



Respondent Name:

TARRANT COUNTY
PURCHASING DEPARTMENT

JACK BEACHAM, C.P.M., A.P.P.
PURCHASING AGENT

ROB COX, C.P.M., A.P.P.
ASSISTANT PURCHASING AGENT

RFP NO. 2017-173

**REQUEST FOR PROPOSALS
FOR
COUNTY CLERK
RECORD MANAGEMENT SYSTEM (RMS)**

**PROPOSALS DUE SEPTEMBER 11, 2017
2:00 P.M.**

RFP NO. 2017-173

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This Table of Contents is intended as an aid to Respondents and not as a comprehensive listing of the proposal package. Respondents are responsible for reading the entire proposal package and complying with all specifications.

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

PRE-PROPOSAL CONFERENCE

All respondents are encouraged to attend a Pre-Proposal Conference to be held:

DATE: FRIDAY, AUGUST 18, 2017
TIME: 10:00 A.M.
**LOCATION: TARRANT COUNTY ADMINISTRATION BUILDING
PURCHASING DEPARTMENT CONFERENCE ROOM
100 E. WEATHERFORD STREET, SUITE 303
FORT WORTH, TX 76102**

Note: There is No opportunity for remote attendance of this meeting

RSVP: Respondents planning to attend the pre-proposal conference should RSVP, in writing, via facsimile, no later than 5:00 p.m., Thursday, August 17, 2017.

Send RSVP'S to Chris Lax, at (817) 884-2629.

Questions from respondents will be addressed at the pre-proposal conference. Any vendor who submits a proposal without attending the scheduled pre-proposal conference does so at his own risk. Such applicant who submits a proposal and does not attend the scheduled pre-proposal conference waives any right to assert claims due to undiscovered conditions

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

Tarrant County is soliciting proposals for **COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)** for the **COUNTY CLERK'S DEPARTMENT**.

BY MAIL VIA US POSTAL SERVICE
THE ORIGINAL AND FIVE (5) COPIES

OF
COMPLETED PROPOSALS
MUST BE RECEIVED IN THE
PURCHASING DEPARTMENT
AT 100 E. WEATHERFORD, SUITE 303
FORT WORTH, TEXAS 76196-0104
ON OR BEFORE SEPTEMBER 11, 2017
AT 2:00 P.M.

BY COURIER, FEDERAL EXPRESS
THE ORIGINAL AND FIVE (5) COPIES

OF
COMPLETED PROPOSALS
MUST BE RECEIVED IN THE
PURCHASING DEPARTMENT
AT 100 E. WEATHERFORD, SUITE 303
FORT WORTH, TEXAS 76102
ON OR BEFORE SEPTEMBER 11, 2017
AT 2:00 P.M.

All proposals, including a "NO BID", are due in the Purchasing Department by the due date in sealed envelopes or boxes. All proposals must be clearly marked with the Proposal Number, the name of the company submitting the proposal package, and date and time of opening on the outside of the envelope/box and/or Air Bill/Delivery Receipt. Original proposal must be clearly marked "ORIGINAL" and contain all original signatures.

Any proposal received after the date and hour set for Proposal opening will not be accepted. Respondent will be notified and will advise Tarrant County Purchasing as to the disposition by either pick up, return at Respondent's expense, or destroyed with written authorization of the Respondent. If Proposals are sent by mail to the Purchasing Department, the Respondent shall be responsible for actual delivery of the Proposal package to the Purchasing Department before the date and hour set for Proposal opening. If mail is delayed either in the postal service or in the internal mail system of Tarrant County beyond the date and hour set for the Proposal opening, proposals thus delayed will not be considered and will be disposed of as authorized.

Proposals may be withdrawn at any time prior to the official opening. Alterations made before opening time must be initialed by Respondent guaranteeing authenticity. After the official opening, Proposals become the property of Tarrant County and may not be amended, altered or withdrawn without the recommendations of the Purchasing Agent and the approval of Commissioners Court.

Tarrant County is exempt from Federal Excise and State Sales Tax. The County is not exempt from Surplus Lines Tax or Texas Stamping Tax. Therefore, only applicable taxes must be included in this proposal.

No oral explanation by County officials or employees about the meaning of the Proposal specifications will be made and no oral instructions will be given before the award of the contract. Requests from interested Respondents for additional information or interpretation of the information included in the specifications and all questions should be directed in writing, via facsimile, to:

CHRIS LAX, CPSM, SENIOR BUYER
FAX: (817) 884-2629

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All documents relating to this Proposal including but not limited to, the Proposal document, questions and their answers, addenda and special notices will be posted under the Proposal number on the Tarrant County website and available for download by interested parties. No documents will be faxed or emailed after the initial Notice of Intent prior to award. It is the Respondent's sole responsibility to review this site and retrieve all related documents prior to the Proposal due date.

The deadline for receipt of all questions is 12:00 (Noon), Fort Worth, TX time, Monday, August 21, 2017. After the question deadline, all questions and their answers will be posted on the website and available for download by interested parties after the deadline for questions.

Forms and Questionnaires must be fully completed and included in your Proposal. Forms that have been retyped or altered may result in rejection of proposal. Detailed specifications have been provided and any deviations or exceptions must be referenced on the form provided. Unless deviations are specifically stated herein, services will be provided according to the specifications at no additional charge.

Proposal is issued in compliance with the County Purchasing Act, Section 262.030. Negotiations shall be conducted with responsible Respondent(s) who submit Proposals determined to be reasonably susceptible of being selected for award.

It is the Respondent's sole responsibility to print and review all pages of the Proposal document, attachments, questions and answers, addenda, and special notices. The Signature Form must be signed and returned. Failure to provide signature on this form renders Proposal non-responsive. Failure to complete and submit all required forms, including but not limited to the Reference Page, Compliance with Federal and State Laws, Checklist, Questionnaires, Addenda (including revised forms), and any other specified forms or documents will be grounds for rejection of entire proposal.

CONFIDENTIALITY: Any material that is to be considered confidential in nature must be clearly marked as such and may be treated as confidential to the extent allowable in the Public Information Act. Pricing information is not considered confidential. Trade secrets or confidential information **MUST** be placed in a separate envelope marked "**CONFIDENTIAL INFORMATION**" and **EACH PAGE** must be marked "**CONFIDENTIAL INFORMATION.**" Tarrant County will make every effort to protect these papers from public disclosure as outlined in Texas Local Government Code, Section 262.030(c).

The Texas Public Information Act gives the public the right to request access to government information, subject to certain narrow exceptions. Tarrant County is an entity subject to this Act. Therefore, please be advised that your company's declaration that certain information submitted in response to a Proposal is "confidential" will not be treated as such if the County receives a request for a copy of the Proposal. The County will of course make every effort to inform your company of such a request and to provide you with an opportunity to object to the release of any proprietary information, but Tarrant County cannot and will not make an agreement to withhold information from the public contrary to the County's responsibilities under the Act.

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Additionally, to the extent your Proposal is incorporated into the contract, the Proposal will become an official record available for public inspection.

Proposals shall be opened to avoid disclosure of contents to competing Respondents and kept secret during the process of negotiation. All Proposals that have been submitted shall be open for public inspection after the contract is awarded, except for trade secrets and confidential information contained in the proposals and identified as such.

Respondent shall defend, indemnify, and hold harmless Tarrant County from any and all liability or loss of any nature whatsoever arising out of or relating to the Respondent performing work on County premises, including, without limiting the generality of the foregoing coverage, any act or omission of the Respondent, its agents, servants, employees, or invitees in the execution or performance of the contract.

Continuing non-performance of the Respondent in terms of specifications shall be a basis for the termination of the contract by the County. The County shall not pay for work, equipment, or supplies which are unsatisfactory. Respondents will be given a reasonable opportunity before termination to correct the deficiencies. This, however, shall in no way be construed as negating the basis for termination for non-performance.

The **contract may be terminated** by either party upon written thirty (30) days notice prior to cancellation.

Proposals will be considered irregular if they show any omissions, alteration of form, additions or conditions not called for, or irregularities of any kind. However, Tarrant County reserves the right to waive any irregularities and to make award in the best interest of the County.

Tarrant County reserves the right to accept or reject in part or in whole any Proposals submitted and to waive any technicalities for the best interest of the County. Proposals may be rejected, among other reasons, for any of the following specific reasons:

1. Proposals received after the time limit for receiving proposals.
2. Proposals containing any irregularities.
3. Unbalanced value of any items.

Respondents may be disqualified and their proposals not considered, among other reasons, for any of the following specific reasons:

1. Reason for believing collusion exists among the Respondents.
2. Reasonable grounds for believing that any Respondent is interested in more than one proposal for the work contemplated.
3. Respondent being interested in any litigation against the County.
4. Respondent being in arrears on any existing contract or having defaulted on a previous contract.
5. Lack of competency as revealed by a financial statement, experience and equipment, questionnaires, etc.
6. Uncompleted work that in the judgment of the County will prevent or hinder the prompt completion of additional work, if awarded.
7. Respondents shall not owe delinquent property tax in Tarrant County.

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Due care and diligence has been used in preparation of this information, and it is believed to be substantially correct. However, the responsibility for determining the full extent of the exposure and the verification of all information presented herein shall rest solely with the Respondent. Tarrant County and its representatives will not be responsible for any errors or omissions in these specifications, nor for the failure on the part of the Respondent to determine the full extent of the exposures.

Respondent may not assign their rights and duties under an award without the written consent of the Purchasing Agent. Such consent shall not relieve the assignor of liability in the event of default by the assignee.

RESPONDENT AGREES THAT IT WILL PROTECT, DEFEND, INDEMNIFY AND SAVE WHOLE AND HARMLESS TARRANT COUNTY, AND ALL OFFICERS, AGENTS AND EMPLOYEES OF TARRANT COUNTY (HEREINAFTER "THE INDEMNIFIED PARTIES") FROM AND AGAINST ALL CLAIMS, DEMANDS, CAUSES OF ACTION, DAMAGES, JUDGMENTS, LOSSES AND EXPENSES, INCLUDING ATTORNEY'S FEES, LITIGATION EXPENSES AND COURT COSTS OF WHATSOEVER NATURE, CHARACTER OR DESCRIPTION THAT ANY PERSON OR ENTITY HAS OR MAY HAVE ARISING FROM OR ON ACCOUNT OF ANY EMPLOYMENT RELATED MATTER ASSERTED BY ANY OF ITS EMPLOYEES AGAINST THE INDEMNIFIED PARTIES OR FOR ANY INJURIES OR DAMAGES (INCLUDING, BUT NOT RESTRICTED TO, DEATH) RECEIVED OR SUSTAINED BY ANY PERSON, PERSONS OR PROPERTY, ON ACCOUNT OF, ARISING OUT OF, OR IN CONNECTION WITH THE PERFORMANCE OF THE WORK, INCLUDING WITHOUT LIMITING THE GENERALITY OF THE FOREGOING, ANY NEGLIGENT ACT OR OMISSION OF RESPONDENT OR ANY AGENT, SERVANT, EMPLOYEE OR SUBCONTRACTOR OF RESPONDENT IN THE EXECUTION OR PERFORMANCE OF THIS AGREEMENT. RESPONDENT FURTHER AGREES TO PROTECT, INDEMNIFY AND HOLD THE INDEMNIFIED PARTIES HARMLESS AGAINST AND FROM ANY AND ALL CLAIMS AND AGAINST AND FROM ANY AND ALL LOSS, COST, DAMAGE, JUDGMENTS OR EXPENSE, INCLUDING ATTORNEY'S FEES, LITIGATION EXPENSES AND COURT COSTS ARISING OUT OF THE BREACH OF ANY OF THE REQUIREMENTS AND PROVISIONS OF THIS AGREEMENT BECAUSE OF ANY FAILURE OF RESPONDENT, ITS EMPLOYEES, OFFICERS, AGENTS, SUBCONTRACTORS, INVITEES OR ASSIGNS IN ANY RESPECT TO COMPLY WITH AND PERFORM ALL THE REQUIREMENTS AND PROVISIONS HEREIN.

RESPONDENT(S) WILL COMPLY WITH ALL STATE, FEDERAL, AND LOCAL LAWS INCLUDING BUT NOT LIMITED TO THE AMERICANS WITH DISABILITIES ACT, TITLE VII OF THE CIVIL RIGHTS OF 1964, AGE DISCRIMINATION IN EMPLOYMENT ACT, CIVIL RIGHTS ACT OF 1991, FEDERAL INSURANCE CONTRIBUTIONS ACT (FICA), FAIR LABOR STANDARDS ACT, EQUAL PAY ACT OF 1963 AND THE AFFORDABLE HEALTH CARE ACT, AS TO TREATMENT AND COMPENSATION OF ITS EMPLOYEES.

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RESPONDENT(S) WILL PREPARE PAYROLL CHECKS, MAKE ALL NECESSARY DEDUCTIONS AND PAY ALL TAXES, AND INSURANCE REQUIRED BY FEDERAL, STATE, AND LOCAL LAWS. RESPONDENT ACCEPTS FULL RESPONSIBILITY FOR THE PAYMENT OF WAGES, COMPENSATION, OVERTIME, AND BENEFITS TO PERSONNEL. RESPONDENT ACCEPTS RESPONSIBILITY FOR PAYMENT OF ALL TAXES, ASSESSMENTS, FEES, AND FINES THAT MAY BE DUE AND OWING TO ANY LOCAL, STATE, OR FEDERAL GOVERNMENT AGENCIES.

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SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

1. **Contract Terms:** Respondent(s) will be awarded a contract, effective from date of award or notice to proceed as determined by Tarrant County Purchasing through September 30, 2018. At Tarrant County's option and approval by the Respondent, the contract may be renewed for three (3) additional twelve (12) month periods, as further explained in Renewal Options. **Prices must remain firm for the entire contract.**
2. **Renewal Options:** Tarrant County reserves the right to exercise an option to renew the contract of the Respondent for three (3) additional twelve (12) month periods, provided such option be stipulated in the Special Conditions and agreed upon by both parties. If the County exercises the right in writing, the Respondent shall update and submit any legal documents required during the initial solicitation by no later than thirty (30) calendar days prior to the commencement of the option period. These documents, if applicable, will be specified in the Special Conditions and include, but are not limited to, Insurance Certificates and Performance Bonds and must be in force for the full period of the option. If the updated documents are not submitted by the Respondent in complete form within the time specified, the County will rescind its option and seek a new solicitation.
3. **Minimum Insurance Requirements:**
 - A. Respondent shall take out, pay for and maintain at all times during the prosecution of the work under the contract, the following forms of insurance, in carriers acceptable to and approved by Tarrant County.
 - 1) Workers' Compensation/Employer's Liability
 - a. Worker's Compensation — statutory
 - b. Employer's Liability — \$500,000
 - 2) Commercial General Liability:
 - a. Bodily Injury/Personal Injury/Property Damage
– \$1,000,000 per occurrence/\$2,000,000 aggregate
 - 3) Professional Liability appropriate for performance of position
– \$500,000 per occurrence
 - B. The County reserves the right to review the insurance requirements of this section during the effective period of the contract and to require adjustment of insurance coverage and their limits when deemed necessary and prudent by the County based upon changes in statutory law, court decisions, or the claims history of the industry as well as the Respondent.
 - C. Required Provisions:
 - 1) Proof of Carriage of Insurance – All certificates of insurance will be required in duplicate and filed with the Purchasing Agent and the Budget and Risk Management Department at 100 East Weatherford Street.

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SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

- 2) All certificates shall provide Tarrant County with an unconditional thirty days written notice in case of cancellation or any major change.
- 3) As to all applicable coverage, certificates shall name Tarrant County and its officers, employees, and elected representatives as an additional insured.
- 4) All copies of the certificates of insurance shall reference the project name and Proposal number for which the insurance is being supplied.
- 5) The Respondent agrees to waive subrogation against Tarrant County, its officers, employees, and elected representatives for injuries, including death, property damage, or any other loss to the extent the loss, if any, is covered by the proceeds of insurance.
- 6) The Respondent is responsible for making sure any subcontractor(s) performing work under this agreement has the required insurance coverage(s) and supplies Tarrant County with the proper documents verifying the coverage.

4. **Criminal Background Check:**

All vendor designated personnel performing work for Tarrant County to include on-site or remote access will be required to undergo a Criminal Justice Information Services (CJIS) Criminal Background Check.

- a. Vendor shall provide information, including, but not limited to, name, date of birth, and driver's license number for each individual who will be performing work on Tarrant County.
- b. Personnel who perform work for Tarrant County must submit to and pass a CJIS Criminal Background Check. That status must be maintained by all Vendor personnel for the duration of the contract.
- c. Criminal Background checks conducted by Vendor for vetting purposes are desired but are not acceptable due to particular requirements. Tarrant County reserves the right to conduct additional Criminal Background Checks as it deems necessary.
- d. Failure of the Vendor to supply personnel who pass a CJIS Criminal Background Check Could result in termination of the contract.

Note: The CJIS Criminal Background Check applies to the individual and not the Company.

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SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

5. **The following is not relevant to all engagements, but instead is applicable when there is a hosted or cloud solution.**

Confidentiality, Integrity, Availability (CIA)

Vendor shall protect the Confidentiality, Integrity, and Availability (CIA) of all Tarrant County Data ensuring extra levels of security. All County information must remain private and permit redaction of protected information before publication, and audit trails cannot be altered.

Breach Notification

Vendor agrees that upon discovery of unauthorized access to Tarrant County data, Vendor shall notify Tarrant County both orally and in writing. In no event shall the notification be made more than forty-eight (48) hours after Vendor knows or reasonably suspects unauthorized access has or may have occurred. In the event of a suspected unauthorized Access, Vendor agrees to reasonably coordinate with Tarrant County to investigate the occurrence.

Data

All Tarrant County data will remain in the 48 contiguous states at all times.

Right to Audit

Tarrant County reserves the right to audit vendor datacenters which house Tarrant County data or receive SSAI 16 SOC Type II audits from a reputable security advisory service firm (e.g. EY, Deloitte, KPMG, PWC, Coalfire, etc.).

6. There is no opportunity for remote attendance of the Pre-Proposal Conference. Bidders/Respondents are not allowed to call in to attend this meeting.

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

STATEMENT OF WORK


I. OVERVIEW

- A. The Tarrant County Clerk’s Office is pleased to invite qualified Respondents to submit competitive proposals to replace its existing Official Public Records System (OPR) and its Vital Records Management System (VR).

- B. The desired systems shall be robust, scalable, and secure while providing high availability with minimal impact to existing business processes. Additionally, the proposed solution(s) recording functionality must comply with all State of Texas statutes as interpreted by the County Clerk’s Office. It is critical that the prospective Respondent have the capabilities to provide exceptional support that is responsive to the County Clerk’s operational needs.

II. BACKGROUND

A. County Clerk’s Office Facts and Current statistics

Tarrant County Facts		
Established	1849	
County Seat	Fort Worth, Texas	
Population	~ 2,000,000 (15th largest US, 3rd largest Texas)	
Land Area	902 square miles	
County Clerk	Mary Louise Garcia	

B. Mission statement

- 1. The Tarrant County Clerk’s Office provides cost-effective services and a satisfying Citizen Experience.

C. Existing System and Environment

Hardware/Software	
Existing Record Management System	Thomson Reuters - Aumentum 2.10.1 b122
Workstation (~75 clients)	Dell

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Operating System	Windows 7 (Windows 10 future)
Application Server	Windows 2012
Database Server	SQL Server 2012 (2014 Future)
Scanners	Fujitsu 6130 and above Canon DR 7580, 610C, 5010C Ricoh Aficio MP W3601 (Plat scanner)
Printers	HP LaserJet LexMark 2500 Brother
Image Resolution	200 dpi
Image format	tiff, jpg, pdf
Image storage	~4 Tb

D. Imaging Standards

1. Documents will be scanned at 200dpi.
2. Documents will be scanned in portrait mode.
3. Document images will be captured as multi-page Group IV TIFF images.
4. Scanned documents will be legible. Legible in this instance means a clear, readable image –including signatures and notary seals-and in which all portions of each page are captured. Document font size must meet Property Record Industry Association (PRIA) minimum standards.

III. SCOPE

A. This RFP is divided into two sections to be awarded:

1. Section I-OPR- The official public records system provides the County Clerk's office with comprehensive system functionality necessary to manage land and real estate records.
2. Section II-VR-The vital records system provides the County Clerk's office with comprehensive system functionality necessary to manage vital records including birth certificates, death certificates, and marriage licenses.

B. Respondents may respond and submit a proposal to replace either one system or both systems. Each section will be scored and evaluated separately.

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IV. UNIVERSAL REQUIREMENTS

- A. **[REQUIREMENT]** Each proposal **MUST** include complete data conversion of all records from the existing system(s).
- B. **[REQUIREMENT]** Each proposal **MUST** include a training component and knowledge transfer including access to documentation.
- C. **[REQUIREMENT]** Each proposal **MUST** include support and maintenance costs to arrive at total cost of ownership.
- D. **[REQUIREMENT]** Each proposal **MUST** state if the Respondent is proposing to replace one system or both systems.
- E. **[REQUIREMENT]** Each proposal **MUST** provide for an on-premises solution(s).
- F. **[REQUIREMENT]** Each system **MUST** have a cashiering function to conduct, collect, and facilitate payments.

V. SECTION I-OPR STATEMENT OF WORK

- A. Overview
 - 1. The County Clerk's office manages over 25 million records and that number grows roughly 350,000 annually. The public's need for these records, which include a mix of land, death, birth, marriage, and assumed name records is enormous. The effective management of these records is vital to our local economy. Tarrant County seeks a solution that optimizes workflow, utilizes current technology and increases access to records by citizens.
 - 2. Real Estate
 - a. All records that are to be available for public record must be filed in this office. Types would include Deeds, Deeds of Trust, Plats, Liens, Notices, Livestock Marks and Brands, Easements, Cemetery Deeds, Powers of Attorney, Oil and Gas Leases, Releases and many other documents.
 - 3. OPR Staffing
 - a. 27 total staff including 1 manager, 2 assistant managers and 2 supervisors.

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4. Volume

Type of Recording	2016	2015	2014
OPR – Documents filed	298,890	291,563	282,005
PLATS - Filed	722	618	650
OPR Copies Sold	10,487	10,846	11,052
Online Copies Sold	5,327	3,054	NA
Online Certified Copies Sold	2,460	1,518	NA

5. Currently, OPR receives documents to be recorded through e-recording providers and the US Mail and in person at the office. For documents that are received via US Mail the process is very manual. The requestor name and address is entered manually into the system if it does not already exist. A Barcode page and a Trailer page is generated and attached to the documents for scanning. After the document is scanned into the system the first validation takes place where the clerk will try to clear up any images that appear distorted using the tools available in the current system. Once validated it then goes to a queue where a second validation will take place. All e-recording documents are sent to a queue where they wait for validation by staff.

6. Current State / Business Need

a. Replacing the current Official Public Records (OPR) System with a Commercial Off-the-Shelf product should provide enhanced availability of critical records to the public, improved workflow and simplified system upgrades.

7. Future State

a. The proposed solution is to purchase a new turnkey OPR System that will offer advantages over the current system. These advantages would include a better workflow, better utilization of technology and increased access to records by citizens.

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- b. The new desired system should also provide the following features:
 - i. An automated redaction model
 - ii. An automated indexer model
 - iii. A financial model for collection of fees
 - iv. E-Recording
 - v. Bulk Data Export
 - vi. Scanning
 - vii. Public browse or public access

B. OPR Specifications

- 1. The scope of the specifications contained within this document includes business, functional, and non-functional specifications necessary or desired to support the stated business needs.
- 2. Specifications: Any item designated as “MUST” is a minimum requirement for this RFP.
 - a. General Business Specifications.

Spec. #	General Business Specification Description
B001	[REQUIREMENT] System MUST provide a searchable database with varying degrees of access based on role (E.g. Clerk, Supervisor, Assistant Manager, Manager)
B002	System should provide users configurable Hot Keys to allow system navigation
B003	[REQUIREMENT] System MUST be able to scan documents to various formats and attach them to records
B004	[REQUIREMENT] System MUST allow users to set up work flows for document management, status tracking and auditing
B005	[REQUIREMENT] System MUST have ability for Bulk Scan
B006	[REQUIREMENT] System MUST create an online user interface to allow public to request official or unofficial copies of records
B007	[REQUIREMENT] System MUST generate unique numbers for documents issued

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B008	System should have ability to scan multiple records at once and remain in a queue until reviewed and approved
B009	[REQUIREMENT] System MUST create an online web portal to allow users to apply for records
B010	[REQUIREMENT] System MUST create an integrated module that will process payments of fees for record requests
B011	System should have capability to support search and retrieval of all non-restricted records from the internet
B012	[REQUIREMENT] System MUST allow public access users to view, print and purchase unofficial copies of non-restricted records
B013	[REQUIREMENT] System MUST have a searchable database of all transactions
B014	[REQUIREMENT] System MUST have ability to assign items to staff with the ability for the Supervisor, Assistant Manager and Manager to re-assign as needed
B015	[REQUIREMENT] System MUST have batch processing capabilities for requests input at Public Access Terminals
B016	[REQUIREMENT] System MUST have a searchable database for all batch activity with batch numbers assigned automatically by the system
B017	[REQUIREMENT] All requests made using online or Public Access Terminal MUST expire upon a configurable number of days and auto-purge from the system if requestor has not come to a location to complete the processing
B018	System should have a template designer for documents
B019	[REQUIREMENT] System MUST allow staff to accept or reject documents submitted for recording
B020	System should provide auto-search function for all drop down boxes
B021	System should generate Rejection letters for any documents that cannot be recorded or for documents that have been recorded but subsequently voided
B022	System should allow for emailing of images. Does not apply to confidential records

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B023	[REQUIREMENT] System MUST create a receipt template which can be modified by authorized personnel
B024	Public Access Terminals to be set up at all multiple locations to allow multiple users to access and request copies of records – hardware will be owned by Tarrant County but must have software loaded onto them for public usage
B025	[REQUIREMENT] System MUST have ability to allow bulk data requests
B026	[REQUIREMENT] System MUST track lifetime counts by instrument

b. OPR Business Specifications

Spec. #	OPR Business Specification Description
OPR01	[REQUIREMENT] System MUST have the capability to directly record, e-record, scan, verify and index OPR Records
OPR02	[REQUIREMENT] System MUST have the capability to issue certified and non-certified copies of OPR Records
OPR03	[REQUIREMENT] System MUST have ability to submit OPR for copies via internet, Public Access Terminal and in-person
OPR04	[REQUIREMENT] System MUST allow acceptance or rejection of e-recording documents
OPR05	[REQUIREMENT] System MUST create barcode page for all new recordings which consists of the barcode and the new document number (system generated)
OPR06	System should create recording labels for each new recording
OPR07	System should replace voided document with a void page listing the Date, Document Number generated by the system and the reason
OPR08	System should provide ability to reprint recording labels on demand
OPR09	System should provide a way to accept a valid batch and bring up the next batch of documents automatically. This will be configurable by personnel.
OPR10	[REQUIREMENT] System MUST auto-index all recordings

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OPR11	[REQUIREMENT] System MUST auto-redact any sensitive data from a document and retain original version and be able to export bulk data of either the original or redacted version of the image. Original version can only be viewed by groups with rights.
OPR12	[REQUIREMENT] System MUST provide Optical Character Recognition
OPR13	[REQUIREMENT] System MUST auto-attach the County Clerk stamp to all documents scanned in
OPR14	[REQUIREMENT] System MUST allow users to produce productivity reports by user role
OPR15	[REQUIREMENT] System MUST allow batches to be broken out by instrument number and assigned by instrument numbers to staff
OPR16	[REQUIREMENT] System MUST add “Document Type” and “Assigned To” to index queue and make both of these additional columns sortable ascending or descending
OPR17	[REQUIREMENT] System MUST have ability to track historical reference numbers
OP18	System should have ability to e-record with other government agencies

c. OPR Accounting and Financial Management Business Specification

Spec. #	OPR Accounting and Financial Management Business Specification Description
AF01	[REQUIREMENT] System MUST have ability to facilitate purchase and processing of records, including official and unofficial copies of records
AF02	[REQUIREMENT] System MUST have ability to print receipts
AF03	[REQUIREMENT] System MUST accept payment in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF04	System prefers to authorize payments without 3rd party vendor. Should allow for integration with 3rd party electronic payment processor.
AF05	[REQUIREMENT] System MUST have a Transaction Type field in the receipt which allows identified staff to modify the list of values

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

AF06	[REQUIREMENT] System MUST provide the ability to split payments in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF07	[REQUIREMENT] System MUST create a receipt Template which can be modified
AF08	[REQUIREMENT] System MUST break out payments to show where fees belong to. Please see Appendix A-OPR – Official Public Records Fee Breakdown
AF09	[REQUIREMENT] System MUST allow voiding receipts
AF10	[REQUIREMENT] System MUST create a searchable database for receipts
AF11	[REQUIREMENT] System MUST allow receipts to be adjusted
AF12	[REQUIREMENT] System MUST provide users with ability to click on receipt number in reports and be taken directly to the receipt for review
AF13	[REQUIREMENT] System MUST be able to print and reprint receipts

d. Assumptions / Constraints

- i. All remote solution access will be done using County-owned and issued hardware and while connected to the County's VPN (virtual private network).
- ii. Public facing web sites will meet all County requirements for security and authorization.
- iii. Solution will meet all domain technical specifications as specified by the Office of Information Security for Tarrant County ITD.

e. Functional Specifications for General Business

	Functional Specification Description
Spec. #	FNC=Functional
B001	[REQUIREMENT] System MUST provide a searchable database with varying degrees of access based on role (E.g. Clerk, Supervisor, Assistant Manager, Manager)

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

FNC01	<p>[REQUIREMENT] System MUST minimally provide the following fields:</p> <p>Fields for Birth Database:</p> <p>Child's Name (First, Middle, Last)</p> <p>Date of Birth</p> <p>Registration Number</p> <p>Date Filed</p> <p>Book</p> <p>Page</p> <p>Mother's Maiden Name</p> <p>Mother's Name (First, Middle, Last)</p> <p>Father's Name (First, Middle, Last)</p> <p>Filing Location</p>
FNC02	<p>[REQUIREMENT] System MUST minimally provide the following fields:</p> <p>Fields for Death Database:</p> <p>Decedent's Name (First, Middle, Last)</p> <p>Registration Number</p> <p>Date of Death</p> <p>Registration Date</p> <p>Book</p> <p>Page</p> <p>Document Type</p> <p>Filing Location</p>

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

FNC03	<p>[REQUIREMENT] System MUST minimally provide the following fields:</p> <p>Fields for Marriage:</p> <p>Party Name (First, Middle, Last)</p> <p>Name Type (eg. Applicant1, Applicant 2)</p> <p>Date of Marriage</p> <p>Date of App</p> <p>Scan Date</p> <p>License Number</p> <p>Book</p> <p>Page</p> <p>Location</p> <p>License Status</p>
FNC04	<p>[REQUIREMENT] System MUST minimally provide the following fields:</p> <p>Fields for Assumed Name:</p> <p>Assumed Name</p> <p>Owner</p> <p>Action Date</p> <p>Certificate Number</p> <p>License Status</p>
FNC05	<p>[REQUIREMENT] System MUST minimally provide the following fields:</p> <p>Fields for Military Discharge:</p> <p>Name (First, Middle, Last)</p> <p>Discharge Date</p> <p>Date Filed</p> <p>Certificate Number</p> <p>Branch</p> <p>Book</p> <p>Page #</p>

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

FNC06	<p>[REQUIREMENT] System MUST minimally provide the following fields:</p> <p>Fields for Index Search:</p> <p>General:</p> <p>Party Name</p> <p>Party Type – multi select option</p> <p>Date Filed</p> <p>Instrument Number</p> <p>Book</p> <p>Page</p> <p>Document Type</p> <p>Legal Description Fields:</p> <p>Addition – multi select option</p> <p>City – multi select option</p> <p>Lot</p> <p>Block</p> <p>Plat Cabinet</p> <p>Plat Slide</p> <p>Freeform Text</p>
B002	System should provide users configurable Hot Keys to allow system navigation
B003	[REQUIREMENT] System MUST be able to scan documents to various formats and attach them to records
B004	[REQUIREMENT] System MUST allow users to set up work flows for document management, status tracking and auditing
B005	[REQUIREMENT] System MUST have ability for Bulk Scan
B006	[REQUIREMENT] System MUST create an online user interface to allow public to request official or unofficial copies of records

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

B007	[REQUIREMENT] System MUST generate unique numbers for documents issued
FNC07	<p>[REQUIREMENT] System MUST generate numbers with the following parameters:</p> <p>Birth = 0600000016</p> <p>Death = 0600000016</p> <p>Fetal Death = 06000000FYY (YY = 2 digit Year)</p> <p>Assumed Names = A216000000</p> <p>Military = Z216000000</p> <p>Marriage = M216000000</p> <p>OPR = YYY0000000 (YYY = 1st, 3rd and 4th digit of the year followed by 7 numbers)</p> <p>The current calendar year 17 must change automatically with the start of each new year. The zeros represent a 6-digit computer generated number</p>
B008	System should have ability to scan multiple records at once and remain in a queue until reviewed and approved
B009	[REQUIREMENT] System MUST create an online web portal to allow users to apply for records
FNC08	[REQUIREMENT] Online web portal MUST be secure and accept applications for records
FNC09	[REQUIREMENT] Applications MUST be queued and processed when the customer comes to the office in person to complete the request
B010	[REQUIREMENT] System MUST create an integrated module that will process payments of fees for record requests
FNC10	[REQUIREMENT] Module MUST accept payments and break down the payments into the fees payable to the various agencies. (see appendix A-OPR)
B011	System should have capability to support search and retrieval of all non-restricted records from the internet

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

B012	[REQUIREMENT] System MUST allow public access users to view, print and purchase unofficial copies of non-restricted records
B013	[REQUIREMENT] System MUST have searchable database of all transactions
FNC11	<p>[REQUIREMENT] System MUST minimally provide the following fields:</p> <p>Employee Name</p> <p>Date</p> <p>Location</p> <p>Department</p> <p>Receipt Number</p> <p>Payment Type</p> <p>Check Number</p> <p>Document Type</p> <p>Instrument Number</p>
B014	[REQUIREMENT] System MUST have ability to assign items to staff with the ability for the Supervisor, Assistant Manager and Manager to re-assign as needed
B015	[REQUIREMENT] System MUST have batch processing capabilities for requests input at Public Access Terminals
B016	[REQUIREMENT] System MUST have a searchable database for all batch activity
FNC12	<p>[REQUIREMENT] System MUST minimally provide the following fields:</p> <p>Batch Number</p> <p>Name of requestor</p> <p>Date of completion</p>
B017	[REQUIREMENT] All requests made using online or Public Access Terminal MUST expire upon a configurable number of days and auto-purge from the system if requestor has not come to a location to complete the processing

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

B018	System should have a template designer for documents
FNC13	System should have a template designer to allow new forms to be scanned into the system and configured by the staff
B019	[REQUIREMENT] System MUST allow staff to accept or reject documents submitted for recording
B020	System should provide auto-search function for all drop down boxes
FNC14	All drop down boxes should begin to auto search for matches on the list as staff enters letters in the search box of the drop down
B021	System should generate Rejection letters for any documents that cannot be recorded or for documents that have been recorded but subsequently voided
FNC15	Staff should have ability to search and select from a list of reasons by using a checkbox to fill in the rejection reason. (See Appendix A-OPR for Example)
FNC16	<p>There is a list of rejection letters:</p> <ul style="list-style-type: none"> Real Property Rejection Letter Military Discharge Rejection Assumed Name Rejection Letter Birth/Death Cert Copy Reject Letter Marriage Rejection Letter Asn No Record Found Birth No Record Found Death No Record Found No Money Verify Death for Law Marriage No Record Found Verification of Birth Verification of Death

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

B022	System should allow for emailing of images. Does not apply to confidential records
B023	[REQUIREMENT] System MUST create a receipt template which can be modified by authorized personnel
B024	Public Access Terminals to be set up at all multiple locations to allow multiple users to access and request copies of records
B025	[REQUIREMENT] System MUST have ability to allow bulk data requests
B026	[REQUIREMENT] System MUST track lifetime counts by instrument
FNC17	[REQUIREMENT] System MUST track lifetime county by instrument: Birth, Death, Fetal Death, Marriage, Military Discharge, Assumed Names, Official Public Record (OPR)

f. Functional Specification for Official Public Records

Spec. #	Functional Specification Description
OPR01	[REQUIREMENT] System MUST have the capability to directly record, e-record, scan, verify and index OPR Records
FNC18	<p>[REQUIREMENT] System MUST minimally capture the following requestor/submitter information</p> <ul style="list-style-type: none"> Name Address 1 Address 2 - Optional Fields City/State/ Zip (Autofill with Zip) Phone Email Delivery Method (Currently a Drop Down List) Add to this Delivery Method List: <ul style="list-style-type: none"> Mail Certified/Express Mail Walk in Customer Delivery Service – create a drop down list of services Option for number of trailer pages (recording pages) Capture Document type (choose from dropdown of 99 document types) Capture Number of Pages in document

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

	<p>Capture returnee Information (person to whom the filed document should be returned)</p> <p>Last Name</p> <p>First Name</p> <p>Address 1</p> <p>Address 2</p> <p>City/State/Zip (Autofill with Zip)</p> <p>Common Name Data List (Codes associated with names and addresses of Common Users) can be selected to auto fill all of the required fields. Data used by Intake and Indexing.</p> <p>Visible List of each document entry, document type, page count and fees as documents are entered until proceeding to Payment Collection.</p>
OPR02	<p>[REQUIREMENT] System MUST have the capability to issue certified and non-certified copies of OPR Records</p>
OPR03	<p>[REQUIREMENT] System MUST have ability to submit OPR for copies via internet, Public Access Terminal and in-person</p>
OPR04	<p>[REQUIREMENT] System MUST allow acceptance or rejection of e-recording documents</p>
FNC19	<p>Filing or Rejecting Documents for OPR that are submitted Electronically</p> <p>Visible and accessible to all Intake Users -Common queue for accessing submitted document for review</p> <p>Documents are delivered in batches (related documents/packages) that are put together and scanned by the submitter</p> <p>Visible when reviewing electronic documents – all pages of each document, filing fees for each document, document type, and page counts for each document in batch selected.</p> <p>Accepted – each document is stamped with the recording stamp electronically</p> <p>Actions while processing accepted documents</p> <ul style="list-style-type: none"> No Fee Show/Adjust Stamp Add New Surcharge Add File Page Delete Surcharge

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

	<p>Add Row Previous Document Edit Requestor Information Delete Row Update Document Show /Edit Remarks Receipt Remarks More Names Other Fees Forward Double Fees Process Fee Override Revenue Detail Despeckle Erosion Dilation</p>
FNC20	<p>Rejected- if one document in a batch is rejected all docs in that batch will be returned unrecorded.</p> <p>Fields to add:</p> <p>Rejection of a Document Rejection Reason Box Appears for that Document Drop down reason for common rejections added by administrator can be used or a new rejection reason can be added.</p>
FNC21	<p>After Accepting or Rejection – a confirmation box will appear and ask if the user wants the next transaction.</p>
OPR05	<p>[REQUIREMENT] System MUST create barcode page for all new recordings which consists of the barcode and the new document number (system generated)</p>
OPR06	<p>System should create recording labels for each new recording</p>
OPR07	<p>System should generate and replace voided document with a void page listing the Date, Document Number generated by the system and the reason</p>

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

FNC22	System should create a reason field with a drop down box list of common reasons for rejection.
OPR08	System should provide ability to reprint recording labels on demand
OPR09	System should provide a way to accept a valid batch and bring up the next batch of documents automatically. This will be configurable by personnel.
OPR10	[REQUIREMENT] System MUST auto-index all recordings
OPR11	[REQUIREMENT] System MUST auto-redact any sensitive data from a document and retain original version and be able to export bulk data of either the original or redacted version of the image. Original version can only be viewed by groups with rights.
FNC23	[REQUIREMENT] System MUST auto-scan documents and highlight keywords that are identified as containing sensitive data when scanned into system in order to combine verification and redaction in one step
FNC24	[REQUIREMENT] System MUST allow staff to manually unselect fields highlighted for redaction by the system on a document
FNC25	[REQUIREMENT] System MUST have a button to click “Redact All” for the remaining highlighted fields on a document
FNC26	[REQUIREMENT] System MUST identify the following items to be highlighted for redaction in different colors: Items highlighted in YELLOW by the system – these require attention – if no action taken these items will NOT be redacted. Items highlighted in RED – require attention – if no action taken these WILL be redacted by the system
FNC27	[REQUIREMENT] System MUST have ability to be configured to exclude certain document types from additional review after auto-redacting. The system will move these documents to the next stage in the workflow if no action is required
OPR12	[REQUIREMENT] System MUST provide Optical Character Recognition

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

OPR13	[REQUIREMENT] System MUST auto-attach the County Clerk stamp to all e-recorded documents scanned in
FNC28	[REQUIREMENT] System MUST allow staff to manually adjust the stamp or relocate it to another part of the document with buttons to position the stamp
OPR14	[REQUIREMENT] System MUST allow users to produce productivity reports by user role
OPR15	[REQUIREMENT] System MUST allow batches to be broken out by instrument number and assigned by instrument numbers to staff
FNC29	<p>[REQUIREMENT] System MUST allow a batch with multiple pages to be broken out by instrument number and assigned by instrument number to staff and percentage complete. Example:</p> <p>Batch 123456</p> <p>Instrument 1-10 assigned to Staff#1 75% complete</p> <p>Instrument 11-21 assigned to Staff #2 85% complete</p> <p>Instrument 22-32 assigned to Staff#3 95% complete</p> <p>Etc.</p> <p>System will also break out by document type or actual Instrument Number</p>
OPR16	[REQUIREMENT] System MUST add “Document Type” and “Assigned To” to index queue and make both of these additional columns sortable ascending or descending
OPR17	[REQUIREMENT] System MUST have ability to track historical reference numbers
FNC30	[REQUIREMENT] For existing documents recorded prior to computerized numbering – MUST track by book/volume and page
OPR18	System should have ability to e-record with other government agencies

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

g. Functional Specifications for Accounting and Financial Management

Spec. #	Functional Specification Description
	STA=Statutory/Legislative, RPT=Reporting
AF01	[REQUIREMENT] System MUST have ability to facilitate purchase and processing of records, including official and unofficial copies of records
AF02	[REQUIREMENT] System MUST have ability to print receipts
FNC31	<p>[REQUIREMENT] Receipts MUST minimally consist of the following configurable fields:</p> <p>Receipt Date/Time Stamp – auto populated by system</p> <p>Receipt Number – auto generated by system</p> <p>Transaction Type – new field to be created – a freeform text field</p> <p>Issued To</p> <p>A Documents Heading with the following underneath:</p> <p>Number of Documents</p> <p>Type of Documents</p> <p>Number of Pages – Count of all records issued</p> <p>Quantity</p> <p>Reference Number</p> <p>Amount</p> <p>A Payments Heading with the following underneath:</p> <p>Type of Payment</p> <p>Payment Number – auto generated by system</p> <p>Amount</p> <p>Total Payments</p> <p>A configurable Salutation to be located bottom center of the receipt</p>

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

AF03	[REQUIREMENT] System MUST accept payment in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF04	System prefers to authorize payments without 3rd party vendor. Should allow for integration with 3rd party electronic payment processor.
AF05	[REQUIREMENT] System MUST have a Transaction Type field in the receipt which allows identified staff to modify the list of values
AF06	[REQUIREMENT] System MUST provide the ability to split payments in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF07	[REQUIREMENT] System MUST create a receipt Template which can be modified
AF08	[REQUIREMENT] System MUST break out payments to show where fees belong to. Please see Appendix A-OPR – Official Public Records Fee Breakdown
FNC32	<p>[REQUIREMENT] System MUST minimally have the following Payment Collection Information fields:</p> <p>Customer/Submitter</p> <p>Address (Optional or auto fill from Capture requestor/submitter information)</p> <p>City/State/Zip</p> <p>Phone</p> <p>Email</p> <p>Payment type (Drop Down List of Approved Methods of Payment)</p> <p>Payment I.D.#</p> <p>Amount</p> <p>No Fee.</p>

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

	<p>Print Receipt</p> <p>Change Option –Refund-Surplus-with address box for refunds if there is an overage</p> <p>Comments</p> <p>System will not proceed if funds do not match entries (Shortage, overage, no fee reason, address for refund)</p> <p>Receipts and Recording pages print after completion of Payment Collection.</p>
AF10	[REQUIREMENT] System MUST allow voiding receipts
AF11	[REQUIREMENT] System MUST create a searchable database for receipts
FNC33	<p>[REQUIREMENT] System MUST minimally have the following searchable receipt fields for OPR:</p> <p>Date Received From</p> <p>Date Received To</p> <p>Receipt Number</p> <p>User</p> <p>Department</p> <p>Workstation</p> <p>Location</p> <p>Customer</p> <p>Payment Method</p> <p>Payment ID</p> <p>Amount</p> <p>Document Number From</p> <p>Document Number To</p> <p>Transaction Type</p> <p>Module</p>

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

FNC34	<p>[REQUIREMENT] System MUST minimally have the following searchable receipt fields for Vital Records:</p> <p>Receipt Time</p> <p>Receipt Number</p> <p>Issued To</p> <p>Document Number</p> <p>Document Type</p> <p>Number of Pages</p> <p>Quantity</p> <p>Reference Number</p> <p>Book/Page</p> <p>Amount</p> <p>Number of Payments</p> <p>Payment Type</p> <p>Payment Number</p> <p>Amount</p> <p>Secure Paper Number</p> <p>Vital Check Number</p> <p>State Registrar Number</p>
AF12	[REQUIREMENT] System MUST allow receipts to be adjusted
FNC35	[REQUIREMENT] Fields MUST auto-populate with default settings but will allow each field to be adjusted by staff
AF13	[REQUIREMENT] System MUST provide users with ability to click on receipt number in reports and be taken directly to the receipt for review
AF14	[REQUIREMENT] System MUST be able to print and reprint receipts on demand

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

h. Functional Specifications for Accounting and Financial Management

Spec. #	Non-functional Specification Description
	NFN=Non-Functional, DCS=Design Constraints, SCL=Scalability
NFN01	[REQUIREMENT] Public Access web portal MUST be accessible on the public internet and display content using a variety of browsers such as Internet Explorer
NFN02	[REQUIREMENT] System MUST be available 24/7/365 for public access with exception for maintenance windows
NFN03	[REQUIREMENT] All images MUST scanned in portrait mode
NFN04	[REQUIREMENT] Document Images MUST be captured as multi-page Group IV TIFF Images
NFN05	[REQUIREMENT] All images MUST capture signatures and notary seals
NFN06	[REQUIREMENT] Document font size and page format MUST meet PRIA minimum standards
NFN07	[REQUIREMENT] System MUST work with any Tarrant County hardware
NFN08	[REQUIREMENT] System MUST comply with Tarrant County IT Standards
NFN09	[REQUIREMENT] System MUST have a distinguishable Test and Production environment

C. REPORTING AND ANALYTICS

1. **[REQUIREMENT]** For all searchable databases the data **MUST** be exportable to various formats such as Excel, PDF or other form for reporting and auditing
2. **[REQUIREMENT]** System **MUST** allow for customized reporting by various staff members of OPR
3. **[REQUIREMENT]** **MUST** provide reports expressing usage patterns and user activity for audit purposes
4. **[REQUIREMENT]** **MUST** view, print, schedule and extract user productivity reports

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

5. **[REQUIREMENT] MUST** view, print, schedule and extract reports related to document filings and current status
6. **[REQUIREMENT] MUST** view, print, schedule and extract detailed and/or summary financial reports by user, physical location, and terminal or submission source
7. **[REQUIREMENT] MUST** view and print images or receipts

D. DATA CONVERSION AND MIGRATION

1. **[REQUIREMENT]** All data images **MUST** be in 200 DPI resolution or better.
2. **[REQUIREMENT]** All PLATS **MUST** be in 600 DPI resolution or better.
3. System should be compatible with Microsoft SQL Server 2014 Service Pack 2 (SQL 2012 backward compatibility is optional). Prefer SQL Server 2016 Service Pack 1.
4. **[REQUIREMENT]** All images **MUST** be in TIFF format
5. **[REQUIREMENT]** System **MUST** maintain current structure of image path stored in database with images stored on Tarrant County NAS drives.
6. **[REQUIREMENT]** System **MUST** have Active Directory Authentication.
7. **[REQUIREMENT]** If Tarrant County hosts SSRS the system **MUST** support folders on our SQL Reporting Servers.
8. Current max length of page file field is set to varchar(200).

E. SYSTEM ADMINISTRATION

1. **[REQUIREMENT]** System **MUST** grant access based on role: Clerk, Supervisor, Assistant Manager, and Manager
2. **[REQUIREMENT]** System **MUST** allow 75 users to use the system concurrently
3. **[REQUIREMENT]** System **MUST** capability to segregate records and restrict access to specific record and/or record types
4. **[REQUIREMENT]** System **MUST** track all users in real time as they are logged in
5. **[REQUIREMENT] MUST** allow unlimited use by public for public access

VI. SECTION II-VITAL RECORDS SYSTEM STATEMENT OF WORK

A. Background

1. The Vital Records Division of the County Clerk's office is the registrar of birth and death records for 28 cities and eight precincts in Tarrant County.

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

2. Vitals records staffing:
 - a. 27 total staff, 1 manager, 1 assistant manager and 1 supervisor
 - b. 5 days a week, Monday-Friday, 8:00 am – 5:00 pm excluding County holidays
 - c. 8 geographic locations, serving 37 cities and precincts.
3. List of locations:
 - a. Tarrant County Plaza Building – main office
 - b. Mansfield
 - c. Arlington
 - d. Poly
 - e. Hurst
 - f. Southlake
 - g. Lake Worth
 - h. Southwest Fort Worth

4. Volume:

Type of Recording	2016	2015	2014
Assumed Names	16,875	17,821	17,563
Births Filed	20,443	20,535	19,990
Birth Copies	54,793	52,516	47,815
Deaths Filed	9,885	9,562	9,018
Death Copies	9,978	10,414	10,473
Marriages Filed	15,896	14,384	13,335
Marriages Copied	13,367	12,535	12,435
Military Discharges Filed	120	163	141
Military Discharges Copied	426	539	388

5. Birth and death certificates are available to immediate family members. A valid government-issued picture ID is required. Records are confidential for 75 years and 25 years respectively.

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6. The County Clerk issues and maintains all marriage licenses in Tarrant County. A marriage license requires a 72-hour waiting period and the marriage ceremony must take place within 90 days from date of issuance.
 7. An assumed name/DBA (doing business as) should be filed with the Clerk's office in the county where business is to be conducted. An applicant may conduct business under multiple assumed names but each name must be filed separately.
 8. Military discharge records or DD214s can be recorded and will be kept confidential for 75 years. This service is provided at no charge to veterans.
 9. Current State / Business Need: Replacing the current Records Management System with a Commercial Off-the-Shelf product should provide enhanced availability of critical records to the public, improved workflow and simplified system upgrades.
 10. Future State
 - a. The proposed solution is to purchase a new turnkey Records Management System that will offer advantages over the current system. These advantages would include a better workflow, better utilization of technology and increased access to records by citizens.
 - b. The new desired system should also provide the following features:
 - 1) An automated redaction model
 - 2) An automated indexer model
 - 3) A financial model for collection of fees
 - 4) E-Recording
 - 5) Bulk Data Export
 - 6) Scanning
 - 7) Public browse or public access
- B. SPECIFICATIONS OVERVIEW**
1. Scope of Specifications
 - a. The scope of the specifications contained within this document includes business, functional, and non-functional requirements necessary to support the stated business needs.
 2. Business Requirements
 - a. General Requirements

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

Spec. #	Business Specification Description
B001	[REQUIREMENT] System MUST provide a searchable database with varying degrees of access based on role (E.g. Clerk, Supervisor, Assistant Manager, Manager)
B002	System should provide users configurable Hot Keys to allow system navigation
B003	[REQUIREMENT] System MUST be able to scan documents to various formats and attach them to records
B004	[REQUIREMENT] System MUST allow users to set up work flows for document management, status tracking and auditing
B005	[REQUIREMENT] System MUST have ability for Bulk Scan
B006	[REQUIREMENT] System MUST create an online user interface to allow public to request official or unofficial copies of records
B007	[REQUIREMENT] System MUST generate unique numbers for documents issued
B008	System should have ability to scan multiple records at once and remain in a queue until reviewed and approved
B009	[REQUIREMENT] System MUST create an online web portal to allow users to apply for records
B010	[REQUIREMENT] System MUST create an integrated module that will process payments of fees for record requests
B011	System should have capability to support search and retrieval of all non-restricted records from the internet
B012	[REQUIREMENT] System MUST allow public access users to view, print and purchase unofficial copies of non-restricted records
B013	[REQUIREMENT] System MUST create a searchable database of all transactions
B014	[REQUIREMENT] System MUST have ability to assign items to staff with the ability for the Supervisor, Assistant Manager and Manager to re-assign as needed
B015	System should have batch processing capabilities for requests input at Public Access Terminals

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B016	[REQUIREMENT] System MUST have a searchable database for all batch activity with batch numbers assigned automatically by the system
B017	[REQUIREMENT] All requests made using online or Public Access Terminal MUST expire upon a configurable number of days and auto-purge from the system if requestor has not come to a location to complete the processing
B018	System should have a template designer for documents
B019	[REQUIREMENT] System MUST allow staff to accept or reject documents submitted for recording
B020	System should provide auto-search function for all drop down boxes
B021	[REQUIREMENT] System MUST comply with Tarrant County IT Standards
B022	System should generate Rejection letters for any documents that cannot be recorded or for documents that have been recorded but subsequently voided
B023	System should allow for emailing of images. Does not apply to confidential records
B024	[REQUIREMENT] System MUST create a receipt template which can be modified by authorized personnel
B025	Public Access Terminals to be set up at all multiple locations to allow multiple users to access and request copies of records – hardware will be owned by Tarrant County but must have software loaded onto them for public usage
B026	[REQUIREMENT] System MUST have ability to allow bulk data requests
B027	[REQUIREMENT] System MUST track lifetime counts by instrument

b. Specifications for Vital Records

Spec. #	Business Specification Description
VR01	[REQUIREMENT] System MUST track and audit security paper for multiple locations

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VR02	[REQUIREMENT] System MUST read and scan the barcode of each security paper issued and tracked with Employee ID, Date/Time Stamp, Instrument Number and Location
VR03	[REQUIREMENT] System MUST have ability to import records from the Texas Electronic Registration (TER) system
VR04	[REQUIREMENT] System MUST connect all issued security paper to a receipt, State Number and Vital Check number for auditing

c. Specifications for Birth/Death and Fetal Death Records

Spec. #	Business Specification Description
BD01	[REQUIREMENT] System MUST directly record, scan, verify and index birth, death and fetal death records
BD02	[REQUIREMENT] System MUST issue certified copies of birth, death and fetal death records
BD03	[REQUIREMENT] System MUST provide ability to submit birth, death and fetal death applications for copies via internet, Public Access Terminal or in person
BD04	System should have capability to scan multiple documents at once and remain in the queue until reviewed and approved
BD05	[REQUIREMENT] System MUST provide ability to enter numbers manually to file a record manually when the State of Texas requires it
BD06	[REQUIREMENT] System MUST provide ability to track lifetime number of certificates issued per record

d. Specifications for Marriage Records

Spec. #	Business Specification Description
M001	[REQUIREMENT] System MUST be able to submit marriage license applications via internet, Public Access Terminal or in person
M002	[REQUIREMENT] System MUST be able to record, scan, verify, index and issue marriage records including minor marriage
M003	[REQUIREMENT] System MUST be able to recognize premarital education classes and adjust fees automatically

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M004	[REQUIREMENT] System MUST auto-calculate ages of marriage license applicants and flag if under 18
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e. Specifications for Military Discharge Records

Spec. #	Business Specification Description
MD01	[REQUIREMENT] System MUST have ability to record, scan, verify and index copies of DD214 records
MD02	[REQUIREMENT] System MUST have the capability to scan application of requestor and any supporting documentation

f. Specifications for Assumed Name Records

Spec. #	Business Specification Description
AN01	[REQUIREMENT] System MUST have the capability to record, scan, verify and index copies of assumed names records
AN02	System should have the capability to file mark assumed name records when scanned
AN03	[REQUIREMENT] System MUST have the capability to allow duplication of application data for multiple filings at one time
AN04	[REQUIREMENT] System MUST have the capability to set expiration dates for assumed name records
AN05	[REQUIREMENT] System MUST have the capability to purge expired assumed names records
AN06	[REQUIREMENT] System MUST have the capability to change the expiration date for assumed name records by the Vital Records Staff – records will be auto set to a 10 year expiration date initially

g. Specifications for Accounting and Financial Management

Spec. #	Business Specification Description
AF01	[REQUIREMENT] System MUST have ability to facilitate purchase and processing of records, including official and unofficial copies of records
AF02	[REQUIREMENT] System MUST have ability to print receipts

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AF03	[REQUIREMENT] System MUST accept payment in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF04	System prefers to authorize payments without 3rd party vendor. Should allow for integration with 3rd party electronic payment processor.
AF05	[REQUIREMENT] System MUST have a Transaction Type field in the receipts which allows identified staff to modify the list of values
AF06	[REQUIREMENT] System MUST provide the ability to split payments in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF07	[REQUIREMENT] System MUST create a receipt Template which can be modified
AF08	[REQUIREMENT] System MUST break out payments to show where the fees belong to. Please see Appendix A-VR – Vital Records Fee Breakdown
AF09	[REQUIREMENT] System MUST allow voiding receipts
AF10	[REQUIREMENT] System MUST create a searchable database for receipts
AF11	[REQUIREMENT] System MUST allow receipts to be adjusted
AF12	[REQUIREMENT] System MUST provide users with ability to click on receipt number in reports and be taken directly to the receipt for review
AF13	[REQUIREMENT] System MUST be able to print and reprint receipts

C. Business Rules for Vital Records

1. All requests made using online or Public Access Terminal will expire after 60 days and delete from the system if requestor has not come to a location to complete the processing.
2. Auto calculate dates and restrict access for the following from the date of filing:
 - i. 75 years for Birth Records
 - ii. 25 years for Death Records
 - iii. Prior to 9/1/2003 for Military Discharge
 - iv. 75 years for Military Discharge on or after 9/1/2003
3. Auto calculates assumed name records to expire 10 years from the date of filing and from public access for an additional 2 years.

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D. Assumptions / Constraints

1. All remote solution access will be done using County-owned and issued hardware and while connected to the County's VPN (virtual private network).
2. Public facing web sites will meet all County requirements for security and authorization.
3. Solution will meet all domain technical specifications as specified by the Office of Information Security for Tarrant County ITD.

E. Specifications

1. The vendor will analyze and provide detailed functional and technical requirements traced to the business requirements.

2. Functional Specifications

- a. Functional Specifications for General Requirements

Spec. #	Functional Specification Description
B001	[REQUIREMENT] System MUST provide a searchable database with varying degrees of access based on role (E.g. Clerk, Supervisor, Assistant Manager, Manager)
FNC36	System MUST minimally provide the following fields for Birth Database: Child's Name (First, Middle, Last) Date of Birth Registration Number Date Filed Book Page Mother's Maiden Name Mother's Name (First, Middle, Last) Father's Name (First, Middle, Last) Filing Location

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FNC37	<p>System MUST minimally provide the following fields for Death Database:</p> <p>Decedent's Name (First, Middle, Last)</p> <p>Registration Number</p> <p>Date of Death</p> <p>Registration Date</p> <p>Book</p> <p>Page</p> <p>Document Type</p> <p>Filing Location</p>
FNC38	<p>System MUST minimally provide the following fields for Marriage:</p> <p>Party Name (First, Middle, Last)</p> <p>Name Type (eg. Applicant1, Applicant 2)</p> <p>Date of Marriage</p> <p>Date of App</p> <p>Scan Date</p> <p>License Number</p> <p>Book</p> <p>Page</p> <p>Location</p> <p>License Status</p>

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FNC39	<p>System MUST minimally provide the following fields for Assumed Name:</p> <p>Assumed Name</p> <p>Owner</p> <p>Action Date</p> <p>Certificate Number</p> <p>License Status</p>
FNC40	<p>System MUST minimally provide the following fields for Military Discharge:</p> <p>Name (First, Middle, Last)</p> <p>Discharge Date</p> <p>Date Filed</p> <p>Certificate Number</p> <p>Branch</p> <p>Book</p> <p>Page #</p>
FNC41	<p>System MUST minimally provide the following fields for Index Search:</p> <p>General:</p> <p>Party Name</p> <p>Party Type – multi select option</p> <p>Date Filed</p> <p>Instrument Number</p> <p>Book</p> <p>Page</p>

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	<p>Document Type</p> <p>Legal Description Fields:</p> <p>Addition – multi select option</p> <p>City – multi select option</p> <p>Lot</p> <p>Block</p> <p>Plat Cabinet</p> <p>Plat Slide</p> <p>Freeform Text</p>
B002	System should provide users configurable PF Keys to allow system navigation
B003	[REQUIREMENT] System MUST be able to scan documents to various formats and attach them to records
B004	[REQUIREMENT] System MUST allow users to set up work flows for document management, status tracking and auditing
B005	[REQUIREMENT] System MUST have ability for Bulk Scan
B006	[REQUIREMENT] System MUST create an online user interface to allow public to request official or unofficial copies of records
B007	[REQUIREMENT] System MUST generate unique numbers for documents issued
FNC42	<p>System MUST generate numbers with the following parameters:</p> <p>Birth = 0600000016</p> <p>Death = 0600000016</p> <p>Fetal Death = 06000000FYY (YY = 2 digit Year)</p> <p>Assumed Names = A216000000</p> <p>Military = Z216000000</p> <p>Marriage = M216000000</p> <p>OPR = YYY0000000 (YYY = 1st, 3rd and 4th digit of the year followed by 7 numbers)</p>

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	The current calendar year 17 must change automatically with the start of each new year. The zeros represent a 6-digit computer generated number
B008	System should have ability to scan multiple records at once and remain in a queue until reviewed and approved
B009	[REQUIREMENT] System MUST create an online web portal to allow users to apply for records
FNC43	System MUST have an online web portal which must be secure and accept applications for records
FNC44	Applications MUST be queued and processed when the customer comes to the office in person to complete the request
B010	[REQUIREMENT] System MUST create an integrated module that will process payments of fees for record requests
FNC45	Module MUST accept payments and break down the payments into the fees payable to the various agencies. (see appendix A-VR)
B011	System should have capability to support search and retrieval of all non-restricted records from the internet
B012	[REQUIREMENT] System MUST allow public access users to view, print and purchase unofficial copies of non-restricted records
B013	[REQUIREMENT] System MUST create a searchable database of all transactions
FNC46	System MUST minimally provide the following fields to search by: Employee Name Date Location Department Receipt Number Payment Type Check Number Document Type Instrument Number

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B014	[REQUIREMENT] System MUST have ability to assign items to staff with the ability for the Supervisor, Assistant Manager and Manager to re-assign as needed
B015	System should have batch processing capabilities for requests input at Public Access Terminals
B016	[REQUIREMENT] System MUST have a searchable database for all batch activity
FNC47	System MUST minimally provide the following fields to search by: Batch Number Name of requestor Date of completion
B017	[REQUIREMENT] All requests made using online or Public Access Terminal MUST expire after 60 days and auto-purge from the system if requestor has not come to a location to complete the processing
B018	System should have a template designer for documents
FNC48	System should have a template designer to allow new forms to be scanned into the system and configured by the staff
B019	[REQUIREMENT] System MUST allow staff to accept or reject documents submitted for recording
B020	System should provide auto-search function for all drop down boxes
FNC49	All drop down boxes should begin to auto search for matches on the list as staff enters letters in the search box of the drop down
B021	System should generate Rejection letters for any documents that cannot be recorded or for documents that have been recorded but subsequently voided
FNC50	Staff should have ability to search and select from a list of reasons by using a checkbox to fill in the rejection reason. (See Appendix A-VR for Example)

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FNC51	<p>There is a list of rejection letters:</p> <ul style="list-style-type: none"> Real Property Rejection Letter Military Discharge Rejection Assumed Name Rejection Letter Birth/Death Cert Copy Reject Letter Marriage Rejection Letter Asn No Record Found Birth No Record Found Death No Record Found No Money Verify Death for Law Marriage No Record Found Verification of Birth Verification of Death
FNC52	<p>System should have an auto-search for each field and return a list of possible results for each letter typed in. For each letter typed in the system will return a list of possible results to allow the user to select from that list</p>
B022	<p>System should allow for emailing of images. Does not apply to confidential records</p>
B023	<p>[REQUIREMENT] System MUST create a receipt template which can be modified by authorized personnel</p>
B024	<p>[REQUIREMENT] Public Access Terminals to be set up at all multiple locations to allow multiple users to access and request copies of records – hardware will be owned by Tarrant County but must have software loaded onto them for public usage</p>
B025	<p>[REQUIREMENT] System MUST have ability to allow bulk data requests</p>

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B026	[REQUIREMENT] System MUST track lifetime counts by instrument
FNC53	Counts by instrument: Birth, Death, Fetal Death, Marriage, Military Discharge, Assumed Names, Official Public Record (OPR)

b. Functional Specifications for Vital Records

Spec. #	Functional Specification Description
VR01	[REQUIREMENT] System MUST track and audit security paper
FNC54	[REQUIREMENT] System MUST record security paper number at the time it is printed by scanning the barcode located on each sheet. The number is to be recorded in the searchable database with a date time stamp auto-populated
FNC55	[REQUIREMENT] System MUST create a searchable database that minimally contains the following fields for security paper: Employee ID Date/Time Location Instrument Number Vital Check Number State Number Receipt Number
VR02	[REQUIREMENT] System MUST read and scan the barcode of each security paper issued and tracked with Employee ID, Date/Time Stamp, Instrument Number and Location
FNC56	[REQUIREMENT] Receipt MUST minimally have the following fields: Certificate Paper Number, Vital Check Number and Receipt Number
VR03	[REQUIREMENT] System MUST have ability to import records from the Texas Electronic Registration (TER) system
VR04	[REQUIREMENT] System MUST connect all issued security paper to a receipt for auditing

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FNC57	[REQUIREMENT] System MUST be able to track all security paper issued to a receipt for auditing
FNC58	[REQUIREMENT] System MUST t provide ability to print out listings of certificate paper to the associated receipt

c. Functional Specifications for Birth, Death and Fetal Death Records

Spec. #	Functional Specification Description
BD01	[REQUIREMENT] System MUST directly record, scan, verify, and index birth records
FNC59	[REQUIREMENT] System MUST record image of records into a queue for Vital Records Staff. System will highlight any inconsistencies with instruments and notify staff by highlighting fields. System will show the records with a status of “Requires Validation”
BD02	[REQUIREMENT] System MUST issue certified copies of birth records
FNC60	System MUST be able to load and print certified copies of birth, death and fetal death records on State authorized security paper.
BD03	[REQUIREMENT] System MUST provide ability to submit birth, death and fetal death applications for copies via internet, Public Access Terminal or in person
BD04	System should have capability to scan multiple documents at once and remain in the queue until reviewed and approved
BD05	[REQUIREMENT] System MUST provide ability to enter numbers manually to file a record manually when the State of Texas requires it
BD06	[REQUIREMENT] System MUST provide ability to track lifetime number of certificates issued per record

d. Functional Specifications for Marriage Records

Spec. #	Functional Specification Description
M001	[REQUIREMENT] System MUST be able to submit marriage license applications via internet, Public Access Terminal or in person
FNC61	Applications MUST be queued and processed when the customer comes to the office in person to complete the request

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M002	[REQUIREMENT] System MUST be able to record, scan, verify, index and issue marriage records including minor marriage
M003	[REQUIREMENT] System MUST be able to recognize premarital education classes and adjust fees automatically
M004	[REQUIREMENT] System MUST auto-calculate ages of marriage license applicants and flag if under 18
FNC62	System MUST auto-calculate ages of marital license requestors and flag anyone under the age of 18
FNC63	System MUST alert operator and provide options to continue
FNC64	System MUST be able to scan in supporting documents from parents/guardians of any applicant under the age of 18 and attach those to the license request
FNC65	System MUST allow all supporting documentation to be viewed by the staff and not made public
FNC66	System MUST provide ability to mark licenses as "Returned"

e. Functional Specifications for Accounting and Financial Management

Example: FNC=Functional, STA=Statutory/Legislative, RPT=Reporting

Spec. #	Functional Specification Description
AF01	[REQUIREMENT] System MUST have ability to facilitate purchase and processing of records, including official and unofficial copies of records
AF02	[REQUIREMENT] System MUST have ability to print receipts

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FNC67	<p>Type of Documents</p> <p>Number of Pages – Count of all records issued</p> <p>Quantity</p> <p>Reference Number</p> <p>Amount</p> <p>A Payments Heading with the following underneath:</p> <p>Type of Payment</p> <p>Payment Number – auto generated by system</p> <p>Amount</p> <p>Total Payments</p> <p>A configurable Salutation to be located bottom center of the receipt</p>
AF03	[REQUIREMENT] System MUST accept payment in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF04	System prefers to authorize payments without 3rd party vendor. Should allow for integration with 3rd party electronic payment processor.
AF05	[REQUIREMENT] System MUST have a Transaction Type field in the receipt which allows identified staff to modify the list of values
AF06	[REQUIREMENT] System MUST provide the ability to split payments in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF07	[REQUIREMENT] System MUST create a receipt Template which can be modified
AF08	[REQUIREMENT] System MUST break out payments to show where the fees belong to. Please see Appendix A-VR – Vital Records Fee Breakdown
FNC68	<p>System must minimally contain the following Payment Collection Information fields:</p> <p>Customer/Submitter</p>

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	<p>Address (Optional or auto fill from Capture requestor/submitter information)</p> <p>City/State/Zip</p> <p>Phone</p> <p>Email</p> <p>Payment type (Drop Down List of Approved Methods of Payment)</p> <p>Payment I.D.#</p> <p>Amount</p> <p>No Fee</p> <p>Print Receipt</p> <p>Change Option –Refund-Surplus-with address box for refunds if there is an overage</p> <p>Comments</p> <p>System will not proceed if funds do not match entries (Shortage, overage, no fee reason, address for refund)</p> <p>Receipts and Recording pages print after completion of Payment Collection.</p>
AF10	[REQUIREMENT] System MUST allow voiding receipts
AF11	[REQUIREMENT] System MUST create a searchable database for receipts
FNC69	<p>[REQUIREMENT] System MUST minimally contain the following searchable receipts fields for OPR:</p> <p>Date Received From</p> <p>Date Received To</p> <p>Receipt Number</p>

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	<p>User</p> <p>Department</p> <p>Workstation</p> <p>Location</p> <p>Customer</p> <p>Payment Method</p> <p>Payment ID</p> <p>Amount</p> <p>Document Number From</p> <p>Document Number To</p> <p>Transaction Type</p> <p>Module</p>
FNC70	<p>[REQUIREMENT] System MUST minimally contain the following searchable receipts fields for Vital Records:</p> <p>Receipt Time</p> <p>Receipt Number</p> <p>Issued To</p> <p>Document Number</p> <p>Number of Pages</p> <p>Quantity</p> <p>Reference Number</p> <p>Book/Page</p> <p>Amount</p> <p>Number of Payments</p>

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	Payment Type Payment Number Amount Secure Paper Number Vital Check Number State Registrar Number
AF12	[REQUIREMENT] System MUST allow receipts to be adjusted
FNC71	[REQUIREMENT] Fields MUST auto-populate with default settings but will allow each field to be adjusted by staff
AF13	[REQUIREMENT] System MUST provide users with ability to click on receipt number in reports and be taken directly to the receipt for review
AF14	[REQUIREMENT] System MUST be able to print and reprint receipts on demand

3. Non-functional Specifications

Spec. #	Non-functional Specification Description
NFN01	[REQUIREMENT] Public Access web portal MUST be accessible on the public internet and display content using a variety of browsers such as Internet Explorer
NFN02	[REQUIREMENT] System MUST be available 24/7/365 for public access with exception for maintenance windows
NFN03	[REQUIREMENT] All images MUST be scanned in portrait mode
NFN04	[REQUIREMENT] Document Images MUST be captured as multi-page Group IV TIFF Images
NFN05	[REQUIREMENT] All images MUST capture signatures and notary seals
NFN06	[REQUIREMENT] Document font size and page format MUST meet PRIA (Property Records Industry Association) minimum standards

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NFN07	[REQUIREMENT] System MUST work with any Tarrant County hardware
NFN08	[REQUIREMENT] System MUST comply with Tarrant County IT Standards
NFN09	[REQUIREMENT] System MUST have a distinguishable Test and Production environment
NFN10	[REQUIREMENT] System MUST have ability to add gender neutral birth certificate language

VII. REPORTING AND ANALYTICS

- A. For all searchable databases the data will be exportable to various formats such as Excel, PDF or other form for reporting and auditing.
- B. System will allow for customized reporting by various staff members of Vital Records.
- C. Provide reports expressing usage patterns and user activity for audit purposes.
- D. View, print, schedule and extract user productivity reports.
- E. View, print, schedule and extract reports related to document filings and current status.
- F. View, print, schedule and extract detailed and/or summary financial reports by user, physical location, terminal or submission source.
- G. View and print images or receipts.

VIII. DATA CONVERSION AND MIGRATION

- A. All data images **MUST** be in 200 DPI resolution or better.
- B. All PLATS **MUST** be in 600 DPI resolution or better.
- C. System should be compatible with Microsoft SQL Server 2014 Service Pack 2 (SQL 2012 backward compatibility is optional). Prefer SQL Server 2016 Service Pack 1.
- D. All images will be in TIFF format.

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- E. System will maintain current structure of image path stored in database with images stored on Tarrant County NAS drives.
- F. System will have Active Directory Authentication.
- G. If Tarrant County hosts SSRS the system **MUST** support folders on our SQL Reporting Servers.
- H. Current max length of page file field is set to varchar(200).

IX. INTEGRATION

- A. N/A.

X. SYSTEM ADMINISTRATION

- A. System access granted based on role: Clerk, Supervisor, Assistant Manager, Manager.
- B. 75 users that can use the system concurrently on the system.
- C. System has capability to segregate records and restrict access to specific record and/or record types.
- D. System **MUST** track all users in real time as they are logged in.
- E. Unlimited use by public for public access.

XI. EVALUATION CRITERIA

- A. An evaluation committee will be established to review and grade each qualified proposal based on the following criteria using a 1000 point scale. Vendor may respond to either OPR or VR or both.
- B. Official Public Records System

Attribute	Points
Specifications	500
Vendor Qualifications	100
Vendor References	100
Price	300
Total	1,000

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C. Vital Records System

Attribute	Points
Specifications	500
Vendor Qualifications	100
Vendor References	100
Price	300
Total	1,000

D. Respondent Qualifications

1. Included in the response, each vendor **MUST** include the following regarding their qualifications:
 - a. Company overview, years in service, number of staff, locations, and financial disclosures
 - b. Current client list and geographical location
 - c. Three (3) largest active implementations based on population of Agency's locality
 - d. Three (3) active implementations with multiple facility recording offices
 - e. Three (3) largest data conversions performed including source system
 - f. Support hours, standard service level agreement, and support escalation procedures

E. Demonstrations

1. Prior to the determination of the award, the County may require a thorough demonstration of the proposed system(s) by selected finalists. Respondents must be prepared to demonstrate in the event they become a finalist. These demonstrations should clarify any portion of their response or describe how the functional requirements will be accomplished. Failure to demonstrate requested components may be grounds for disqualification. Respondents will be asked to conduct the presentation during a designated week. Any and all costs associated with demonstrations are the sole burden of the Respondent.

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F. Award

1. The award of the contract shall be made to the responsible Respondent(s) whose proposal is determined to be the best evaluated offer resulting from negotiation, taking into consideration the relative importance of price and other evaluation factors set forth herein. Prompt payment discounts will not be considered in determining low proposals and making awards.
2. In considering the proposals, Tarrant County reserves the right to select one or more responsible Respondents. Tarrant County reserves the right to award only a portion of the RFP.
3. It is understood that Tarrant County, reserves the right to accept or reject any and/or all proposals as it shall deem to be in the best interest of Tarrant County. Receipt of any proposal shall under no circumstances obligate Tarrant County to accept the lowest proposal. The award of the contract shall be made to the responsible Respondent whose proposal is determined to be the lowest and best evaluated offer resulting from negotiation, taking into consideration the relative importance of price and other evaluation factors set forth in the request for proposal.

XII. RESPONSE FORMAT

- A. Provide RFP response in the format listed below. All documentation should be in typed or written format on standard 8 1/2 x 11 pages. Do not include any electronic submission such as CD's, DVD's or Flash Drives. Follow the response guidelines precisely. Tarrant County considers how well a vendor follows RFP instructions in the evaluation of the RFP.
 1. Required Forms. This section shall be the first section of your response and must be the forms exactly as they are presented in the RFP document and in the exact order stated below. Do not add items such as headers or footers to these forms. Do not remake these forms into your own format.
 - a. Proposal Signature Form with signature
 - b. Addendum Signature Form(s) with signature (if applicable)
 - c. Compliance with Federal and State Laws Form
 - d. References
 - e. Deficiencies and Deviations Form
 - f. HUB Certificate/Form for Disadvantaged Business Enterprises
 - g. confirmation of meeting the required insurance for this RFP
 - h. Price Forms

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2. Vendor Proposal to Meet Tarrant County Statement of Work
 - a. This section shall provide a thorough proposal to meet the requirements stated in the RFP with detail down to each individual requirement's level. References to specific requirements should be noted by using the section coding, ie...section (IV.C.1)
 - b. Describe the implementation process for Tarrant County as a whole and then for each department. Provide a project plan, including timing and resources (hardware, software, connectivity, staffing, etc.), and any required diagrams, charts, etc...needed to provide a clear picture of vendor solution. Identify any risks or limitations related to an implementation and mitigation plan, including but not limited to: bandwidth, server availability, multi-tenancy, and number of users.
 - c. Describe your technical expertise and capability to process Tarrant County's transaction volumes, amounts and information accurately and on time without interruption.
3. Company Experience
 - a. This section should detail experience providing the same services. Experience should be for work done at a similar scale as Tarrant County. Additionally, experience with a government entity is preferred. The description provided should include enough detail to allow Tarrant County to determine whether your firm has the specified experience and other qualifications.

XIII. PRESENTATIONS

- A. The Vendor(s) may be invited to provide an oral presentation of the proposed solution to the evaluation committee.
- B. After the oral presentations, those Vendors may be re-scored for all Evaluation Criteria categories except Price and References.
- C. Tarrant County reserves the right at its sole discretion to determine if oral presentations are in the best interest of the County. Tarrant County is under no obligation to request presentations.

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XIV. BEST AND FINAL OFFER (BAFO):

- A. The respondents presenting the proposals with the highest scores may be invited to prepare a Best and Final Offer for consideration by the Evaluation Committee.
- B. Tarrant County reserves the right, at its sole discretion, to determine if pursuing BAFOs is in the best interest of the County. The County is under no obligation to pursue BAFOs.
- C. In the event the County elects not to pursue BAFOs, contract negotiation may be conducted based on final rankings.

XV. CONTRACT NEGOTIATION:

- A. The Tarrant County Purchasing Department may conduct contract negotiations along with representatives from ITD.
- B. The County reserves the right, at its sole discretion, to determine if pursuing contract negotiation is in the best interest of the County. The County is under no obligation to pursue contract negotiation.



TARRANT COUNTY

HISTORICALLY UNDERUTILIZED BUSINESSES (HUB) POLICY

I. POLICY STATEMENT

The Tarrant County Commissioners Court, being the policy development and budgetary control unit of county government, will strive to ensure that all businesses, regardless of size, economic, social or ethnic status have an equal opportunity to participate in the County's procurement processes. The County is committed to promote full and equal business opportunity for all businesses to supply the goods and services needed to support the mission and operations of county government, and seeks to encourage the use of certified historically underutilized businesses (HUBs) through the use of race, ethnic and gender-neutral means. It is the policy of Tarrant County to involve certified HUBs to the greatest extent feasible in the County's procurement of goods, equipment, services and construction projects while maintaining competition and quality of work standards. The County affirms the good faith efforts of firms who recognize and practice similar business standards.

II. DEFINITIONS

Historically underutilized businesses (HUBs), also known as a disadvantaged business enterprise (DBE), are generally business enterprises at least 51% of which is owned and the management and daily business operations are controlled by one or more persons who is/are socially and economically disadvantaged because of his or her identification as a member of certain groups, including women, Black Americans, Mexican Americans and other Americans of Hispanic origin, Asian Americans, and American Indians.

Certified HUBs includes business enterprises that meet the definition of a HUB and who meet the certification requirements of certification agencies recognized by Tarrant County.

Businesses include firms, corporations, sole proprietorships, vendors, suppliers, contractors, subcontractors, professionals and other similar references when referring to a business that provides goods and/or services regardless of the commodity category.

Statutory bid limit refers to the Texas Local Government Code provision that requires competitive bidding for many items valued at greater than \$50,000.

III. POLICY GUIDELINES

- A. Tarrant County, its contractors, their subcontractors and suppliers, as well as all vendors of goods, equipment and services, shall not discriminate on the basis of race, color, creed, gender, age, religion, national origin, citizenship, mental or physical disability, veteran's status or political affiliation in the award and/or performance of contracts. All entities doing business or anticipating doing business with the County shall support, encourage and implement affirmative steps toward a common goal of establishing equal opportunity for all citizens and businesses of the county.
- B. Tarrant County will use and recognize the State of Texas certification process in conjunction with the implementation of this policy. The County may recognize other agencies' certification processes recognized by the State of Texas. Tarrant County reserves the right to review the certification status of any vendor applying to do business with the County. This review will be accomplished to determine the validity and authenticity of the vendor's certification as a HUB.
- C. The Commissioners Court may establish HUB target goals. Through a systematic approach of soliciting quotes, bids and proposals from certified HUBs and in compliance with applicable state and federal law this policy will strive to meet those goals.
 1. Target goals should consider:
 - the availability of HUB firms within the specific category of goods or services to be procured; and
 - the diversity of the county's population.
 2. The goals should be reviewed and amended periodically.
 3. The program may apply to all County procurements including construction and professional services.
 4. Particular attention will be given to HUB participation on purchases in excess of the statutory bid limit.
 5. The Commissioners Court herein establishes a 20% good faith target goal for Tarrant County.

- D. Tarrant County will actively seek and encourage HUBs to participate in all facets of the procurement process by:
1. Continuing to increase and monitor a database of certified HUB vendors, professionals and contractors. The database will be expanded to include products, areas of expertise and capabilities of each HUB firm.
 2. Continuing to seek new communication links with HUB vendors, professionals and contractors to involve them in the procurement process.
 3. Continuing to advertise bids on the County's website and in newspapers including newspapers that target socially and economically disadvantaged communities.
 4. Continuing to provide copies of bid specifications to minority Chambers of Commerce.
- E. As prescribed by law, the purchase of one or more items costing in excess of the statutory bid limit must comply with the competitive bid process. Where possible, those bids will be structured to include and encourage the participation of HUB firms in the procurement process by:
1. Division of proposed requisitions into reasonable lots in keeping with industry standards and competitive bid requirements.
 2. Where feasible, assessment of bond and insurance requirements and the designing of such requirements to reasonably permit more than one business to perform the work.
 3. Specification of reasonable, realistic delivery schedules consistent with the County's actual requirements.
 4. Specifications, terms and conditions reflecting the County's actual requirements are clearly stated, and do not impose unreasonable or unnecessary contract requirements.
- F. A HUB Policy statement shall be included in all specifications. The County will consider the bidder's responsiveness to the HUB Policy in the evaluation of bids and proposals. Failure to demonstrate a good faith effort to comply with the County's HUB policy may result in a bid or proposal being considered non-responsive to specifications.
- G. The Purchasing Department will actively seek the participation of HUB firms in the quotation process for purchases under the statutory bid limit. HUB firms will be identified on the computerized database and linked to the commodities they represent. Buyers will be encouraged to use available internal and external databases of certified HUB firms.

- H. Nothing in this policy shall be construed to require the County to award a contract other than to the lowest responsive bidder as required by law. This policy is narrowly tailored in accordance with applicable law.

IV. ADMINISTRATIVE GUIDELINES

- A. The Purchasing Department shall serve as the County's HUB Office with responsibility for the implementation, monitoring and general operations of the HUB policy. The Purchasing Agent shall serve as the County HUB Officer.
 - 1. The HUB Officer will establish procedures to implement this policy across the full spectrum of the procurement process. The County HUB Office will periodically review with department head and elected officials regarding procurement opportunities.
 - 2. Managing the policy and training buyers and other County personnel in order to meet County goals will be the responsibility of the HUB Office.
 - 3. The HUB Office will cooperate with other local government entities to increase HUB participation throughout the county and region. The HUB Office is encouraged to participate in educational and other outreach programs to assist HUB firms.
 - 4. The HUB Officer will receive and review complaints and recommendations regarding the implementation of the HUB Policy and the good faith efforts of bidders. Further, the HUB Office will audit for compliance to the HUB Policy on eligible projects after award, during the performance of the contract and after completion, while also making any recommendations to Commissioners Court regarding any irregularities or misrepresentation of facts as they relate to compliance with the policy. The HUB Office will review documentation submitted by HUB firms in compliance with this policy.
 - 5. An annual report along with recommendations shall be provided to the Commissioners Court and Purchasing Board. The annual report will provide statistical data and efforts reflected in the number of purchase orders, value of goods and services purchased, percentages to HUB firms, and outreach and marketing efforts. Other statistics may be required or requested by the Commissioners Court or Purchasing Board.

510 Historically Underutilized Businesses Policy

Adopted: Court Order 64788 (December 17, 1990)

Amended: Court Order 69958 (December 7, 1993)

Amended: Court Order 99651 (December 28, 2006)

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

FOR DISADVANTAGED BUSINESS ENTERPRISES ONLY

Disadvantaged Business Enterprises (DBE) is encouraged to participate in Tarrant County's Proposal process. The Purchasing Department will provide additional clarification of specifications, assistance with Forms, and further explanation of procedures to those DBEs who request it.

Representatives from DBE companies should identify themselves as such and submit a copy of the Certification.

The County recognizes the certifications of both the State of Texas General Services Commission HUB Program and the North Central Texas Regional Certification Agency. All companies seeking information concerning DBE certification are urged to contact.

Texas Procurement and Support Services
Statewide HUB Program
1711 Jacinto Blvd.
PO Box 13047
Austin, TX 78711-3047
(512) 463-5872

OR

North Central Texas
Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606

If Respondent is already certified, attach a copy of your certification to this form and return with Proposal.

COMPANY NAME: _____

REPRESENTATIVE: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

TELEPHONE NO. _____ FAX NO. _____

Indicate all that apply:

- _____ Minority-Owned Business Enterprise
- _____ Women-Owned Business Enterprise
- _____ Disadvantaged Business Enterprise

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

REFERENCES

Please list three (3) references, **other than Tarrant County**, who can verify your performance as a Respondent. Performance includes but shall not be limited to, sales and/or service, delivery, invoicing, and other items as may be required for Tarrant County to determine Respondent's ability to provide the intended goods or service of this Proposal. The County **PREFERS** references to be from Government customers. References must be able to verify the quality of service Respondent's company provide and that the company has completed a project of similar size and scope of work in the bid. Inaccurate, obsolete or negative responses from the listed references could result in rejection of your Proposal.

Failure to supply required references will deem Respondent as non-responsive and will not be considered for award.

Respondent involvement with reference checks is not permitted. Only Tarrant County or their designee will conduct reference checks. Any deviation to this will result in rejection of the Proposal.

REFERENCE ONE

GOVERNMENT/COMPANY NAME: _____
ADDRESS: _____
CONTACT PERSON AND TITLE: _____
TELEPHONE NUMBER: _____
E-MAIL ADDRESS: _____
SCOPE OF WORK: _____
CONTRACT PERIOD: _____

REFERENCE TWO

GOVERNMENT/COMPANY NAME: _____
ADDRESS: _____
CONTACT PERSON AND TITLE: _____
TELEPHONE NUMBER: _____
E-MAIL ADDRESS: _____
SCOPE OF WORK: _____
CONTRACT PERIOD: _____

THE ORIGINAL AND FIVE (5) COPIES OF THIS FORM MUST BE RETURNED WITH PROPOSAL!

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

REFERENCES

REFERENCE THREE

GOVERNMENT/COMPANY NAME: _____

ADDRESS: _____

CONTACT PERSON AND TITLE: _____

TELEPHONE NUMBER: _____

E-MAIL ADDRESS: _____

SCOPE OF WORK: _____

CONTRACT PERIOD: _____

THE ORIGINAL AND FIVE (5) COPIES OF THIS FORM MUST BE RETURNED WITH PROPOSAL!

SIGNATURE FORM

The undersigned, on behalf of and as the authorized representative of Respondent, agrees this proposal becomes the property of Tarrant County after the official opening.

The undersigned affirms that the Respondent has familiarized itself with the local conditions under which the work is to be performed; satisfied itself of the conditions of delivery, handling and storage of equipment and all other matters that may be incidental to the work, before submitting a proposal.

The undersigned agrees, on behalf of Respondent that if this Proposal is accepted, Respondent will furnish all items/services upon which prices are offered, at the price(s) and upon the terms and conditions contained in the specifications. The period for acceptance of the Proposal will be ninety (90) calendar days.

The undersigned affirms that they are duly authorized to execute this contract, that this Proposal has not been prepared in collusion with any other Respondent, nor any employee of Tarrant County, and that the contents of this Proposal have not been communicated to any other Respondent or to any employee of Tarrant County prior to the official opening of the Proposal.

Respondent hereby assigns to purchase all claims for overcharges associated with this contract which arise under the antitrust laws of the United States, 15 USCA Section 1 et seq., and which arise under the antitrust laws of the State of Texas, Tex. Bus. & Com. Code, Section 15.01, et seq.

The undersigned affirms that they have read and understand the specifications and any attachments contained in this Proposal package. ***Failure to sign and return this form will result in the rejection of the entire Proposal.***

Signature _____ **X**

Authorized Representative

NAME AND ADDRESS OF COMPANY:

_____	Date _____
_____	Name _____
_____	Title _____
Tel. No. _____	FAX No. _____
E-Mail Address: _____	

AFTER HOURS EMERGENCY CONTACT:

Name: _____ Tel. No. _____

THIS FORM MUST BE SIGNED.

THE ORIGINAL WITH ORIGINAL SIGNATURE AND ONE (1) COPY MUST BE RETURNED WITH PROPOSAL!



Did you sign your Proposal
and/or your Addendum?

**If not, your Proposal
will be rejected**

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

COMPANY IS:

Business included in a Corporate Income Tax Return? _____YES _____NO

_____Corporation organized & existing under the laws of the State of _____

_____Partnership consisting of _____

_____Individual trading as _____

_____Principal offices are in the city of _____

DUNS Number: _____

CAGE Code: _____

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

FORM 1295 INFORMATION
The following information applies ONLY
to an awarded Respondent

Certificate of Interested Parties (Form 1295)

In 2015, the Texas Legislature adopted House Bill 1295, which added Section 2252.908 of the Government Code. The law states that a governmental entity may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity. The disclosure of interested parties will be submitted online via Form 1295 and must be submitted to the governmental entity prior to any signed contract and/or vote by the governing authority.

The Filing Process:

1. Prior to award by Commissioners Court, Respondent will be required to log in to the Texas Ethics Commission, https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm and fill out the Electronic Filing Application.
2. Once submitted, the system will generate an electronic Form 1295 displaying a "Certificate Number." Respondent must print, sign, and notarize Form 1295.
3. **Within ten (10) business days** from notification of pending award by the Tarrant County Purchasing Agent, the completed Form 1295 **must** be submitted to Tarrant County.
4. Respondent will need to repeat this process and obtain a separate Form 1295 each time you enter into a new contract, renew a contract or make modification and/or amendments to a Tarrant County contract.

Instruction and information are available at <https://www.ethics.state.tx.us/tec/1295-Info.htm> or you may call the Texas Ethics Commission at (512) 463-5800.

BY SIGNING ON THE "COMPLIANCE PAGE"
RESPONDENT AGREES TO ADHERE TO HB 1295 REFERENCED ABOVE.

COMPLIANCE WITH FEDERAL AND STATE LAWS

CERTIFICATION OF ELIGIBILITY

By submitting a Proposal in response to this solicitation, the Respondent certifies that at the time of submission, they are not on the Federal Government's list of suspended, ineligible, or debarred entities.

In the event of placement on the list between the time of Proposal submission and time of award, the Respondent will notify the Tarrant County Purchasing Agent. Failure to do so may result in terminating the contract for default.

RELATING TO STATE CONTRACTS WITH AND INVESTMENTS IN COMPANIES THAT BOYCOTT ISRAEL

Effective September 1, 2017, Contractor/Vendor verifies that it/he/she does not boycott Israel and will not boycott Israel during the term of this contract. The term "boycott Israel" is defined by Texas Government Code Section 808.001, effective September 1, 2017.

DISCLOSURE OF INTERESTED PARTIES

By submitting a Proposal in response to this solicitation, the Respondent agrees to comply with HB 1295, Government Code 2252.908. Respondent agrees to provide Tarrant County Purchasing Agent, and/or requesting department, the "Certificate of Interested Parties," Form 1295 as required, within **ten (10)** business days from notification of pending award, renewal, amended, or extended contract.

Visit https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm for more information.

Signature _____ X

THIS FORM MUST BE SIGNED.

THE ORIGINAL WITH ORIGINAL SIGNATURE AND ONE (1) COPY MUST BE RETURNED WITH PROPOSAL.

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

PRICE FORM

Software/System Proposed: _____

1. Software License	Price Per License/Year	Extended Price
a. _____	\$ _____	\$ _____
b. _____	\$ _____	\$ _____
c. _____	\$ _____	\$ _____
d. _____	\$ _____	\$ _____
e. _____	\$ _____	\$ _____

TOTAL \$ _____
Include any 3rd party licenses

2. **Hardware Price** \$ _____
 (includes servers, printers, kiosks, handheld, tablets, etc...). *Detail all Hardware Requirements on a separate page in your response*
\$ _____

3. **Data Conversion Price** \$ _____
Detail all Conversion activities and component costs on a separate page in your response

4. **Inter Faces** \$ _____
Detail all interfaces on a separate page in your response

5. **Training** (including documentation and reference manuals)
Detail all training on a separate page in your response
\$ _____

6. **Implementation** \$ _____

RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

PRICE FORM, continued

7. **Maintenance:**
- Year 1 \$ _____
 - Year 2 \$ _____
 - Year 3 \$ _____
 - Year 4 \$ _____
8. **All other fees** \$ _____
Detail on a separate page in your response. Include a professional service by job description and including hourly rate
9. **Sum of prices from 1-8 above** \$ _____