K

- Keefe will interface with the existing ICSolutions housing kiosks to apply our Edge commissary ordering software.

- Keefe will invest over $28,000 on a custom interface with your JMS provider!

- KCN will provide bagging and delivery of commissary orders once a week from our Regional warehouse as scheduled by Lake County Jail. County staff will be responsible for all distribution of orders.

- KCN will provide one lobby deposit kiosk, as well as web and phone deposit capabilities, at no charge to the County! (standard fee schedule provided in our bid)

- KCN will provide one Intake (booking) Kiosk that can accept cash, credit or debit upon inmate booking.

Option B. Off Site Commissary (Keefe run operation)

- **31%** commission on all commissionable sales for commissary and Securepak Friends and Family web order services are included with this offer. Non commissionable sales (i.e. postage, indigent items, tax, phone time, tablet time) are not included.

  - Optional vending program which can increase sales by an additional 30% to 50% once implemented. Terms to be negotiated if awarded to Keefe.

  - Optional Telmate tablet deployment jail wide. If chosen as the main ordering platform the jail will receive 10% of all tablet revenue each month on top of the commissary and SP Commission.

  - Optional midweek kit program to sell to inmates who missed commissary delivery.

- KCN will cover all installation costs, as well as provide all hardware and banking software for the Commissary operation for the duration of the contract, at ZERO cost to the County

- Keefe to provide an onsite Lead with delivery agents to manage the commissary operation, delivery, vending replenishment.

- Keefe will pay the county $500 per month for use of the onsite space currently being used for the commissary operation. **note should the county wish to have these funds added to commission % we can accommodated that request as well**

- Keefe will invest over $28,000 on a custom interface with your JMS provider!

- KCN will provide bagging and delivery of commissary orders once a week from our Regional warehouse as scheduled by Lake County Jail. KCN on site staff will manage all aspects of the commissary operation to minimize jail staff involvement.

- KCN will provide one lobby deposit kiosk as well as web and phone deposit capabilities at no charge to the County! (standard fee schedule provided in bid)

- KCN will provide one Intake (booking) Kiosk that can accept cash, credit or debit upon inmate booking.

KCN will provide all equipment, software, supplies, support, warranties and training with regard to Commissary and Banking services.

- KCN has offered the **leading technology in the industry for Inmate Trust and Commissary Ordering.** KCN will provide software and training necessary, free of charge. KCN will also provide 24 hour, 7 day a week, 365 day a year _in-house_ support of our technology.

- KCN is the industry leader, partnering with over 57% of the privatized market share in the United States, over **75% in the State of CA**, and nearly **70% in the Western States.**

Should the Command Staff wish to negotiate any aspect of this offer, KCN is open to revisit any element of the proposal.

<u>We look forward to continuing our partnership with Lake County</u>

SCOPE OF WORK

The Contractor shall provide commissary service to the inmates at least twice per week. Deliveries to the jail shall normally be next day after the orders are entered into the System. Delivery date(s) to be determined by the Sheriff's Department.

K *Keefe Response*: Keefe understands and will adhere. Please refer to Options A and B below.

Proposal must include a plan for off site filling of commissary orders. To include order timeframe and turn around time. Type of transit to be used for delivery and whether delivery is guaranteed. Proposal for both once or twice a week commissary. If the Department wishes the vendor to distribute the commissary, there should be a line item for this cost.

K *Keefe Response:* Keefe is providing two options, A and B. One for our staff to manage all commissary operations and distribution; and the other is for the County employees to manage the operations and distribution. Due to the geographic location of the jail and cost of freight, Keefe is proposing a once a week delivery to avoid additional costs and maintain the ability to offer the County a better financial proposal. We are sure that by not capping the spending limit and offering vending services, there would be no need for twice a week delivery.

Option A: Keefe will provide one lead Onsite Commissary Manager to handle all commissary operations, order processing, deliveries, credits, refunds, reroutes, discrepancies, vending product orders, restocks, etc. We will also provide two part-time employees to assist with receiving and staging of the orders, as well as distributing orders to the inmates. Orders will be pulled by Keefe and sorted by housing location, in our secure Regional offsite warehouse with a guaranteed delivery once a week, in a Keefe 26-foot box truck, driven by Keefe personnel, on the agreed upon delivery day. Example: Orders are submitted on Tuesday for a Thursday morning delivery, received and staged by onsite staff, and distributed on Thursday. There is no direct cost to the County for this option. Please refer to Option A in the Executive Summary for all offer financial details.

Option B: County staff will electronically submit orders once a week on mutually agreed upon day. Keefe will pull and sort the orders by housing location in our secure Regional offsite warehouse with a guaranteed delivery once a week, in a Keefe 26-foot box truck, driven by Keefe personnel, on the agreed upon delivery day. Orders will then be received and distributed by County staff. Example: Orders are submitted on Tuesday for a Thursday morning delivery, then received and distributed by County staff. County staff will receive full training on all commissary and banking software to handle refunds, credits, discrepancies, grievances, etc. There is no direct cost to the County for this option. Please refer to Option B in the Executive Summary for all offer details.

Contractor shall provide commissary order forms and update them as changes are made in the inventory. If necessary, the Sheriff's Department will be responsible for printing the order forms, delivering them and picking them up from the inmates.

K Keefe Response: Keefe understands and will adhere.

Keefe has the full capability and rights to offer our EDGE ordering software on the existing ICS kiosks that are already in the housing units. We will interface with the kiosks by adding our EDGE ordering application and allowing inmates to order via kiosks instead of paper ordering. This is a much more efficient method of ordering, and allows the orders to be submitted electronically in our software. Paper order forms will still be provided by Keefe for any back up situation that may occur. Keefe will also offer phone ordering as a backup method should the County decide to do so. Please refer to our description of both the Edge Software capabilities and Phone ordering below.

Keefe's EDGE software is currently deployed at over 200 facilities servicing over 210,000 inmates nationwide.

The EDGE software is developed by Keefe's in-house technology and development teams.

Each kiosk will then allow the inmate to participate in a number of self-service activities including:

- Commissary Order Entry
- Account History Review
- Message Exchange with staff
- Message Exchange with family members and friends including viewing and replying to messages (with ***Access Corrections Secure Mail & Secure Photo*** Program)
- Facility Bulletin Board Information

Edge Self-Serve Activities
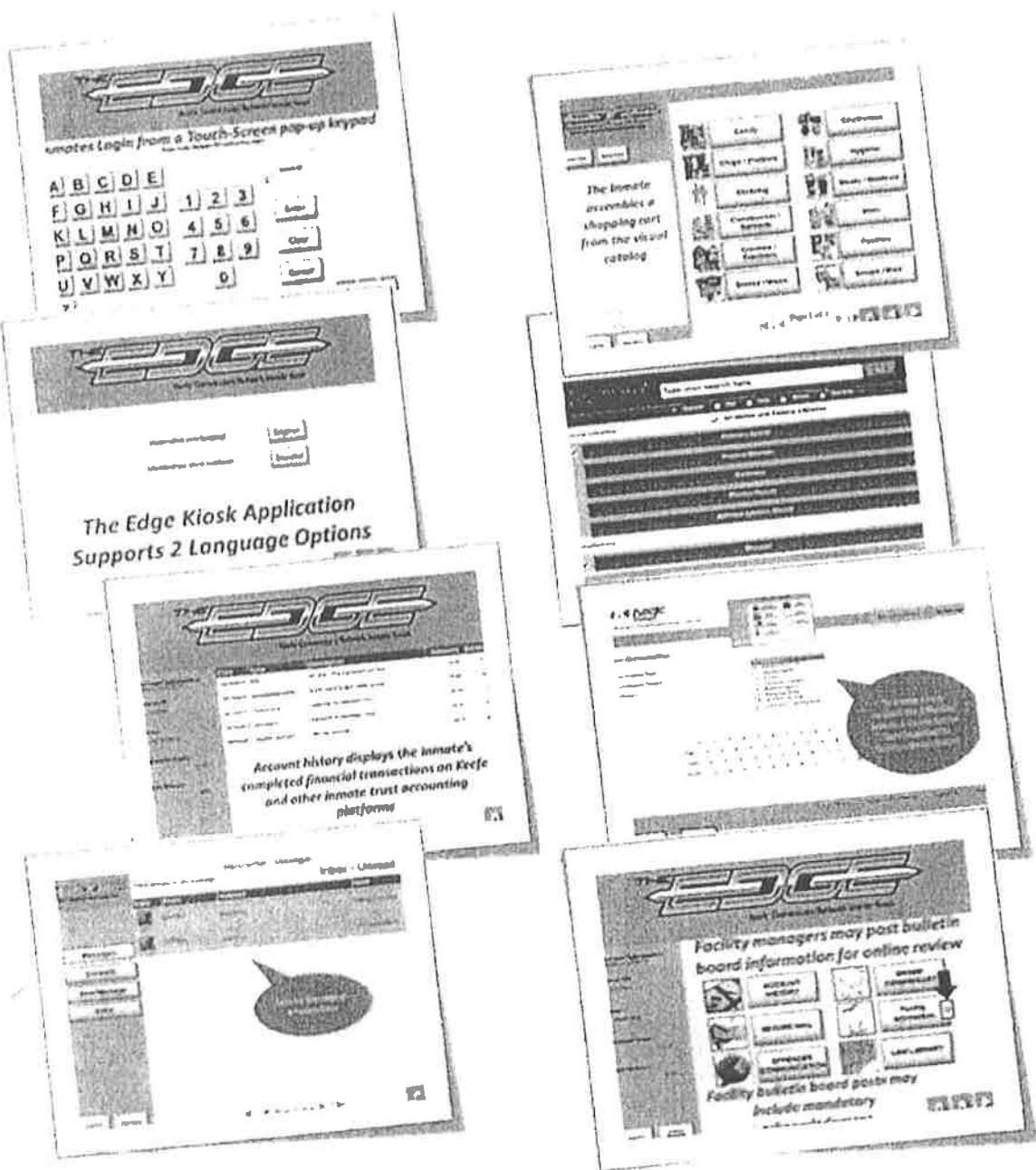
Account History

The Edge software allows inmates to look up their accounts for balance and line item inquiries as well as order requests. Inmates enter their facility number and pin numbers, as if they were at a bank ATM.

The pin number is able to be reset by either the inmate or an authorized facility administrator

Commissary Ordering

The software is designed to allow inmates to enter their orders and adjust them as often as they would like until the cutoff time. This is a huge advantage over other ordering systems, as it supports changes and additions and promotes increased sales.

Once the cutoff time is reached, all order requests are processed and all facility rules and restrictions are applied. After all requests are processed, orders are built and dispatched to the distribution center for fulfillment.

The touch screen ordering system allows users to view approved commissary product pricing and availability. The ability of an inmate to see the product they are ordering has a direct impact on overall sales.

Inmates are able to create a "grocery list" with our system. Inmates are assigned facility approved order forms or menus which are displayed to the inmates as their choices. Each order form or menu is displayed in category sections. Inmates will simply touch the category that will then display the items to be added to the grocery list.

KCN has chosen to display pictures of all the products to the users allowing them to understand fully what items they are requesting. This provides an additional advantage for those who may have issues with literacy and/or language.

This module will apply all of the facility's commissary restrictions at the time the order is created. Those restrictions are:

- Order for assignment
- Order form spending group limit
- Order form max spending limit
- Item category max spending limit
- Item max time quantity
- Item max quantity
- Resident indigence status
- Item indigence status
- Resident age
- Resident available balance
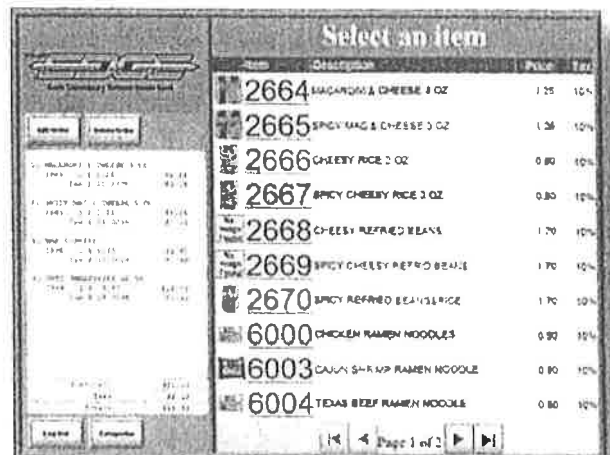
All refunds are done in real time and linked back to the billing system for a fully automated system.
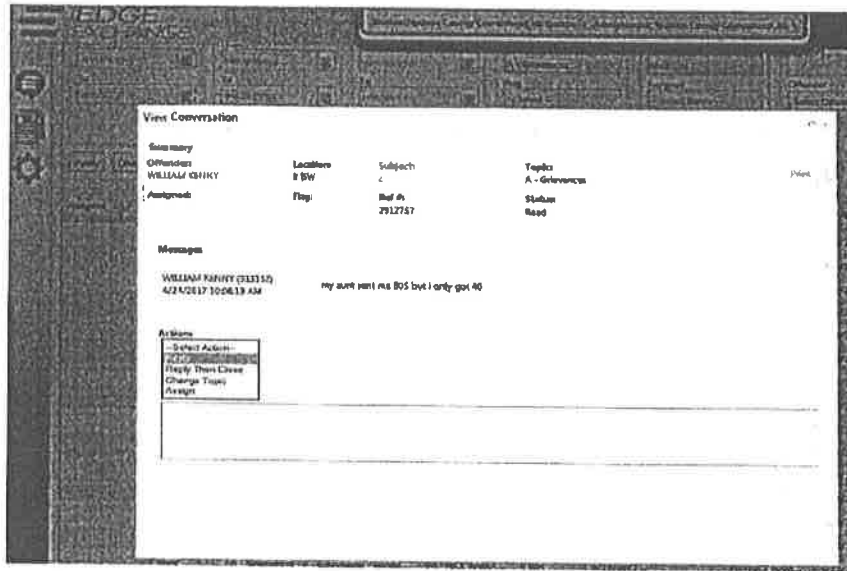
Message Exchange with Staff

The EDGE software will allow facility staff to utilize Keefe's The Edge Exchange (TEX) for reading and responding to inmate requests online.

TEX is a messaging service hosted by KCN that enables paperless communications between inmates and staff. The requests are routed from the EDGE software directly to authorized facility staff for review, approval and/or facility reply.
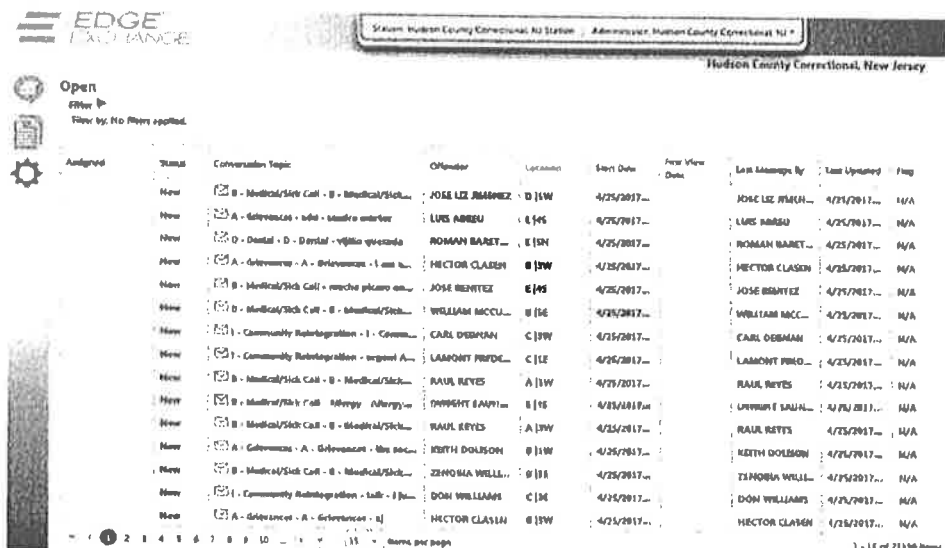
Additional Features of the TEX Include:

- Individual staff members can be assigned roles that filter the types of topics they can read, initiate or reply
- An inmate or a staff member may choose a given topic to create a conversation
- Staff members and inmates can add text comments to an open conversation
- Ability for staff to sort and filter messages
- Conversations may be reassigned from one staff member to another
- Facility may define a number of hours after which a dormant conversation topic must be escalated to an alert state
- Messages that achieve a given alert state may trigger an email to selected staff for immediate attention
- All texts within a conversation are individually time-stamped
- A given conversation may be selected and printed in its entirety
- Summary information for all conversations may be exported into Excel and filtered for further research or statistical reporting

Phone Order Entry

Keefe also offers the County the ability for inmates to order commissary over the existing ICS phones as a secondary method, at no additional cost to the County or inmate. Any inmate may access Keefe's phone order entry platform from the Inmate Telephone System (ITS). Keefe's phone order entry platform may be accessed from the ITS via simple speed dial to Keefe's Integrated Voice Response (IVR) center. Connections from the ITS to Keefe's IVR may be analog or voice over IP. Keefe's IVR script announces the inmate's spendable balance, and enables order entry from Keefe's menu of commissary products. Orders placed on the Keefe IVR are swept on a scheduled basis for fulfillment and delivery. All items in the inmate's phone order entry request are listed on the delivery receipt, including items that were denied for various restrictions or insufficient funds.

Contractor is responsible for the pick up of the order forms from the Sheriff. Said forms shall show items available and their current prices. Contractor may propose an alternate automated ordering process.

K *Keefe Response*: Keefe understands and will adhere. Keefe will also interface with the existing ICSolutions kiosks to enable the commissary ordering feature. Keefe can also offer the ability to order via Tablet should the County choose that option. Please refer to the Tablet details below.

Inmate Tablets:

The Inmate tablet is a secure, wireless device specifically designed for correctional facilities, which transforms inmate interactions. It brings a new wave of benefits to facility staff and inmates, which is further proof that well-designed, modern technology can advance both correctional operations and inmate well-being.

Enhanced Features & Benefits:

- Commissary Ordering
- Messaging and Photo Sharing

- Continuing Education and GED
- Music, Entertainment, Games, News
- Library of eBooks
- Law Library, PREA
- Investigative Suite
- Security and Control
- Ability to Gather Real-Time Data

This deployment comes at NO COST to Lake County

Features and Benefits
The following features will be available for the inmate tablet solution at no cost to you:

Commissary Ordering: The tablets support the ability for inmates to place commissary orders electronically through the tablet, without involving correctional staff and time. This solution is compatible with Keefe's commissary ordering system.

Digital Grievances: The tablet will provide a complete digital inmate grievance and inmate request system, available to users of the inmate tablets. This system will allow the creation, publishing, and management of digital forms and allows submissions to be routed directly to specific individuals. The system will also support follow-up communication with the staff member who receives the submission.

Routing of Requests: Ouachita's staff will control the routing of submitted digital requests and grievances to key staff.

Photo Sharing: To reduce physical photographs being introduced into the facility, we will provide a photo sharing solution that allows approved contacts to share digital photos with inmates. The photos will be manually reviewed for nudity and offensive behavior before it may be seen by the inmate. Inmates may not take photos or share photos with their approved contacts.

Secure Messaging: To reduce mailroom volume, a messaging solution that allows inmates and approved contacts to exchange electronic typed messages will be provided. This solution will trigger alarms based on watchwords, allow text searches across messages, and permit facility staff to conduct speedy reviews of messages.

Religious Content: By default, the tablets will provide content to help meet the needs of inmates of diverse religious beliefs.

Educational Content: The tablet's solution will have the capability of displaying current and/or future educational content.

Entertainment: Inmate tablets will provide entertainment options for inmates, including sports scores, music, non-violent games, and other inmate appropriate entertainment.

Content Blocking: The Client will be able to block specific content offerings either temporarily or permanently if the Client anticipates that the content will provide problems for their facility.

Inmate Self Improvement: The tablets provide content options for inmate self-improvement, including personal finance, employment, national news, and learning options.

No Penalties: There is no additional cost to the Client for any features or hardware described herein.

The following services are also included with the tablets:

- Free access to the Casemaker Law Library which will be loaded onto the inmate tablets
- All new hardware including server, work stations, printers, tablets and lobby kiosk

Casemaker Law Library

Casemaker is the company that originated the concept of providing comprehensive legal research as a member benefit through state/county bar associations. The Company was created about 16 years ago by the Ohio State Bar Association for its own members in recognition of the reality that attorneys, especially those in small firms and solo practice, need a reliable and affordable alternative for online legal research.

The Casemaker consortium now numbers 23 state bars and the Bar of the City of New York, and provides its service to almost 300,000 attorneys every month. And most of those attorneys rely on Casemaker as their principal source of legal research.

Casemaker is headquartered in Charlottesville, Virginia where it hosts its executive offices, much of the programming and development management, statute editing function, customer service and some other functions. Casemaker's data center is in Southern California and the company also has several employees who work out of home offices. The company also houses a significant data editing facility in Mumbai, India were material that has been collected from various sources is put into a standard format for dissemination online.

Casemaker is privately owned company and is very stable company from a financial standpoint. Because of the quality of Casemaker's editorially enhanced products (i.e., statutes, page linking, citator, etc.) Casemaker is able to sell these services to several other companies within the online legal research market. This opportunity creates a lucrative source of revenue for the company which subsidizes the fees that Casemaker charges to bar associations. As subscribers to Casemaker the bar will get the advantage of the quality of the services and the benefit of a lower fee due to that additional revenue source.

Access to the Casemaker service will be available to members through the SDCBA website; members will log in to the 'members only' section of the bar website and after a one-time-only registration to set up a password, will simply click on the Casemaker logo and will be connected to the Casemaker home screen.

Contractor shall have the ability to allow inmate's family and friends to purchase commissary items via the internet or kiosk. Contractor shall propose alternative automated methods for inmates to order commissary and deposits made by the inmate's family or friends.

Keefe Response: Keefe understands and will adhere.

Access Securepak

Access Securepak provides the opportunity for family and friends to purchase packages online for delivery to inmates. The menu of approved items can match the commissary menu or may have additional items if the facility chooses. All items offered for sale are pre-approved by the Facility.

The website allows family and friends to browse items including food and snacks; health and beauty; and kits and the general store. Inmate information is pulled from the County database, limits are imposed, and the items allowed for each classification or facility are the only items offered. A $6.95 processing fee is charged to the user for each package ordered.

Securepak has an in-house team of 12 individuals dedicated to the support of our e-commerce operations. We process and ship in excess of 1,000,000 packages a year nationwide, and are the exclusive provider of this service to 15 State Department of Corrections.

Securepak Program Features

- Allows custom orders instead of only pre-made kits. While we can sell kits, however our experience has shown that sales are maximized when the consumer can select the items to suit their individual preferences, rather than being limited to pre-set kit.

- Provide facility staff access to web based Facility Research Tool application so staff can electronically verify status of a specific inmates orders; who is buying a package for a specific inmate, and which inmates a family or friend is buying packages for. This aids in investigation efforts when knowledge of who bought a package is needed quickly, as well as what items an inmate has recently received.

- Interface with various database files containing inmate names, numbers, location, housing and other information necessary to adhere to various rules and restrictions as determined by the Facility.

- Electronically determine inmate's eligibility to receive a package or determine what items they are allowed to receive based on rules and restrictions provided by the Facility.

- Control which family or friends are allowed to place an order. Requires the facility to provide list of approved visitors or similar type list to determine eligibility.

- Provide detailed sales reports such as: number of orders by facility, dollar sales by facility or dollar sales by item.

- Sell items with multiple sizes and colors.

- Print "blind" pick/pack slips; "blind" indicating that all inmate-specific identifiers are removed.

- Print large self-adhesive bag /box labels that are affixed to the outside of the package to aid in package identification and distribution.

- Provide a manifest via e-mail or fax which provides identity of "blind" shipped packages to aid in prevention of tampering during transport to final facility destination.

- Provide barcoded labels for tracking of shipped packages.
- Provide facility staff access to web based Facility Research Tool application so staff can electronically verify status of a specific inmates orders; who is buying a package for a specific inmate, and which inmates a family or friend is buying packages for. This aids in investigation efforts when knowledge of who bought a package is needed quickly, as well as what items an inmate has recently received.

- Interface with various database files containing inmate names, numbers, location, housing and other information necessary to adhere to various rules and restrictions as determined by the Facility.

- Electronically determine inmate's eligibility to receive a package or determine what items they are allowed to receive based on rules and restrictions provided by the Facility.

- Control which family or friends are allowed to place an order. Requires the facility to provide list of approved visitors or similar type list to determine eligibility.

Securepak currently accepts and processes all credit cards and other forms of payment (money orders, cashier checks) online.

Securepak also provides telephone order placement via our Call Center staff and operation. Securepak currently employs 118 individuals – 90 of which are dedicated as Customer Service Representatives answering telephone calls from 7:30am to 11:00pm CST Monday through Friday; and 10:00am to 4:00pm CST on Saturday. In addition to telephone support, we also have online chat and e-mail support to assist in the order placement/order tracking process.

Access Secure Deposits/Payments Overview

Access Corrections is well experienced in handling trust fund deposits and payments. Access Corrections currently processes over 6 million transactions per year, nationwide, including 800 County agencies and sixteen (16) State Department of Corrections. Counties that we service near your agency include Napa, Mendocino and Yolo Counties.

Residents/Recipients

Helping You Stay Connected With Loved Ones and Providing Support
In the face of adverse circumstances, maintaining a connection to home can help make life a little better. Access Corrections is dedicated to offering the technologies and services to enhance communication for your offenders in a number of ways.

Agencies today can have funding applied into several unique accounts in order to meet agency needs. These accounts can include the following.

- General Spending Account (also called Trust or Commissary)
- Prepaid Phone Account

A deposit **purpose** such as a prepaid phone account may be customized for Lake County Sheriffs Office.

The agency has the flexibility to set different transaction limits for each service offered—for example, you could specify a $300 limit on the General Spending Account and $500 on prepaid phone services. This system will allow deposits and payments using credit or debit cards as well as cash. There are several options for funding an account including online, mobile app, telephone, kiosks and walk-in retail locations.

Family and Friends Needs

In the face of adverse conditions, family is assured that they can ease the stress of their loved one by funding accounts to increase communication. There are many convenient funding options for Family and Friends. These include web, mobile app, phone, kiosk, and walk-in locations.
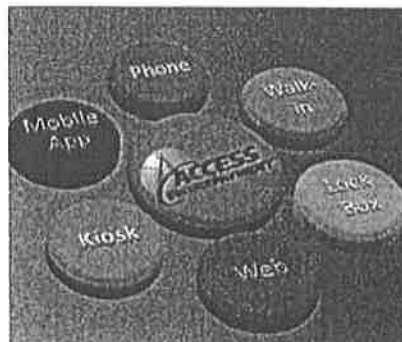
Online Deposits/Payments via Computer, Smart Phone or Tablet

In order to allow inmates' family and friends to make deposits or payments online, Keefe operates a secure website 24/7/365 – www.accesscorrections.com. All that is required to set up an account is an email address and a personal password. Once they have completed this process, they can log onto the secure website.
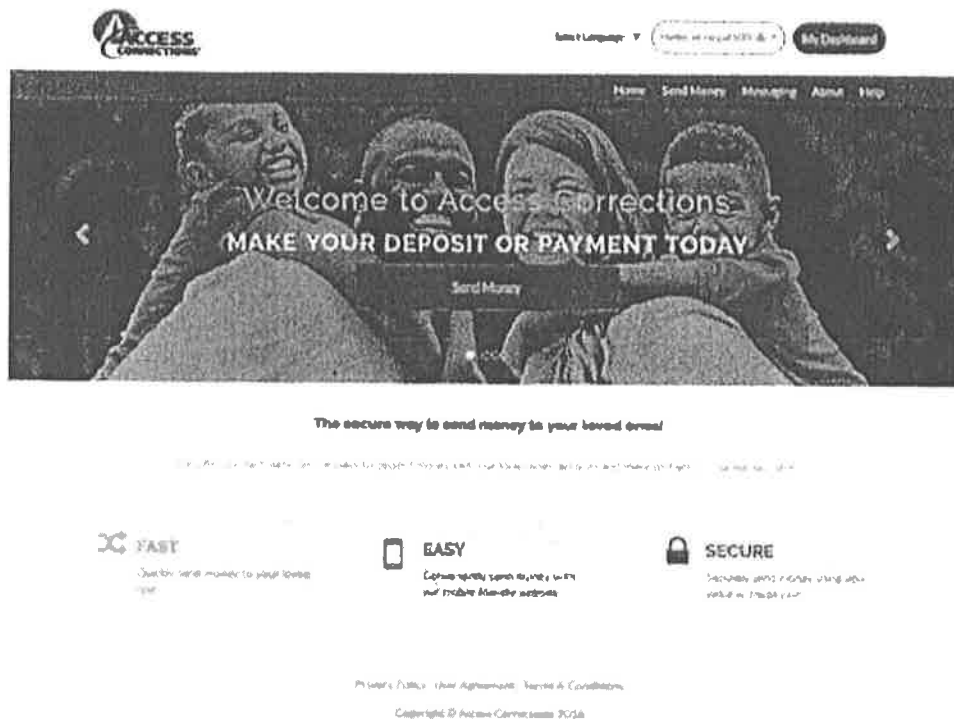
Adding a Recipient to my Dashboard

FIND AN AGENCY

Make a deposit or payment by selecting a state and an agency.

VISA

AGENCY SEARCH

Select State:

CALIFORNIA ▼

Select Agency:

Select An Agency

| ALAMEDA - SANTA RITA, CA |
| Alameda - North County, CA |
| AMADOR COUNTY, CA |
| CALAVERAS COUNTY, CA |
| California CDCR Inmate Trust/TCL/Restitution |
| California CDCR Parolee Restitution |
| Chula Vista City Jail, CA |

Privacy Policy|User Agreement| Te

Copyright © Access C

Family and Friends can choose from several directed accounts today as shown below.

Select Language | ▼   Hello, Ann ▲ ▼   My Dashboard

Home   Send Money   SecureMail   About   Help

Recipient Name:
Recipient Id:
Date of Birth: 1/3/1991
Agency: Oregon Dept. of Corrections
Change Recipient

DEPOSIT INFORMATION

Billing Information

Verify billing information matches the credit card you are using.

VISA

Name:
Address: 05   ☑ Edit

Choose a purpose and enter an amount below.

Deposit Purpose:

General spending account ▼

| General spending account |
| Dental use only |
| Medical use only |
| Optical use only |
| Trip use only |

Deposit Amount: * (Max of $300.00)

$ 0.00

⬅

tential illegal activity may be held for review and

*- Attention: By checking this box, you agree in the event that your transaction is reported as unauthorized

Deposit and Payment Mobile App

Keefe also offers the ability for individuals to make deposits and payments via our user friendly Mobile App. The App is available on both the Google Play and iTunes stores.

Phone Deposits

Keefe offers a 24/7 toll free phone number for friends and family to deposit funds or make payments using their MasterCard or Visa debit/credit card into an inmate's account. Our bilingual (English & Spanish) Customer Service Representatives ("CSR's") collect all account holder information that is required to gain approval for the use of the credit card.

Keefe has *eighty nine (89)* in-house customer service representatives and also provides support through a U.S. based third party call center. All CSRs are specifically trained to handle customer's phone deposits, transaction history, complaints and financial discrepancies. Keefe provides support and allows for phone deposits 24 hours a day, 7 days a week. In addition to live CSR's, users can make deposits or payments via *Interactive Voice Response System (IVR)* for a quick and easy payment option.

All call center employee candidates must successfully pass a thorough background check, a satisfactory credit check, and drug testing before they are considered for employment. We take full responsibility of our call center operations and employees, and go above and beyond to provide exceptional, professional, and the most secure services to our customers.

We have two separate and independent call centers which operate daily as backup and disaster recovery. Should one call center experience technical difficulties, all calls would automatically route to the other call center to continue providing uninterrupted service.

Walk-In Cash Deposits/Payments (Optional)

Keefe is partnered with **Western Union** in order to provide friends and family a convenient low cost option for walk-in cash payments. We offer one standard low handling charge for deposits/payments up to $1,000. These locations will accept cash deposits for inmates on behalf of Keefe. Through this partnership, Keefe is able to provide a network of convenient locations making the service easy and readily accessible.

To make a walk-in deposit, visit a Western Union® agent location to send money using cash, or in some cases, a debit card.

1. You will need the name, ID# and location of the inmate, along with your government-issued ID.

Usted necesitará el nombre, No. de ID y ubicación del preso junto con una identificación gubernamental.

2. Find a Western Union® agent location worldwide in places such as supermarkets, check cashers and convenience stores in a city near you.

Encuentre una ubicación de Western Union en lugares como supermercados, tiendas de cambios de cheque y de conveniencia.

3. To find participating locations near you and send money through Western Union®, visit westernunion.com/us/en/send-money/app/sendinmatestart or call 800-325-6000.

Para encontrar una ubicación cercana y enviar dinero por medio de Western Union, visite westernunion.com/us/en/send-money/app/sendinmatestart o llame al 800-325-6000

*A handling charge will be assessed based on the deposit amount.
  *El cargo de manejo envío será basado en la cantidad del depósito.

Lobby Kiosks

This response includes the opportunity to add another access point for Family and Friends by utilizing a lobby kiosk at Lake County.

Secure Deposits Lobby Kiosk

PHOTO CAPTURE

Mounted camera takes a photo of each depositor at the time of the transaction

PHOTO IDENTIFICATION

Kiosk software has the ability to show a provided image of the recipient during a transaction

DRIVER'S LICENSE/CARD READER

Reads driver's license and Accepts Visa or MasterCard Debit and Credit Cards

BILL COLLECTOR (Available with bulk acceptor)

Accepts $5, $10, $20, $50 and $100 bills

RECEIPTS

Each depositor receives a printed receipt of the transaction

Family and Friends can use the convenient lobby kiosk to fund a loved one's account. Here is an example of the kiosk screen. The depositor has the option to direct funds to a specific account such as a prepaid phone account.

Lake County, CA ID #

START OVER

Select Purpose

General Spending Account

Dental Use

Medical Use

Optical Use

Prepaid Phone Account

BACK   Results Page 1 of 1 (Total : 2 items)

Access Corrections offers the ability for friends and family to send money from our 800+ lobby kiosks located in correctional facilities across the country, including **thirty-one** (31) California county locations. The California County lobby kiosk locations closest to your agency are Napa County, Mendocino County and Yolo County. When a customer goes to one of those kiosks, the kiosk gives them an option to "change agency location" and select Lake County, CA as the new agency and they search for the inmate in your agency. They can send money using cash or credit card. These transactions are batched with all other types (phone, web, walk-in) transactions for Lake County offenders and post to their account at the same time. The funds are also batched with all other transactions and sent via ACH to your bank account all together.

START OVER

Select Location:

Yolo County, CA

Lake County, CA

Mendocino County, CA

Napa County, CA

Select Other Location

Agency Staff

Access to Reports

Our new Agency Manager Tool provides all financial reports needed by Lake County, CA staff.

Date Time▲	Notification #⇕	Type⇕	Source⇕	Purpose⇕	Depositor Name⇕
01/07/2013 19:46:31 CST	51621143	Credit	Web	General	
12/03/2013 22:51:00 CST	77859975	Credit	Web	General	
02/10/2014 12:34:03 CST	79560279	Credit	Web	General	
03/28/2014 17:49:31 CDT	60620348	Credit	Web	General	
06/06/2017 17:15:59 CDT	5162137	Credit	Web	Optical	
04/21/2018 06:55:22 CDT	22528913	Credit	Web	General	
10/29/2018 10:59:06 CDT	97526364	Credit	Web	General	

Agency Manager Quick Guide

How Do I - Navigate the New Agency Manager?

As an agency Administrator, use this guide as an overview of the *New* Agency Manager application. This guide highlights key functional areas for How-to perform standard functions within the application.

Navigate to the following URL-> https://agency.accesscorrections.com.

- Bookmark this link by clicking the **Favorites Star** (☆) to the far right of the browser window.
- Enter a name for the bookmark. Click **Done** to save.

Navigating Agency Manager

1. Select **Reports** from the navigation panel to expand the reporting options.
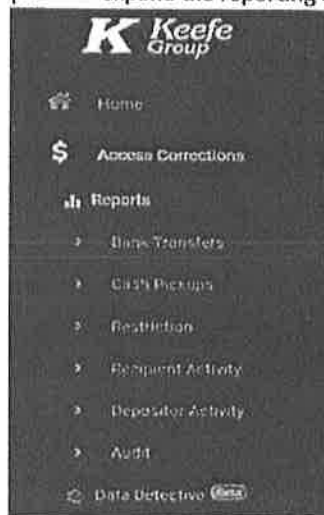
2. Select a **Report**. *(i.e. Bank Transfers)*

3. Opens to the selected report view.

   Note: The report title appears in the upper-left corner of the report view.

4. Use the **Date/Range** filters to set report range results. Click the calendar icon (📅) to specify a *Start* or *End* date.

5. Click a **Batch ID** link to drill-down to Bank Transfers Detail report.

6. The **Bank Transfer Details** report enables additional drill-down report details – such as **Recipient** and **Depositor** reports.

Depositor Photo Preview

New Agency Manager presents the ease of access to depositor photos.

- Click the photo icon (🖼) from the **Depositor Activity Report**. Source <u>must</u> specify Kiosk (*Lobby* or *Intake*).

Depositor Activity - NAVA JOSE

NAVA JOSE, Address: 200 at 3A TX 76357

NAVA JOSE

Date Time	Receipt #	Photos	Type	Source
01/09/2019 01:34:55 CST	$17,86,367	🖼	Cash	Kiosk

- Opens to depositor photo.

Note: Some images may not register returning *"Image Not Found"*.

Report Features

Use the icons in the upper-right corner of a Bank Transfer Details report view to do the following:

- Click the **Tool** (🔧) icon to Filter search Locations and Purposes.
- Click the **Download** (⬇) icon to export reports to MS Excel.
- Click the **Print** (🖨) icon to print reports.

Data Detective

To obtain recipient-to-public user interaction search feature.

1. Select **Data Detective** from the navigation panel.
2. Search **Recipient** or **Public User** details using the intuitive search feature.

3. Click **Search**. *Hover* over the nodes for additional information. *Drag* nodes out for accessibility.
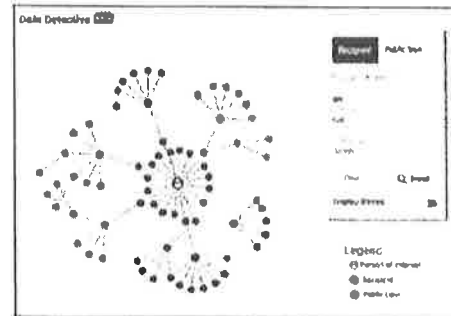
Security Management

Use Security Management for administrative tasks, such as password changes.

1. Click User (🧑) to expand the security application options.
2. Select **Security Management**.
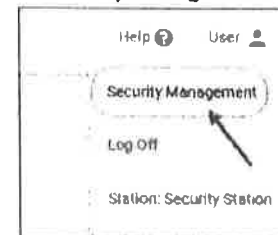
3. Click **Change Password**.

Note: Access is based on role.

Help Resources

Refer to the *Agency Manager Help File - Knowledge Base* for further instructional guidance.

For support, contact *IT Service Desk* at (800) 864-5986.

Data Detective

Our integrated Data Detective Software can identify and connect individuals on the outside who have interacted with multiple AICs at your facilities.

Data Detective® is Keefe's data mining solution specifically designed for our services. This tool is designed with the investigative nature of the corrections market in mind. Authorized staff will be able to search varying degrees of separation in order to establish links from inmate to inmate or end user to end user. Some of the features are listed below:

- Agency staff can explore important data using a dynamic visual map.
- The unique design of the visual map allows investigators to quickly find connections and patterns
- Web based program so authorized agency staff are able to view from their own desktop computer.

Months of research and development, utilizing established relationships with correctional agencies allowed Keefe to develop the very best solution for the corrections market. This tool will automatically be applied to all payment information.

The Agency will have access to reports 24/7 in real time via the agency website. These reports can be searched by date range and include all transaction information including the depositor/sender's address and IP address.

Keefe also provides detailed information regarding the sender through its Data Detective software.
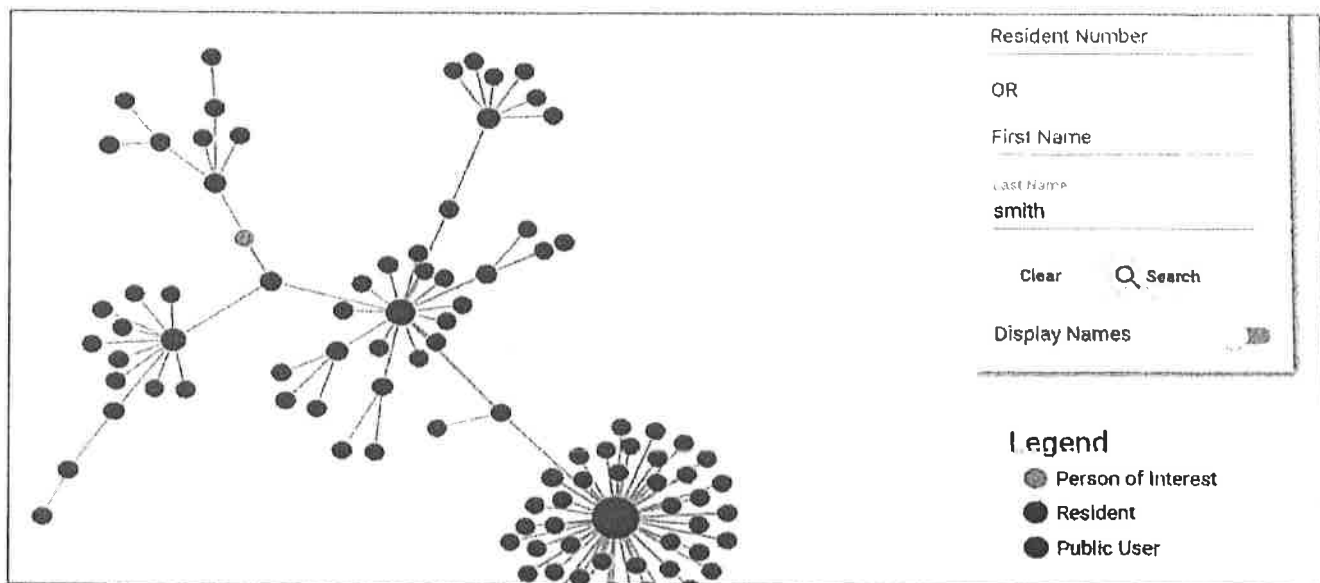
Intake (Booking) Kiosk

The Secure Intake kiosk is designed to collect money from new inmates, securely and with minimal staff interaction. The self-service kiosk features a large, easy to navigate touch-screen display for inmate registration and validation. Inmates and/or facility staff can feed a stack of bills or pour coins directly into the acceptors for automatic counting – saving time and eliminating the potential for error. The kiosk provides a printed receipt with a unique confirmation number and deposit totals.

Intake Kiosks features include:
- Automatic counting of cash and coin
- Large capacity acceptors: holds up to 1,000 bills and 2,000 coins
- Deposit tracking during each shift
- Accessible only by authorized staff
- *Security Controls*
  - Conduct automatic real time OFAC checks
  - Detect and reject counterfeit currency
  - Gather additional information for high dollar transactions
  - Audit access to kiosk components and cash bins

Facility Benefits:
- Less intake process workload, cash handling and cost
- Interfaces seamlessly with cash management software
- Manual input and human error are eliminated
- Online shift reporting for cash management
- Intake Kiosk can be configured to accept Bail Payments

Deposit Fees

Gross Amount Deposited	Credit/Debit Deposits via Website	Credit/Debit Deposits via Phone	Credit/Debit Deposits via Lobby Kiosk	Cash Deposits via Lobby Kiosk	Walk-In Location
$0.01 - $19.99	$4.95	$6.95	$4.00	$4.00	
$20.00 - $99.99	$7.95	$9.95	$4.00	$4.00	
$100.00 - $199.99	$9.95	$11.95	$4.00	$4.00	
$200.00 - $300.00	$11.95	$13.95	$4.00	$4.00	
$0.01-$1,000.00					$5.95

Commissary orders are to be delivered in heat sealed clear plastic bags with two (2) copies of the order receipt sealed within the bag. The receipt should contain the following information:

- Inmate Name
- Inmate Location
- Inmate ID#
- Items and quantity ordered
- Total of order and sales tax, if applicable
- Balance of account after the order

Keefe Response: Keefe has read, understands and will adhere.

Keefe obtains and retains signed receipts for all orders. KCN places a three-ply receipt inside the clear plastic bag where it is visible to delivery staff and inmates. Once the bag is opened and inventoried by the inmate and delivery agent, the receipt is signed by the inmate to indicate accuracy and acceptance of the order. Should a discrepancy arise, it will be handled at that time. Credits due are noted on the receipt and handled following delivery within 24 hours. The second invoice is forwarded to any designee the County requires; complete electronic orders are also available for the county to review at any time. Warehouse Security

A sample receipt is provided on the following page.

KEEFE COMMISSARY NETWORK
P.O. BOX 17490
ST. LOUIS, MO 63178-7490

NAME: DOE, JOHN

NBR: 588872

LOC: VALD - LOWND - A

SITE: GEORGIA DEPT OF CORRECTIONS

ORDER DATE:	1/20/2009
ORDER NBR:	20165
RECEIPT:	38819

BEGINNING FUND BALANCE: $ 94.00

PAGE: 1

ORDER QTY	ITEM	ITEM DESCRIPTION	ITEM PRICE	TOTAL PRICE
1	0102	POWER-UP A/P DEODORANT EXTREME 2.5 OZ	2.22	2.22
1	0212	NEXT1 MOIST SKIN CARE LOTION 15OZ	2.13	2.13
1	0331	PROTECTION SHAVE CREAM 7OZ	1.70	1.70
1	0361	NEXT1 TOTAL CARE SHAMPOO & CONDITIONER 15OZ	2.15	2.15
1	0397	NEXT1 COCOA BUTTER BAR SOAP 5OZ	0.74	0.74
1	0530	COOL WAVE CLEAR 4OZ TOOTHPASTE	2.26	2.25
1	0562	ANTISHANK SECURITY TOOTHBRUSH	0.26	0.25
1	2210	KEEFE S.S. FRUIT PUNCH	0.15	0.15
1	2664	VELVEETA MACARONI & CHEESE 3OZ	2.25	2.25
1	2670	VELVEETA SPICY BEANS & RICE 4OZ	2.40	2.40
1	3248	SLICED CINNAMON ROLL 4OZ	1.28	1.28
1	3270	SNACK LEGENDS CHOCOLATE CUPCAKES 2PK	1.50	1.50
1	3274	SNACK LEGENDS MONSTER ICED HONEY BUN 6OZ	1.25	1.25
1	4135	JOLLY RANCHER ASSORTED 3.7OZ	1.60	1.60
1	6116	C.A. CHEESE PUFF 2OZ	0.90	0.90
1	6120	NACHO TORTILLA CHIP 1.5OZ	0.37	0.37
1	6127	C.A. HOT PORK RINDS 2OZ	1.10	1.10
1	6607	MOON LODGE HOT HOT HOT PEANUTS 1.75OZ	0.70	0.70
1	6320	SIX GUN BEEF & CHEESE 1OZ	0.57	0.57
1	6348	C.A. HOT CHEESE CRUNCHY 8.5OZ	2.65	2.65
1	6349	C.A. PARTY MIX 11OZ	1.80	1.80
1	6415	SQUEEZUM PEANUT BUTTER 1.12OZ	0.40	0.40
1	6428	C.A. CHEDDAR SQUEEZE SNACK 2OZ	1.70	1.70
1	6600	6CT C.A. FLOUR TORTILLA 8OZ	2.25	2.25
1	6176	FRESH CATCH MACKEREL FILLETS 3.53OZ	2.40	2.40
1	6626	FRESH CATCH CHUNK LIGHT TUNA	3.40	3.40
1	6655	C.A. REFRIED BEANS 8OZ	1.56	1.56
5	9810	PHONE TIME PURCHASE	10.00	50.00

SECURE ITEMS

SUB-TOTAL	91.67
SALES TAX	0.96
ORDER TOTAL	92.63
ENDING FUND BALANCE $	1.37

REJECTED ITEMS

QTY	ITEM#	ITEM DESCRIPTION	REASON
1	0102	POWER-UP A/P DEODORANT EXTREME 2.5 OZ	EXCEEDED MAX QTY
2	6116	C.A. CHEESE PUFF 2OZ	EXCEEDED CATEGORY LIMIT
1	9810	PHONE TIME PURCHASE	EXCEEDED MAX QTY
3	6626	FRESH CATCH CHUNK LIGHT TUNA	INSUFFICIENT FUNDS
1	6655	C.A. REFRIED BEANS 8OZ	INSUFFICIENT FUNDS
1	9602	INDIGENT HYGEINE KIT	UNAUTHORIZED INDIGENT ITEM

LIST SHORTAGES AND/OR DAMAGES HERE

ITEM#	QTY	CATEGORY / DESCRIPTION

SIGNED _____ DATE _____

WITNESSED BY _____ DATE _____

Contractor shall provide a method of handling backorders and restocking for items that have been ordered and the inmate has been released prior to delivery. After the initial start-up period, Contractor shall be expected to maintain a 98% or greater completed (no backorders) order percentage.
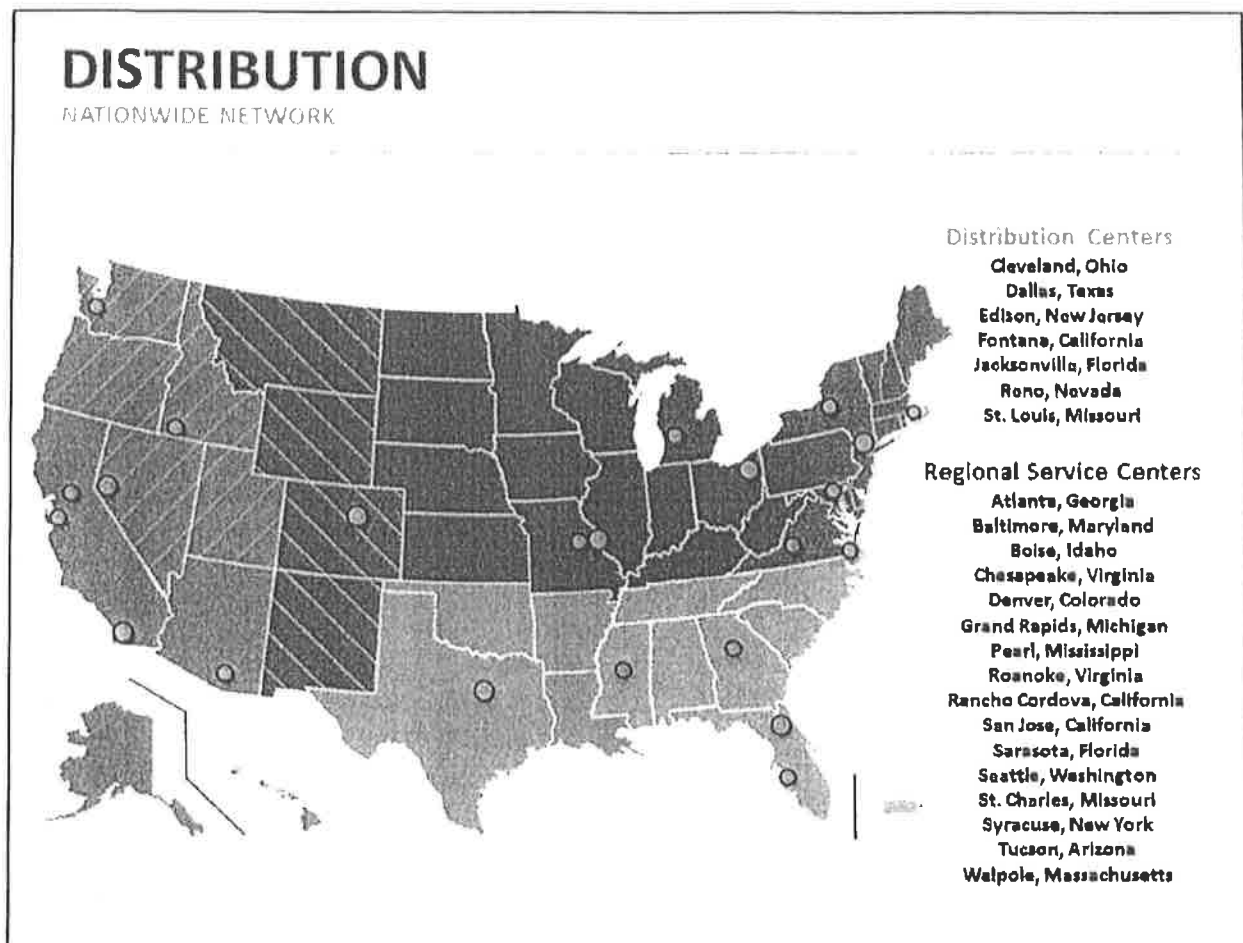
Keefe Response: Keefe understands and will adhere.

We typically implement an out of stock list prior to processing order to severely reduce or eliminate credits for out of stock items. This way the inmate is not charge and owed a credit. On occasion, inventory may get depleted during an order fulfillment cycle, at which point KCN staff will note the credit owed on the pick slip and process promptly back to the inmate's account. No substitution of items will be allowed unless expressed written approval is provided by Jail Command Staff. Keefe invests millions of dollars in our inventory and ability to fill orders every time when ordered. Some items become delayed in shipment or manufactures notify us of production delays which KCN will notify the jail of such major issue and make the adjustments necessary. We have the experience to forecast item usage based off of the menus we put together with our large pool of customers to provide stable and consistent product.

Keefe closely monitors the accuracy of every order that we fill. Each order is double checked for accuracy prior to departure. Each bag contains a receipt along with two copies and as the order is filled, each item added to the bag is checked off by the order filler. At the end, each order is marked with a number that is assigned to the individual filling the order. A copy of the order is kept by Keefe for future reference. Any errors are then reported back to us via credits issued and receipt number. We then check it against our copy and can address any issues. Keefe also makes adjustments to order fill procedures when necessary to ensure compliance with a **99% accuracy rate**.

Keefe has a dedicated purchasing department and a full-time distribution department to help ensure proper inventory levels for filling orders. In addition, our Western Region Business Manager and Regional Inventory Control Manager monitor inventory levels daily, to ensure proper levels within the region. Our commitment to customer service and use of multiple distribution resources ensures a high product fill rate.

Product is received and rotated for distribution on a "first in, first out" system. All products are date coded and extensive physical inventories are conducted twice annually. KCN receives direct shipments from manufacturers to ensure product availability. We are neither a middle man nor are we reliant upon others, and in many cases, we are the major manufacturers of our products. Keefe currently has **23 distribution centers** totaling over 1.5 million square feet, shipping 25 million pounds of inventory per month and carrying over $80 million in inventory daily. Should a service disruption occur at the warehouse servicing your facility, KCN has the capability to seamlessly continue operations from our nationwide distribution network.

DISTRIBUTION
NATIONWIDE NETWORK

Distribution Centers
Cleveland, Ohio
Dallas, Texas
Edison, New Jersey
Fontana, California
Jacksonville, Florida
Reno, Nevada
St. Louis, Missouri

Regional Service Centers
Atlanta, Georgia
Baltimore, Maryland
Boise, Idaho
Chesapeake, Virginia
Denver, Colorado
Grand Rapids, Michigan
Pearl, Mississippi
Roanoke, Virginia
Rancho Cordova, California
San Jose, California
Sarasota, Florida
Seattle, Washington
St. Charles, Missouri
Syracuse, New York
Tucson, Arizona
Walpole, Massachusetts

Warehouse Security

No other vendor understands the sensitive nature of the corrections industry to the extent of KCN. We provide the following services in-house, for added assurance of our commitment to security.

- KCN provides a 24-hour video surveillance of our warehouses, with a single entrance/exit system. KCN requires uniforms to identify employees, key and tool logs, driver cages to keep non-employees from entering, and security lighting. Our staff each have their own lockers and are not permitted to carry any personal belongings into the work area.

- Security measures currently in place at our Sparks, NV warehouse include:

  ✓ Security cameras in warehouse and office
  ✓ Collared KCN uniform polo shirts
  ✓ Tool display box for sign in and sign out
  ✓ Sign in and out logs for truck keys, vending keys, tools
  ✓ Alarm system installed

✓ High cost items in a security cage
✓ Lockable file system for confidential papers
✓ Single point of entry for personnel and visitors
✓ Driver's cage installed and used
✓ Door alarms on all exit doors in the warehouse
✓ Locks on all roll-up doors.
✓ Only manager, assistant manager, sales and upper management personnel have keys
✓ All exit doors in warehouse (except driver's doors) are kept locked at all times
✓ Entire warehouse is alarmed; only personnel with keys have the password

Warehouse Employee Training

KCN's training policies and procedures include each employee receiving a 40-hour Training Certification that covers the following topics:

- Order pulling
- Correctional environment training
- Inmate manipulation awareness
- Inventory re-stocking
- Shipping of Completed Orders
- Product Receiving
- Safety, Security, and Sanitation
- Equipment Use, including Forklift and Fire Extinguisher Certification

KCN On-Site Employee Training

On-site employees are trained on the following topics:

- Security Passes
- Chain Of Command
- DOC Policy on Sexual Harassment
- Drugs and Alcohol
- Internal Company Operations
- General Security and Safety
- Fraternization
- Grievances
- Key and Tool Control
- Sanitation
- Contraband
- Emergency Procedures
- Commissary Delivery Operations
- Report Writing
- Hands-on Training

All new employees receive a review on their 30- and 90-day anniversaries, and annually thereafter.

Contractor shall be prepared to discuss the purchase of debit cards through commissary.

Keefe Response: Keefe has read, understands and will adhere.

Value-Loaded Cards
This solution allows inmates to purchase a debit card through commissary. The debit card will have the pre-set amount programmed into the card, $5.00, $10.00, $20.00, or $30.00.

Direct Debit Vending
Keefe state of the art Direct Debit Vending solution replaces the need for all preloaded cards. The smart technology identifies the inmates account and allows direct access to the account balance. This allows inmates to order from the machines using real time balances without the need for vending cards.

Contractor must have the ability to supply vending machines, operated by debit cards, in locations determined by the Sheriff's Department. These vending machines shall be filled by Contractor.

Keefe Response: Keefe understands and will adhere.

Direct Debit Vending
Keefe state of the art Direct Debit Vending solution replaces the need for all preloaded vending cards. The smart technology identifies the inmates account and allows direct access to the account balance. This allows inmates to order from the machines using real time balances without the need for vending cards.

- The inmate authenticates their identity and unique PIN at the vending machine.

- Once verified, the inmate receives approval to vend.

- If the inmate's product selection is approved, their account balance is verified and a charge is applied.

- If the product vends successfully, the transaction is complete and the account is immediately debited.

- If the product does not vend successfully, the transaction is cancelled and a credit is immediately applied to the inmate's account.

DIRECT-DEBIT VENDING
HOW IT WORKS

| Each inmate will authenticate his/her unique ID and key in his/her unique PIN number. Barcode scanning for the ID is also an option. | Options on the touchscreen include Purchase, Account History, PIN management and Lock Account functions. It can also display the inmate's balance and spending limit. | An image of the item being purchased, along with its calorie count and price will appear before the purchase is confirmed. | The inmate's prior transactions can also be displayed to help him/her manage the account. |

Vending staff will clean, test and fill each machine, and ensure all trash is cleared from the area and a conduct a visual check to ensure the integrity of each machine has not been compromised.

Repair

Keefe vending staff is trained to perform a variety of preventative maintenance, including regular weekly inspections and cleaning. Keefe is also partnered with a variety of vending machine providers capable of repairing more complex vending machine issues. Should a vending machine require repair beyond the training of our in-house staff, our partnerships with vending companies allow us to call on them for further repair services

Contractor shall be prepared to discuss the ability for Installation of Kiosks to handle booking monies, grievances, etc.

Keefe Response: Keefe understands and will adhere.

Intake (Booking) Kiosk

The Secure Intake kiosk is designed to collect money from new inmates, securely and with minimal staff interaction. The self-service kiosk features a large, easy to navigate touch-screen display for inmate registration and validation. Inmates and/or facility staff can feed a stack of bills or pour coins directly into the acceptors for automatic counting – saving time and eliminating the potential for error. The kiosk provides a printed receipt with a unique confirmation number and deposit totals. As the kiosk is part of a money transmitter network, deposits are cleared through the PCI compliant Keefe money transmitter environment and matched with bookings from the facility's custody system prior to being

Intake Kiosks features include:
- Automatic counting of cash and coin
- Large capacity acceptors: holds up to 1,000 bills and 2,000 coins
- Deposit tracking during each shift
- Accessible only by authorized staff
- **Security Controls**
  - Conduct automatic real time OFAC checks
  - Detect and reject counterfeit currency
  - Gather additional information for high dollar transactions
  - Audit access to kiosk components and cash bins

Facility Benefits:
- Less intake process workload, cash handling and cost
- Interfaces seamlessly with cash management software
- Manual input and human error are eliminated
- Online shift reporting for cash management
- Intake Kiosk can be configured to accept Bail Payments

Grievances: Edge Message Exchange with Staff
EDGE software will allow facility staff to utilize Keefe's *The Edge Exchange (TEX)* for reading and responding to inmate requests online.

TEX is a messaging service hosted by KCN that enables paperless communications between inmates and staff. The requests are routed from the EDGE kiosks directly to authorized facility staff for review, approval and/or facility reply.
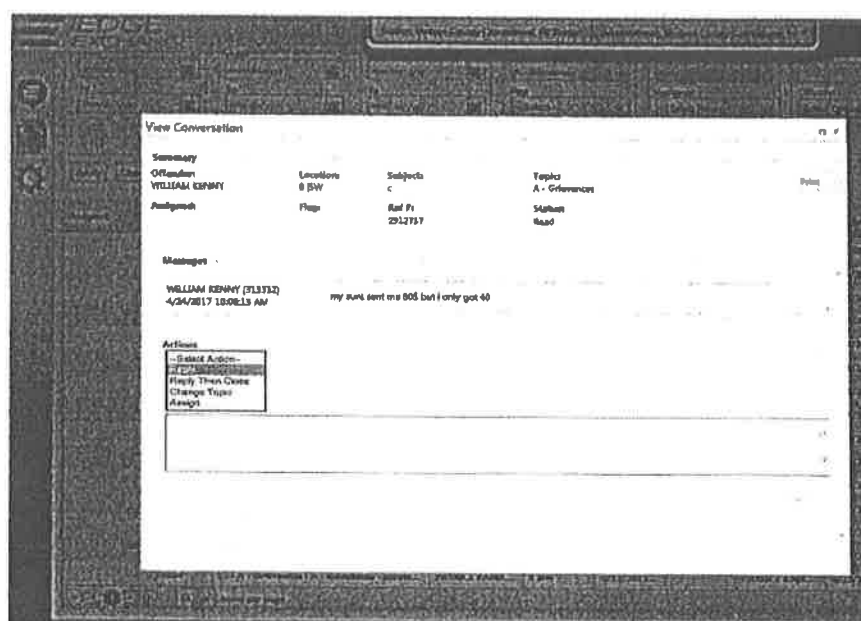
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