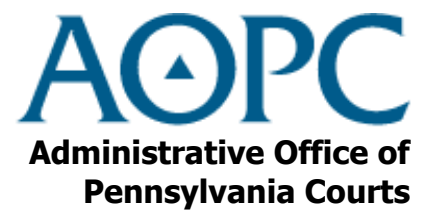


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# Financial Records Public Guide

May 11, 2013



<http://ujportal.pacourts.us>

## Concepts Covered in this Guide

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## Introduction

### Overview

The AOPC has created a web-based application that allows the public to search for contracts, purchase orders and judicial expenditure records.

### Accessing the Application

The information on contracts, purchase orders and judicial expenditures is available through Pennsylvania's Unified Judicial System (UJS) Web Application Portal which is a free, public Internet Web site that provides access to a variety of court related documents.

### Site Requirements

The UJS Portal requires a current web browser with JavaScript and cookies enabled. Other browsers without JavaScript and cookies enabled will see graphical errors or may be denied access completely. Due to the technology used in creating this site, Internet Explorer 7 and above will provide the most satisfying user experience. Also, the images that appear in this guide may vary slightly in appearance depending on the browser used and the version.

The reporting and printing functions on the site require Adobe Reader. Please be advised that pop-up blockers may prevent pages and reports from opening properly.

### Navigation

Open your Internet browser and enter the following web address:

<http://ujportal.pacourts.us/FinancialRecords/FinancialRecords.aspx>

The Pennsylvania Unified Judicial System portal page opens to the Financial Records selection page. To begin the search for the information you need, click on either the Contracts/Purchase Order Summaries or the Judicial Expenditures link.

### Financial Records

[Help](#)

This Web site provides public access to search, view and print Unified Judicial System (UJS) contract and purchase order summaries. The Web site displays summary information on purchase orders and contracts of \$5000 or more that were executed on or after July 1, 2008. On December 17, 2012 the Web site was expanded to include annual appropriation, expenditure, personnel complement and annual compensation information for the Supreme, Superior and Commonwealth courts and Administrative Office of Pennsylvania Courts.

Select one of the links below to begin your search

[Contracts/Purchase Order Summaries](#)   [Judicial Expenditures](#)

## Contracts and Purchase Order Summaries

In June 2008, the Supreme Court amended Rule of Judicial Administration 509. Effective January 1, 2009, Rule 509 mandates that the AOPC establish a Web site for the posting of Unified Judicial System (UJS) contracts and purchase orders. The Web site will display summary information on purchase orders and contracts of \$5000 or more. The UJS entities covered are the appellate courts, AOPC, Supreme Court boards and committees, courts and court-related offices in the judicial districts, and judicial entities that have elected to follow Rule 509 (Judicial Conduct Board and Court of Judicial Discipline). UJS entities must post the contract and purchase order information on the Web site within 10 days of being fully executed.

### **Business Rules**

The following business rules are presumed when using the application to search for contracts and purchase orders:

- Only contracts, purchase order and amendments executed on or after July 1, 2008 will be available to search on the Web site.
- The information provided will be an extract or summary of the contract, purchase order or amendment. The complete postings will not be available on the Web site. However, a process is available for requesting additional or complete information on a posting.
- Records of postings will be available on the Web site for a period of 4 years from their end date.

### **Terminology**

The following is a list of terminology used for contracts and purchase orders:

- Amount – The dollar amount of the contract, amendment, or purchase order. Note that if search results are returned with this field left blank, it may indicate that the document does not contain an assigned, definite amount in its terms (e.g., contract for employment services where only an hourly or per diem rate is established).
- Begin Date of Contract – Date on which an obligation first becomes due under the contract.
- End Date of Contract – Date on which obligations under the contract cease.
- Execution Date – Date of the last necessary signature to fully execute the contract, purchase order or amendment.
- Minor Object Description – A value that describes the nature of the contract or purchase order, i.e. consulting, supplies, software, hardware, etc.
- Parent Contract Number – Refers to the original contract number and can be used for amendments and purchase orders.
- Posting Number – A unique alphanumeric identifier assigned to a posting in its system.
- Posting Type – Describes the type of posting recorded; contract, amendment or purchase order.


- Subject Matter – A brief narrative description of the services or commodities to be provided under the contract.
- UJS Entity – Name of the UJS court or office within the judiciary entering into the contract.
- Vendor – The party providing a service or commodity under the contract or purchase order.

## **Searching for Contract and Purchase Order Postings**

To view and print contract and purchase order postings, begin by performing a search.

### **Performing the Search**

The Search Type must first be specified. Searches can be performed by Posting Type, Judicial Office or Vendor. Select the type of search to perform from the Search Type dropdown.


Search Type:  

Posting Type


Judicial Office


Vendor



The page refreshes and the available fields below the Search Type dropdown will change depending on the selection made.



\* Judicial Office:  

Amount From:  To:

Minor Object:  

Minor Object Description:  

Execution Date Range:   through  

Document Date Range:   through  

A minimum amount of information must be entered for each Search Type and this is indicated with an asterisk next to the required fields.

\* Judicial Office:  

Entering as much information as possible will help narrow the search results. After entering the available criteria, click SEARCH.

If a required field was not filled out, a message displays indicating the possible problems. Enter the required fields prior to clicking SEARCH again.

\* Judicial Office:   ! Required

## Public Guide – Financial Records

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If no postings match the criteria entered, a message will display below the criteria fields. Change the Search Type or criteria to try the search again.

No Records Found

### Search Results

If contract and purchase order postings are found, a grid will populate with the results below the criteria fields. The grid displays the Posting Number, Posting Type, Parent Contract number, Judicial Office, Execution Date, Amount, and Begin and End Dates. The viewing and printing functions are available through the grid.

| Posting No  | Posting Type   | Parent Contract      | Judicial Office | Execution Date | Amount       | Begin Date | End Date   | Vendor                   |
|---|----------------|----------------------|-----------------|----------------|--------------|------------|------------|--------------------------|
| <input type="checkbox"/> <a href="#">80000059</a> | Purchase Order |                      | AOPC            | 8/27/2008      | \$7,490.00   |            |            | Melissa Data             |
| <input type="checkbox"/> <a href="#">80000060</a> | Purchase Order |                      | AOPC            | 8/27/2008      | \$8,976.76   |            |            | ePlus Technology, Inc.   |
| <input type="checkbox"/> <a href="#">80000061</a> | Purchase Order |                      | AOPC            | 8/27/2008      | \$104,261.19 |            |            | ePlus Technology, Inc.   |
| <input type="checkbox"/> <a href="#">80000058</a> | Purchase Order |                      | AOPC            | 8/26/2008      | \$592,169.58 |            |            | CDW Government           |
| <input type="checkbox"/> 2                        | Amendment      | <a href="#">9000</a> | AOPC            | 8/25/2008      | \$0.00       | 1/1/2009   | 12/31/2009 | United Behavioral Health |
| <input type="checkbox"/> <a href="#">80000055</a> | Purchase Order |                      | AOPC            | 8/22/2008      | \$212,835.00 |            |            | Interchange Technologies |

If more than ten records are found, links will be available below the grid to jump to a different page or navigate to the first, previous, next or last pages of results.

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[Print Selected](#) [Print All](#)

## Viewing Records

To view the details about the posting, click on the Posting Number link. The Contracts/Purchase Orders Posting screen opens which contains the details of the posting.

Document Details

|                  |  |                 |   |
|------------------|--|-----------------|---|
| Posting Type:    | <input type="text" value="Contract"/>  |                 |   |
| Posting Number:  | <input type="text" value="2355"/>  |                 |   |
| Parent Contract: | <input type="text"/>   |                 |   |
| Judicial Office: | <input type="text" value="AOPC"/>  |                 |   |
| Minor Object:    | <input type="text" value="335 - Travel, Lodging, &amp; Meals"/>  |                 |   |
| Vendor:          | <input type="text" value="Radisson Penn Harris Hotel and Convention Center"/>  |                 |   |
| Amount:          | <input type="text" value="\$282,553.60"/>  | Execution Date: | <input type="text" value="12/11/2008"/> |
| Begin Date:      | <input type="text" value="9/07/2009"/>   | End Date:       | <input type="text" value="12/17/2010"/> |
| Subject Matter:  | <input style="width: 100%; height: 50px;" type="text" value="This contract is with the Radisson Penn Harris Hotel and Convention Center for the provision of overnight accommodations for students attending Minor Judiciary Education Board 's programs."/> |                 |   |

To request more information on this Posting, enter additional comments and your email address and click Send.

\* Additional Comments:

\* E-mail:

To print the posting, click PRINT. A new window opens and displays a report populated with the information in the posting. The report can be viewed on the screen, saved or printed. For more information, see *Print Preview Functions* on page 13.

Additional information can be requested for each posting. For more information, see *Requesting Additional Information on a Contract or Purchase Order Posting* on page 6.

To return to the Contracts/Purchase Orders Postings Search screen and the search results grid, click CANCEL.

## **Generating a Print Preview for Contract and Purchase Order Postings Information**

After identifying the necessary records, they can be printed individually, or all records in a search result can be printed at once.

### Generating a Print Preview for Individual Records

To print individual postings, select the check boxes for the records wanted on the report and click Print Selected.

| Posting No   | Posting Type   | Parent Contract       | Judicial Office | Execution Date | Amount       | Begin Date | End Date   | Vendor   |
|--|----------------|-----------------------|-----------------|----------------|--------------|------------|------------|--|
| <input checked="" type="checkbox"/> 1                        | Amendment      | <a href="#">31688</a> | AOPC            | 1/1/2009       | \$10,000.00  | 1/1/2009   | 12/31/2010 | AT&T   |
| <input checked="" type="checkbox"/> <a href="#">80000421</a> | Purchase Order |                       | AOPC            | 12/12/2008     | \$24,785.00  | 1/1/2009   | 12/31/2009 | Communications Solutions Company                 |
| <input type="checkbox"/> <a href="#">2355</a>                | Contract       |                       | AOPC            | 12/11/2008     | \$282,553.60 | 9/7/2009   | 12/17/2010 | Radisson Penn Harris Hotel and Convention Center |
| <input checked="" type="checkbox"/> <a href="#">80000169</a> | Purchase Order |                       | AOPC            | 12/8/2008      | \$5,513.78   |            |            | Dell Marketing                                   |
| <input type="checkbox"/> <a href="#">80000166</a>            | Purchase Order |                       | AOPC            | 12/4/2008      | \$11,196.80  |            |            | Dell Marketing                                   |
| <input type="checkbox"/> <a href="#">70000454</a>            | Purchase Order |                       | AOPC            | 11/6/2008      | \$19,840.24  |            |            | Transamerican Office Furniture, Inc.             |

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The report opens in a new window and populates with the information from the selected postings. The report can be viewed on the screen, printed and saved. For more information, see *Print Preview Functions* on page 13.

### Generating a Print Preview for All Records

To print all the records in the search results, it is not necessary to select any check boxes. Simply click the Print All link. If the search results grid contains multiple pages, all records on all pages in the results grid are added to the report.

| Posting No   | Posting Type   | Parent Contract       | Judicial Office | Execution Date | Amount       | Begin Date | End Date   | Vendor   |
|--|----------------|-----------------------|-----------------|----------------|--------------|------------|------------|--|
| <input checked="" type="checkbox"/> 1                        | Amendment      | <a href="#">31688</a> | AOPC            | 1/1/2009       | \$10,000.00  | 1/1/2009   | 12/31/2010 | AT&T   |
| <input checked="" type="checkbox"/> <a href="#">80000421</a> | Purchase Order |                       | AOPC            | 12/12/2008     | \$24,785.00  | 1/1/2009   | 12/31/2009 | Communications Solutions Company                 |
| <input type="checkbox"/> <a href="#">2355</a>                | Contract       |                       | AOPC            | 12/11/2008     | \$282,553.60 | 9/7/2009   | 12/17/2010 | Radisson Penn Harris Hotel and Convention Center |
| <input checked="" type="checkbox"/> <a href="#">80000169</a> | Purchase Order |                       | AOPC            | 12/8/2008      | \$5,513.78   |            |            | Dell Marketing                                   |
| <input type="checkbox"/> <a href="#">80000166</a>            | Purchase Order |                       | AOPC            | 12/4/2008      | \$11,196.80  |            |            | Dell Marketing                                   |
| <input type="checkbox"/> <a href="#">70000454</a>            | Purchase Order |                       | AOPC            | 11/6/2008      | \$19,840.24  |            |            | Transamerican Office Furniture, Inc.             |

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The report opens in a new window and populates with the information from all the postings that were returned in the search. The report can be viewed on the screen, printed and saved. For more information, see *Print Preview Functions* on page 13.

### Requesting Additional Information on a Contract or Purchase Order Posting

The Contracts/Purchase Orders Posting screen shows a summary of the posting. However, additional information can be requested.



To obtain additional details of a posting, search for the posting record as described in *Searching for Contract and Purchase Order Postings* on page 3, and open the Contracts/Purchase Orders Posting screen. Enter the Additional Comments and a valid email address at the bottom of the screen and click SEND.

**Document Details**

|                  |   |  |
|------------------|---|--|
| Posting Type:    | <input type="text" value="Contract"/>   |  |
| Posting Number:  | <input type="text" value="2346"/>   |  |
| Parent Contract: | <input type="text"/>  |  |
| Judicial Office: | <input type="text" value="AOPC"/>   |  |
| Minor Object:    | <input type="text" value="314 - Training"/>   |  |
| Vendor:          | <input type="text" value="James C. Raymond, Ph.D."/>  |  |
| Amount:          | <input type="text" value="\$5,000.00"/>   | Execution Date: <input type="text" value="6/05/2008"/> |
| Begin Date:      | <input type="text" value="10/27/2008"/>   | End Date: <input type="text" value="10/28/2008"/>      |
| Subject Matter:  | <input style="height: 60px;" type="text" value="This contract is with James C. Raymond, Ph.D. for the provision of agreeing to teach the Opinion Writing Symposium held in October 2008."/> |  |

To request more information on this Posting, enter additional comments and your email address and click Send.

\* Additional Comments:

\* E-mail:

A confirmation is displayed.

**!** Your request has been sent

An email is sent to the appropriate contracts and purchase orders records manager who will respond to the request via the email address provided.

## Judicial Expenditures

Effective December 17, 2012, amendments to Rule 509 further expanded the existing web site to include information related to appropriations, expenditures, personnel complement and annual compensation information for the Supreme, Superior and Commonwealth courts and the Administrative Office of Pennsylvania Courts. The Web site posts judicial expenditures dating back to November 19, 2012. Records of expenditures will be available on the Web site for a period of seven years from their end date.

### Searching for Judicial Expenditure Postings

To view and print judicial expenditure postings, begin by performing a search.

#### Performing the Search

The Search Type must first be specified. Searches can be performed by Appropriation or Vendor. Select the type of search to perform from the Search Type dropdown.

Search Type:  ▼

The page refreshes and the available fields below the Search Type dropdown will change depending on the selection made.

\* Department Appropriation:  ▼  
Vendor:    
Paid From:     
Amount From:  To   
Fiscal Year:

A minimum amount of information must be entered for each Search Type and this is indicated with an asterisk next to the required fields.

▼

Entering as much information as possible will help narrow the search results.

The Vendor is required when using the Search Type of Vendor, and is available as optional criteria when using the Search Type of Appropriation. To complete this field, either type the name directly into the search field, or click SELECT VENDOR to access a search window. In the vendor search window, enter a name or partial name and click FIND. The search returns all vendors found. Scroll to find the vendor needed, or use the alphabetic characters to jump

to vendors with names beginning with that letter. Click on the vendor to select them and return to the Judicial Expenditures Search screen. The selected vendor is displayed in the Vendor field.

ABCDEFGHIJKLMNOPQRSTUVWXYZ#

Close

car Find

**B**

[Bernardo Carbajal](#)

**C**

[Capital City Car Wash](#)

[Carahsoft Technology Corporation](#)

[Carbon County Treasurer](#)

[Carl Sutton](#)

[Carlinos's Specialty Foods & Catering Inc.](#)

[Carol S. Mills McCarthy](#)

[Caroline M. Roberto](#)

[Carolynn Murphy Perry](#)

**E**

[Enterprise Rent-A-car](#)

After entering the available criteria, click SEARCH.

If a required field was not filled out, a message displays indicating the possible problems. Enter the required fields prior to clicking SEARCH again.

**!** You must enter a Vendor

If no postings match the criteria entered, a message will display below the criteria fields. Change the Search Type or criteria to try the search again.

No Expenditures Found

### Search Results

If postings are found, a grid will populate with the results below the criteria fields. The grid displays the Department, Appropriation, Payment Date, Amount, Payee Name and Fiscal Year. The viewing and printing functions are available through the grid.

| Select  | Department    | Appropriation | Payment Date | Amount   | Payee Name                | Fiscal Year |
|---|---------------|---------------|--------------|----------|---------------------------|-------------|
| <input type="checkbox"/> <a href="#">Detail</a> | Supreme Court |               | 12/5/2012    | \$276.05 | Phillips Office Solutions | 2012-13     |
| <input type="checkbox"/> <a href="#">Detail</a> | Supreme Court |               | 12/5/2012    | \$84.99  | United Parcel Service     | 2008-09     |
| <input type="checkbox"/> <a href="#">Detail</a> | Supreme Court |               | 12/5/2012    | \$40.00  | United Parcel Service     | 2008-09     |
| <input type="checkbox"/> <a href="#">Detail</a> | Supreme Court |               | 12/5/2012    | \$86.23  | United Parcel Service     | 2008-09     |
| <input type="checkbox"/> <a href="#">Detail</a> | Supreme Court |               | 12/5/2012    | \$10.00  | United Parcel Service     | 2008-09     |
| <input type="checkbox"/> <a href="#">Detail</a> | Supreme Court |               | 12/5/2012    | \$13.50  | United Parcel Service     | 2008-09     |
| <input type="checkbox"/> <a href="#">Detail</a> | Supreme Court |               | 12/5/2012    | \$34.76  | United Parcel Service     | 2008-09     |
| <input type="checkbox"/> <a href="#">Detail</a> | Supreme Court |               | 12/5/2012    | \$295.00 | PA Bar Association        | 2012-13     |

If more than ten records are found, links will be available below the grid to jump to a different page or navigate to the first, previous, next or last pages of results.

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 Print Selected [Print All](#)

### Viewing Records

To view the details about the posting, click on the Detail link. The Judicial Expenditures Posting Detail screen opens which contains the details of the posting.

#### Judicial Expenditures Posting Detail

Payee: Phillips Office Solutions  
 Address: 501 Fulling Mill Road  
 City: Middletown  
 State/Province: PA  
 Postal Code: 17057  
 Department Appropriation: Supreme Court  
 Amount: \$276.05  
 Payment Date: 12/5/2012  
 Fiscal Year: 2012-13

[Print](#) [Cancel](#)

To print the posting, click PRINT. A new window opens and displays a report populated with the information in the posting. The report can be viewed on the screen, saved or printed. For more information, see *Print Preview Functions* on page 13.

To return to the Judicial Expenditures Search screen and the search results grid, click CANCEL.

### **Generating a Print Preview for Judicial Expenditures Postings Information**

After identifying the necessary records, they can be printed individually, or all records in a search result can be printed at once.

#### **Generating a Print Preview for Individual Records**

To print individual postings, select the check boxes for the records wanted on the report and click Print Selected.

| Select                              | Department             | Appropriation | Payment Date | Amount   | Payee Name                 | Fiscal Year |
|-------------------------------------|------------------------|---------------|--------------|----------|----------------------------|-------------|
| <input checked="" type="checkbox"/> | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$276.05 | Phillips Office Solutions  | 2012-13     |
| <input checked="" type="checkbox"/> | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$84.99  | United Parcel Service      | 2008-09     |
| <input checked="" type="checkbox"/> | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$40.00  | United Parcel Service      | 2008-09     |
| <input type="checkbox"/>            | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$236.00 | PA Bar Association         | 2012-13     |
| <input type="checkbox"/>            | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$138.00 | Staples Business Advantage | 2012-13     |

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[Print Selected](#) [Print All](#)

The report opens in a new window and populates with the information from the selected postings. The report can be viewed on the screen, printed and saved. For more information, see *Print Preview Functions* on page 13.

### Generating a Print Preview for All Records

To print all the records in the search results, it is not necessary to select any check boxes. Simply click the Print All link. If the search results grid contains multiple pages, all records on all pages in the results grid are added to the report.

| Select                   | Department             | Appropriation | Payment Date | Amount   | Payee Name                 | Fiscal Year |
|--------------------------|------------------------|---------------|--------------|----------|----------------------------|-------------|
| <input type="checkbox"/> | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$276.05 | Phillips Office Solutions  | 2012-13     |
| <input type="checkbox"/> | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$84.99  | United Parcel Service      | 2008-09     |
| <input type="checkbox"/> | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$40.00  | United Parcel Service      | 2008-09     |
| <input type="checkbox"/> | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$236.00 | PA Bar Association         | 2012-13     |
| <input type="checkbox"/> | <a href="#">Detail</a> | Supreme Court | 12/5/2012    | \$138.00 | Staples Business Advantage | 2012-13     |

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Print Selected [Print All](#)

The report opens in a new window and populates with the information from all the postings that were returned in the search. The report can be viewed on the screen, printed and saved. For more information, see *Print Preview Functions* on page 13.

## Print Preview Functions

When a Financial Records report opens in the preview window, the icons in the toolbar can be used to print, save or, navigate through the report (if there is more than one page). The plus and minus icons are used to magnify the report for ease of viewing on the screen. The information contained in the judicial expenditures report is different to what is contained in the contracts and purchase orders report. (Below is an example of the contracts and purchase orders report).

**Pennsylvania's Unified Judicial System**  
Rule of Judicial Administration 509

**Document Type:** Contract  
**Document No:** 1173  
**Parent Contract:**  
**Judicial Office:** Commonwealth Court  
**Minor Object:** 370 - Rent/Real Estate  
**Vendor:** PRK-MOR Inc  
**Amount:** \$28,800.00      **Execution Date:** 08/26/2008  
**Begin Date:** 07/01/2008      **End Date:** 06/30/2009  
**Subject Matter:** this contract is with PRK-MOR Inc to provide parking spaces

**Document Type:** Contract  
**Document No:** 2286  
**Parent Contract:**  
**Judicial Office:** AOPC  
**Minor Object:** 365 - Contract Maintenance DP  
**Vendor:** Interchange Technologies  
**Amount:** \$38,225.00      **Execution Date:** 08/22/2008  
**Begin Date:** 08/22/2008      **End Date:** 08/21/2011  
**Subject Matter:** Hardware support on Tandberg video conferencing infrastructure.

When finished, close the window to return to search screen.

**Note:** Depending on the settings on your computer, reports may open Adobe Reader or Adobe Acrobat instead of the preview in your web browser. Refer to the owner manual for your pdf reader for information on navigating and printing documents.

## Other Financial Reports

Several additional reports are also available for viewing directly on the Financial Records site. These reports are always available for viewing without having to search for them.

To view one of these reports, click on the link for the report you wish to view.

### Financial Records

[Help](#)

This Web site provides public access to search, view and print Unified Judicial System (UJS) contract and purchase order summaries. The Web site displays summary information on purchase orders and contracts of \$5000 or more that were executed on or after July 1, 2008. On December 17, 2012 the Web site was expanded to include annual appropriation, expenditure, personnel complement and annual compensation information for the Supreme, Superior and Commonwealth courts and Administrative Office of Pennsylvania Courts.

Select one of the links below to begin your search



The report opens in a new window and populates with the information from the selected postings. The report can be viewed on the screen, printed and saved. For more information, see Print Preview Functions on page 13.