,926.63  | 9,105.16  | 9,287.27  | 9,473.01  |
| 3. Reduction in Deputy Register II time processing inquiries to chambers regarding disposition of documents. 3 hrs wk x 52 wks x 1 Deputy Register II /4 | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 780.00                       | 795.60    | 811.51    | 827.74    | 844.30    | 861.18    |
| 4. Reduction in Office Supervisor I time to dismantle, scan, and reassemble documents 3 hr/wk x 52 wks   | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 858.00                       | 875.16    | 892.66    | 910.52    | 928.73    | 947.30    |
| 5. Reduction in Student time filing documents - 6 hrs/week x 52 weeks  | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 702.00                       | 716.04    | 730.36    | 744.97    | 759.87    | 775.06    |
| 6. Reduction in Clerk time locating, pulling, and re-shelving files and documents for hearings and chambers  | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 1,344.00                     | 1,370.88  | 1,398.30  | 1,426.26  | 1,454.79  | 1,483.88  |
| 7. Reduction in paper for dispo sheets and bar code sheets. 6 cases at \$30/4  | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 45.00                        | 45.90     | 46.82     | 47.75     | 48.71     | 49.68     |
| 8. Reduction in toner cartridges used printing dispo sheets and bar code sheets  | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 202.00                       | 206.04    | 210.16    | 214.36    | 218.65    | 223.02    |
| 9. Postage savings in returning documents which are rejected /4  | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 192.40                       | 192.40    | 192.40    | 192.40    | 192.40    | 192.40    |

## Oakland County -- Probate Efiling

## Return on Investment Analysis

## Savings Detail

| Benefit/Savings Description   | Project Savings Category | Affects Project ROI? |    |    |    |    |    | Potential Savings Extensions |          |          |          |          |          |
|---|--------------------------|----------------------|----|----|----|----|----|------------------------------|----------|----------|----------|----------|----------|
|   |                          | Y1                   | Y2 | Y3 | Y4 | Y5 | Y6 | Y1                           | Y2       | Y3       | Y4       | Y5       | Y6       |
| 10. Reduction in Supervisor I pulling files for mail processing - 1 Supervisor I x 4 hrs/week x 52 wks /4   | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 1,144.00                     | 1,166.88 | 1,190.22 | 1,214.02 | 1,238.30 | 1,263.07 |
| 11. Reduction in Deputy Register II time necessary to review and prep files for court hearings. 1 Deputy Register II x 4 hours/week x 52 weeks /4           | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 1,040.00                     | 1,060.80 | 1,082.02 | 1,103.66 | 1,125.73 | 1,148.24 |
| 12. Reduction in Deputy Register II time processing rejected pleadings for return mail. Deputy Register II time, 10.5 hrs/wk x 52 weeks /4                  | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 2,730.00                     | 2,784.60 | 2,840.29 | 2,897.10 | 2,955.04 | 3,014.14 |
|   |                          |                      |    |    |    |    |    |                              |          |          |          |          |          |
| <b>Benefits to judges' clerks, staff attorneys and office staff</b>   |                          |                      |    |    |    |    |    |                              |          |          |          |          |          |
|   |                          |                      |    |    |    |    |    |                              |          |          |          |          |          |
| 13. Reduction in clerk time handling paper documents, filing and retrieving files, prepping files for court. 1 Court Clerk x 6 hrs/wk x 52 wks              | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 6,240.00                     | 6,364.80 | 6,492.10 | 6,621.94 | 6,754.38 | 6,889.46 |
| 14. Efficiencies gained through streamlined processing of petitions, orders and other documents   | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 4,160.00                     | 4,243.20 | 4,328.06 | 4,414.63 | 4,502.92 | 4,592.98 |
| 15. Reduced traffic in chambers resulting from fewer couriers, attorneys resulting in fewer interruptions and less document handling. 5 hrs/week x 52 weeks | Cost Avoidance           | x                    | x  | x  | x  | x  | x  | 5,200.00                     | 5,304.00 | 5,410.08 | 5,518.28 | 5,628.65 | 5,741.22 |

**Oakland County -- Probate Efiling**

Return on Investment Analysis

Savings Detail

| Benefit/Savings Description  | Project Savings Category | Affects Project ROI? |    |    |    |    |    | Potential Savings Extensions |    |    |    |    |    |
|--|--------------------------|----------------------|----|----|----|----|----|------------------------------|----|----|----|----|----|
|  |                          | Y1                   | Y2 | Y3 | Y4 | Y5 | Y6 | Y1                           | Y2 | Y3 | Y4 | Y5 | Y6 |
|  |                          |                      |    |    |    |    |    |                              |    |    |    |    |    |
|  |                          |                      |    |    |    |    |    |                              |    |    |    |    |    |
|  |                          |                      |    |    |    |    |    |                              |    |    |    |    |    |
| *Note: There are certain intangible benefits associated with implementing this project. A reduced wait time at the counter, more efficient tracking of documents, ease of access for customers and additional flexibility in scheduling employee duty assignments are all anticipated benefits leading to higher customer satisfaction and increased productivity. |                          |                      |    |    |    |    |    |                              |    |    |    |    |    |
| *Note: Additional savings and benefits will accrue outside the six-year scope of the ROI analysis through reduction in time required to process files for destruction after the 7 year retention period.   |                          |                      |    |    |    |    |    |                              |    |    |    |    |    |
|  |                          |                      |    |    |    |    |    |                              |    |    |    |    |    |
|  |                          |                      |    |    |    |    |    |                              |    |    |    |    |    |



## Oakland County -- Probate Efiling

## Return on Investment Analysis

## Savings Summary

| Benefit/Savings Description   | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Total  |
|---|--------|--------|--------|--------|--------|--------|--------|
| 6. Reduction in Clerk time locating, pulling, and re-shelving files and documents for hearings and chambers   | 1,344  | 1,371  | 1,398  | 1,426  | 1,455  | 1,484  | 8,478  |
| 7. Reduction in paper for dispo sheets and bar code sheets. 6 cases at \$30/4   | 45     | 46     | 47     | 48     | 49     | 50     | 284    |
| 8. Reduction in toner cartridges used printing dispo sheets and bar code sheets   | 202    | 206    | 210    | 214    | 219    | 223    | 1,274  |
| 9. Postage savings in returning documents which are rejected /4   | 192    | 192    | 192    | 192    | 192    | 192    | 1,154  |
| 10. Reduction in Supervisor I pulling files for mail processing - 1 Supervisor I x 4 hrs/week x 52 wks /4   | 1,144  | 1,167  | 1,190  | 1,214  | 1,238  | 1,263  | 7,216  |
| 11. Reduction in Deputy Register II time necessary to review and prep files for court hearings. 1 Deputy Register II x 4 hours/week x 52 weeks /4           | 1,040  | 1,061  | 1,082  | 1,104  | 1,126  | 1,148  | 6,560  |
| 12. Reduction in Deputy Register II time processing rejected pleadings for return mail. Deputy Register II time, 10.5 hrs/wk x 52 weeks /4                  | 2,730  | 2,785  | 2,840  | 2,897  | 2,955  | 3,014  | 17,221 |
| Benefits to judges' clerks, staff attorneys and office staff  |        |        |        |        |        |        |        |
| 13. Reduction in clerk time handling paper documents, filing and retrieving files, prepping files for court. 1 Court Clerk x 6 hrs/wk x 52 wks              | 6,240  | 6,365  | 6,492  | 6,622  | 6,754  | 6,889  | 39,363 |
| 14. Efficiencies gained through streamlined processing of petitions, orders and other documents   | 4,160  | 4,243  | 4,328  | 4,415  | 4,503  | 4,593  | 26,242 |
| 15. Reduced traffic in chambers resulting from fewer couriers, attorneys resulting in fewer interruptions and less document handling. 5 hrs/week x 52 weeks | 5,200  | 5,304  | 5,410  | 5,518  | 5,629  | 5,741  | 32,802 |

**Oakland County -- Probate Efiling**

## Return on Investment Analysis

## Savings Summary

| <b>Benefit/Savings Description</b> | <b>Year 1</b> | <b>Year 2</b> | <b>Year 3</b> | <b>Year 4</b> | <b>Year 5</b> | <b>Year 6</b> | <b>Total</b>   |
|------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| <i>Cost Avoidance Subtotal:</i>    | <b>43,617</b> | <b>44,486</b> | <b>45,372</b> | <b>46,275</b> | <b>47,197</b> | <b>48,137</b> | <b>275,085</b> |
| <b>Savings Total:</b>              | <b>43,617</b> | <b>44,486</b> | <b>45,372</b> | <b>46,275</b> | <b>47,197</b> | <b>48,137</b> | <b>275,085</b> |

## Oakland County -- Probate Efiling

## Return on Investment Analysis

## Cost Detail

| Cost Description                 | Project Cost Category | Budget Category/Funding Source | Unit Desc | Units | Rate per Unit | Total Cost | Annual Multiplier |
|----------------------------------|-----------------------|--------------------------------|-----------|-------|---------------|------------|-------------------|
| IT Hours - New Development       | Development Svcs      |                                |           | 525   | 122           | 64,050     |                   |
| IT Hours - System Maintenance    | Development Svcs      |                                |           |       | 122           | 0          |                   |
| User Hours - New Development     | Development Svcs      |                                |           |       |               | 0          |                   |
| User Hours - PTNE/OT             | Development Svcs      |                                |           |       |               | 0          |                   |
| Contractor Professional Services | Development Svcs      |                                |           |       |               | 0          |                   |
| PC System - Acquisition          | Hardware              |                                |           |       |               | 0          |                   |
| PC System - Maintenance          | Hardware              |                                |           |       | 2,304         | 0          |                   |
| Notebook - Acquisition           | Hardware              |                                |           |       |               | 0          |                   |
| Notebook - Maintenance           | Hardware              |                                |           |       | 2,372         | 0          |                   |
| Mini Notebook - Acquisition      | Hardware              |                                |           |       |               | 0          |                   |
| Mini Notebook - Maintenance      | Hardware              |                                |           |       | 2,196         | 0          |                   |
| Laserprinter 1 - Acquisition     | Hardware              |                                |           |       |               | 0          |                   |
| Laserprinter 1 - Maintenance     | Hardware              |                                |           |       | 1,104         | 0          |                   |
| Laserprinter 2 - Acquisition     | Hardware              |                                |           |       |               | 0          |                   |
| Laserprinter 2 - Maintenance     | Hardware              |                                |           |       | 1,208         | 0          |                   |
| Laserprinter 3 - Acquisition     | Hardware              |                                |           |       |               | 0          |                   |
| Laserprinter 3 - Maintenance     | Hardware              |                                |           |       | 1,860         | 0          |                   |
| Image Workstations - Acquisition | Hardware              |                                |           |       |               | 0          |                   |
| Image Workstations - Maintenance | Hardware              |                                |           |       | 3,496         | 0          |                   |
| Terminals - Acquisition          | Hardware              |                                |           |       |               | 0          |                   |
| Terminals - Maintenance          | Hardware              |                                |           |       | 644           | 0          |                   |
| PRTR w/TERM ID - Acquisition     | Hardware              |                                |           |       |               | 0          |                   |
| PRTR w/TERM ID - Maintenance     | Hardware              |                                |           |       | 1,072         | 0          |                   |
| PRTR w/o TERM ID - Acquisition   | Hardware              |                                |           |       |               | 0          |                   |
| PRTR w/o TERM ID - Maintenance   | Hardware              |                                |           |       | 1,072         | 0          |                   |
| PC Maintenance User Owned        | Hardware              |                                |           |       | 2,304         | 0          |                   |
| Printer Maintenance User Owned   | Hardware              |                                |           |       | 1,072         | 0          |                   |
| Package Software - Acquisition   | Software              |                                |           |       |               | 0          |                   |
| Package Software - Maintenance   | Software              |                                |           |       |               | 0          |                   |
| Business Objects Access          | Software              |                                |           |       |               | 0          |                   |
| Term Emulation SFTW-Acquisition  | Software              |                                |           |       |               | 0          |                   |

## Oakland County -- Probate Efiling

## Return on Investment Analysis

## Cost Detail

| Cost Description                    | Project Cost Category | Budget Category/Funding Source | Unit Desc | Units | Rate per Unit | Total Cost | Annual Multiplier |
|-------------------------------------|-----------------------|--------------------------------|-----------|-------|---------------|------------|-------------------|
| Term Emulation SFTW-Maintenance     | Software              |                                |           |       |               | 0          |                   |
| Server - Acquisition/Upgrade        | Infrastructure        |                                |           |       |               | 0          |                   |
| Server - Maintenance                | Infrastructure        |                                |           |       |               | 0          |                   |
| Server Sftwre - Acquisition/Upgrade | Infrastructure        |                                |           |       |               | 0          |                   |
| Server Sftwre - Maintenance         | Infrastructure        |                                |           |       |               | 0          |                   |
| TBD                                 | Infrastructure        |                                |           |       |               | 0          |                   |
| TBD                                 | Infrastructure        |                                |           |       |               | 0          |                   |
| TBD                                 | Infrastructure        |                                |           |       |               | 0          |                   |
| TBD                                 | Infrastructure        |                                |           |       |               | 0          |                   |
| Internet Access                     | Infrastructure        |                                |           |       | 180           | 0          |                   |
| Project Staff Training              | Training              |                                |           |       |               | 0          |                   |
| User Training                       | Training              |                                |           |       |               | 0          |                   |

**Oakland County -- Probate Efiling**

Return on Investment Analysis

Cost Detail

| Cost Description                 | Project Cost Category | Affects Project ROI? |    |    |    |    |    | Potential Cost Extensions |    |    |    |    |    |  |
|----------------------------------|-----------------------|----------------------|----|----|----|----|----|---------------------------|----|----|----|----|----|--|
|                                  |                       | Y1                   | Y2 | Y3 | Y4 | Y5 | Y6 | Y1                        | Y2 | Y3 | Y4 | Y5 | Y6 |  |
| IT Hours - New Development       | Development Svcs      | X                    |    |    |    |    |    | 64,050.00                 |    |    |    |    |    |  |
| IT Hours - System Maintenance    | Development Svcs      |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| User Hours - New Development     | Development Svcs      |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| User Hours - PTNE/OT             | Development Svcs      |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Contractor Professional Services | Development Svcs      |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| PC System - Acquisition          | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| PC System - Maintenance          | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Notebook - Acquisition           | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Notebook - Maintenance           | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Mini Notebook - Acquisition      | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Mini Notebook - Maintenance      | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Laserprinter 1 - Acquisition     | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Laserprinter 1 - Maintenance     | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Laserprinter 2 - Acquisition     | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Laserprinter 2 - Maintenance     | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Laserprinter 3 - Acquisition     | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Laserprinter 3 - Maintenance     | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Image Workstations - Acquisition | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Image Workstations - Maintenance | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Terminals - Acquisition          | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Terminals - Maintenance          | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| PRTR w/TERM ID - Acquisition     | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| PRTR w/TERM ID - Maintenance     | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| PRTR w/o TERM ID - Acquisition   | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| PRTR w/o TERM ID - Maintenance   | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| PC Maintenance User Owned        | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Printer Maintenance User Owned   | Hardware              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Package Software - Acquisition   | Software              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Package Software - Maintenance   | Software              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Business Objects Access          | Software              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |
| Term Emulation SFTW-Acquisition  | Software              |                      |    |    |    |    |    |                           |    |    |    |    |    |  |

**Oakland County -- Probate Efiling**

Return on Investment Analysis

Cost Detail

| Cost Description                    | Project Cost Category | Affects Project ROI? |    |    |    |    |    | Potential Cost Extensions |    |    |    |    |    |
|-------------------------------------|-----------------------|----------------------|----|----|----|----|----|---------------------------|----|----|----|----|----|
|                                     |                       | Y1                   | Y2 | Y3 | Y4 | Y5 | Y6 | Y1                        | Y2 | Y3 | Y4 | Y5 | Y6 |
| Term Emulation SFTW-Maintenance     | Software              |                      |    |    |    |    |    |                           |    |    |    |    |    |
| Server - Acquisition/Upgrade        | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| Server - Maintenance                | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| Server Sftwre - Acquisition/Upgrade | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| Server Sftwre - Maintenance         | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| TBD                                 | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| TBD                                 | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| TBD                                 | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| TBD                                 | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| Internet Access                     | Infrastructure        |                      |    |    |    |    |    |                           |    |    |    |    |    |
| Project Staff Training              | Training              |                      |    |    |    |    |    |                           |    |    |    |    |    |
| User Training                       | Training              |                      |    |    |    |    |    |                           |    |    |    |    |    |

**Oakland County -- Probate Efiling**  
Return on Investment Analysis

Cost Summary

| Cost Description                      | Year 1        | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Total         |
|---------------------------------------|---------------|--------|--------|--------|--------|--------|---------------|
| <b>Development Services:</b>          |               |        |        |        |        |        |               |
| IT Hours - New Development            | 64,050        |        |        |        |        |        | 64,050        |
| IT Hours - System Maintenance         |               |        |        |        |        |        |               |
| User Hours - New Development          |               |        |        |        |        |        |               |
| User Hours - PTNE/OT                  |               |        |        |        |        |        |               |
| Contractor Professional Services      |               |        |        |        |        |        |               |
| <i>Development Services Subtotal:</i> | <b>64,050</b> |        |        |        |        |        | <b>64,050</b> |
| <b>Hardware:</b>                      |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
| <i>Hardware Subtotal:</i>             |               |        |        |        |        |        |               |
| <b>Software:</b>                      |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
| <i>Software Subtotal:</i>             |               |        |        |        |        |        |               |
| <b>Infrastructure:</b>                |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
| <i>Infrastructure Subtotal</i>        |               |        |        |        |        |        |               |
| <b>Training:</b>                      |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
| <i>Training Subtotal:</i>             |               |        |        |        |        |        |               |
| <b>Other:</b>                         |               |        |        |        |        |        |               |
|                                       |               |        |        |        |        |        |               |
| <i>Other Subtotal:</i>                |               |        |        |        |        |        |               |
| <b>Costs Total:</b>                   | <b>64,050</b> |        |        |        |        |        | <b>64,050</b> |

