



**TARRANT COUNTY**  
**PURCHASING DEPARTMENT**

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September 1, 2017

**ADDENDUM #1**

**RFP NO. 2017-173**

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

**RFP DUE SEPTEMBER 25, 2017**

**1. Questions and Responses:**

A. Questions received and Tarrant County responses are included in the following page(s) of this addendum.

**2. Changes/Additions:**

A. Discard pages 12, 18, 21, 22, 24, 31, 34, 35, 39, 42, 43, 47, 48, 53, 57 and 58 of the original specification package and replace with the revised pages. Additional Price Form Pages 77-81 has been added to the specifications. **Changes are highlighted.**

B. The due date for this RFP has been changed to September 25, 2017 at 2:00 p.m.

C. Added Appendix A-OPR References; Appendix B-Vital Records References and Appendix C-Electronic Communication System Policy.

**This addendum must be signed and the original and Five (5) copies must be returned with RFP.**

**NAME AND ADDRESS OF COMPANY:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**AUTHORIZED REPRESENTATIVE:**

Signature \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Tel. No. \_\_\_\_\_

**E-Mail Address** \_\_\_\_\_

**Fax No:** \_\_\_\_\_

**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

**QUESTIONS AND RESPONSES**

1. Will the County be providing vendors with a standard answer key to facilitate responding to the RFP requirements?

Response: No. Please list your responses in an orderly manner referencing the item number from the RFP.

2. How much disk space is used by all the images that are stored with the recorder system?

Response: Below are record and image totals on the main modules as of 8/21/2017.

<b>RECORDS</b>	<b>TOTAL</b>
ASN	245,255
BIRTH	728,191
DEATH	359,281
MILITARY DISC	21,128
MARRIAGE	691,265
OPR	14,002,780
<b>TOTAL</b>	<b>16,047,900</b>

<b>IMAGES</b>	<b>TOTAL</b>
ASN	259,048
BIRTH	607,751
DEATH	214,206
MILITARY DISC	2,718
MARRIAGE	1,124,740
OPR	19,958,530
<b>TOTAL</b>	<b>22,166,993</b>

The Storage group reports Total Disk space used for images stored on NAS is:

Logical Space: 3.22 TB

Physical Space: 7.44 TB

Average image size 200 kb

## RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

### QUESTIONS AND RESPONSES, continued

3. What is the size of the database?  
Response: The total size of the existing database is 407 GB. This includes Official Public Records (OPR) and Vital Records (VR) data.
4. Page 14.V.A.7.b.v. Please describe in detail what is envisioned for “Bulk Data Export”?  
Response: Ability to export both public index and image information for external customers upon request. Example: a request from a Title Company.
5. BO18-Please describe intent for “templated designer for documents”?  
Response: Ability for department to create and modify document templates as needed. Example: Rejection Letter or Form Letter.
6. OPR10-Which fields does the county want to auto-index?  
Response: At minimum: Grantor, Grantee, Legal Description, and Document Type.
7. Does type ahead technology qualify as auto-index?  
Response: No.
8. OPR11-define “sensitive data”?  
Response: Social Security Number leaving last 4 digits, Date of Birth leaving 2 or 4 digit year, Driver’s License leaving the last 3 digits, State, Tax ID (Federal or State).
9. OPR18-define “other government agencies”?  
Response: State and City Agencies – including but not limited to: Office of Attorney General, Municipalities, County Offices such as Child Protective Services, etc.
10. B003-define the formats required  
Response: Ability to scan or attach documents to related instruments i.e.: Driver’s License, Spreadsheet, and Letters.

**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

**QUESTIONS AND RESPONSES, continued**

11. VR02-define barcodes and security paper required to read.  
Response: Security paper from Bank Note Corporation of America per contract with Department of State Health Services – Vital Statistics Unit.
12. X System Admin D.-please define “track” all users in real time?  
Response: Ability to audit and view activity of users logged into the system and the device being used at any given time.
13. Are references within TX clerk’s offices ranked higher in the evaluation?  
Response: No.
14. Has the County seen demonstrations from any vendor prior to RFP release? If so, which companies?  
Response: No vendors have been invited to demonstrate their software prior to RFP.
15. Is there a budget range for this project? Is the budget approved?  
Response: The project has sufficient budget to proceed with the proposal solicitation.
16. What is the County’s estimated timeframe for system installation?  
Response: The estimated timeline is 9 (nine) to twelve (12) months depending on whether a vendor supplies one or both systems being solicited.
17. Who consists of the evaluation committee?  
Response: The evaluation team is comprised of subject matter experts from the County Clerk Official Public Records Divisions, County Clerk Vital Records Division, and Information Technology Department.
18. Are communication means with constituents important/desired?  
Response: Vendors should propose solutions to satisfy the requirements. Features that improve customer service including communications would be desirable.

## RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

### QUESTIONS AND RESPONSES, continued

19. Will the County allow single page tiff capture rather than multipage?  
Response: Multipage TIFF will be required for new records entered.
20. Please elaborate on the necessity of a 'template designer'. Is this in relation to document margin rules the County employs?  
Response: Ability for department to create and modify document templates as needed. Example: Rejection Letter or Form Letter. Not in relation to document margin rules.
21. What is the necessity of the barcode page? Does the County charge for this page, if so at what point; recording and/or for copies?  
Response: Barcode Page is a necessity for Bulk Scanning. The County does not charge for this page.
22. Does your automated line management system integrate into your current system? Is it required to be a component of the new system?  
Response: No. No.
23. Will the County still use Megasearch? If so, will the new system be required to push images and data to Megasearch?  
Response: Yes. No, there is no requirement for an automated interface. The daily image and index export to Megasearch is performed manually by staff.
24. Does Megasearch hit a production database or a replicated/backup database?  
Response: Megasearch is out of scope for this RFP.
25. Please clarify if a cloud based solution is acceptable?  
Response: Cloud based solutions are acceptable per addendum.
26. Please clarify the hardware requirements for workstations? Can you provide a clear inventory of existing County-owned hardware that you would prefer be migrated into the new system rather than replaced, so that any hardware pricing submitted in our response is more accurate to your needs?  
Response: The County will be responsible for providing workstations. The vendor should provide the necessary hardware specifications for workstations to operate the system in their response.

**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

**QUESTIONS AND RESPONSES, continued**

27. Please clarify the data to be converted?

Response: All data necessary to transition from the existing environment to the new environment. This includes historical data, transactional data, user defined code table data, and the image reference data to the files stores on the NAS.

28. Can you provide the requirements in spreadsheet form rather than pdf so that any deviation from, or feature existing in our solutions that exceeds the requirements can be more easily references in our response?

Response: No. Please list your responses in an orderly manner referencing the item number from the RFP.

29. Page 12.IV Universal Requirements. **[REQUIREMENT]** Each proposal **MUST** provide for an on-premises solution(s).

a. Does the requirement mean that there must **ONLY** be an on-premises solution or will Tarrant County consider an optional hosted or cloud-based solution with an on-premises replication and storage component? The alternative solution would provide demonstrable fault-tolerance, real-time recovery, high-level security and automatic disaster recover for continual operation in the event of failure of the singular server location.

Response: Cloud based solutions are acceptable per addendum.

b. If a hosted system is proposed and listed in the Deficiencies and Deviations form, would it be rejected without consideration based on this deficiency alone?

Response: N/A.

c. If any requirement listed as "MUST HAVE" is not met, will this eliminate the proposal from consideration? Or does it simply need to be addressed in the Deficiencies and Deviations form?

Response: An unmet "MUST HAVE" or "[REQUIREMENT]" (the terminology used in the RFP), would deem a submission non-responsive; however, a deviation, or an alternate methodology that meets the requirement, would warrant evaluation as long as the deviation was identified. The Deficiencies and Deviations is a form to list shortcomings and variations.

**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

**QUESTIONS AND RESPONSES, continued**

29. *(continued)*

- d. Are there any specific requirements that, if not provided will eliminate a proposal from consideration?

Response: Any item designated as "MUST" is a minimum requirement for this RFP.

30. Page 35.V.Section I-OPR Statement of Work, D. Data Conversion and Migration, "2. **[REQUIREMENT]** ALL PLATS MUST be in 600 DPI resolution or better".

- a. If you are currently imaging your PLATS or 600 DPI or better, please provide file sizes for a couple of the PLAT images.

Response: All PLATS MUST be in 300 dpi resolution or better per the addendum.

31. Page 35.V.Section I-OPR Statement of Work, D. Data Conversion and Migration, "3. Solution will meet all domain technical specifications as specified by the Office of Information Security for Tarrant County ITD."

- a. If this is different than the Tarrant County IT Standards, please provide these technical specifications.

Response: Please see addendum. The requirement has been removed.

32. Page 35.V.Section I-OPR Statement of Work, D. Data Conversion and Migration, "5. **[REQUIREMENT]** System MUST maintain current structure of image path stored in database with images stored on Tarrant County NAS drives."

- a. What is the purpose of maintaining existing image paths? Is it expected that images will be stored on existing NAS drives after implementation of a new system rather than within the hardware provided by the new vendor? And are there other applications that will be accessing the images going forward?

Response: System must not store images in the database per the addendum. The County is responsible for hardware on premise. No other applications are accessing the images at this time.

33. Page 29. FNC29 **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:

Batch 123456

Instrument 1-10 assigned to Staff #1 75% complete

**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

**QUESTIONS AND RESPONSES, continued**

33. (continued)

Instrument 11-21 assigned to Staff #2 85% complete  
Instrument 22-32 assigned to Staff #3 95% complete  
Etc.

System will also break out by document type or actual Instrument Number

- a. What step(s) in the workflow are these requirements applicable? Would the system assign the documents or would a manager assign them? Is the purpose to balance workloads in eRecording and Indexing?

Response: The purpose of this requirement is to balance workload which will be determined by the manager.

34. Page 31. AF05 REQUIREMENT System must have a Transaction Type field in the receipt which allows identified staff to modify the list of values.

- a. Does this refer to Document Types or transaction sources? I.e. Walk-in, mail, phone, fax, etc.?

Response: Yes, both.

35. Page 34. NFN08-System MUST comply with Tarrant County IT Standards. Please provide a copy of the Tarrant County IT Standards.

Response: Please see addendum. System must comply with Electronic Communication Systems Policy. Please see Appendix C-Electronic Communications Systems Policy.

36. Page 75: Pricing: Is the county asking for a priced quotation for all required hardware (i.e. servers, workstations, and peripherals) or just the hardware specifications? If itemized pricing is desired, please provide separately for both OPR and Vital Records the Total Number of workstations desired and of these a) the number of cashiering workstations, b) the number of scanning workstations, and c) the number of public workstations.

Response: The County will be responsible for providing hardware on premise. The vendor should provide the necessary hardware specifications for equipment to operate the system in their response.



**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

**QUESTIONS AND RESPONSES, continued**

37. Page 16.B024: Even if provided by the County, please provide the number of public access stations desired in a) OPR and b) VR.

Response:

<b>System</b>	<b>Public Access Terminals</b>
<b>Official Public Records (OPR)</b>	
Historic Courthouse	22
<b>Vital Records (VR)</b>	
Plaza	2
Northwest	1
Southwest	1
Northeast	1
Southeast	2
Charles Griffin (Miller)	1
Mansfield	0
Southlake	2

38. Page 35, E. System Administration, Item 2: OPR section requires 75 concurrent users but only 27 total staff members were mentioned on page 12. Please explain this discrepancy and clarify the total number of concurrent staff users desired for Official Public Records. (Was 75 perhaps a combination of both OPR and VR?)

Response: It is a combination of all departments that use the current system.

39. Page 59, X. System Administration, Item D: VR section requires 75 concurrent users but only 27 staff members were mentioned on page 36. Please explain this discrepancy and clarify the total number of concurrent staff users desired from Vital Records.

Response: It is a combination of all departments that use the current system.

40. Page 16: B025 [REQUIREMENT] System MUST have ability to allow bulk data requests. Is this referring to data and image extractions for title companies or other purposes? If not, please explain.

Response: Yes.

**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

**QUESTIONS AND RESPONSES, continued**

41. Page 16: B025 [REQUIREMENT] System MUST track lifetime counts by instrument. Please explain exactly what is meant by “lifetime counts”.

Response: Lifetime Count is the number of copies issued over the lifetime of the record. This pertains to confidential Vital Records where a birth record can only be issued a limited amount of times. The current limit is 10.

42. Page 51: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”. Please provide examples of how you would like the system to highlight inconsistencies for this requirement.

Response: This requirement involves importing data from DSHS-VSU’s Texas Electronic Registry (TER) for birth, death and fetal death records. Once the record is imported, the system will determine if a similar record already exists based on the data fields highlighted below which are included in the import.

Birth

Name of child  
Date of birth  
City of birth  
Mother’s maiden name  
Mother’s current name  
Father’s name (if known)

Death or Fetal Death

Name  
Date of death  
Date of birth  
City of birth  
State of birth  
City of death  
State of death  
Current address  
Age

**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

**QUESTIONS AND RESPONSES, continued**

42. *(continued)*

If a similar record does exist, the system will highlight or display a pop up alert box notifying the clerk. The clerk must choose whether to Continue or Cancel. If Continue, a new record is created and instrument number created. If Cancel, the clerk is returned to the data entry screen to research and take the appropriate action.

43. Page 35:D5-[REQUIREMENT] System MUST maintain current structure of image path stored in database with images stored on Tarrant County NAS drives. Typically data and images are converted on a transition from one system to another. Is it the intention of the county to retain and utilize the existing image files without conversion or just to retain the path structure to the image files?

Response: The images should be stored on the NAS/cloud and not within the database.

44. Page 41:AN02: System should have the capability to file mark assumed name records when scanned. Please define your process to “file mark” pertaining to this requirement.

Response: It is a Date/Time stamp including the County Clerk’s Name and Title.

45. Page 49-FNC52: 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. Please define “auto-search field”:

Response: Possible values are returned as each letter is typed in by the user.

## RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

### 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 system **MUST** have a cashiering function to conduct, collect, and facilitate payments
- F. **[REQUIREMENT]** The Respondent **MUST** provide a completed and updated Continuity of Operations Plan (COOP) Disaster Recovery (DR) testing for the System before it goes into production.
- G. **[REQUIREMENT]** The Respondent **MUST** provide its system backup and recovery strategies of the datacenter and services to Tarrant County.
- H. **[REQUIREMENT]** The Respondent **MUST** provide its system backup and recovery strategies of the datacenter and services to Tarrant County.

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

**d. Functional Specifications for General Business**

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

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FNC06	<p><b>[REQUIREMENT]</b> System <b>MUST</b> 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> <p><b>Generic searchable user defined field – in order to link to Tarrant Appraisal District Records using a common primary key.</b></p>
B002	System should provide users configurable Hot Keys to allow system navigation
B003	<b>[REQUIREMENT]</b> System <b>MUST</b> be able to scan documents to various formats and attach them to records
B004	<b>[REQUIREMENT]</b> System <b>MUST</b> allow users to set up work flows for document management, status tracking and auditing
B005	<b>[REQUIREMENT]</b> System <b>MUST</b> have ability for Bulk Scan
B006	<b>[REQUIREMENT]</b> System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> generate unique numbers for documents issued
FNC07	<p><b>[REQUIREMENT]</b> System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> create an online web portal to allow users to apply for records
FNC08	<b>[REQUIREMENT]</b> Online web portal <b>MUST</b> be secure and accept applications for records
FNC09	<b>[REQUIREMENT]</b> Applications <b>MUST</b> be queued and processed when the customer comes to the office in person to complete the request
B010	<b>[REQUIREMENT]</b> System <b>MUST</b> create an integrated module that will process payments of fees for record requests
FNC10	<b>[REQUIREMENT]</b> Module <b>MUST</b> accept payments and break down the payments into the fees payable to the various agencies. <b>(see Appendix A OPR)</b>
B011	System should have capability to support search and retrieval of all non-restricted records from the internet

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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	<b>[REQUIREMENT]</b> System <b>MUST</b> 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. <del>(See Appendix A-OPR for Example)</del>
FNC16	<p>There is a list of rejection letters:</p> <ul style="list-style-type: none"> <li>Real Property Rejection Letter</li> <li>Military Discharge Rejection</li> <li>Assumed Name Rejection Letter</li> <li>Birth/Death Cert Copy Reject Letter</li> <li>Marriage Rejection Letter</li> <li>Asn No Record Found</li> <li>Birth No Record Found</li> <li>Death No Record Found</li> <li>No Money</li> <li>Verify Death for Law</li> <li>Marriage No Record Found</li> <li>Verification of Birth</li> <li>Verification of Death</li> </ul>



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AF03	<b>[REQUIREMENT]</b> System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> have a Transaction Type field in the receipt which allows identified staff to modify the list of values
AF06	<b>[REQUIREMENT]</b> System <b>MUST</b> provide the ability to split payments in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF07	<b>[REQUIREMENT]</b> System <b>MUST</b> create a receipt Template which can be modified
AF08	<b>[REQUIREMENT]</b> System <b>MUST</b> break out payments to show where fees belong to. Please see Appendix A- <b>OPR</b> – Official Public Records Fee Breakdown
FNC32	<p><b>[REQUIREMENT]</b> System <b>MUST</b> 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)

### **g.** Functional Specifications for Accounting and Financial Management

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

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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 300 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** not store images in the database.
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.

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B016	<b>[REQUIREMENT]</b> System <b>MUST</b> have a searchable database for all batch activity with batch numbers assigned automatically by the system
B017	<b>[REQUIREMENT]</b> All requests made using online or Public Access Terminal <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> allow staff to accept or reject documents submitted for recording
B020	System should provide auto-search function for all drop down boxes
B021	<b>[REQUIREMENT]</b> System <b>MUST</b> comply with Tarrant County <b>Electronic Communication Systems Policy (Please see Appendix C Electronic Communication Systems Policy)</b>
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	<b>[REQUIREMENT]</b> System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> have ability to allow bulk data requests
B027	<b>[REQUIREMENT]</b> System <b>MUST</b> track lifetime counts by instrument

b. Specifications for Vital Records

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

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AF03	<b>[REQUIREMENT]</b> System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> have a Transaction Type field in the receipts which allows identified staff to modify the list of values
AF06	<b>[REQUIREMENT]</b> System <b>MUST</b> provide the ability to split payments in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF07	<b>[REQUIREMENT]</b> System <b>MUST</b> create a receipt Template which can be modified
AF08	<b>[REQUIREMENT]</b> System <b>MUST</b> break out payments to show where the fees belong to. Please see Appendix <b>B</b> A-VR – Vital Records Fee Breakdown
AF09	<b>[REQUIREMENT]</b> System <b>MUST</b> allow voiding receipts
AF10	<b>[REQUIREMENT]</b> System <b>MUST</b> create a searchable database for receipts
AF11	<b>[REQUIREMENT]</b> System <b>MUST</b> allow receipts to be adjusted
AF12	<b>[REQUIREMENT]</b> System <b>MUST</b> provide users with ability to click on receipt number in reports and be taken directly to the receipt for review
AF13	<b>[REQUIREMENT]</b> System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> provide a searchable database with varying degrees of access based on role (E.g. Clerk, Supervisor, Assistant Manager, Manager)
FNC36	System <b>MUST</b> 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

## RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

	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	<b>[REQUIREMENT]</b> System <b>MUST</b> create an online web portal to allow users to apply for records
FNC43	System <b>MUST</b> have an online web portal which must be secure and accept applications for records
FNC44	Applications <b>MUST</b> be queued and processed when the customer comes to the office in person to complete the request
B010	<b>[REQUIREMENT]</b> System <b>MUST</b> create an integrated module that will process payments of fees for record requests
FNC45	Module <b>MUST</b> accept payments and break down the payments into the fees payable to the various agencies. (see <b>Appendix B A-VR</b> )
B011	System should have capability to support search and retrieval of all non-restricted records from the internet
B012	<b>[REQUIREMENT]</b> System <b>MUST</b> allow public access users to view, print and purchase unofficial copies of non-restricted records
B013	<b>[REQUIREMENT]</b> System <b>MUST</b> create a searchable database of all transactions
FNC46	System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> have a searchable database for all batch activity
FNC47	System <b>MUST</b> minimally provide the following fields to search by:  Batch Number  Name of requestor  Date of completion
B017	<b>[REQUIREMENT]</b> All requests made using online or Public Access Terminal <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> 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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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	<b>[REQUIREMENT]</b> System <b>MUST</b> 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	<b>[REQUIREMENT]</b> System <b>MUST</b> have a Transaction Type field in the receipt which allows identified staff to modify the list of values
AF06	<b>[REQUIREMENT]</b> System <b>MUST</b> provide the ability to split payments in a variety of forms including: cash, check, credit card, debit card, escrow and voucher
AF07	<b>[REQUIREMENT]</b> System <b>MUST</b> create a receipt Template which can be modified
AF08	<b>[REQUIREMENT]</b> System <b>MUST</b> break out payments to show where the fees belong to. Please see <b>Appendix B A-VR</b> – Vital Records Fee Breakdown
FNC68	<p>System must minimally contain the following Payment Collection Information fields:</p> <p>Customer/Submitter</p>

<b>RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)</b>
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NFN07	<b>[REQUIREMENT]</b> System <b>MUST</b> work with any Tarrant County hardware
NFN08	<b>[REQUIREMENT]</b> System <b>MUST</b> comply with Tarrant County <b>Electronic Communication Systems Policy (Please see Appendix C Electronic Communication Systems Policy)</b>
NFN09	<b>[REQUIREMENT]</b> System <b>MUST</b> have a distinguishable Test and Production environment
NFN10	<b>[REQUIREMENT]</b> System <b>MUST</b> 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 **300 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. **Images will not be stored in the database.**
- 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
<b>Total</b>	<b>1,000</b>

**RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)**

## Optional Data Conversion Services – Price Form

<b>Optional Data Conversion #1</b> - Official Public Records stored in PaperVision	<b>Price per Record:</b>
<b>Optional Data Conversion #2</b> - Vitals Records stored in PaperVision	<b>Price per Record:</b>
<b>Optional Data Conversion #3</b> - Vitals Records stored on Network drives	<b>Price per Record:</b>

<b>Optional Data Conversion #1 - Official Public Records stored in PaperVision</b>			
<b>Description:</b> The County Clerk's Office maintains a large archive of pre-1970 documents and images in its PaperVision version R79 system provided by Digitech. <i>(Note: large deed documents are more recent)</i> . These documents are currently indexed by Volume and Page. And, a subset is known to be stored in duplication in the existing RMS.			
<b>Activities:</b> Asses with staff and identify candidate records for transition (avoid converting duplicates in existing RMS system) Create new instrument numbers for PaperVision records for the conversion Convert the existing volume and page index records into the new system Convert documents and images into the new system			
Artifacts are detailed in the table below (As of 7/13/2017):			
<b>OPR records in PaperVision</b>			
	<u>Storage Size (Mb)</u>	<u>Total Documents</u>	<u>Total Images</u>
Adoption Index to Deeds	41.85	720	720
Bill of Sale	2623.16	21511	21519
BOND TO PAY	558.45	5078	5094
CATTLE BRAND	189.07	1475	1726
CATTLE BRAND INDEX	6.34	75	75
CONDEMNATION	10199.52	3308	113430
CONDO	486.94	485	3119
Deed of Trust	594086.1	2450676	2453331
DEPUTATION REGISTRAR VOLUMES	3187.61	16	15296
Deputations	1680.33	13797	24169
EARLY DEED RECORDS	1833907.5	8498419	8510879
Exhibit Files	338.57	973	2897
GRANTEE INDEX TO DEEDS	36638.21	79114	79114
GRANTOR INDEX TO DEEDS	35779.76	84216	84219

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INDEX TO MECH AND FURNISHERS LIENS	3691.26	8623	8623
Judgments	10098.23	172749	173076
Laborers Lien Records	1729.98	16109	16109
LARGE DEED DOCUMENTS	6326.05	46	51475
Lis Pendens Record	1110.23	5915	5915
Mechanics Lien Record	253639.73	481756	481816
Ordinations	53.01	99	201
OFFICIAL POSTINGS AND LEGAL NOTICES	7.91	25	71
Physician Registrar	405.15	116	124
Plat Index Books	801.34	40870	41266
PLATS	35786.57	56045	75688
POLYGRAPH REGISTER RECORD	14.68	133	191
Power of Attorney	7688.94	35700	35702
WET DRY ELECTION BOOK	27.92	100	378
	<b>2,841,104.41</b>	<b>11,978,149.00</b>	<b>12,206,223.00</b>

**Optional Data Conversion #2 - Vitals Records stored in PaperVision**

**Description:**

The County Clerk's Office maintains a large archive of documents and images in its PaperVision version R79 system provided by Digitech. These documents are currently indexed by Volume and Page. And, a subset is known to be stored in duplication in the existing RMS.

**Activities:**

- Asses with staff and identify candidate records for transition (avoid converting duplicates in existing RMS system)
- Create new instrument numbers for PaperVision records for the conversion
- Convert the existing volume and page index records into the new system
- Convert documents and images into the new system

Artifacts are detailed in the table below (As of 7/13/2017):

**Vitals records in PaperVision**

	<u>Storage Size (Mb)</u>	<u>Total Documents</u>	<u>Total Images</u>
MARRIAGE APPLICATION AND AFFIDAVIT	100.59	991	991
Marriage Licenses	1784.53	10394	20787
Marriage Record	13024.47	65137	65137
Military Discharge	13970.63	110189	178590
CLOSED Military Discharge	24.34	48	98
	<b>28,904.56</b>	<b>186,759</b>	<b>265,603</b>

## RFP FOR COUNTY CLERK RECORD MANAGEMENT SYSTEM (RMS)

### Optional Data Conversion #3 - Vitals Records stored on network drive

**Description:**

The County Clerk's Office maintains a large archive of vital records files on the NAS drive from the DocuLynx project and City of North Richland Hills consolidation project.

**Activities:**

Asses with staff and identify candidate records for transition (avoid converting duplicates in existing RMS system)

Create indexes per the indexing specifications

Convert documents and images into the new system

**Indexing Specifications:**

Vendor will work with the County to confirm the requested indexing protocol. The fields identified to be indexed are as follows:

1. Birth Records

- a. BR images are birth records and ABR images are amended birth records. ABR images should have the same five-digit local file number as the original BR record and should be added to the original record.
- b. Registration (Certificate) Number
  - i. Format = 02 + space + five-digit local file number + space + two-digit year (example 02 10369 13).
  - ii. Any two or more records where the five-digit local file number and the date of birth is the same will be moved to a special handling queue. The County will determine if the record should be deleted, the index and image should be changed, or the Registration number should be changed.
  - iii. In addition to ABR images, other birth records with the same five-digit local file number will include:
    1. Adoptions – The records will be moved to the special handling queue and the County will determine how to handle them;
    2. Expired or Deceased – The records should be paired and the "Death Indicator" field in RMS birth record should be set to Yes;
    3. Correction or Replacement – The records will be moved to the special handling queue and the County will determine how to handle them.
  - iv. The County's Laserfiche birth index database includes a "Type" field for exception documents where A = Amended, N = Adoption, E = Expired/Deceased, C = Correction, R = Replacement and F = Flagged. F or Flagged images should be ignored. The images should be reconciled to 1.a and 1.b.iii.
- c. Document Type
  - i. Default B for all birth records.
- d. Child's Name
  - i. First name;
  - ii. Middle name;
  - iii. Last name;
  - iv. Where the child's name is missing on an image, indicate in a report, move the record(s) to the special handling queue for the County to process, and use the mother's last name only.
- e. Date of Birth
  - i. Valid year range is 1878 through 2007;
  - ii. Duplicate records found in 2005 forward should be moved to the special handling queue for the County to determine which record to retain;
  - iii. Images will exist for 2008. The County has completed indexing and scanning for 2008. Vendor will not process 2008 records as part of this project.

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- f. Sex – Do Not Index
- g. Mother's Name
  - i. First name;
  - ii. Middle name;
  - iii. Last name;
  - iv. Indicate in a report and move to the special handling queue those records where the mother's name is missing on the image.
- h. Father's name
  - i. First name;
  - ii. Middle name;
  - iii. Last name
  - iv. Indicate in a report those records where the father's name is missing on the image.

### 2. Death Records

- a. FWDR images are death records and ADT images are amended death records. ADR images should have the same five-digit local file number as the original FWDR record and should be added to the original record.
- b. Registration (Certificate) Number
  - i. Format = 02 + space + five-digit local file number + space + two-digit year (example 02 10369 13).
  - ii. Any two or more records where the five-digit local file number and the date of death is the same will be moved to a special handling queue. The County will determine if the record should be deleted, the index and image should be changed, or the Registration number should be changed.
  - iii. The County's Laserfiche death index database includes a "Type" field for exception documents where A = Amended and F = Flagged. F or Flagged images should be ignored. The images should be reconciled to 2.a.
- c. Document Type
  - i. Default D for all death records.
- d. Date of Death
  - i. Valid year range is 1878 through 2007;
  - ii. Images will exist for 2008. The County has completed indexing and scanning for 2008. Vendor will not process 2008 records as part of this project.
- e. Sex – Do Not Index
- f. Deceased's Name
  - i. First name;
  - ii. Middle name;
  - iii. Last name.

### 3. Hospital Lists

- a. Hospital lists include birth records and will be set up and configured by vendor within RMS to support scan, record, search and retrieve.
- b. Some of the hospital lists images are not identifiable as hospital lists and contain old index information. These images should be reported and moved to the special handling queue for the County to determine how to proceed.
- c. Fields to be captured from each page:
  - i. Name of institution (create standardized hospital name list as drop down table);
  - ii. Month (two digits);
  - iii. Year (four digits).

### 4. Unknown

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- a. These images will largely include cover pages, blank pages, and index pages. These pages should be set aside. Any pages that are questionable as possible birth, death, or hospital list records should be reported and moved to the special handling queue for County review.

**Assumptions**

Vendor will make every attempt to provide complete and accurate indexing within the constraints of missing data and illegible images/pages. Indexing will be completed within a Conversion instance of the County's RMS system using the field table options for birth, death, and hospital liens. Document images will be loaded and linked to the corresponding index.

Accuracy of indexing will be measured on a per-field basis. The final accuracy rating will be determined by calculating the total number of fields for the project minus the total number of field errors, divided by the total number of fields for the project. Vendor will attempt to attain an accuracy rating of at least 98.5% for all present and legible data. Vendor will capture all index data that is present and legible and will capture all index data verbatim as found exactly on each record.

**Exceptions**

If the required indexing information is illegible or unavailable, Vendor will log this as "Not Indexable" and deliver this information to the County as an error for review using the exceptions report as well as the special handling queue.

Artifacts are detailed in the table below (As of 8/25/2017):

**Vitals records**

	<u>Storage Size</u>	<u>Total Documents</u>	<u>Total Images</u>
.tif images	194.3 Gb		1,599,758
.pdf files	51.8 Mb		60