



Respondent Name:

TARRANT COUNTY
PURCHASING DEPARTMENT

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

MELISSA LEE, C.P.M., A.P.P.
ASSISTANT PURCHASING AGENT

RFP NO. 2019-120

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

**PROPOSALS DUE APRIL 8, 2019
2:00 P.M.**

RFP NO. 2019-120

TABLE OF CONTENTS

PRE-PROPOSAL CONFERENCE	1
OPENING DATE, TIME, PROCEDURES, CONTACTS	2
GENERAL CONDITIONS	2
SPECIAL TERMS AND CONDITIONS OF THE CONTRACT	7
STATEMENT OF WORK	15
I. OVERVIEW	15
II. BACKGROUND.....	15
III. SCOPE	16
IV. UNIVERSAL REQUIREMENTS	17
V. SECTION I – OFFICIAL PUBLIC RECORDS	18
VI. SECTION II – VITAL RECORDS.....	39
VII. SECTION III – DATA CONVERSION AND MIGRATION.....	66
VIII. REPORTING AND ANALYTICS MUST ACCOMMODATE THE FOLLOWING	74
IX. INTEGRATION	74
X. SYSTEM ADMINISTRATION	74
XI. EVALUATION CRITERIA.....	74
XII. RESPONSE FORMAT	78
XIII. PRESENTATIONS	79
XIV. BEST AND FINAL OFFER (BAFO)	79
XV. CONTRACT NEGOTIATION	80
TARRANT COUNTY HUB POLICY	81
FORMS AND QUESTIONNAIRE	
DISADVANTAGED BUSINESS ENTERPRISES FORM	85
REFERENCES	86
SIGNATURE FORM	88
COMPLIANCE WITH FEDERAL AND STATE LAWS FORM.....	90
DEFICIENCIES AND DEVIATIONS FORM	91
NO-BID RESPONSE	92
PRICE FORM	93

APPENDIX A – OPR REFERENCES

APPENDIX B – VITAL RECORDS REFERENCES

APPENDIX C – ELECTRONIC COMMUNICATIONS SYSTEMS POLICY

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 RECORD MANAGEMENT SYSTEM (RMS)

PRE-PROPOSAL CONFERENCE

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

DATE: THURSDAY, MARCH 21, 2019

TIME: 10:00 A.M.

**LOCATION: TARRANT COUNTY ADMINISTRATION BUILDING
PURCHASING DEPARTMENT CONFERENCE ROOM
100 E. WEATHERFORD STREET, ROOM 303
FORT WORTH, TEXAS 76196-0104**

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

Tarrant County will not provide copies of RFP documents. Please download and print prior to meeting.

RSVP: Respondents planning to attend the pre-proposal conference should RSVP, in writing, via facsimile, no later than 5:00 p.m., Wednesday, March 20, 2019.

Send RSVPs to Chris Lax, CPSM, Senior Contracts Administrator, at (817) 884-2629.

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

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

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

Original and Five (5) Copies
OF
COMPLETED PROPOSALS
MUST BE RECEIVED IN THE
TARRANT COUNTY PURCHASING DEPARTMENT
AT 100 E. WEATHERFORD, SUITE 303
FORT WORTH, TEXAS 76196-0104
ON OR BEFORE APRIL 8, 2019 AT 2:00 P.M.

All proposals are due in the Tarrant County 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. "No-Bid" response to be returned on form included in section under Forms.

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 Tarrant County Purchasing Department, the Respondent shall be responsible for actual delivery of the Proposal package to the Tarrant County 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 Tarrant County Purchasing Agent and the approval of Tarrant County Commissioners Court.

Tarrant County is exempt from Federal Excise and State Sales Tax; therefore, tax must not be included in this proposal. Tarrant County is not exempt from Surplus Lines Tax or Texas Stamping Tax.

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 Tarrant County.

No oral explanation or instructions will be given by Tarrant County officials or employees in regard to the meaning of the proposal specifications before the award of the contract unless authorized by the Tarrant County Purchasing Agent or their designee. Requests from interested proposers for additional information or interpretation of the information included in the specifications should be directed in writing to:

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

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

All documents relating to this proposal including but not limited to, the proposal document, questions and their responses, 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, Texas time, Friday, March 22, 2019. After the question deadline, all questions and their responses will be posted on the website and available for download by interested parties.

All Proposal Response Forms and questionnaires must be fully completed and included in your response. Detailed specifications have been provided, and any deviations or exceptions must be referenced on the designated response forms that have been provided. Unless deviations are specifically stated herein, benefits will be provided according to the specifications at no additional charge.

Proposal is issued in compliance with County Purchasing Act, Section 262.030. Negotiations may 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 responses, 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 References, Compliance with Federal and State Laws Form, Questionnaires (when applicable), 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 Texas 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 Tarrant County receives a request for a copy of the Proposal. Tarrant 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 per the procedure outlined in Texas Government Code Section 552.305. Notice to your company under Section 552.305 may be sent via either certified mail or e-mail using the contact information provided by you on the signature form. Please be advised that Tarrant County cannot and will not make an agreement to withhold information from the public contrary to Tarrant County's responsibilities under the Act.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

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.

All proposals shall specify terms and conditions of payment, which will be considered as part of, but not control, the award of proposal. Tarrant County review, inspection, and processing procedures ordinarily require thirty (30) days after receipt of invoice, materials, or service. Proposals which call for payment before thirty (30) days from receipt of invoice, or cash discounts given on such payment, will be considered only if, in the opinion of the Tarrant County Purchasing Agent, the review, inspection, and processing procedures can be completed as specified.

Invoices shall be sent directly to the Tarrant County Auditor's Office, Attention: Accounts Payable, 100 East Weatherford, Room 506, Fort Worth, Texas 76196, or email to SAP-invoices@tarrantcounty.com. In accordance with the Prompt Payment Act, it is the intention of Tarrant County to make payment on completed orders within thirty (30) days after receipt of invoice or items; whichever is later, unless unusual circumstances arise. **Invoices must be fully documented as to labor, materials, and equipment provided and must reference the Tarrant County Purchase Order Number in order to be processed. No payments shall be made on invoices not listing a Purchase Order Number.**

Continuing non-performance of the Vendor in terms of specifications shall be a basis for the termination of the contract by Tarrant County. Tarrant County shall not pay for work, equipment, or supplies which are unsatisfactory. The Vendor 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) day notice prior to cancellation.

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

Proposals may be deemed non-responsive, among other reasons, for any of the following specific reasons:

1. Proposals containing any inconsistencies.
2. Unbalanced value of any items.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

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. The Respondent being interested in any litigation against Tarrant County.
4. The 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 Tarrant County will prevent or hinder the prompt completion of additional work, if awarded.
7. Respondents shall not owe delinquent property tax in Tarrant County.
8. Respondent's past performance record with Tarrant County.
9. Limited competition.

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.

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

Audit Clause: The Vendor must agree that Tarrant County will, until the expiration of twelve (12) months after final payment under this agreement, have access to and the right to examine at reasonable times any directly pertinent books, documents, papers and records (hard copy, as well as computer generated data) of the Vendor involving those transactions related to this solicitation. Vendor must agree that Tarrant County will have access during normal working hours to all necessary facilities, staff and work space in order to conduct audits. Tarrant County will provide the Vendor with reasonable advance notice of intended audits. The Vendor must provide records within ten (10) business days or a mutually agreed upon timeline.

TO THE EXTENT PERMITTED BY LAW, RESPONDENT AGREES TO DEFEND, INDEMNIFY AND HOLD TARRANT COUNTY, ITS OFFICIALS, AGENTS, SERVANTS, AND EMPLOYEES, HARMLESS AGAINST ANY AND ALL CLAIMS, LAWSUITS, ACTIONS, COSTS AND EXPENSES OF ANY KIND, INCLUDING BUT NOT LIMITED TO, THOSE FOR PROPERTY DAMAGE OR LOSS (INCLUDING ALLEGED DAMAGE OR LOSS TO OWNER'S BUSINESS AND ANY RESULTING LOST PROFITS), EMPLOYMENT MATTERS, AND/OR PERSONAL INJURY, INCLUDING DEATH, THAT MAY RELATE TO OR ARISE OUT OF OR BE OCCASIONED BY (I) RESPONDENT'S BREACH OF ANY OF THE TERMS OF PROVISIONS OF THIS AGREEMENT OR (II) ANY NEGLIGENT ACT OR OMISSION OR INTENTIONAL MISCONDUCT OF RESPONDENT, ITS OFFICERS, AGENTS, ASSOCIATES, EMPLOYEES, CONTRACTORS OR SUBCONTRACTORS, RELATED TO THE PERFORMANCE OF THIS AGREEMENT.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

THE SUCCESSFUL 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.

RESPONDENT(S) WILL PREPARE PAYROLL CHECKS, MAKE ALL NECESSARY DEDUCTIONS AND PAY ALL TAXES AND MAINTAIN 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.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

1. **CONTRACT TERMS:** Vendor(s) will be awarded a twelve (12) month contract, effective from date of award or notice to proceed as determined by Tarrant County Purchasing. At Tarrant County's option and approval by the Vendor, 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 OPTION:** 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 is stipulated in the Special Conditions and agreed upon by both parties. If Tarrant County exercises the right in writing, the Vendor must update and submit any documents required during the initial solicitation by no later than thirty (30) calendar days prior to the commencement of the option period. These required documents must be in force for the full period of the option. If the updated documents are not submitted by the Vendor in complete form within the time specified, Tarrant County may rescind its option and seek a new solicitation.

3. **SECONDARY/ALTERNATE AWARD:** Secondary or Alternate Vendors serve in a backup capacity only. In the event the Primary is unable to honor the terms and conditions of the contract, the Secondary Vendor(s) may be called. If the Secondary Vendor is unable to honor the terms and conditions of the contract the Alternate Vendor(s) may be called. The Primary Vendor is the first contact. Use of the Secondary or Alternate Vendor(s) must be approved, in writing, by the Tarrant County Purchasing Agent or his designee.
 - A. In the event the Secondary or Alternate Vendors are called upon, they will offer the materials and services at their awarded price(s), or better. Any attempt to increase their awarded price(s) may be cause to remove the Vendor from the contract. Calling upon the Secondary or Alternate Vendors does not necessarily affect the status of any awarded Vendor, including the Primary Vendor.
 - B. If a Secondary or Alternate Vendor represents themselves as the Primary Vendor without written authorization from the Tarrant County Purchasing Agent, or his designee, the Secondary or Alternate Vendor may be removed from the contract.
 - C. Would you, as the Vendor, be willing to accept a Secondary or Alternate Award based on the above?

_____Yes _____No

4. **COOPERATIVE PURCHASING:** Tarrant County has the lead role in developing and encouraging Cooperative Purchasing efforts among governmental entities that participate in its Cooperative Purchasing Program. Cooperative Purchasing can be a great benefit to Tarrant County vendors by providing an avenue to offer materials and services to participating entities. A current list of participating entities is included in this solicitation and an up-to-date list can be found on the Tarrant County website.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

- A. Should other Governmental Entities decide to participate in this contract, would you, as the Vendor, agree that all terms, conditions, specifications, pricing, and discounts would apply? **A “NO” answer could result in complete rejection of proposal.**

_____Yes _____No

- 1) If you, the Respondent, checked Yes, the following will apply:
 - a) Governmental Entities utilizing Intergovernmental Contracts with Tarrant County will be eligible, but not obligated, to purchase materials and services under the contract(s) awarded because of the solicitation. All purchases by Governmental Entities other than Tarrant County will be billed directly to that Governmental Entity and paid by that Governmental Entity. Tarrant County will not be responsible for another Governmental Entity’s debts. Each Governmental Entity will order their own material and services as needed.
 - b) Delivery to governmental entities located within Tarrant County will be at no charge or as otherwise provided for in the Award Document. Delivery charges, if any, for governmental entities located outside Tarrant County shall be negotiated between the Vendor and each governmental entity.
 - c) Tarrant County utilizes County Purchase Orders as its primary means of encumbering funds and pays for goods and services utilizing Vendor invoices. In the event Governmental Entities utilizing Inter-Governmental Contracts use other payment methods, including but not limited to, purchasing cards, debit cards, check requests or other methods which cause the Vendor to incur service, processing, or other fees, these fees are the responsibility of that Governmental Entity, unless otherwise negotiated with the Vendor.
 - d) Vendor(s) awarded contract(s) resulting from RFP will be responsible for providing to Tarrant County, at no additional charge, a complete list of all governmental entities currently utilizing the contract and their annual expenditures. This information should be provided ninety (90) days prior to the expiration of the contract, or as otherwise requested by Tarrant County.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Entities Currently Participating in Cooperative Purchasing Program with Tarrant County

1.	ALAMO HEIGHTS ISD	60.	CITY OF BROWNWOOD	120.	CITY OF GODLEY
2.	ALLEN ISD	61.	CITY OF BRYAN	121.	CITY OF GRANBURY
3.	ALVORD ISD	62.	CITY OF BURKBURNETT	122.	CITY OF GRAND PRAIRIE
4.	ANNA FIRE DEPARTMENT	63.	CITY OF BURLESON	123.	CITY OF GRAND SALINE
5.	ANDERSON COUNTY	64.	CITY OF CADDO MILLS	124.	CITY OF GRAPEVINE
6.	ARANSAS COUNTY	65.	CITY OF CANTON	125.	CITY OF GREENVILLE
7.	ARLINGTON ISD	66.	CITY OF CARROLLTON	126.	CITY OF HALTOM CITY
8.	ARMSTRONG COUNTY	67.	CITY OF CASTLE HILLS	127.	CITY OF HASLET
9.	ATASCOSA COUNTY	68.	CITY OF CEDAR HILL	128.	CITY OF HEATH
10.	AUBREY ISD	69.	CITY OF CEDAR PARK	129.	CITY OF HITCHCOCK
11.	BASTROP COUNTY	70.	CITY OF CELESTE	130.	CITY OF HORIZON CITY
12.	BELL COUNTY	71.	CITY OF CELINA	131.	CITY OF HUDSON OAKS
13.	BENBROOK WATER AUTHORITY	72.	CITY OF CIBOLO	132.	CITY OF HUNTSVILLE
14.	BETHANY SPEC UTILITY DIST	73.	CITY OF CLEBURNE	133.	CITY OF HURST
15.	BEXAR COUNTY	74.	CITY OF COCKRELL HILL	134.	CITY OF HUTCHINS
16.	BIRDVILLE ISD	75.	CITY OF COLLEYVILLE	135.	CITY OF HUTTO
17.	BLUE RIDGE FIRE DEPARTMENT	76.	CITY OF COLUMBUS	136.	CITY OF INGLESIDE
18.	BOSQUE COUNTY	77.	CITY OF COMBINE	137.	CITY OF IRVING
19.	BRANCH FIRE DEPARTMENT	78.	CITY OF COMMERCE	138.	CITY OF ITALY
20.	BRAZORIA COUNTY	79.	CITY OF CONVERSE	139.	CITY OF JACKSBORO
21.	BRAZOS COUNTY	80.	CITY OF COPPELL	140.	CITY OF JONESTOWN
22.	BRIAR VOLUNTEER FIRE DEPT.	81.	CITY OF COPPERAS COVE	141.	CITY OF JEFFERSON
23.	BROOKS COUNTY CONSTABLES, PRECINCTS 1-4	82.	CITY OF CORINTH	142.	CITY OF KEENE
24.	BROWN COUNTY	83.	CITY OF CORSICANA	143.	CITY OF KELLER
25.	BULVERDE POLICE DEPARTMENT	84.	CITY OF CROWLEY	144.	CITY OF KENNEDALE
26.	BURNET COUNTY	85.	CITY OF CUMBY	145.	CITY OF KERMIT
27.	BYNUM ISD	86.	CITY OF DALWORTHINGTON GRDN	146.	CITY OF KILLEEN
28.	CAMERON COUNTY	87.	CITY OF DE LEON	147.	CITY OF KRUM
29.	CARROLL ISD	88.	CITY OF DECATUR	148.	CITY OF KYLE
30.	CARROLLTON-FARMERS BRANCH ISD	89.	CITY OF DEER PARK	149.	CITY OF LA VERNIA
31.	CASTLEBERRY ISD	90.	CITY OF DENISON	150.	CITY OF LAKE DALLAS
32.	CEDAR HILL ISD	91.	CITY OF DENTON	151.	CITY OF LAKE WORTH
33.	CHAMBERS COUNTY	92.	CITY OF DESOTO	152.	CITY OF LANCASTER
34.	CHEROKEE COUNTY	93.	CITY OF DIBOLL	153.	CITY OF LAREDO
35.	CITY OF ALEDO	94.	CITY OF DUNCANVILLE	154.	CITY OF LEAGUE CITY
36.	CITY OF ALLEN	95.	CITY OF EARLY	155.	CITY OF LEANDER
37.	CITY OF ALVORD	96.	CITY OF EASTLAND	156.	CITY OF LEWISVILLE
38.	CITY OF AMARILLO	97.	CITY OF EL PASO	157.	CITY OF LINDALE
39.	CITY OF ANGLETON	98.	CITY OF ELECTRA	158.	CITY OF LITTLE ELM
40.	CITY OF ANNA	99.	CITY OF EMORY	159.	CITY OF LITTLEFIELD
41.	CITY OF ARLINGTON	100.	CITY OF ESCOBARES	160.	CITY OF LIVE OAK
42.	CITY OF ATHENS	101.	CITY OF EULESS	161.	CITY OF LUBBOCK
43.	CITY OF AUBREY	102.	CITY OF EVERMAN	162.	CITY OF LUCAS
44.	CITY OF AUSTIN	103.	CITY OF FARMERS BRANCH	163.	CITY OF LUFKIN
45.	CITY OF AZLE	104.	CITY OF FARMERSVILLE	164.	CITY OF LUMBERTON
46.	CITY OF BALCH SPRINGS	105.	CITY OF FERRIS	165.	CITY OF MANSFIELD
47.	CITY OF BANGS	106.	CITY OF FLORESVILLE	166.	CITY OF MARSHALL
48.	CITY OF BAYTOWN	107.	CITY OF FLOYDADA	167.	CITY OF McALLEN
49.	CITY OF BEDFORD	108.	CITY OF FOREST HILL	168.	CITY OF MCKINNEY
50.	CITY OF BELLS	109.	CITY OF FORNEY	169.	CITY OF MELISSA
51.	CITY OF BENBROOK	110.	CITY OF FORT WORTH	170.	CITY OF MERKEL
52.	CITY OF BIG SPRING	111.	CITY OF FRISCO	171.	CITY OF MESQUITE
53.	CITY OF BLUE MOUND	112.	CITY OF GAINESVILLE	172.	CITY OF MIDLOTHIAN
54.	CITY OF BONHAM	113.	CITY OF GALENA PARK	173.	CITY OF MINEOLA
55.	CITY OF BOVINA	114.	CITY OF GALVESTON	174.	CITY OF MINERAL WELLS
56.	CITY OF BOWIE	115.	CITY OF GANADO	175.	CITY OF MORGAN'S POINT RESORT
57.	CITY OF BOYD	116.	CITY OF GARLAND	176.	CITY OF MURPHY
58.	CITY OF BRIDGE CITY	117.	CITY OF GATESVILLE	177.	CITY OF NACOGDOCHES
59.	CITY OF BRIDGEPORT	118.	CITY OF GEORGETOWN		
		119.	CITY OF GLEN HEIGHTS		

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Entities Currently Participating in Cooperative Purchasing Program with Tarrant County

178.	CITY OF NEDERLAND	239.	CITY OF WHITE SETTLEMENT	294.	GREGG COUNTY
179.	CITY OF NEW BRAUNFELS	240.	CITY OF WHITESBORO	295.	GRIMES COUNTY
180.	CITY OF NORTH RICHLAND HILLS	241.	CITY OF WHITEWRIGHT	296.	GUADALUPE COUNTY
181.	CITY OF ODESSA	242.	CITY OF WILLS POINT	297.	HARDIN COUNTY
182.	CITY OF OVILLA	243.	CITY OF WILMER	298.	HARRIS CNTY EMG SVCS DIST #7
183.	CITY OF PALESTINE	244.	CITY OF WINNSBORO	299.	HARRIS CNTY EMG SVCS DIST #10
184.	CITY OF PARKER	245.	CITY OF WYLIE	300.	HARRIS CNTY EMG SVCS DIST #24
185.	CITY OF PASADENA	246.	CLAY COUNTY	301.	HARRISON COUNTY
186.	CITY OF PELICAN BAY	247.	CLEAR CREEK ISD	302.	HAWKINS ISD
187.	CITY OF PERRYTON	248.	CLEBURNE ISD	303.	HAYS COUNTY
188.	CITY OF PHARR	249.	COCHRAN COUNTY	304.	HEART OF TEXAS REGIONAL MHMR CENTER
189.	CITY OF PLANO	250.	COLLIN COUNTY	305.	HENDERSON COUNTY
190.	CITY OF PORT ISABEL	251.	COLLIN COUNTY COMMUNITY COLLEGE DISTRICT	306.	HILL COUNTY
191.	CITY OF POTEET	252.	COMAL COUNTY	307.	HOOD COUNTY
192.	CITY OF POTTSBORO	253.	COOKE COUNTY	308.	HOPKINS COUNTY
193.	CITY OF PRINCETON	254.	CORYELL COUNTY	309.	HOUSING AUTHORITY OF THE CITY OF AUSTIN
194.	CITY OF RALLS	255.	COTTONDALE VOL FIRE DEPT	310.	HUMBLE ISD
195.	CITY OF RED OAK	256.	CROWLEY ISD	311.	HUNT COUNTY
196.	CITY OF RHOME	257.	DALLAS COUNTY	312.	HURST EULESS BEDFORD ISD
197.	CITY OF RICHARDSON	258.	DALLAS/FORT WORTH INTERNATIONAL AIRPORT BOARD	313.	HUTCHINSON COUNTY
198.	CITY OF RICHLAND HILLS	259.	DALLAS ISD	314.	IDEA PUBLIC SCHOOLS
199.	CITY OF RIVER OAKS	260.	DECATUR ISD	315.	IRVING ISD
200.	CITY OF ROANOKE	261.	DENISON ISD	316.	JACK COUNTY
201.	CITY OF ROBINSON	262.	DENTON COUNTY	317.	JASPER COUNTY
202.	CITY OF ROCKWALL	263.	DENTON COUNTY FRESH WATER SUPPLY DIST NO. 1-A	318.	JEFFERSON COUNTY
203.	CITY OF ROUND ROCK	264.	DENTON ISD	319.	JEFFERSON CNTY DRAIN. DIST. #7
204.	CITY OF ROWLETT	265.	DESOTO ISD	320.	JIM WELLS COUNTY
205.	CITY OF ROYSE CITY	266.	DIANA SPECIAL UTILITY DISTRICT	321.	JOHNSON COUNTY
206.	CITY OF RUNAWAY BAY	267.	DUNCANVILLE ISD	322.	JOHNSON COUNTY SUD
207.	CITY OF RUSK	268.	DUVAL COUNTY	323.	KARNES COUNTY
208.	CITY OF SACHSE	269.	EAGLE MOUNTAIN-SAGINAW ISD	324.	KAUFMAN COUNTY
209.	CITY OF SAGINAW	270.	EAST TEXAS COUNCIL OF GOVS.	325.	KAUFMAN ISD
210.	CITY OF SAN ANGELO	271.	ECTOR COUNTY	326.	KELLER ISD
211.	CITY OF SAN BENITO	272.	ECTOR COUNTY ISD	327.	KENNEDALE ISD
212.	CITY OF SAN MARCOS	273.	EDDY COUNTY, NM	328.	KERENS ISD
213.	CITY OF SANGER	274.	EL PASO COUNTY	329.	KINNEY COUNTY
214.	CITY OF SANSOM PARK	275.	EL PASO COUNTY HOSPITAL DISTRICT DBA UNIVERSITY MEDICAL CENTER OF EL PASO	330.	KRUM ISD
215.	CITY OF SEAGOVILLE	276.	ELECTRA ISD	331.	LAKE DALLAS ISD
216.	CITY OF SHERMAN	277.	ELLIS COUNTY	332.	LAKE WORTH ISD
217.	CITY OF SOUR LAKE	278.	ERATH COUNTY	333.	LAMAR COUNTY
218.	CITY OF SOUTHLAKE	279.	EVERMAN ISD	334.	LAMB COUNTY
219.	CITY OF SOUTHMAYD	280.	FANNIN COUNTY	335.	LAMPASAS COUNTY
220.	CITY OF SPRINGTOWN	281.	FLOYD COUNTY	336.	LAVON POLICE DEPARTMENT
221.	CITY OF STEPHENVILLE	282.	FORT BEND COUNTY	337.	LEON COUNTY
222.	CITY OF SULPHUR SPRINGS	283.	FORT BEND COUNTY ESD#2	338.	LEONARD ISD
223.	CITY OF TAFT	284.	FORT WORTH HOUSING AUTHORITY	339.	LEWISVILLE ISD
224.	CITY OF TAYLOR	285.	FORT WORTH ISD	340.	LIMESTONE COUNTY
225.	CITY OF TEMPLE	286.	FORT WORTH TRANSP AUTHORITY	341.	LITTLE ELM ISD
226.	CITY OF TERRELL	287.	FRANKLIN COUNTY	342.	LOVEJOY ISD
227.	CITY OF TEXARKANA, AR	288.	FREESTONE COUNTY	343.	LOWRY CROSSING VOL FIRE DEPT
228.	CITY OF TEXARKANA, TX	289.	FRISCO ISD	344.	LUBBOCK COUNTY
229.	CITY OF THE COLONY	290.	GRAND PRAIRIE ISD	345.	MANSFIELD ISD
230.	CITY OF UNIVERSITY PARK	291.	GRANDVIEW POLICE DEPT.	346.	MAVERICK COUNTY
231.	CITY OF VAN ALSTYNE	292.	GRAPEVINE\COLLEYVILLE ISD	347.	McKINNEY ISD
232.	CITY OF VENUS	293.	GRAYSON COUNTY	348.	McLENNAN COUNTY
233.	CITY OF VERNON			349.	McLENNAN COMM. COLLEGE
234.	CITY OF WACO				
235.	CITY OF WATAUGA				
236.	CITY OF WAXAHACHIE				
237.	CITY OF WEATHERFORD				
238.	CITY OF WESTWORTH VILLAGE				

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Entities Currently Participating in Cooperative Purchasing Program with Tarrant County

350.	MEDINA VALLEY ISD	404.	SHERMAN ISD	457.	TRAVIS COUNTY EMERGENCY SERVICES DISTRICT NO.6
351.	MERILEE SPECIAL UTILITY DIST.	405.	SMITH COUNTY	458.	TRAVIS COUNTY HEALTHCARE DISTRICT
352.	MHMR OF TARRANT COUNTY	406.	SPRINGTOWN ISD	459.	TRINITY RIVER AUTHORITY
353.	MIDLAND COUNTY	407.	SOUTH MONTGOMERY FIRE DEPT	460.	U.S. MARSHALS SERVICE
354.	MIDWAY ISD	408.	SOUTH TEXAS COLLEGE	461.	UNIVERSITY OF NORTH TEXAS
355.	MILAM COUNTY	409.	SPAN, INC.	462.	UNIVERSITY OF NORTH TEXAS HEALTH SCIENCE CENTER
356.	MILLS COUNTY	410.	STEPHENS COUNTY	463.	UNIVERSITY OF TEXAS AT ARLINGTON
357.	MONTGOMERY COUNTY	411.	STERLING COUNTY	464.	UNIVERSITY OF TEXAS AT DALLAS
358.	MONTGOMERY COUNTY EMG SVCS DIST NO. 10 (ESD 10)	412.	STONEWALL COUNTY	465.	UNIVERSITY OF TX MD ANDERSON CANCER CENTER
359.	MONTGOMERY CNTY HOSP DIST.	413.	TARLETON STATE UNIVERSITY	466.	UPPER TRINITY REGIONAL WATER DISTRICT
360.	MOUNT PLEASANT POLICE DEPT.	414.	TARRANT APPRAISAL DISTRICT	467.	UPSHUR COUNTY
361.	MOUNT VERNON POLICE DEPT.	415.	TARRANT COUNTY 9-1-1 EMG ASSISTANCE DISTRICT	468.	UPTON COUNTY
362.	NACOGDOCHES COUNTY	416.	TARRANT COUNTY COLLEGE DISTRICT	469.	VAN ALSTYNE ISD
363.	NAVARRO COUNTY	417.	TARRANT COUNTY EMERGENCY SERVICES DISTRICT 1	470.	VAN ZANDT COUNTY
364.	NEVADA VOL. FIRE DEPT.	418.	TARRANT COUNTY HOSP DIST	471.	VERNON ISD
365.	NEW CANEY ISD	419.	TARRANT COUNTY WORKFORCE DEVELOPMENT BOARD	472.	VICTORIA COUNTY
366.	NOLAN COUNTY	420.	TARRANT REGIONAL WATER DIST	473.	WACO ISD
367.	NORMANGEE ISD	421.	TAYLOR COUNTY	474.	WALKER COUNTY
368.	NORTH CENTRAL TEXAS COUNCIL OF GOVERNMENTS	422.	TEMPLE COLLEGE	475.	WALLER COUNTY
369.	NORTH TEXAS MUNICIPAL WATER DISTRICT	423.	TERRELL ISD	476.	WARD COUNTY
370.	NORTH TEXAS TOLLWAY AUTH	424.	TEXARKANA ISD	477.	WEATHERFORD COLLEGE
371.	NORTHWEST ISD	425.	TEXAS A&M UNIVERSITY AT COMMERCE	478.	WEATHERFORD ISD
372.	NUECES COUNTY	426.	TEXAS A&M UNIVERSITY-KINGSVILLE	479.	WESTMINSTER FIRE DEPT.
373.	OLTON POLICE DEPARTMENT	427.	TEXAS A&M UNIVERSITY-TEXARKANA	480.	WESTON VOLUNTEER FIRE DEPT
374.	ORANGE COUNTY	428.	TEXAS ALCOHOLIC BEVERAGE COMMISSION	481.	WHITE SETTLEMENT ISD
375.	ORANGE CNTY DRAINAGE DIST	429.	TEXAS DEPT. OF PARK/WILDLIFE	482.	WILLIAMSON COUNTY
376.	PALO PINTO COUNTY	430.	TEXAS DEPT. OF PUBLIC SAFETY	483.	WILLIAMSON CNTY EMG SVCS DIST #3
377.	PANOLA COUNTY	431.	TEXAS WOMAN'S UNIVERSITY	484.	WILSON COUNTY
378.	PARADISE ISD	432.	THE WOODLANDS TOWNSHIP	485.	WINKLER COUNTY
379.	PARKER COUNTY	433.	TITUS COUNTY	486.	WINNSBORO ISD
380.	PARKER COUNTY EMERGENCY SERVICES DISTRICT 1	434.	TML MULTISTATE INTERGOV EMPLOYEE BENEFITS POOL	487.	WISE COUNTY
381.	PARMER COUNTY	435.	TOM GREEN COUNTY	488.	WOOD COUNTY
382.	PLANO ISD	436.	TOWN OF ADDISON	489.	YMCA OF METROPOLITAN DALLAS
383.	POTTER COUNTY	437.	TOWN OF ARGYLE	490.	YOUNG COUNTY
384.	PUBLIC TRANSIT SERVICE OF MINERAL WELLS	438.	TOWN OF DOUBLE OAK	491.	ZAPATA COUNTY
385.	QUINLAN ISD	439.	TOWN OF EDGECLIFF VILLAGE		
386.	RAINS COUNTY ESD #1	440.	TOWN OF FAIRVIEW		
387.	RANCHO VIEJO POLICE DEPT.	441.	TOWN OF FLOWER MOUND		
388.	RANDALL COUNTY	442.	TOWN OF HICKORY CREEK		
389.	RED OAK ISD	443.	TOWN OF HIGHLAND PARK		
390.	RED RIVER COUNTY	444.	TOWN OF LAKESIDE		
391.	REFUGIO COUNTY	445.	TOWN OF LITTLE ELM		
392.	REGION 9 EDUCATION SERVICE CENTER OF WICHITA	446.	TOWN OF NORTHLAKE		
393.	REGION 11 EDUCATION SERVICE CENTER (ESC)	447.	TOWN OF PANTEGO		
394.	RICHARDSON ISD	448.	TOWN OF PECOS CITY		
395.	ROCKWALL COUNTY	449.	TOWN OF PONDER		
396.	ROUND ROCK ISD	450.	TOWN OF PROSPER		
397.	SAM RAYBURN ISD	451.	TOWN OF PROVIDENCE VILLAGE		
398.	SAN JACINTO COM COLL DIST.	452.	TOWN OF SUNNYVALE		
399.	SAN PATRICIO COUNTY	453.	TOWN OF TROPHY CLUB		
400.	SCHLEICHER COUNTY	454.	TOWN OF WESTLAKE		
401.	SEABROOK VOL FIRE DEPT.	455.	TOWN OF WESTOVER HILLS		
402.	SR. CNT RESOURCE AND PUBLIC TRANSIT, INC. OF HUNT COUNTY	456.	TRAVIS COUNTY		
403.	SEVEN POINTS FIRE RESCUE				

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

5. MINIMUM INSURANCE REQUIREMENTS:

- A. Vendor 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
- B. Tarrant 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 Tarrant County based upon changes in statutory law, court decisions, or the claims history of the industry as well as the Vendor.
- C. Required Provisions:
- 1) Proof of Carriage of Insurance – All Certificates of Insurance will be required in duplicate and filed with the Tarrant County Purchasing Agent and the Budget and Risk Management Department at 100 East Weatherford Street, Suite 305, Fort Worth, Texas 76196 prior to work commencing.
 - 2) All Certificates shall provide Tarrant County with an unconditional thirty (30) day written notice in case of cancellation or any major change.
 - 3) As to all applicable coverage, policies 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 sub-contractor(s) performing work under this agreement has the required insurance coverage(s) and supplies Tarrant County with the proper documents verifying the coverage.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

6. **CRIMINAL BACKGROUND CHECK:**

- A. If this contract requires that Vendor personnel access Tarrant County Data (either on-site or remotely) or access secure areas of Tarrant County Facilities, then Vendor personnel may be required to undergo a Criminal Justice Information Services (CJIS) Background Check, a Human Resources Criminal Background Check, or a Sheriff's Criminal Background Check. Criminal Background Checks will be paid for by Tarrant County.
1. Vendor must provide information, including, but not limited to, Employee Name, date of birth, and driver's license number for each individual required to pass a Criminal Background Check.
 2. Award of a contract could be affected by Vendor's refusal to agree to these terms.
 3. Failure of the Vendor to supply personnel who pass a Criminal Background Check could affect the award of the contract or could result in termination of the contract.
 4. The Criminal Background Check applies to the individual and not the Company.
 5. Passing status must be maintained by Vendor personnel for duration of the contract.

7. **INFORMATION TECHNOLOGY HOSTED OR CLOUD SOLUTION:**

- A. The following is only applicable when Vendor is providing Information Technology hosted or cloud solution:
1. **Confidentiality, Integrity, Availability (CIA)**
Vendor shall protect the Confidentiality, Integrity, and Availability (CIA) of all Tarrant County Data ensuring extra levels of security. All Tarrant County information must remain private and permit redaction of protected information before publication. Audit trails cannot be altered.
 2. **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 suspect 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.
 3. **Data**
All Tarrant County data will remain in the 48 contiguous United States at all times.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

4. **Right to Audit**
Tarrant County reserves the right to audit Vendor datacenters which house Tarrant County Data or receive SSAE 16 SOC Type II audits from a reputable security advisory service firm (e.g. EY, Deloitte, KPMG, PWC, Coalfire, etc.).
8. There is no opportunity for remote attendance at the Pre-Proposal Conference. Respondents are not allowed to call in to attend this meeting.

RFP FOR 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 Records Management System (RMS). The RMS manages Official Public Records (OPR) and Vital Records (VR). Additionally, the County Clerk desires to consolidate, convert, and migrate OPR and VR stored in several disparate systems and locations into the new RMS system to serve as a unified source for these types of records.
- B. The desired system must be robust, scalable, and secure while providing high availability with minimal impact to existing business processes. 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 Nicholson	

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 Records Management System	Thomson Reuters - Aumentum 2.10.1 b122
Workstation (~75 clients)	Dell
Operating System	Windows 7 and Windows 10
Application Server	Windows 2016
Database Server	SQL Server 2016

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Hardware/Software	
Scanners	Fujitsu 6130 and above Canon DR 7580, 610C, 5010C Ricoh Aficio MP W3601 (Plat scanner)
Printers	HP LaserJet Lexmark 2500 Brother
Image Resolution	300 dpi
Image format	tiff, jpg, pdf
Image storage	~4 Tb

D. Imaging Standards

1. Documents will be scanned at 300 dpi.
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, 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 three (3) sections:

1. Section I – OPR – The Official public records module of the RMS system provides the County Clerk’s office with comprehensive features necessary to manage land, real estate records, and historical records.
2. Section II – VR –The Vital records module of the RMS system provides the County Clerk’s office with comprehensive features necessary to manage vital records including birth certificates, death certificates, and marriage licenses.
3. Section III – DATA CONVERSION AND MIGRATION – Official public records and vital records are currently stored in a variety of disparate systems and locations outside the existing RMS system. These records may also be stored in a variety of formats and file types including digital scans and physical paper. The new system will serve as a unified source encompassing all these types of records in an electronic format in a common location.

B. Respondents must respond and submit a proposal to replace the existing records management system, as well as, migrate data and/or convert records per the requirements described in sections I, II, and III. Each section will be scored and evaluated as part of a single combined overall score.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

- C. Any item designated as “MUST” is a minimum requirement for this RFP. An unmet “MUST” 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.

IV. UNIVERSAL REQUIREMENTS

- A. **[REQUIREMENT]** Each proposal **MUST** include complete data conversion of all records from the existing RMS system **and** migration/conversion of the additional identified sources of data, images, and records for OPR and Vitals records.
- B. **[REQUIREMENT]** Each proposal **MUST** include a training component and knowledge transfer including access to these resources and documentation at no additional cost.
- C. **[REQUIREMENT]** Each proposal **MUST** include support and maintenance costs to arrive at total cost of ownership. Annual increases for support and maintenance must not exceed 4% per year during the duration of the contract.
- D. **[REQUIREMENT]** Each proposal **MUST** provide for an on-premise solution. Vendor hosted or software as service solutions (SAAS) are not desired.
- E. **[REQUIREMENT]** The system **MUST** have a cashiering function to conduct, collect, and facilitate payments **and** the system **MUST** have the ability to integrate with nCourt to facilitate payment processing.
- F. **[REQUIREMENT]** Each proposal **MUST** include unlimited user licenses without restriction.
- G. **[REQUIREMENT]** Each proposal **MUST** provide for a system that is already developed and deployable. With the exception of limited necessary customizations to fully meet requirements, the County does not desire to participate with a respondent to develop and build a solution or leverage another platform to build a RMS system.
- H. **[REQUIREMENT]** The Respondent **MUST** provide a completed and updated Continuity of Operations Plan (COOP) and Disaster Recovery (DR) testing for the system before it goes into production.
- I. **[REQUIREMENT]** The Respondent **MUST** provide their system backup and recovery strategies of the datacenter and services to Tarrant County.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

V. SECTION I – OFFICIAL PUBLIC RECORDS

A. Overview:

1. The County Clerk’s office manages over 25 million records and that number grows roughly by 350,000 records annually. The public’s need and access to these records, which include a mix of land, death, birth, marriage, and assumed name records, is critical. The effective management of these records is vital to the local economy. Tarrant County seeks a solution that optimizes workflow, utilizes current technology, and increases access to these records.
2. Real Estate:
 - a. Real estate record 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.
4. Volume:

Type of Recording	2017	2016	2015	2014
OPR – Documents filed	302,079	298,890	291,563	282,005
PLATS - Filed	723	722	618	650
OPR Copies Sold	11,394	10,487	10,846	11,052
Online Copies Sold	4,893	5,327	3,054	NA
Online Certified Copies Sold	3,103	2,460	1,518	NA

5. Currently, OPR receives documents to be recorded through e-recording providers, the US Postal Service, FTP Upload, and in person at the office. The below process is for documents received via USPS:
 - a. The requestor name and address is entered manually into the system if it does not already exist.
 - b. A Barcode page and a Trailer page is generated and attached to the documents for scanning. The Barcode Page is a necessity for Bulk Scanning. The County does not charge for this page.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

c. 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. Objective:

a. Replace the current RMS with a new RMS that will provide enhanced availability of critical records to the public, improved workflow, and simplified system upgrades.

b. The new desired system Must 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 (*i.e. Ability to export both public index and image information for external customers upon request. Example: a request from a Title Company*)

vi. Scanning

vii. Public browse or public access

viii. Government to Government recording

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. 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)		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

B002	System should provide users configurable Hot Keys to allow system navigation		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B003	[REQUIREMENT] System MUST be able to scan documents as a tif and attach them to records (<i>Ability to scan or attach documents to related instruments i.e.: Driver's License, Spreadsheet, and Letters</i>)		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B004	[REQUIREMENT] System MUST allow users to set up work flows for document management, status tracking, and auditing		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B005	[REQUIREMENT] System MUST have ability for Bulk Scan		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

B006	[REQUIREMENT] System MUST generate unique numbers for documents issued		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B006-A	[REQUIREMENT] System MUST generate numbers with the following parameters: Birth = 060000000019 (LR + 8 digits + YR) Death = 060000000019 (LR + 8 digits + YR) Fetal Death = 0600000000FYR (YR = 2-digit Year) Assumed Names = A216000000 Military = Z216000000 Marriage = M216000000 OPR = YYY0000000 (YYY = 1st, 3rd and 4th digit of the year followed by 7 numbers) The current calendar year 19 must change automatically with the start of each new year. The zeros represent an 8-digit required for TxEVER		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B007	System should have ability to scan multiple records at once and remain in a queue until reviewed and approved		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B008	[REQUIREMENT] System MUST have a secure online user interface to allow public to request certified or non-certified copies of records		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

B008-A	[REQUIREMENT] Applications for records MUST be queued and processed when the customer comes to the office in person to complete their transaction.		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
B009	[REQUIREMENT] System MUST have an integrated module that will process payments of fees for record requests		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
B009-A	[REQUIREMENT] Module MUST accept payments and break down the payments into the fees payable to the various agencies. (see Appendix A)		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
B010	[REQUIREMENT] System MUST have capability to support search and retrieve all non-restricted records from the internet		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

B011	[REQUIREMENT] System MUST allow public access users to view, print, and purchase non-certified copies of non-restricted records		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B012	[REQUIREMENT] System MUST have a searchable database of all transactions in real time.		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B012-A	[REQUIREMENT] System MUST minimally provide the following searchable fields: Employee Name Date Location Department Receipt Number Payment Type Check Number Document Type Instrument Number		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B013	[REQUIREMENT] System MUST have ability to assign work items to staff with the ability for the Supervisor, Assistant Manager, and Manager to re-assign as needed		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

B014	[REQUIREMENT] System MUST have batch processing capabilities for requests input at Public Access Terminals		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
B015	[REQUIREMENT] System MUST have a searchable database for all batch activity		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
B015-A	[REQUIREMENT] System MUST minimally provide the following searchable fields: Batch Number Name of requestor Date of request/submission Date of completion		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
B016	[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		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

B017	System should have a template designer for documents		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B017-A	System should have a template designer to allow new forms to be scanned into the system and configured by the staff (<i>Ability for department to create and modify document templates as needed. Example: Rejection Letter or Form Letter</i>)		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B018	[REQUIREMENT] System MUST allow staff to accept or reject documents submitted for recording, including auto reject for e-recordings if compression and dpi do not meet standards configurable by Tarrant County		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B019	System should provide auto-search function for all drop down boxes		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B019-A	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		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
B020	[REQUIREMENT] System MUST generate rejection letters for any documents that cannot be recorded or for documents that have been recorded but subsequently voided		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

B020-A	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)		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
B020-B	<p>[REQUIREMENT] System MUST, at a minimum, have the ability to generate these 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 Assumed Names 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 		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

B021	System should allow for emailing of images. This does not apply to confidential records																										
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet																								
B022	[REQUIREMENT] System MUST create a receipt template which can be modified by authorized personnel																										
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet																								
B023	<p>[REQUIREMENT] System MUST allow Public Access Terminals to be set up at unlimited locations to allow multiple users to access and request copies of records</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u>System</u></th> <th style="text-align: left;"><u>Public Access Terminals</u></th> </tr> </thead> <tbody> <tr> <td colspan="2">Official Public Records (OPR)</td> </tr> <tr> <td>Historic Courthouse</td> <td style="text-align: right;">22</td> </tr> <tr> <td colspan="2">Vital Records (VR)</td> </tr> <tr> <td>Plaza</td> <td style="text-align: right;">2</td> </tr> <tr> <td>Northwest</td> <td style="text-align: right;">1</td> </tr> <tr> <td>Southwest</td> <td style="text-align: right;">1</td> </tr> <tr> <td>Northeast</td> <td style="text-align: right;">1</td> </tr> <tr> <td>Southeast</td> <td style="text-align: right;">2</td> </tr> <tr> <td>Charles Griffin (Miller)</td> <td style="text-align: right;">1</td> </tr> <tr> <td>Mansfield</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Southlake</td> <td style="text-align: right;">2</td> </tr> </tbody> </table>			<u>System</u>	<u>Public Access Terminals</u>	Official Public Records (OPR)		Historic Courthouse	22	Vital Records (VR)		Plaza	2	Northwest	1	Southwest	1	Northeast	1	Southeast	2	Charles Griffin (Miller)	1	Mansfield	0	Southlake	2
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Official Public Records (OPR)																											
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Southeast	2																										
Charles Griffin (Miller)	1																										
Mansfield	0																										
Southlake	2																										
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet																								
B024	[REQUIREMENT] System MUST have ability to allow bulk data requests, including via an export																										
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet																								
B025	[REQUIREMENT] System MUST track Lifetime Copy by instrument. 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.																										

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

b. 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
Fully Meets	Will fully meet by go-live with this additional cost
OPR01-A	<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 – have a drop-down list of services Option for number of trailer pages (recording pages) Capture Document type (choose from drop down of 99 document types) Capture number of pages in document

RFP FOR 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>		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR02	<p>[REQUIREMENT] System MUST have the capability to issue certified and non-certified copies of OPR Records</p>		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR03	<p>[REQUIREMENT] System MUST have ability to submit for copies of OPR records via internet, Public Access Terminal, and in-person</p>		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR04	<p>[REQUIREMENT] System MUST allow acceptance or rejection of e-recording documents</p>		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR04-A	<p>[REQUIREMENT] System MUST be able to perform the following process or functions:</p> <p>Filing or rejecting documents for OPR that are submitted electronically visible and accessible to all Intake Users -Common queue for accessing submitted document for review</p>		

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	<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 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 Zoom Darken portions of image Erosion Dilation 	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

OPR04-B	When a document in a batch is rejected all documents in that batch MUST be returned unrecorded with the following information: 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.		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
OPR04-C	System should automatically go to the next transaction but be configurable to generate a confirmation box after Acceptance or Rejection. The default setting should be to automatically go the next transaction. This should be configurable by the security of the user.		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
OPR05	[REQUIREMENT] System MUST create a barcode page for all new recordings which consists of the barcode and the new document number (system generated according to TC ruleset)		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
OPR06	System should create recording stamps for each new recording		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
OPR07	System should generate and replace voided document with a void page listing the Date, Document Number (generated by the system), and the reason		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

OPR07-A	System should have a configurable reason field with a drop down box list of common reasons for rejection.		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
OPR08	System should provide ability to reprint recording labels on demand		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
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 staff.		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
OPR10	[REQUIREMENT] System MUST auto-index all recordings (<i>At minimum: Grantor, Grantee, Legal Description, and Document Type</i>)		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
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 appropriate permissions. (<i>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)</i>)		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
OPR11-A	[REQUIREMENT] System MUST auto-scan documents and highlight keywords that are identified as containing sensitive data when scanned into the system in order to combine verification and redaction in one step		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

OPR11-B	[REQUIREMENT] System MUST allow staff to manually unselect fields highlighted for redaction by the system on a document	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR11-C	[REQUIREMENT] System MUST have a button to click "Redact All" for the remaining highlighted fields on a document	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR11-D	<p>[REQUIREMENT] System MUST identify the following items to be highlighted for redaction in different colors:</p> <p>Items highlighted in YELLOW by the system – these require attention – if no action taken these items will NOT be redacted.</p> <p>Items highlighted in RED – require attention – if no action taken these WILL be redacted by the system</p>	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR11-E	[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	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR12	[REQUIREMENT] System MUST provide Optical Character Recognition	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

OPR13	[REQUIREMENT] System MUST auto-attach the County Clerk stamp to all e-recorded documents scanned in.		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
OPR13-A	[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		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
OPR14	[REQUIREMENT] System MUST allow users to produce real time workload and productivity reports AND dashboards by user role, minimally including reports and metrics on e-recordings, indexing, image review, and image verification.		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
OPR15	[REQUIREMENT] System MUST allow batches to be broken out by instrument number and assigned by instrument numbers to staff		
Fully Meets	Will fully meet by go-live with this additional cost		Does not meet
OPR15-A	[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. The purpose of this requirement is to balance workload which will be determined by the manager. Example: Batch 123456 Instrument 1-10 assigned to Staff #1 75% complete Instrument 11-21 assigned to Staff #2 85% complete Instrument 22-32 assigned to Staff #3 95% complete etc.		

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	System will also break out by document type or actual Instrument Number		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
OPR16	[REQUIREMENT] System MUST add “Document Type” and “Assigned To” to index queue and make both of these additional columns sortable ascending or descending		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
OPR17	[REQUIREMENT] System MUST have ability to track historical reference numbers		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
OPR17-A	[REQUIREMENT] For existing documents recorded prior to computerized numbering – system MUST track by book volume and page		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
OPR18	System should have ability to e-record with other government agencies. Other government agencies are defined as State and City Agencies – including but not limited to: Office of Attorney General, Municipalities, County Offices such as Child Protective Services, etc. Additionally, the system should auto reject for e-recordings if compression and dpi do not meet standards configurable by Tarrant County		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

OPR19	System MUST have the ability to track and distinguish between e-recorded and regular record document totals both separately and combined	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR20	System MUST support dual monitor configurations with the ability to segregate document image display to a separate monitor	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR21	System MUST allow for a customized user defined field for GIS integration, e.g. A free form textbox for a unique identifier	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR22	System should be able to set an automatic import/export to agencies, i.e. appraisal district, cattle associations, etc.	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR23	System MUST have a means of verification of eCertifications	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR24	System MUST be able to apply an electronic certification stamp on documents	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR25	System should have driver's license swipe capability	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

OPR26	System should auto-fill information from driver's license swipe	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR27	System MUST be configurable to force user to view each page during the Recording and Indexing process	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR28	System should have ability to auto replace documents with formatted document on voids	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR29	System MUST support multi-tiff images. Multipage TIFF will be required for new records entered, single-page TIFF files are not desired.	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR30	System MUST support a single sign on using the Tarrant County network	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

OPR31	System should have ability to attach non-public notes to a recording for other authorized users to review.	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR32	System MUST skip documents in the redaction queue based on document types	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
OPR33	Recording stamp for new recordings should be able to be applied electronically on all recorded document; regular and eRecorded filings	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VI. SECTION II – VITAL RECORDS

A. Background:

1. The Vital Records Division of the County Clerk's office is the registrar of birth and death records for 32 cities and eight precincts in Tarrant County.
2. Vitals Records staffing:
 - a. 27 total staff, 1 manager, and 1 supervisor
 - b. 5 days a week, Monday-Friday, 8:00 am – 5:00 pm Central Standard Time excluding County holidays
 - c. 8 geographic locations, serving 42 cities and precincts.
3. List of locations:
 - a. Tarrant County Plaza Building – main office
 - b. Mansfield
 - c. Arlington
 - d. Miller
 - e. Northeast
 - f. Southlake
 - g. Northwest
 - h. Southwest
4. Volume:

Type of Recording	2017	2016	2015	2014
Assumed Names	16,286	16,875	17,821	17,563
Births Filed	21,042	20,443	20,535	19,990
Birth Copies	43,253	54,793	52,516	47,815
Deaths Filed	10,553	9,885	9,562	9,018
Death Copies	3,280	9,978	10,414	10,473
Marriages Filed	16,926	15,896	14,384	13,335
Marriages Copied	9,002	13,367	12,535	12,435
Military Discharges Filed	200	120	163	141
Military Discharges Copied	192	426	539	388

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

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.
 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.
- 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
- C. Business Rules for Vital Records:
1. All applications made using online or Public Access Terminal MUST expire after 60 days and delete from the system if requestor has not come to a location to complete the processing.
 2. The system must Auto calculate dates and restrict access for the following items based on the filing date:
 - 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 Must automatically expire 10 years from the date of filing and be removed from public access after an additional 2 years.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

D. 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		
VG01	[REQUIREMENT] System MUST provide a searchable database with varying degrees of access based on role (E.g. Clerk, Supervisor, Manager)		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG01-A	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 County of occurrence Sex of registrant		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VG01-B	<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>	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG01-C	<p>System MUST minimally provide the following fields for Marriage:</p> <p>Party Name (First, Middle, Last)</p> <p>Name Type (e.g. 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>	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VG01-D	<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>	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG01-E	<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>	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG01-F	<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>	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	Instrument Number Book Page Document Type Legal Description Fields: Addition – multi select option City – multi select option Lot Block Plat Cabinet Plat Slide Freeform Text Generic searchable user defined field – in order to link to Tarrant Appraisal District Records using a common primary key	
	.	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG02	System should provide users configurable Program Function or Hot Keys to allow system navigation	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG03	[REQUIREMENT] System MUST be able to scan documents to various formats and attach them to records with the ability to mark some as confidential	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG04	[REQUIREMENT] System MUST allow users to set up work flows for document management, status tracking and auditing	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VG05	[REQUIREMENT] System MUST have ability for Bulk Scan		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
VG06	[REQUIREMENT] System MUST have an online user interface to allow public to request certified and non-certified copies of records		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
VG07	[REQUIREMENT] System MUST generate unique numbers for documents issued		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
VG07-A	System MUST generate numbers with the following parameters:		
	<p>Birth = 060000000018 (LR + 8 digits + YR)</p> <p>Death = 060000000018 (LR + 8 digits + YR)</p> <p>Fetal Death = 0600000000FYR (YR = 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 18 must change automatically with the start of each new year. The zeros represent an 8-digit required for TxEVER</p>		

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG08	System should have ability to scan multiple records at once and remain in a queue until reviewed and approved		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG09	[REQUIREMENT] System MUST have a secure online web portal to allow users to apply for records		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG09-A	Applications MUST be queued and processed when the customer comes to the office in person to complete the request		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG10	[REQUIREMENT] System MUST have an integrated module that will process payments of fees for record requests		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG10-A	Module MUST accept payments and break down the payments into the fees payable to the various agencies. (see Appendix B)		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG11	System should have capability to support search and retrieval of all non-restricted records from the internet		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG12	[REQUIREMENT] System MUST allow public access users to view, print, and purchase non-certified copies of non-restricted records		

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG13	[REQUIREMENT] System MUST have a searchable database of all transactions		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG13-A	System MUST minimally provide the following fields to search by: Employee Name Date Location Department Security paper number Receipt Number Payment Type Check Number Document Type Instrument Number		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG15	System should have batch processing capabilities for requests input at Public Access Terminals		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG16	[REQUIREMENT] System MUST have a searchable database for all batch activity		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VG16-A	System MUST minimally provide the following fields to search by: Batch Number Name of requestor Date of completion		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG17	[REQUIREMENT] All requests made using online or Public Access Terminal MUST auto-purge on a time configurable by Tarrant County if requestor has not come to a location to complete the processing		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG18	System should have a template designer for documents		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG18-A	System should have a template designer to allow new forms to be scanned into the system and configured by the staff		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG20	System should provide auto-search function for all drop down boxes		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG20-A	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		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VG21	System should generate Rejection letters for any documents that cannot be recorded or for documents that have been recorded but subsequently voided		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG21-A	Staff should have ability to search and select from a list of reasons by using a checkbox or drop down to fill in the rejection reason. (See Appendix B-VR for Example)		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG21-B	<p>Must include these types 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 Assumed Names 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 <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</p>		

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	that list. <i>(Possible values are returned as each letter is typed in by the user.)</i>	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG22	System should allow for emailing of images. Does not apply to confidential records	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG23	[REQUIREMENT] System MUST create a receipt template which can be modified by authorized personnel	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG24	[REQUIREMENT] Public Access Terminals MUST be set up at all County Clerk Vital Records office 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	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG25	[REQUIREMENT] System MUST have ability to allow bulk data requests	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG26	[REQUIREMENT] System MUST track lifetime counts of certified copies by instrument: Birth, Death, Fetal Death, Marriage, Military Discharge, and Assumed Names	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VG27	[REQUIREMENT] System MUST have ability to restrict public access to records of Law Enforcement personnel	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

VG28	[REQUIREMENT] System MUST automatically notify businesses when assumed name is about to expire using email address
------	--

Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

VG29	[REQUIREMENT] System MUST after 10 years no longer display Assumed names in public access, they expire after 10 years
------	---

Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

b. Functional Specifications for Vital Records:

Spec. #	Functional Specification Description	
VR01	[REQUIREMENT] System MUST track and audit security paper; including by Vitals Records Office locations	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VR01-A	[REQUIREMENT] System should 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	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VR01-B	[REQUIREMENT] System MUST have a searchable database that minimally contains the following fields for security paper: Employee ID Date/Time	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	Location Instrument Number Vital Check Number State Number Receipt Number	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
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 (<i>Security paper from Bank Note Corporation of America per contract with Department of State Health Services – Vital Statistics Unit DSHS-VSU</i>)	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VR02-A	[REQUIREMENT] Receipt MUST minimally have the following fields: Certificate Paper Number, Vital Check Number, and Receipt Number	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VR03	[REQUIREMENT] System MUST have ability to import records (image and index) from the TxEVER system, including adding the 2-digit year generated by TxEVER to the end of the instrument. The number must restart or rollover per TxEVER specifications at the beginning of each calendar year	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VR04	[REQUIREMENT] System MUST connect all issued security paper to a receipt for auditing	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VR04-A	[REQUIREMENT] System MUST be able to track all security paper issued to a receipt for auditing	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
VR04-B	[REQUIREMENT] System MUST provide ability to print out listings of certificate paper to the associated receipt.	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

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
Fully Meets	Will fully meet by go-live with this additional cost
BD01-A	<p>[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”.</p> <p>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.</p> <p style="margin-left: 40px;"><u>Birth</u> Name of child Date of birth City of birth Mother’s maiden name Mother’s current name Father’s name (if known)</p> <p style="margin-left: 40px;"><u>Death or Fetal Death</u> Name</p>

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	<p>Date of death Date of birth City of birth State of birth City of death State of death Current address Age</p> <p>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.</p>						
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Fully Meets</td> <td style="width: 40%;">Will fully meet by go-live with this additional cost</td> <td style="width: 30%;">Does not meet</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet			
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet					
BD02	<p>[REQUIREMENT] System MUST have the ability to issue certified copies of birth records</p>						
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Fully Meets</td> <td style="width: 40%;">Will fully meet by go-live with this additional cost</td> <td style="width: 30%;">Does not meet</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet			
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet					
BD02-A	<p>[REQUIREMENT] System MUST be able to load and print certified copies of birth, death, and fetal death records on State authorized security paper.</p>						
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Fully Meets</td> <td style="width: 40%;">Will fully meet by go-live with this additional cost</td> <td style="width: 30%;">Does not meet</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet			
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet					
BD03	<p>[REQUIREMENT] System MUST provide ability to submit birth, death, and fetal death applications for copies via internet, Public Access Terminal or in person</p>						
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Fully Meets</td> <td style="width: 40%;">Will fully meet by go-live with this additional cost</td> <td style="width: 30%;">Does not meet</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet			
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet					
BD04	<p>System should have capability to scan multiple documents at once and remain in the queue until reviewed and approved</p>						
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Fully Meets</td> <td style="width: 40%;">Will fully meet by go-live with this additional cost</td> <td style="width: 30%;">Does not meet</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet			
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet					

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

BD05	[REQUIREMENT] System MUST provide ability to enter numbers manually to file a record manually when the State of Texas requires it		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
BD06	[REQUIREMENT] MUST have the ability to publish Birth and Death Index Information		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

d. Functional Specifications for Marriage Records:

Spec. #	Functional Specification Description		
M001	[REQUIREMENT] System MUST be able to submit applications for marriage, assumed names, etc... via internet, Public Access Terminal, or in person		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
M001-A	[REQUIREMENT] Applications MUST be queued and processed when the customer comes to the office in person to complete the request		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

M002	[REQUIREMENT] System MUST be able to record, scan, verify, index, and issue marriage records		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
M003	[REQUIREMENT] System MUST be able to recognize premarital education classes and adjust fees automatically		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
M004	[REQUIREMENT] System MUST auto-calculate ages of marriage license applicants and flag if under 18 and provide options to continue		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
M004-A	[REQUIREMENT] System MUST auto-calculate ages of marital license requestors and flag anyone under the age of 18 and provide options to continue		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
M004-B	[REQUIREMENT] 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		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
M004-C	[REQUIREMENT] System MUST allow all supporting documentation to be viewed by the staff and not made public		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
M004-D	[REQUIREMENT] System MUST provide ability to mark licenses as "Returned"		

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
MD05	[REQUIREMENT] System MUST have ability to distinguish between formal and informal marriages		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

e. Requirements Exclusive to Assumed Names:

Req. #	Business Requirement Description		
AN01	[REQUIREMENT] System MUST have the capability to record, scan, verify and index copies of assumed names records		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AN02	[REQUIREMENT] System MUST have the capability to file mark assumed name records when scanned (<i>file mark is a Date/Time stamp including the County Clerk's Name and Title</i>)		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AN03	[REQUIREMENT] System MUST have the capability to allow duplication of application data for multiple filings at one time		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AN04	[REQUIREMENT] System MUST have the capability to set expiration dates for assumed name records		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AN05	[REQUIREMENT] System MUST have the capability to purge expired assumed names records		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

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		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

- f. 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 certified and non-certified copies of records		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AF02	[REQUIREMENT] System MUST have ability to print receipts, including a QR Code configurable by Tarrant County		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AF02-A	Type of Documents Number of Pages – Count of all records issued Quantity Reference Number Amount A Payments Heading with the following underneath: Type of Payment Payment Number – auto generated by system Amount Total Payments		

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

	A configurable Salutation to be located bottom center of the receipt	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
AF03	[REQUIREMENT] System MUST accept payment in a variety of forms including: cash, check, credit card, debit card, escrow, and voucher	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
AF04	[REQUIREMENT] System MUST integrate to nCourt electronic payment processor.	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
AF05	[REQUIREMENT] System MUST have a Transaction Type field in the receipt which allows identified staff to modify the list of values	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
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 AND restrict payment type by transaction (i.e. no checks allowed for marriage licenses)	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
AF07	[REQUIREMENT] System MUST create a receipt Template which can be modified	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
AF08	[REQUIREMENT] System MUST break out payments to show where the fees belong. Please see Appendix A – Official Public Records Fee Breakdown and Appendix B – Vital Records Fee Breakdown	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
AF08-A	<p>[REQUIREMENT] System MUST minimally contain 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> <p>Print Receipt</p> <p>Change Option –Refund-Surplus-with address box for refunds if there is an overage</p> <p>Comments</p>	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
AF08-B	<p>System MUST not proceed if funds do not match entries(Shortage, overage, no fee reason, address for refund)</p> <p>and Receipts and Recording pages Must print after completion of Payment Collection.</p>	
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

AF09	[REQUIREMENT] System MUST allow voiding of receipts		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AF10	[REQUIREMENT] System MUST have a searchable database for receipts		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AF10-A	[REQUIREMENT] System MUST minimally contain the following searchable receipts fields for OPR: Date Received From Date Received To Receipt Number User Department Workstation Location Customer Payment Method Payment ID Amount Document Number From Document Number To Transaction Type Module		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

AF10-B	<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> <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>		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AF11	<p>[REQUIREMENT] System MUST allow receipts to be adjusted</p>		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

AF11-A	[REQUIREMENT] Fields MUST auto-populate with default settings but will allow each field to be adjusted by staff		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AF12	[REQUIREMENT] System MUST provide users with ability to click on receipt number in reports and be taken directly to the receipt for review		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
AF13	[REQUIREMENT] System MUST be able to print and reprint receipts on demand		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

3. Non-functional Specifications:

Spec. #	Non-functional Specification Description		
NFN01	[REQUIREMENT] Public Access web portal MUST be accessible on the public internet and be browser agnostic		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
NFN02	[REQUIREMENT] System MUST be available 24/7/365 for public access with exception for maintenance windows; vendor must provide customer support		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
NFN03	[REQUIREMENT] All images MUST be scanned in portrait mode		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

NFN04	[REQUIREMENT] Document Images MUST be captured as multi-page Group IV TIFF Images		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
NFN05	[REQUIREMENT] All images MUST capture signatures and notary seals		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
NFN06	[REQUIREMENT] Document font size and page format MUST meet PRIA (Property Records Industry Association) minimum standards		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
NFN07	[REQUIREMENT] System MUST work with any Tarrant County hardware. 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.		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
NFN08	[REQUIREMENT] System MUST comply with Tarrant County Electronic Communication Systems Policy (Please see Appendix C Electronic Communication Systems Policy)		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet
NFN09	[REQUIREMENT] System MUST have a distinguishable Test and Production environment		
	Fully Meets	Will fully meet by go-live with this additional cost	Does not meet

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

NFN10	[REQUIREMENT] System MUST have ability to add gender-neutral birth certificate language		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	
NFN11	<p>[REQUIREMENT] 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> <p>County of occurrence</p> <p>Sex of registrant</p> <p>Marital status of registrant</p> <p>Name of registrant's spouse (if applicable)</p> <p>Flag for unidentified deaths so they can be made public after 1 year from death</p> <p>Identify death records over 25 years old they can be made public</p>		
Fully Meets	Will fully meet by go-live with this additional cost	Does not meet	

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VII. SECTION III – DATA CONVERSION AND MIGRATION

- A. The County Clerk's Office desires to consolidate and centralize all Vitals and Official Public Records from several disparate sources into one repository via the new Records Management Systems. Having all records in a single enterprise system provides many advantages, efficiencies, and operational benefits. Currently, candidate records (and index information) for migration and conversion exist in the following data stores/systems:
- Aumentum (primary RMS)
 - PaperFlow/PaperVision
 - OnBase (index books)
 - Super Search (Conduit)
 - Flash Drives
- B. As part of the records consolidation, the vendor is expected to help identify duplicate records and only convert the best quality records/image(s) when multiple copies exist based on business rules provided by County Clerk staff.
- C. Prospective vendors should include in their proposal an on-site engagement with the Vitals Division and Official Public Records Division to perform discovery and assessment. The vendor is expected to perform the actual conversion and migration of data/records into the new Records Management System with minimal involvement of Tarrant County staff. The County Clerk's Office will provide guidance and be available to answer inquiries regarding the records and business processes. The County Clerk's Office will provide subject matter experts to work collaboratively with vendor staff on the conversion planning. The vendor can be provided copies of all data/records as part of the conversion effort. All records and data remain the sole property of the Tarrant County Clerk's Office and shall not be disseminated or provided to any third parties without the expressed written consent of the Chief Deputy of the County Clerk's Office. Any copies of data/records used to facilitate the conversion will be disposed of and removed from the Vendor's equipment at the conclusion of the project. The vendor will adhere to all County policies regarding the County Clerk's records and data.
- D. The prospective vendor is expected to have the knowledge, skills, experience, and tools to consolidate records from disparate data sources into their proposed record management system including the existing primary records management system, Aumentum. Additionally, the vendor should be flexible to work with County Clerk staff with the understanding that ambiguity exists. For the final data migration and conversion, the vendor will provide a detailed assessment of the disparate systems and a conversion plan with recommendations to effectively proceed with the conversion into the new records management system. County Clerk staff will have the final decision-making authority on the data migration strategy. Once the plan is agreed and finalized, the vendor will perform as many iterations as required (multiple, if necessary) to achieve accuracy and quality deemed acceptable based on tolerances identified by staff. Any proposed manual conversion activities of

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

records/data on the part of County Clerk staff will be kept to a minimum (< 1% of the total records for any given data set). The vendor should ensure 100% conversion of records into a single records management system with the exception of any duplicates that can be omitted.

Notes about OPR records/data:

1. Volumes of varying document types were combined into one volume starting in April 1979.
2. There are No Judgments digitally Indexed before 1970
3. The first OPR Volume in Aumentum is 1628 from 3/7/1944.
4. Bill of Sale Volumes 21-42 are in Aumentum. 42 is last volume.
5. Deed of Trust volumes 552-1996 page 282. Volume ends on 520. Volumes 1996 through Volume 2211 are in Papervision. Volume 2211 page 143 through volume 2645 are in Aumentum . Volumes 2646 through 3205 are in Papervision.
6. Mechanic Liens 131 through volume 509. 510 through volume 544 page 54 are in Papervision. Volumes 544 starting page 55 through volume 648 are in Aumentum. Volumes 649-668 are in Papervision.
7. Plats 388-A is first Plat exclusive volume recorded 6/29/1933. There are some plats in Aumentum that were included in the Early Deed Volumes. The first is_D142002728 from volume 1540 page 72 from 10/14/1942. 388-47 (labeled 47) page 989 is first plat specific appearance in Aumentum.
8. Lien Volumes 4-14 are in Aumentum.
9. Lien Volumes 15-21 are in Papervision
10. Lien Volume 21 page 285 starts in 1970. Volumes 22 through the end of 45 are in Aumentum.
11. Lis Pendens volumes 7 through conclusion of volume 15 are in Aumentum
12. Power of Attorney volumes 12-27 are in Aumentum. Volume 28 is in Papervision. Volume 28 starts page 103. Volumes 29 through the conclusion of volume 44 are in Aumentum
13. The last OPR Volume in Aumentum is 4360 from 2/13/1967.
14. After 1967-1969 gap, the first volume of OPR in Aumentum in 1970 is 4824 on 1/5/1970. 5758 is the last volume of OPR with Images on 1/3/1978. After 1975-1984 gap, 7965 is the first volume of OPR with Images on 10/1/1984.
15. The last OPR volume in Papervision is 9886 from 4/3/1990. The last volume of OPR is 17451. Volume structure is removed after that

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

E. The summary below outlines the existing known artifacts of the disparate systems.

Aumentum (primary RMS)

The primary Records Management System. This system contains records from 1985 through the present. It contains known duplicate records from PaperVision that were copied over.

This space used by all images that are stored with the RMS System as of 12/17/2018

RECORDS	TOTAL
ASSUMED NAMES	267,514
BIRTH	803,254
DEATH	395,201
MILITARY DISCHARGE	21,296
MARRIAGE	712,445
REAL ESTATE REJECTED SCANS	161
OFFICIAL PUBLIC RECORDS	14,384,731
DAILY REVENUE BALANCING	21,417
DAILY MAIL (VITALS)	72,017
UCC	151,171
TOTAL	16,829,207

IMAGES	TOTAL
ASSUMED NAMES	283,724
BIRTH	684,772
DEATH	248,307
MILITARY DISCHARGE	2,976
MARRIAGE	1,147,931
MISC REJECTIONS	159
OFFICIAL PUBLIC RECORDS	20,371,186
DAILY REVENUE BALANCING	
DAILY MAIL (VITALS)	59,753
UCC	8,762
TOTAL	22,739,055

Average image size 200 kb.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Total size of existing database is 483.5 GB. This includes Official Public Records and Vital Records.

OPR Totals Grouped by Years	
YEAR	TOTAL RECORDS
NULL	4
1900	17
1910	4
1911	7
1913	3
1914	2
1918	7
1919	104
1921	2
1922	1
1926	1
1927	1
1928	349
1929	1,495
1930	1,091
1931	529
1932	110
1933	53
1934	36
1935	96
1936	629
1937	529
1938	453
1939	650
1940	1,200
1941	1,631
1942	7,758
1943	30,322
1944	32,056
1945	37,387
1946	55,231
1947	54,732
1948	50,650
1949	51,068
1950	62,739
1951	61,927
1952	70,377

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

1953	75,589
1954	76,974
1955	84,775
1956	78,322
1957	71,793
1958	77,916
1959	88,849
1960	78,544
1961	80,271
1962	78,377
1963	82,215
1964	88,869
1965	96,979
1966	87,604
1967	9,393
1968	463
1969	400
1970	90,887
1971	114,955
1972	124,964
1973	121,312
1974	108,975
1975	112,224
1976	128,644
1977	151,993
1978	165,025
1979	166,539
1980	153,405
1981	141,353
1982	148,877
1983	208,132
1984	236,351
1985	252,971
1986	271,551
1987	266,450
1988	228,598
1989	214,209
1990	213,696
1991	223,658
1992	254,452
1993	286,815

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

1994	276,681
1995	239,072
1996	253,672
1997	240,463
1998	306,612
1999	319,702
2000	290,042
2001	323,000
2002	375,667
2003	476,875
2004	401,934
2005	389,720
2006	412,440
2007	461,538
2008	470,261
2009	339,108
2010	323,655
2011	315,557
2012	320,139
2013	326,467
2014	282,874
2015	291,839
2016	305,678
2017	300,193
2018	274,964

PaperFlow/PaperVision

OPR Records in PaperVision requiring conversion. The County Clerk's Office maintains a large archive of pre-1970 documents and images in its PaperVision version R79 system provided by Digitech. *(Note: large deed documents are more recent).* These documents are currently indexed by Volume and Page. And, a subset is known to be stored in duplication in the existing RMS. This system contains records prior to 1985.

Activities:

Assess 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 November 30, 2018):

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

OPR records in PaperVision			
	<u>Storage Size (Mb)</u>	<u>Total Documents</u>	<u>Total Images</u>
Adoption Index to Deeds	41.85	720	720
Bill of Sale	2623.25	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	1705.54	13972	24441
EARLY DEED RECORDS	1834158.57	8498422	8510882
Exhibit Files	338.57	973	2897
GRANTEE INDEX TO DEEDS	36638.21	79114	79114
GRANTOR INDEX TO DEEDS	35779.76	84216	84219
INDEX TO MECH AND FURNISHERS LIENS	3689.91	8623	8623
Judgments	10666.7	172741	173070
Laborers Lien Records	1729.98	16109	16109
LARGE DEED DOCUMENTS	8049.31	50	58502
Lis Pendens Record	1110.23	5915	5915
Mechanics Lien Record	245783.82	481769	481825
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	35785.63	56044	75713
POLYGRAPH REGISTER RECORD	14.68	133	191
Power of Attorney	7688.95	35700	35702
WET DRY ELECTION BOOK	27.92	100	378
	2,835,814.32	11,978,335	12,213,553

Vitals Records stored in PaperVision requiring conversion. 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.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

Activities:

Assess 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 November 30, 2018):

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	13977.61	110189	178592
CLOSED Military Discharge	9.43	55	108
	28,887.2	186,711	265,507

OnBase

Index books. OnBase contains scanned images of the index books for OPR and Vital records. These will be necessary if the vendor cannot derive the index information from the Aumentum system for a potential conversion/migration.

Super Search (Conduit)

Super Search contains the most accurate matching of indexes to records and may be a useful source to generate higher quality matches.

Record/Image requirements:

- A. **[REQUIREMENT]** All data images **MUST** be in 200 DPI resolution or better.
- B. **[REQUIREMENT]** All PLATS **MUST** be in 300 DPI resolution or better.
- C. System should be compatible with Microsoft SQL Server 2016.
- D. **[REQUIREMENT]** All images **MUST** be in TIFF format for OPR records.
- E. System **MUST** not store images in the database
- F. System **MUST** have Active Directory Authentication.
- G. If Tarrant County hosts SQL Server Reporting Services the system **MUST** support folders on the Tarrant County SQL Reporting Servers.
- H. Current max length of page file field is set to varchar (200).

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

VIII. REPORTING AND ANALYTICS MUST ACCOMMODATE THE FOLLOWING:

- 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.
- 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.

IX. INTEGRATION:

- A. System **MUST** include the ability to integrate with nCourt for payment processing. For further information regarding the *nCourt Direct API* please contact nCourt representative, Adam Wilkins, email is: awilkins@ncourt.com.

X. SYSTEM ADMINISTRATION:

- A. System **MUST** provide access granted based on role: Clerk, Supervisor, Assistant Manager, Manager, and IT Support Personnel.
- B. System **MUST** allow, at a minimum, 100 users that can use the system concurrently. It is a combination of all departments that use the current system.
- C. System **MUST** have the capability to segregate records and restrict access to specific records and/or record types.
- D. System **MUST** provide the ability to audit and view activity of users logged into the system and the device being used at any given time.
- E. System **MUST** allow 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 1,000 point scale.
- B. Records Management System:

Attribute	Points
Specifications	500
Vendor Qualifications	100
Vendor References	100
Customer Service	100
Price	200
Total	1,000

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

C. 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

D. Respondent Customer Service and Support:

1. Included in the response, each vendor **MUST** include the following regarding their customer service and support:
 - a. List of customers supported in 2017 and 2018.
 - b. Number of staff available to answer Tarrant County inquiries between the hours of 8:00 am to 5:00 pm Central Standard time? Will support staff be dedicated to Tarrant County? How many?
 - c. Explain who provides support to Public access site users. Provide contact methods available and hours of availability.
 - d. Please provide a visual of the issue initiation and escalation process.
 - e. Please provide a visual of the organizational structure of the support team.
 - f. How many support resources will be on-site during implementation and through the duration of the go-live?
 - g. Support hours, standard service level agreement.
 - h. Please identify sources of knowledge management available to customers.
 - i. Please describe your account management program. Will a dedicated account manager be assigned to Tarrant County?
 - j. Please provide a list of the top five (5) issues that required customers to contact the support group for assistance.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

E. Implementation:

1. Please provide a description on the following items where applicable:
 - a. Implementation approach to meet our goals
 - b. Describe specific tools and methodologies that you offer that facilitate the design, implementation and on-going maintenance of your product. (e.g., configuration and change controls; design and implementation work breakdown structure and methodology; templates and accelerators, etc.)
 - c. Please describe your implementation services, including program management, site configuration, deployment options, and test/go live process for the proposed software solution.
 - d. Proposed Project Team composition and Team location
 - e. Please provide your current headcount of certified solution implementation consultants for the proposed software solution.
 - f. Provide a proposed schedule with key activities, deliverables and milestones
 - g. Describe key assumptions and risks
 - h. Implementation approach regarding configuration, development, Data conversion/migration, integrations and reports
 - i. Vendor and Customer (County) responsibilities (could be a RACI matrix)
 - j. Describe Training and Knowledge transfer approach
 - k. Describe your change management approach
 - l. Quality Assurance approach
 - m. Completion Criteria
 - n. Team and Technical requirements for implementation
 - o. Infrastructure required
 - p. Software / Licenses required
 - q. County resource requirements: Technical and Non-Technical (Subject Matter Experts or SME's)
 - r. Any other requirements from your side (e.g. facilities)

F. Support and Maintenance

1. Please describe the following where applicable:
 - a. Please describe the extent of resources and capabilities contained in the external market to support the proposed software solution (e.g. Number of certified consultants, system integrator partnerships, etc.).

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

- b. Please describe your account management and service model. (e.g., Dedicated account rep? Broken down by industry/sector vs. by geography, etc.)
- c. Do you have Standard SLA's (please provide a copy of one) to ensure uptime and adequate system response times. What escalation procedures are in place to overcome speed and availability issues?
- d. What is the Uptime Service Level Agreement (SLA) and current average?
- e. Please provide comments about the RPO (recovery point objective), RTO (recovery time objective), DR (Disaster Recovery) procedures and plans, and where your DR site is located.
- f. Please provide the standard support/maintenance policy (attach if necessary), including incident response procedures and plans.
- g. Describe the extent of your application maintenance?
- h. How are upgrades distributed? Is there a difference in how they are distributed between the Public, Private cloud and on-premise solutions?
- i. Please describe your support offerings. Is it provided by staff or a third party?
- j. Is 24/7 support available?
- k. Is there a regularly scheduled support status call available? (e.g., incident report status). If not, how is this handled?
- l. Please describe the procedure to request/execute refreshes for non-production environments and specify impact on "uptime" for refresh activities.

G. 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.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

H. Award:

1. The award of the contract shall be made to the responsible Respondent 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. Additionally, provide an electronic copy in a locked, read only version, in PDF format on a USB flash drive. The electronic copy must exactly match the printed response. In the event of a discrepancy, the printed response will prevail. 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

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

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, i.e...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.

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.

RFP FOR RECORD MANAGEMENT SYSTEM (RMS)

XV. CONTRACT NEGOTIATION:

- A. The Tarrant County Purchasing Department may conduct contract negotiations along with representatives from ITD and County Clerk's Office.
- 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 does recognize other agencies' certifications. 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 bid notifications 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 Tarrant County 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 meeting specifications as required by law. This policy is narrowly tailored in accordance with applicable law.

IV. ADMINISTRATIVE GUIDELINES

- A. The Tarrant County 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)
Amended: Court Order 127875 (June 19, 2018)

RFP FOR RECORD MANAGEMENT SYSTEM

FOR DISADVANTAGED BUSINESS ENTERPRISES ONLY

Disadvantaged Business Enterprises (DBE) are encouraged to participate in Tarrant County's Proposal process. The Tarrant County 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.

Tarrant 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, Texas 78711-3047
(512) 463-5872

OR

North Central Texas
Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, Texas 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 RECORD MANAGEMENT SYSTEM

REFERENCES

Please list three (3) references, **other than past or present employees of Tarrant County**, who can verify your performance as a Vendor. Performance includes but is not 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. Tarrant County **PREFERS** references to be from Government customers. References must be able to verify the quality of service Respondent's company provides and that the Respondent has completed a project of similar size and scope of work in this solicitation. 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 its designee will conduct reference checks. Any deviation to this will result in rejection of your response.

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: _____

REFERENCES MUST BE RETURNED WITH PROPOSAL!

RFP FOR RECORD MANAGEMENT SYSTEM

REFERENCES

REFERENCE THREE

GOVERNMENT/COMPANY NAME: _____

ADDRESS: _____

CONTACT PERSON AND TITLE: _____

TELEPHONE NUMBER: _____

E-MAIL ADDRESS: _____

SCOPE OF WORK: _____

CONTRACT PERIOD: _____

REFERENCES 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 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, to furnish all materials and services upon which price(s) are offered, at the price(s) and upon the terms and conditions contained in the Specifications. The period for acceptance of this 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 this Proposal.

Respondent hereby assigns to Tarrant County 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 do understand the specifications and any attachments contained in this solicitation. **Failure to sign and return this form will result in the rejection of the entire Proposal.**

Signature _____ X

Authorized Representative

LEGAL 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 FIVE (5) COPIES MUST BE RETURNED WITH PROPOSAL!



Did you sign and submit all
required forms?

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

RFP FOR RECORD MANAGEMENT SYSTEM

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: _____

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 this contract for default.

RELATING TO STATE CONTRACTS WITH AND INVESTMENTS IN COMPANIES THAT BOYCOTT ISRAEL AND INVESTMENTS IN COMPANIES THAT DO BUSINESS WITH IRAN, SUDAN, OR ANY OTHER FOREIGN TERRORIST ORGANIZATIONS.

Effective September 1, 2017, Respondent verifies that they do 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. Respondent further verifies that they are not engaged in business with Iran, Sudan, or any foreign terrorist organization. The term "foreign terrorist organization" means an organization designated as a foreign terrorist organization by the United States Secretary of State as authorized by 8 U.S.C. Section 1189.

DISCLOSURE OF INTERESTED PARTIES

The law states that a governmental entity may not enter into certain contracts with a non-exempt business entity unless the business entity submits a disclosure of interested parties to the governmental entity. By submitting a Bid 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.

Signature _____ X

THIS FORM MUST BE SIGNED.

THE ORIGINAL WITH ORIGINAL SIGNATURE AND FIVE (5) COPIES MUST BE RETURNED WITH PROPOSAL.

NO-BID RESPONSE

In the event that your organization chooses not to submit a bid/proposal for this solicitation, the Tarrant County Purchasing Department is interested in the reasons why vendors have chosen not to submit bids/proposals in order to better serve the taxpayers of Tarrant County. Please indicate your reason(s) by checking all applicable items below and return this form to the address shown below.

- Could not meet specifications.
- Items or materials requested not manufactured by us or not available to our company.
- Insurance requirements too restricting.
- Bond requirements too restricting.
- Scope of services not clearly understood or applicable (too vague, too rigid, etc.)
- Project not suited to our organization.
- Quantities too small.
- Insufficient time allowed for preparation of bid/proposal.
- Other (please specify).

Vendor Name: _____

Contact Person: _____

Telephone: _____

Email: _____

Please send your response to:
Tarrant County Purchasing Department
100 E. Weatherford, Suite 303
Fort Worth, TX 76196-0104

RFP FOR RECORD MANAGEMENT SYSTEM

PRICE FORM

Software/System Proposed: _____

1.	Software License	Price Per License/Year	Extended Price
a.	_____	\$ _____	\$ _____
b.	_____	\$ _____	\$ _____
c.	_____	\$ _____	\$ _____
d.	_____	\$ _____	\$ _____
TOTAL			
<i>Include any 3rd party licenses</i>			\$ _____
2.	Hardware Price (includes servers, printers, kiosks, handheld, tablets, etc.) <i>Detail all Hardware Requirements on a separate page in your Proposal.</i>		\$ _____
3.	Data Conversion Price <i>Detail all Conversion activities and component costs on a separate page in your Proposal.</i>		\$ _____
4.	Interfaces <i>Detail all interfaces on a separate page in your Proposal.</i>		\$ _____
5.	Additional costs to fully meet go-live requirements		\$ _____
6.	Training (including documentation and reference manuals) <i>Detail all training on a separate page in your Proposal.</i>		\$ _____
7.	Implementation		\$ _____

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

RFP FOR RECORD MANAGEMENT SYSTEM

PRICE FORM, continued

- 8. Maintenance**
 - Year 1 \$ _____
 - Year 2 \$ _____
 - Year 3 \$ _____
 - Year 4 \$ _____

- 9. All Other Fees** \$ _____
*Detail on a separate page in your Proposal.
Include a professional service by job description
and including hourly rate*

- 10. Sum of Prices from 1– 8 above** \$ _____

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

Please cut out and affix to the outside of your response package



**TARRANT COUNTY
SEALED BID/PROPOSAL/RESPONSE**

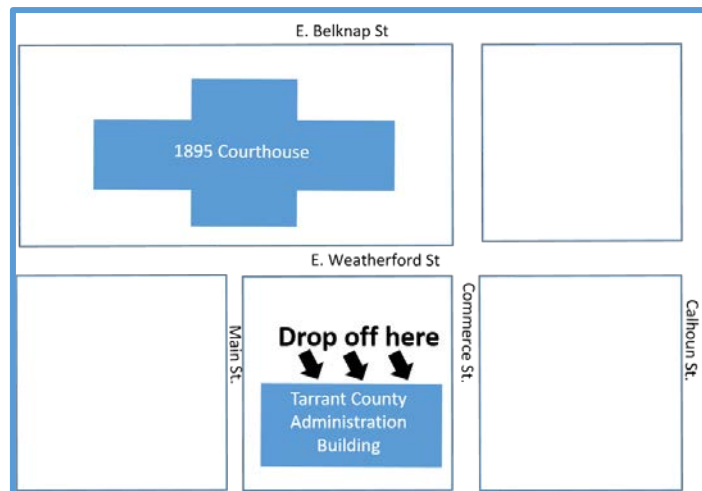
RFP No. 2019-120

Request for Proposals for Record Management System
(RMS)

Due Date: APRIL 8, 2019 at 2:00 P.M.

**Tarrant County Administration Building
ATTN: Purchasing Department
100 E. Weatherford St., Third Floor, Suite 303
Fort Worth, Texas 76196-0104**

*Street
View*



*Building
View*

