RFP #776

PROFESSIONAL, TECHNICAL AND EXPERT SERVICES

Clark County Washington

RELEASE DATE: WEDNESDAY, MARCH 11, 2020
DUE DATE: WEDNESDAY, APRIL 8, 2020 by 3:00 p.m.

Request for Proposal for:

LEGAL DOCUMENT RECORDING SYSTEM REPLACEMENT

Submit one (1) original and seven (7) complete copies of the Proposal to:

Proposals must be date and time stamped by Purchasing staff before 3:00 p.m. on due date.

Clark County
Office of Purchasing
P.O. Box 5000
1300 Franklin Street, 6th Floor, Suite 650
Vancouver, Washington 98660
564-397-2323

Refer Questions to Project Manager:

Soni Starr
Project Manager Information Services
Soni.starr@clark.wa.gov
564-397-4904

General Terms and Conditions

ADMINISTRATIVE REQUIREMENTS - Contractors shall comply with all management and administrative requirements established by Washington Administrative Code (WAC), the Revised Code of the State of Washington (RCW), and any subsequent amendments or modifications, as applicable to providers licensed in the State of Washington.

ALL proposals submitted become the property of Clark County. It is understood and agreed that the prospective Proposer claims no proprietary rights to the ideas and written materials contained in or attached to the proposal submitted. Clark County has the right to reject or accept proprietary information.

AUTHORSHIP - Applicants must identify any assistance provided by agencies or individuals outside the proposers own organization in preparing the proposal. No contingent fees for such assistance will be allowed to be paid under any contract resulting from this RFP.

CANCELLATION OF AWARD - Clark County reserves the right to immediately cancel an award if the contractual agreement has not been entered into by both parties or if new state regulations or policy make it necessary to change the program purpose or content, discontinue such programs, or impose funding reductions. In those cases where negotiation of contract activities are necessary, Clark County reserves the right to limit the period of negotiation to sixty (60) days after which time funds may be unencumbered.

CONFIDENTIALLY - Proposer shall comply with all applicable state and federal laws governing the confidentiality of information."

CONFLICT OF INTEREST - All proposals submitted must contain a statement disclosing or denying any interest, financial or otherwise, that any employee or official of Clark County or the appropriate Advisory Board may have in the proposing agency or proposed project.

CONSORTIUM OF AGENCIES - Any consortium of companies or agencies submitting a proposal must certify that each company or agency of the consortium can meet the requirements set forth in the RFP.

COST OF PROPOSAL & AWARD - The contract award will not be final until Clark County and the prospective contractor have executed a contractual agreement. The contractual agreement consists of the following parts: (a) the basic provisions and general terms and conditions, (b) the special terms and conditions, (c) the project description and goals (Statement of Work), and (d) the budget and payment terms. Clark County is not responsible for any costs incurred prior to the effective date of the contract. Clark County reserves the right to make an award without further negotiation of the proposal submitted. Therefore, the proposal should be submitted in final form from a budgetary, technical, and programmatic standpoint.

DISPUTES - Clark County encourages the use of informal resolution to address complaints or disputes arising over any actions in implementing the provisions of this RFP. Written complaints should be addressed to Clark County – Purchasing, P.O. Box 5000, Vancouver, Washington 98666-5000.

DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS - It is the policy of Clark County to require equal opportunity in employment and services subject to eligibility standards that may be required for a specific program. Clark County is an equal opportunity employer and is committed to providing equal opportunity in employment and in access to the provision of all county services. Clark County's Equal Employment Opportunity Plan is available at http://www.clark.wa.gov/hr/documents.html. This commitment applies regardless of race, color, religion, creed, sex, marital status, national origin, disability, age, veteran status, on-the-job injury, or sexual orientation. Employment decisions are made without consideration of these or any other factors that are prohibited by law. In compliance with department of Labor Regulations implementing Section 504 of the rehabilitation Act of 1973, as amended, no qualified handicapped individual shall be discriminated against in admission or access to any program or activity. The prospective contractor must agree to provide equal opportunity in the administration of the contract, and its subcontracts or other agreements.

ENVIRONMENTALLY RESPONSIBLE PURCHASING PROGRAM - Clark County has implemented an Environmentally Responsible Purchasing Policy with a goal to reduce negative impacts on human health and the environment. Negative environmental impacts include, but are not limited to, greenhouse gases, air pollution emissions, water contamination, waste from the manufacturing process and waste in packaging. This policy also seeks to increase: 1) water and energy efficiency; 2) renewable energy sources; 3) use of products with recycled content; 4) product durability; 5) use of products that can be recycled, reused, or composted at the end of its life cycle. Product criteria have been established on the Green Purchasing List http://www.clark.wa.gov/general-services/purchasing/erp/environmental.html

INDEPENDENT PRICE DETERMINATION - The prospective contractor guarantees that, in connection with this proposal, the prices and/or cost data have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition. This does not preclude or impede the formation of a consortium of companies and/or agencies for purposes of engaging in jointly sponsored proposals.

INTERLOCAL AGREEMENT - Clark County has made this RFP subject to Washington State statute RCW 39.34. Therefore the bidder may, at the bidders' option, extend identical prices and services to other public agencies wishing to participate in this RFP. Each public agency wishing to utilize this RFP will issue a purchase order (or contract) binding only their agency. Each contract is between the proposer and the individual agency with no liability to Clark County.

LIMITATION - This RFP does not commit Clark County to award a contract, to pay any costs incurred in the preparation of a response to this RFP, or to procure or contract for services or supplies.

LATE PROPOSALS - A proposal received after the date and time indicated above will not be accepted. No exceptions will be made.

ORAL PRESENTATIONS - An oral presentation may be required of those prospective contractors whose proposals are under consideration. Prospective contractors may be informed that an oral presentation is desired and will be notified of the date, time and location the oral presentation is to be conducted.

OTHER AUDIT/MONITORING REQUIREMENTS - In addition, auditing or monitoring for the following purposes will be conducted at the discretion of Clark County: Fund accountability; Contract compliance; and Program performance.

PRICE WARRANT - The proposer shall warrant that the costs quoted for services in response to the RFP are not in excess of those which would be charged any other individual or entity for the same services performed by the prospective contractor, in a similar socioeconomic, geographical region.

PROTESTS - Must be submitted to the Purchasing Department.

PUBLIC SAFETY - May require limiting access to public work sites, public facilities, and public offices, sometimes without advance notice. The successful Proposer's employees and agents shall carry sufficient identification to show by whom they are employed and display it upon request to security personnel. County project managers have discretion to require the successful Proposer's employees and agents to be escorted to and from any public office, facility or work site if national or local security appears to require it.

REJECTION OF PROPOSALS - Clark County reserves the right to accept or reject any or all proposals received as a result of this RFP, to negotiate with any or all prospective contractors on modifications to proposals, to waive formalities, to postpone award, or to cancel in part or in its entirety this RFP if it is in the best interest of Clark County to do so.

SUBCONTRACTING - No activities or services included as a part of this proposal may be subcontracted to another organization, firm, or individual without the approval of Clark County. Such intent to subcontract shall be clearly identified in the proposal. It is understood that the contractor is held responsible for the satisfactory accomplishment of the service or activities included in a subcontract.

VERBAL PROPOSALS - Verbal proposals will not be considered in making the award of any contract as a result of this RFP.

WORKERS COMPENSATION INSURANCE – The contractor shall comply with R.C.W. Title 51- with minimum coverage limits of $500,000 for each accident, or provide evidence that State law does not require such coverage.

FOR ALTERNATIVE FORMATS
Clark County ADA Office: V: 564-397-2025
TTY: 564-397-2445 ADA@clark.wa.gov

Request for Proposals
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Request for Proposal #776
Legal Document Recording System Replacement

Part I Proposal Requirements

Section IA General Information

1. Introduction

Washington law (RCW 65.04) holds Clark County legally responsible for recording certain legal documents (e.g., marriage licenses, real estate documents) for official public record; issuing copies of recorded documents; and receiving excise tax payments on behalf of the State.

Clark County's Recorders Division is seeking to acquire a product from a qualified and experienced Contractor to implement a recorders system that will support the recording of all land documents, issuing copies of recorded documents, processing marriage licenses, plat documents (book and page), liens, process server licensing, deeds, recording and indexing, DD214 and other permanent records.

Clark County has made this Request for Proposal subject to Washington State statute RCW 39.34. Therefore the proposer may, at the proposers' option, extend identical prices and services to other public agencies wishing to participate in this RFP. Each public agency wishing to utilize this bid will issue a purchase order (or contract) binding only their agency. Each contract is between the bidder and the individual agency with **no** liability to Clark County.

2. Background

The Recorders Office is currently using the Eagle Recorder recording system. The County has been using this system for the last 14 years. Additional functionality is desired and required to ensure the county can meet future business needs and streamline processing. As a result, the Recorders Office seeks a replacement solution to reliably support the recording of documents, electronic recording of documents, issuing copies of recorded document, processing marriage license applications, indexing, reporting, public access, government to government processing, staff-managed extracts, and acceptance of e-payments. There are currently approximately 56 possible users and the system currently has 16 licenses. Seeking enterprise-based licensing.

3. Scope of Project

The selected Contractor will be responsible for all project tasks, including planning, configuring, customizing, providing interface integrations, testing, implementing, data conversion, training, go-live implementation services, system administration, and maintenance support.

Scope/Project Management Planning
The Contractor shall be responsible for planning and managing the project in conjunction with the county project manager, using practices generally recognized by the County as good project management methodology, and designating a Project Manager to the project, who will be responsible for:

- Adherence to the project scope, schedule, and budget
- Risk Management, including immediate notifications to the Clark County's Project Manager within 24 hours – via email or phone - when the project scope, schedule or budget may be impacted, as well as -providing mitigation plans
- Management of work activities including system design and installation; system configuration; data conversion and migration; testing and quality assurance; administrator and end-user training; and go-live support
- Coordination of Contractor's resources, work sessions, and training in-person or online/phone

- Issue tracking using mutually agreed upon tracking system (e.g., SharePoint, Excel, etc.)
- Written status reports, which include all reported issues and their statuses – weekly via email
- An updated project schedule in MS Project format – weekly via email
- Available for status call as requested by County
- Possibly participate and provide updates to steering committee – monthly via in person or online meeting if required

In addition to the Project Manager, the Contractor shall assign skilled and experienced staff to complete the deliverables described in this Statement of Work, including at minimum: system installation, software configuration and customization, data conversion and migration, interface integrations, testing, system administration, end-user training, and go-live support.

The County shall reserve the right to reject any of the Contractor's employees or subcontractors (i) whose qualifications, do not meet the standards established by the County as necessary for the performance of the Services; or (ii) whom the County identifies as not being acceptable

4. Project Funding

Specific allocation for project funding has been approved for the 2020 budget by the county manager and county council.

The Proposers proposal shall include the Proposers true estimated cost to perform the work irrespective of the budgeted funds for this work.

Allocation of funds for this RFP will be established based on the funds requested in the selected proposal.

5. Timeline for Selection

The following dates are the **intended** timeline:

Proposals due	April 8, 2020
Proposal review/evaluation period	April 24, 2020
Demonstration	May 4 – 8, 2020
Selection committee recommendation	Week of May 11, 2020
Contract negotiation/execution	Month of May
Contract intended to begin	June 2020

6. Employment Verification

Effective November 1st, 2010, to be considered **responsive** to any formal Clark County Bid/RFP or Small Works Quote, all vendors shall submit before, include with their response or within **48 hours** after submittal, a recent copy of their E-Verify MOU or proof of pending enrollment. The awarded contractor shall be responsible to provide Clark County with the same E-Verify enrollment documentation for each sub-contractor ($25,000 or more) within thirty days after the sub-contractor starts work. Contractors and sub-contractors shall provide a report(s) showing status of new employee's hired after the date of the MOU. The status report shall be directed to the county department project manager at the end of the contract, or annually, which ever comes first. E-Verify information and enrollment is available at the Department of Homeland Security web page: www.dhs.gov/E-Verify

How to submit the MOU in advance of the submittal date:
1. Hand deliver to 1300 Franklin St, Suite 650, Vancouver, WA 98660, or;
2. E-mail: koni.odell@clark.wa.gov or priscilla.ricci@clark.wa.gov

Note : Sole Proprietors shall submit a letter stating exempt.

Section IB Work Requirements

1. Required Services	Assign a fulltime Project Manager, in addition, the Contractor shall assign skilled and experienced staff to complete the deliverables described in this Statement of Work, including at minimum: system installation, software configuration and customization, data conversion and migration, interface integrations, testing, system administration, end-user training, and go-live support.
2. County Performed Work	Provide technical lead, that shall be responsible for providing direction and information for integrations, data conversion, configurations and ensuring proposed solution meets Clark County's technical requirements. Provide existing coding, workflow process information, Washington State regulatory requirements, identify new required system workflows, subject matter expertise, identify end user testers, and assist with training curriculum. Provide staff for "train the trainer". Final level review and approval of requirements and functionality. Provide project management and business analysis assistance. Clark County will participate fully through the entire lifecycle of the project.
3. Deliverables & Schedule	Proposer to provide a new Recording application, project plan, system documentation, training curriculum, and training of assigned train the trainer staff, completed integrations and conversion. Timeline will be set after contract award and negotiations.
4. Place of Performance	Contract performance may take place in the County's facility and/or the Proposer's facility.
5. Period of Performance	A contract awarded as a result of this RFP will be for 1 year and is intended to begin on June 2020 and end June 2021. Clark County reserves the right to extend the contract resulting from this RFP for a period of two (2) additional years, in one (1) year increments, with the same terms and conditions, by service of a written notice of its intention to do so prior to the contract termination date.
6. Public Disclosure	This procurement is subject to the Washington Public Records Act (the "Act"), chapter 42.56 RCW. Once in the County's possession, all of the RFP Submittals shall be considered public records and available for public records inspection and copying, unless exempt under the Act. If a Respondent or Proposer considers any portion of an RFP Submittal to be protected under

the law, whether in electronic or hard copy form, the Respondent or Proposer shall clearly identify each such portion with the word "PROPRIETARY. If a request is made for disclosure of such a portion, the County will determine whether it should be made available under the Act. If the county determines that such a record(s) is subject to disclosure, the County will notify the Respondent or Proposer in writing of the request and allow the Respondent or Proposer ten (10) days to obtain a court order enjoining release of the record(s). If the Respondent or Proposer does not take such action within the ten (10) day period, the County will release the portions of the RFP Submittal deemed subject to disclosure. All Respondents and Proposers who provide RFP Submittals for this procurement accept the procedures described above and agree that the County shall not be responsible or liable in any way for any losses that the party may incur from the disclosure of records to a third party who requests them.

7. Insurance/Bond

A. **Commercial General Liability (CGL) Insurance** written under ISO Form CG0001 or its latest equivalent with minimum limits of $1,000,000 per occurrence and in the aggregate for each one year policy period. This policy will renew annually. This coverage may be any combination of primary, umbrella or excess liability coverage affording total liability limits of not less than $1,000,000 per occurrence and in the aggregate. However, if other policies are added they must be a follow-form policy in language, renewal date, and have no more exclusions than the underlying coverage. Products and Completed Operations coverage shall be provided for a period of three years following Substantial Completion of the Work. The deductible will not be more than $50,000 unless prior arrangements are made with Clark County on a case by case basis; the criterion is the Contractor's liquidity and ability to pay from its own resources regardless of coverage status due to cancellation, reservation of rights, or other no-coverage-enforce reason. Coverage shall not contain any endorsement(s) excluding nor limiting Product/Completed Operations, Contractual Liability or Cross Liability.

B. **Automobile**
If the Proposer or its employees use motor vehicles in conducting activities under this Contract, liability insurance covering bodily injury and property damage shall be provided by the Proposer through a commercial automobile insurance policy. The policy shall cover all owned and non-owned vehicles. Such insurance shall have minimum limits of $500,000 per occurrence, combined single limit for bodily injury liability and property damage liability with a $1,000,000 annual aggregate limit. If the Proposer does not use motor vehicles in conducting activities under this Contract, then written confirmation to that effect on Proposer letterhead shall be submitted by the Proposer.

C. **Proof of Insurance**
Proof of Insurance shall be provided prior to the starting of the contract performance. Proof will be on an ACORD Certificate(s) of Liability Insurance, which the Proposer shall provide to Clark County. Each certificate will show the coverage, deductible and policy period. Policies shall be endorsed to state that coverage will not be suspended, voided, canceled, or reduced without a 30 day written notice by mail. It is the Proposer's responsibility to provide evidence of continuing coverage during the overlap periods of the policy and the contract.

D. **Workers' Compensation**
As required by the Industrial Insurance law of the State of Washington.

All policies must have a Best's Rating of A-VII or better.

8. Plan Holders List

All proposers are required to be listed on the plan holders list.

✓ Prior to submission of proposal, please confirm your organization is on the Plan Holders List below:

To view the Plan Holders List, please click on the link below or copy and paste into your browser.
Clark County RFP site:
http://www.clark.wa.gov/general-services/purchasing/rfp.html

- If your organization is NOT listed, submit Attachment B - Letter of Interest to ensure your inclusion.
- Proposals received by Clark County by proposers not included on the Plan Holders List may be considered non-responsive.

Part II Proposal Preparation and Submittal

Section IIA Pre-Submittal Meeting / Clarification

1. Pre-Submittal Meeting

A Questions and Answer session will be held by conference call on Monday March 30, 2020 at 9:00 a.m. until Noon PST.

Dial-In Number (US): 712-775-7270
Access Code: 389858#
International Dial-In Numbers: https://fccdl.in/i/soni_starr
Online Meeting ID: soni_starr
Join the Online Meeting: https://join.freeconferencecall.com/soni_starr

2. Proposal Clarification

Questions and Requests for Clarification regarding this Request for Proposal must be directed in writing, via email, to the person listed on the cover page. The deadline for submitting such questions/clarifications is March 25, 2020.

An addendum will be issued no later than April 1, 2020 to all recorded holders of the RFP if a substantive clarification is in order.

The Questions & Answers/Clarifications are available for review at the link below. Each proposer is strongly encouraged to review this document prior to submitting their proposal.

Clark County RFP site:
http://www.clark.wa.gov/general-services/purchasing/rfp.html

Section IIB Proposal Submission

1. Proposals Due

Sealed proposals must be received no later than the date, time and location specified on the cover of this document.

The outside of the envelope/package shall clearly identify:
1. RFP Number and;
2. TITLE and;
3. Name and address of the proposer.

Responses received after submittal time will not be considered and will be returned to the Proposer - unopened.

Proposals received with insufficient copies (as noted on the cover of this document) cannot be properly disseminated to the Review Committee and other reviewers for necessary action, therefore, may not be accepted.

2. Proposal

Proposals must be clear, succinct and not exceed 20 pages, excluding resumes, E-Verify, security assessment, requirements sheet, and coversheet. Proposer's who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

For purposes of review and in the interest of the County, the County encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable.

The County discourages the use of materials that cannot be readily recycled such as PVC (vinyl) binders, spiral bindings, and plastic or glossy covers or dividers. Alternative bindings such as reusable/recyclable binding posts, reusable binder clips or binder rings, and recyclable cardboard/paperboard binders are examples of preferable submittal materials.

Proposers are encouraged to print/copy on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.

Additional support documents, such as sales brochures, should be included with each copy unless otherwise specified.

Section IIC Proposal Content

1. Cover Sheet

This form is to be used as your proposal Cover Sheet
See Cover Sheet - Attachment A

A. The proposal shall contain the following items and follow the sequence outlined below:

Sec. 1 & 2 – Instructions and Information about the RFP Process:

- Cover sheet with Proposer's Signature

→ Compliance Forms:

- Equal Benefit Worksheet and Declaration
- Internal Revenue Service Form W-9

Sec. 4 – Scope of Work and Proposal Requirements

- Executive Summary or Overview of Proposal – three pages maximum
- Proposer's Response to SaaS and/or on Premise Questions
- Price Proposal in Attachment
- Letter of Acceptance
- Security Questionnaire
- Identify any exceptions to with a letter signed by Proposer's attorney or authorized representative

B. Submit documents per instructions detailed for the RFP submittal above

2. Project Team

Please provide years of experience for each resource and type of experience being considered specific to this project. Resumes for each resource. Please provide company information as detailed in Attachment C including years of operation.

3.	Management Approach	Describe the project approach that will be used including a sample project plan.
4.	Respondent's Capabilities	The vendor should provide at least 4 references with the RFP submission. If the proposer has available a Washington State County conversion reference, this would be preferred.
5.	Project Approach and Understanding	Utilize the notes section in the requirements document to further explain how the solution will satisfy the requirement. (i.e. standard functionality or if not explain)
6.	Proposed Cost	• Software cost • Hosted solution cost (if applicable) • On prem system cost • 5 year Maintenance Cost • Resource Cost • Implementation Cost • Total Cost
7.	Employment Verification	**Please refer to section 1A.6. – E-Verify** **IMPORTANT NOTE:** Include this portion of the response immediately **AFTER** the cover page, if not already on file with Clark County. Current vendors on file can be viewed at: **https://www.clark.wa.gov/general-services/purchasing-overview**

Part III Proposal Evaluation & Contract Award

Section IIIA Proposal Review and Selection

1. Evaluation and Selection:

Proposals received in response to this RFP will be evaluated by a Review Committee. Committee review results and recommendations may be presented to an appropriate advisory board prior to the consent process with the Clark County Council.

2. Evaluation Criteria Scoring

Each proposal received in response to the RFP will be objectively evaluated and rated according to a specified point system.

A one hundred (100) point system will be used, weighted against the following criteria:

Meets proposal guidelines	25
Work history / Experience	15
Cost	25
References	10
Meets project needs	25

The top two vendors selected will be required to perform a product demonstration which will also be assigned this 60 point scoring value to determine the award and contract.

Administration Capabilities	5
Scanning, Recording, Plat (book & page) and Document Tracking Capabilities	10
E-Recording (including G2G) Capabilities	10
Marriage Applications and Licensing Capabilities	5
Receipting and Balancing Capabilities	5
Interface, Conversion and Web Portal Capabilities	10
Reporting Capabilities	5
User Interface in General	5
Ease of Navigation	5

Section IIIB Contract Award

1.	Consultant Selection	The County will award a contract to the highest scoring Proposer. Should the County not reach a favorable agreement with the highest scoring Proposer, the County shall suspend or terminate negotiations and commence negotiations with the second highest scoring Proposer and so on until a favorable agreement is reached.
2.	Contract Development	The proposal and all responses provided by the successful Proposer may become a part of the final contract.
3.	Award Review	The public may view proposal documents after contract execution. However, any proprietary information so designated by the Proposer as a 'trade secret' will not be disclosed unless the Clark County Prosecuting Attorney determines that disclosure is required. At this time, Proposers not awarded the contract, may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.
4.	Orientation/Kick-off Meeting	Contact negotiations will be completed following the product demonstration and scoring. The County intends to complete negotiations by June of 2020. Following Administrative authorization of the contract, a kick-off meeting with the Recording Replacement Team will be scheduled.

Request for Proposal #776
Legal Document Recording System Replacement

Attachment A: COVER SHEET

General Information:

Legal Name of Applicant/Company/Agency_____

Street Address_____ City _____ State _____ Zip _____

Contact Person _____ Title _____

Phone _____ Fax _____

Program Location (if different than above) _____

Email Address _____

Tax Identification Number _____

ADDENDUM:

Proposer shall acknowledge receipt of Addenda by checking the appropriate box(es).

None ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐

NOTE: Failure to acknowledge receipt of Addendum may render the proposal non-responsive.

Total Funds Requested Under this Proposal $ _____

I certify that to the best of my knowledge the information contained in this proposal is accurate and complete and that I have the legal authority to commit this agency to a contractual agreement. I realize the final funding for any service is based upon funding levels, and the approval of the Clark County Council.

_____ _____
Signature, Date

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Legal Document Recording System Replacement

Attachment B: LETTER OF INTEREST

Legal Name of Applicant Agency_____

Street Address_____

City_____ State _____ Zip _____

Contact Person _____ Title _____

Phone _____Fax_____

Program Location (if different than above) _____

Email address _____

- All proposers are required to be included on the plan holders list.
- If your organization is NOT listed, submit the 'Letter of Interest" to ensure your inclusion.

Email Letter of Interest to*: Koni.Odell@clark.wa.gov* and *Priscilla.Ricci@clark.wa.gov*

Clark County web link:
http://www.clark.wa.gov/general-services/purchasing/rfp.html

This document will only be used to add a proposer to the plan holders list. Submitting this document does not commit proposer to provide services to Clark County, nor is it required to be submitted with proposal.

Proposals may be considered non-responsive if the Proposer is not listed on the plan holders list.

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Legal Document Recording System Replacement

Attachment C: Security Questions Recording Software Excel Spreadsheet

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Attachment D: Clark County Recording System Replacement Requirements Excel Spreadsheet

Attachment C

Area	Number	Requirement	Vendor Response
Application Design	1	Please provide a copy of the architecture documentation.	
	2	Describe connections to other systems provided by the application.	
	3	Does the application follow a multi-tiered approach? If so, please explain.	
	4	Please describe each component of the application for example web services, API, separate administrative interfaces. Etc.	
	5	Can components of the application be enabled or disabled? If so, how?	
	6	Does your application take advantage of third party software such as Apache Tomcat, Magneto, WordPress, etc? If so, please list.	
	7	For each third party component, describe how the component is locked down \secured to assure only the required functionality is enabled.	
Application accounts and passwords	8	Does the application use default accounts or passwords? If yes, list the accounts.	
	9	Do installed third party components use default accounts or passwords? If yes, please list.	
	10	Can passwords be reset without vendor support?	
	11	Has the vendor configured application roles or exclusive permissions? If so, list.	
Remote Access	12	Does the vendor need remote access to the application for support and maintenance? Please specify remote access needs, if any.	
	13	Does the vendor's remote access solution include encryption? If yes, list the encryption type.	
Configuration	14	Does the application support role based access?	
	15	Is the application configured to send data outbound over the internet? If yes, explain which data is sent, and the destination.	
	16	Has the vendor or any other company performed security testing on the application? If yes, please provide a summary of issues detected and plans for resolution	
	17	What process/steps are taken to remeidiate an issue once found?	
	18	Is there documentation/requirements for network configurations/changes to ensure that this application is fully functional?	
Supplemental Software as a Service Questions			
Topical Area		**Question**	
Independent Audits	1	Do you conduct network penetration tests of your cloud service infrastructure regularly as prescribed by industry best practices and guidance?	
	2	Are the results of the network penetration tests available to tenants at their request?	
	3	Are the results of internal and external audits available to tenants at their request?	
Third Party Audits	4	Do you permit tenants to perform independent vulnerability assessments?	
Information System Regulatory Mapping	5	Do you have the ability to logically segment or encrypt customer data such that data may be produced for a single tenant only, without inadvertently accessing another tenant's data?	
	6	Do you have capability to logically segment and recover data for a specific customer in the case of a failure or data loss?	
Retention Policy	7	Do you have technical control capabilities to enforce tenant data retention policies?	
	8	Do you have a documented procedure for responding to requests for tenant data from governments or third parties?	
Secure Disposal	9	Do you support secure deletion (ex. degaussing / cryptographic wiping) of archived data as determined by the tenant?	

Nonproduction Data	10	Do you have procedures in place to ensure production data shall not be replicated or used in non-production environments?	
Information Leakage	11	Do you have controls in place to prevent data leakage or intentional/accidental compromise between tenants in a multi-tenant environment?	
	12	Do you have a Data Loss Prevention (DLP) or extrusion prevention solution in place for all systems which interface with your cloud service offering?	
Policy	13	Do your information security and privacy policies align with particular industry standards (ISO-27001, ISO-22307, CoBIT, etc.)?	
	14	Do you have agreements which ensure your providers adhere to your information security and privacy policies?	
	15	Can you provide evidence of due diligence mapping of your controls, architecture and processes to regulations and/or standards?	
Baseline Requirements	16	Do you have documented information security baselines for every component of your infrastructure (ex. Hypervisors, operating systems, routers, DNS servers, etc.)?	
	17	Do you have a capability to continuously monitor and report the compliance of your infrastructure against your information security baselines?	
User Access Policy	18	Do you have controls in place ensuring timely removal of systems access which is no longer required for business purposes?	
User Access Restriction / Authorization	19	Do you document how you grant and approve access to tenant data?	
	20	Do you have a method of aligning provider and tenant data classification methodologies for access control purposes?	
User Access Revocation	21	Is timely deprovisioning, revocation or modification of user access to the organizations systems, information assets and data implemented upon any change in status of employees, contractors, customers, business partners or third parties?	
Encryption	22	Do you have a capability to allow creation of unique encryption keys per tenant?	
	23	Do you support tenant generated encryption keys or permit tenants to encrypt data to an identity without access to a public key certificate. (e.g. Identity based encryption)?	
Encryption Key Management	24	Do you encrypt tenant data at rest (on disk/storage) within your environment?	
	25	Do you leverage encryption to protect data and virtual machine images during transport across and between networks and hypervisor instances?	
	26	Do you have a capability to manage encryption keys on behalf of tenants?	
Vulnerability / Patch Management	27	Do you conduct network-layer vulnerability scans regularly as prescribed by industry best practices?	
	28	Do you conduct application-layer vulnerability scans regularly as prescribed by industry best practices?	
	29	Do you conduct local operating system-layer vulnerability scans regularly as prescribed by industry best practices?	
	30	Will you make the results of vulnerability scans available to tenants at their request?	
	31	Will you provide your risk-based systems patching timeframes to your tenants upon request?	
Antivirus / Malicious Software	32	Do you have anti-malware programs installed on all systems which support your cloud service offerings?	
Incident Management	33	Do you have a documented security incident response plan?	
	34	Do you integrate customized tenant requirements into your security incident response plans?	

	35	Do you publish a roles and responsibilities document specifying what you vs. your tenants are responsible for during security incidents?	
Incident Reporting	36	Does your security information and event management (SIEM) system merge data sources (app logs, firewall logs, IDS logs, physical access logs, etc.) for granular analysis and alerting?	
Incident Response Legal Preparation	37	Does your incident response plan comply with industry standards for legally admissible chain-of-custody management processes & controls?	
Audit Tools Access	38	Do you restrict, log, and monitor access to your information security management systems? (Ex. Hypervisors, firewalls, vulnerability scanners, network sniffers, APIs, etc.)	
Nondisclosure Agreements	39	Are requirements for non-disclosure or confidentiality agreements reflecting the organization's needs for the protection of data and operational details identified, documented and reviewed at planned intervals?	

Attachment D

ID	Requirement	Meets Requirement?	Notes
	Administration - Ability to manage roles, workflows		
1.1	*The solution must provide role-based security to include, at a minimum, the following roles or similar roles:*		
1.1.1	Administrator		
1.1.2	Manager		
1.1.3	Supervisor		
1.1.4	Lead		
1.1.5	Employee		
1.1.6	Public		
1.20	The solution must provide the following functionality or similar functionality for each role:		
1.2.1	Administrator:		
1.2.1.1	Can do all and make changes in system		
1.2.2	Manager:		
1.2.2.1	Can do all configuration changes directly to the application		
1.2.2.2	Make receipt adjustments		
1.2.2.3	Alter previous recordings		
1.2.2.4	Change role status for all roles below		
1.2.2.6	Redistribute work flows		
1.2.2.7	Research/internal audits for role below		
1.2.2.8	Access statistic/reports		
1.2.2.9	Authorized approver		
1.2.3	Supervisor:		
1.2.3.1	Make receipt adjustments		
1.2.3.2	Alter previous recordings if necessary		
1.2.3.3	Change role status for all roles below		
1.2.3.4	Adjust some system configurations		
1.2.3.5	Redistribute work flows		
1.2.3.6	Research/internal audits for role below		
1.2.3.7	Access statistical/reports		
1.2.3.8	Authorized approver		
1.2.4	Lead:		
1.2.4.1	Make receipt adjustments		
1.2.4.2	Alter previous recordings if necessary		
1.2.4.3	Redistribute work flows		
1.2.4.4	Research/internal audits for role below		
1.2.5	Employee (basic user)		
1.2.5.1	Production only		

ID	Requirement	Meets Requirement?	Notes
1.2.5.2	Search some data		
1.2.5.3	Government (external and internal)		
1.2.5.4	Data Entry and Submission only		
1.2.5.5	Search some data		
1.2.6	Public		
1.2.6.1	Read only access		
1.3	The solution must provide the system administrator with the ability to choose a user to be active or inactive		
1.4	The solution must provide authorized users to edit the information displayed on a receipt		
1.5	The solution should provide authorized users with the ability to create, save and name various reject letter templates		
1.6	The solution should provide authorized users with the ability to format, edit information that appears on all reject letters.		
1.7	The solution must provided authorized users with the ability to create task workflows		
1.8	The solution must provide authorized users with the ability to request a list of tasks in the queue to review		
1.9	Does solution provide an authorized user with the ability to assign tasks to other staff members?		
2.00	The solution should provide the role based users with the ability to edit and save field drop-downs.		
2.10	The solution must provide the role based users with the ability to add, change, and / or remove required field indicators.		
2.20	The solution must have the Ability to transfer current codes and add codes as needed. (In Admin and Mgr role)		
2.30	The solution must have the Ability to correct receipts while a different user is in the document.		
2.40	The solution should provide role based users with the ability to select a user, to view what they are working on.		
2.50	The solution must provide role based users with the ability to customize electronic recording labels.		
2.60	The solution must provide role base users with the ability to redact protected information on recorded documents.		
2.70	The solution must provide the system administrator with the ability to create, edit and disable workflows.		
2.80	The solution must provide the following information as a minimum on each receipt;		
2.8.1	Clark County Auditor		
2.8.2	Receipt number		

ID	Requirement	Meets Requirement?	Notes
2.8.3	Document Number		
2.8.4	Employee (user) Name		
2.8.5	Customer Name		
2.8.6	Date of transaction		
2.8.7	Time of transaction		
2.8.8	Total amount of transaction		
2.8.9	Tender type received		
2.8.10	Tender amount received		
1.10.11	Space for notes		
2.90	The solution must provide role based user with the ability to create, customize, edit and save what is electronically stamped on recorded documents.		
3.00	The solution must provide the following information as a minimum on each recording stamp:		
3.1.1	Instrument (recording) Number		must accommodate up to 14 characters
3.1.2	Receipt Number		
3.1.3	Date of Recording		
3.1.4	Time of Recording		
3.1.5	Document Type Recorded		
3.1.6	Customer Name		
3.1.7	Recording Fee		
3.1.8	Number of Pages Recorded		
3.1.9	Clark County, WA		
3.1.10	Recording; Plats, short plats, condos		Need book and page.
3.1.11	Book and page number		
3.1.12	eRecording		
3.1.13	Marriages		
3.1.14	Certified copies		
4.00	The solution must provide the word "Duplicate" on all re-printed receipts.		
5.00	The solution must provide the user with the ability to print and re-print check, cash and credit/debit receipts slips (to be include with deposit).		

ID	Requirement	Meets Requirement?	Notes
	General - Ability for the Recording Office to efficiently track documents from receipt to return and track the collection of a currency from receipt to distribution according to all regulatory requirements and best practices.		
2.1	The solution must provide the following methods for capturing historical statistical data for consumption (who, what, when, where and how):		
2.1.1	Recording; Plats paperwork (Must have book and page number in addition to recording number)		
2.1.2	eRecording		
2.1.4	Marriages		
2.1.5	Certified copies		
2.1.10	Payment collection options; cash, checks, Credit/Debit cards, on accounts		
2.1.11	Accounting; Cashier balancing, G2G Balancing, Adjustments, Distribution, Accounting		Teller-all in-ffice transactions - balance at end of day with recording software all e-recording and G2G balanced through solution
2.1.12	The solution must be able to integrate current document codes used by Clark County for use in the new system.		
2.2	The solution must provide shortcuts and shortcut keys as often and wherever possible - provide list of shortcut functions available		
2.3	The solution must recognize with mimimal keystrokes defaulting values for to be identified fields (Grantee / Grantor) i.e., FID (Fidelity National Title Insurance Company)		
2.4	The solution must provide carryover information to next step in the process whenever possible		
2.5	The solution must allow the user to have multiple windows open within the solution at one time		
2.6	The solution must provide auto populate, drop downs, type ahead and required field indicators whenever possible to help improve accuracy and processing time.		
2.7	The solution must provide auto-formatting; e.g. date slashes "/", phone number dashes "-", names and address information all caps.		
2.8	The solution must display a "required field" error message, for what is missing when a user tries to advance to the next page prior to completing required fields.		
2.9	The solution must provide role based users with the ability to view what transactions have not been completed.		
2.10	the solution must provide the capability to review documents to insure all pages have been scanned without needing to index		

ID	Requirement	Meets Requirement?	Notes
2.11	The solution must provide the following information in the certification block; Clark County Auditor seal STATE OF WASHINGTON County of Clark Certified language Witness my hand and official seal this [dd] day of [month] 20[yy] Greg A. Kimsey, Auditor, Clark County By [editable name] (deputy)		
2.12	The solution must auto populate the following certification block information; Day (2 digit) Month (written spelled out) Year (four digits)		
2.13	The solution should provide a role based user with the ability to default an electronic signature to the certification block, based on the user logon		
2.14	The solution should provide a role based user with the ability to format and edit the information in the certification block for certified copies.		
2.15	The solution should provide users with the ability to position the certification block prior to printing certified copy documents.		
2.16	The solution must provide role base users with a full audit history screen that displays the following information; User log on date User log on time User log off date User log off time Users transaction list User receipt edits		
2.17	The solution should provide an easy-to-use, forms-driven system that allows a user to copy and paste information from the following:		
2.17.1	Select document item and items to populate selected fields		To help save key stokes and prevent keying errors
2.17.2	Anywhere within the system		
2.18	The solution must provide a movable electronic recording label with the option to print and reprint.		
2.19	The solution must provide the following information on the electronic recording labels:		We scan first - all electronic labels Teller provides electronic stamps for OTC recorded documents ????? Need more infromation for how this process works on OVER THE COUNTER - from Teller
2.19.1	The words, 'Electronically Recorded"		
2.19.2	Instrument Number (Recording number)		

ID	Requirement	Meets Requirement?	Notes
2.19.3	Company		
2.19.4	Fee		
2.19.5	Pagination		
2.19.6	Recording Date (year, month and day)		
2.19.7	Recording Time (hour and minute)		
2.19.8	Clark County, WA		
2.20	The solution must capture the following searchable historical information when the print receipt is selected:		
2.20.1	Recording (reference #) label		
2.20.2	Assign a unique, sequential recording number that will always be associated with the recorded document.		
2.20.3	Date Recorded		
2.20.4	Recorder (who recorded use login)		
2.20.5	Transaction Type		
2.20.6	Number of pages		
2.20.7	Total Charges Detail		
2.20.8	Total Charges		
3.0	Scanning		We are scan first in most scenarios - HOWEVER We must have the option to NOT scan first
3.1	The solution must capture an image of the front and back of the all documents when scanned.		
3.2	The solution must provide online customers with the ability to view only the front of marriage certificate images.		PI are on the back of marriage certificate is not for public eyes. Currently customer must come into office to view online documents.
3.3	The solution must provide user with the ability to process multiple scanning transactions and other types of transactions for the same customer.		
3.4	The solution should provide the option for OCR scanning in the future that would have the ability to digitize printed text that can be edited, searched, stored, displayed online to help improve processing time and data accuracy.		
3.5	The solution should provide the user with the ability to choose if the document was previously scanned or not, prior to scanning.		
3.6	The solution must provide the user with the ability to batch scan documents.		
3.7	The solution must provide the user with the ability to scan and replace chosen pages within a document after initial scanning		
3.8	The solution must provide the user with the following prior to the user finalizing the recording for all document that were NOT previously scanned;		
3.8.1	The solution must have Ability to choose and change the record and / or document type		

ID	Requirement	Meets Requirement?	Notes
3.8.2	The solution must automatically assign an instrument number once document recording type is chosen		
3.8.3	The solution must associate the instrument number to the images in the data file		
3.9	The solution must provide the user with the following when the user selects that the document HAS been previously scanned;		
3.9.1	The solution Must allow the user to choose and change the reason for rescan		
3.10	The solution must be able to provide all scanned images for QA, Indexing and online viewers.(with the exception of confidential documents and CC to determine WHICH images are to be viewed online)		
4.0	Recording		
4.1	The solution must provide the user with a forms based data entry screen that will allow the user to record one or more document type transaction as one receipt.		
4.2	The solution must provide the user with a forms based data entry recording screen (configurable to each document type) to capture the following recording information:		
4.2.1	Parcel Number (up tp 14 digit numeric required)		
4.2.2	Property and Property Owner Information;		
4.2.2.1	Grantee1 (required); First Name Middle Name/Initial Last Name		
4.2.2.2	Grantee2 First Name Middle Name Last Name		
4.2.2.3	Ability to add as many grantees as needed; First Name Middle Name Last Name		
4.3	The solution must provide Grantor Information (required)		
4.3.1	Grantor1; First Name (required) Middle Name/Initial (optional) Last Name (required)		

ID	Requirement	Meets Requirement?	Notes
4.3.2	Grantor2; First Name (required) Middle Name (optional) Last Name (required)		
4.3.3	Ability to add as many grantors as needed.		
4.3.4	Reference Numbers		
4.3.5	ExciseNumbers		
4.3.6	Legal descriptions		
4.3.7	Trustees and Beneficiaries (dependent on document type)		
4.4	The solution must provide a role based user with the ability to add, change, remove and set a cut-off time for recording documents .		This could be applicable for G2G customers
4.5	The solution should provide the user with a message after the cut-off time that they will be allowed to submit the transaction, but documents won't be recorded until the next day.		We will not collect fees until document is recorded.
4.6	The solution should provide a workflow queue for documents received after the cut-off to be held in the order of receipt to be processed the next day.		
4.7	The solution must provide the ability for users to electronically position any recording label, on the document, prior to and after recording document.		CC needs the ability to set and move the default
4.8	The solution should provide the user with all associated document images (multiple documents) when a document is re-recorded.		
4.9	The solution should allow the user to view images of previously recorded side-by-side on the same screen.		
4.10	The solution must provide an electronic recording label with the following information:		
4.10.1	Recording number up to 14 characters for sequence number		
4.10.1.1	Solution must provide for continuation of current document recording number at conversion the time		
4.10.2	Date of recording (mm/dd/yyyy) RCW 65.04.080		
4.10.3	Time of recording (hh:mm) RCW 65.04.080		
4.10.4	The words, "Electronically Recorded" (if applicable) RCW 65.04.080		
4.10.5	Document Type		
4.10.6	Customer Name RCW 65.04.080		
4.10.7	Fee		
4.10.8	Number of pages		
4.10.9	Clark County, WA		

ID	Requirement	Meets Requirement?	Notes
4.11	The solution must provide role based users with the ability to edit and customize the recording label over time to accommodate regulatory changes and business needs.		
4.12	The solution must provide tracking for all recording changes		in the case we think 'tracking' relates to audit reporting
4.13	The solution must provide a history of all recording changes.		
4.14	The solution must provide the following or similar unique numbering sequence for the all document types; Up to 14 digits sequential numbering and the ability to change numbering configuration in the future		
4.15	The solution must provide a role based user with the ability to delete and undelete a recorded page		
4.16	The solution must provide a role based user with the ability to insert a recorded page		
4.17	The solution must allow a user to edit and delete a transaction prior to or after completing the transaction.		
4.18	The solution must allow a role based user to edit and delete a permanent recording.		Security - only mgr and admin - audit?
4.19	The solution should provide the ability to allow the public with access to all online recorded documents except marriage certificates back page and DD 214 and others to be determined by Clark County.		
4.7	The solution must have the capability to record and calculate fees for multiple titled documents		
4.2	The solution should provide the eRecording submitter with a eRecording status update of 'Reviewed' when the document has been reviewed by the RO.		
4.2.1	The solution should provide the eRecording status update using one of the following;		
4.2.1.1	Recorded Acceptance eMail		
4.2.1.2	Recording Rejected eMail		
4.3	The solution must provide Digital Archives access to permanent status files that are ready for release.		
4.4	The solution must provide a self-managed bulk data extract process for transmitting images to customers		
4.5	The solution must allow for image enhancement (G2G specifically).		

ID	Requirement	Meets Requirement?	Notes
	eRecording - Continue to receive through a third party electronic recording documents with existing large volume customers and expand using a web portal to jurisdictions and quasi governmental entities		
5.1	The solution must provide the ability to *receive, accept and reject* the following from multiple eRecording providers; 1. OPR Documents		
5.2	The solution must provide the following similar workflow for documents received electronically;		
5.2.1	Is document legible? (200dpi - 300 dpi)		
	Yes = proceed		
	No = reject document		
5.2.2	Document selection type correct? (selection entered matches document type)		
	Yes = proceed		
	No = correct and proceed		
5.2.3	Meets all first page indexing requirements?		
	Yes = proceed		
	No = reject document		
5.2.4	Format correct according to regulations?		
	Yes = proceed		
	No = reject document		
5.2.5	Is document a Re-Record?		
	No = proceed		
5.2.6	Yes = Has cover sheet?		
	Yes = Proceed		
	No = Reject document for missing cover sheet		
5.2.7	Restricted info in document? (SSN, mother's maiden name, DOB)		This list is complete and restricted data is on the onus of the submitter.
	No = proceed		
	Yes = Must provide the following; Record image of original "As Is" Record image of original with restricted info redacted Redacted image is viewable online Proceed		
5.3	The solution must provide role base users with the ability to add, delete and edit a selection of electronic recording stamps		
5.4	The solution must provide the user with the ability to position an electronic recording stamp on each recorded document.		
5.5	The solution must provide users with the ability to remove and edit indexing information input by the submitter		

ID	Requirement	Meets Requirement?	Notes
5.6	The solution should provide the ability for OCR to pick up indexing information that populates the systems indexing section if Clark County chooses to implement in the future		
5.7	The solution must provide the user with the ability to search eRecording batches by the following;		
5.7.1	Date range (from and to) mm/dd/yyyy		
5.7.2	Submission date - mm/dd/yyyy		
5.7.3	Recording date - mm/dd/yyyy		
5.7.4	Submitter		
5.7.5	Grantor/Grantee		
5.8	The solution must provide the user with the ability to choose how they would like the search data to be displayed;		
5.8.1	Show all items		
5.8.2	Show packages not completed only		
5.8.3	Show packages successfully processed		
5.8.4	Show rejected packages		
5.9	The solution should provide the following summary data for each search result;		
5.9.1	Total number not completed: by packages and by documents		
5.9.2	Total number completed: by packagesand by documents		
5.9.3	Total number of errors: by packages and by documents		
5.9.4	Total sum of items: by packages and by documents		
5.10	The solution must provide role based users with the ability to begin processing the oldest to date eRecording		
5.11	The solution must provide the user with the ability to increase the size of the eRecorded document within the screen.		
5.12	The solution must provide the user with template margins over the images to determine if the document meets all recording regulatory requirements.		
5.13	The solution must provide the user with the ability to quickly advance forward and backward through each page of the eDocument.		
5.14	The solution must provide a forms based data entry screen that allow the user to enter and edit the following recording document detail information;		
5.14.1	Document Code Fee (calculated and populated by system)		
5.15	The solution must provide the user with the ability to quickly (with as few key strokes and clicks as possible) view if there are any other documents to be recorded for the current transaction.		
5.16	The solution must provide the user with an alert when they have an unfinished eRecording document when they try to close out for the day.		

ID	Requirement	Meets Requirement?	Notes
	Plats		
6.1	The solution must provide the user with the required option to choose one of the following recording options and provide sequential Book and Page number for these documents:		We don't record or scan maps. We do record plat, short plat, condominiums, minor corrections, etc. The paper work only. We need book and page.
6.1.1	Plats		
6.1.2	Short Plat		
6.1.3	Condominium		
6.2	The solution must provide the user with the ability to input the parcel number		
6.3	The Solution must assign a recording number AND Book and Page		
6.4	The solution should allow voided book and page numbers to be reused		

ID	Requirement	Meets Requirement?	Notes
	Marriages - Provide the ability to receive eMarriage applications for quicker processing, fewer rejects, streamlined and simpler document workflow.		Marriage Application Kiosk/Online Application required for all marriages
7.1	The solution should allow the customer the ability to print application from web portal.		Should be space on form for notarization.
7.2	The solution must provide a role based user with the ability to create a marriage application workflow.		
7.3	The solution must provide a forms-based data entry screen to allow Recording Office (RO) users to process marriage license applications that capture the following *required* information for both applicants; APPLICANT ONE AND TWO MUST PROVIDE:		
7.3.1	Are you in the Address Confidentiality Program (ACP)? Yes = STOP! and make an appointment to meet with a qualified ACP customer service specialist No = proceed with marriage application		
7.3.2	Applicant's Full legal name (first, middle, last)		
7.3.3	Signature (capture onsite signature when applicants are standing in from of RO staff)		
7.3.4	Date of birth (calculate age and populate the applicants age).		
7.3.4.1	If 17 years of age or younger provide supplemental application 'Under Control of Guardian' form that must be completed.		
7.3.4.2	If 16 or younger, applicant must provide a court order		
7.3.5	Age (decision)		
7.3.6	Place of birth		
7.3.7	Present address		
7.3.8	Previous address (optional)		
7.3.9	Single/widowed/divorced/under control of guardian		
7.3.10	If Under Control of Guardian (17 years of age or younger) provide supplemental application to be completed (9040ra.ailarslmsup 4/99)		
7.3.11	Notary seal (could)		Future state
7.3.12	Pretty much everything on the form still needs to be there (see form)		
7.3.13	SSN (don't track) 2nd page (back of 1st)		
7.3.14	Date sworn in (MM/DD/YYYY)		
7.3.15	Date signed		
7.3.16	Contact Phone Number		
7.3.17	Planned Wedding Date (if known)		

ID	Requirement	Meets Requirement?	Notes
7.3.18	Signature of staff witnessing signature		
7.4	The solution must provide the following marriage certificate copy options that the Recording Office staff must ask the applicant (choose one or more); 1. Standard		
7.5	The solution must provide a role based user with the ability to edit any of the information on the application and capture the following historical information; 1. Who 2. Date 3. Time 4. What was edited		
7.6	The solution should provide the role based user with the ability to seal or pull out ACP information once all documents have been printed.		
7.7	The solution could provide tracking for ACP marriage certificates only by quantity by date range (YYYY)		
7.8	The solution must provide a printed marriage certificate according to State regulations (see sample Washington State Certificate of Marriage) that auto populates as much information as possible from the application.		
7.9	The solution must provide the prevention of the public to view marriage certificates (mothers maiden name and applicants SSN that are on the application and is protected information)		
7.10	The solution must provide role based users with the ability to create, edit, delete and VOID a marriage license and be required to do the following; 1. Scan the void request letter 2. Populate the recording number with the marriage certificate number 3. Input the reason for the void		
7.11	The solution should provide the user with the ability to place a 'VOID' watermark over the marriage certificate image when a marriage license has been voided.		
7.12	The solution must provide users with the ability to append (add a document(s)) to a recorded marriage application and certificate.		
7.13	The solution should provide role based users with the ability to create, update and change the marriage license forms-based data entry screen.		If interferes with software
7.14	The solution must prevent RO users from accepting payment for marriage license applications until proof of ID is recorded for both individuals.		
7.15	The solution must prevent users from completing transaction (save/submit) before payment is processed.		

ID	Requirement	Meets Requirement?	Notes
	Receipting - is the collection of money (fees) for recording services provided		
8.1	The solution must provide the RO user with the following receipt screen of amount owed when a transaction has been completed; 1. Name 2. Document Type 3. Doc/Trans/Recording # 4. Payment type 5. Total amount due 6. Account # 7. Display shortage or overages. Distribution fee/Revenue details (go to funding programs).		Over the counter will receive data from Teller. Teller is a tender type in recording system.
8.2	The solution must provide the user with the ability to select multiple payment type(s) is/are (one or more) being collected:Credit/Debit, Check, Cash, ACH, Teller, G2G, On Account		Over the counter will receive data from Teller. Teller is a tender type. All others are on account and ACH. Today Eagle gets the tender type from Teller - system would only record "Teller"
8.3	The solution must provide a display for all payment discrepancies (surplus and shortage), for all payment methods, prior to completing the transaction.		
8.40	The solution must provide role based users with a flag/message when the RO users does not balance.		
8.4.1	The solution must provide role based users the ability to reconcile and close user tills.		
8.5	The solution should provide the ability to accept Credit/Debit information from a customer centric pin pad or similar when the user selects credit/debit as the method of payment.		Over the counter will receive data from Teller. Teller is a tender type. System would receive info "On Account" or "Internal Billing"
8.6	The solution should auto-populate the Credit/Debit amount when the user selects credit/debit method of payment.		Over the counter will receive data from Teller. Teller is a tender type.
8.7	The solution should provide the forms-based data entry screen when Check is selected to allow the user to input, edit, clear and change:		Over the counter will receive data from Teller. Teller is a tender type.
8.7.1	Check Amount (auto populate fee that can be changed by the user)		Over the counter will receive data from Teller. Teller is a tender type.
8.7.2	Check Number		Over the counter will receive data from Teller. Teller is a tender type.
8.7.3	Check Name (phonetic and wildcard search selection)		Over the counter will receive data from Teller. Teller is a tender type.
8.7.4	Account Number		Over the counter will receive data from Teller. Teller is a tender type.
8.7.5	Document Number		Over the counter will receive data from Teller. Teller is a tender type.
8.7.6	Receipt Number		Over the counter will receive data from Teller. Teller is a tender type.
8.8	Should provide a forms-based data entry screen when Accounts Receivable (external) is selected to allow the user to input, edit, clear and change:		Info to come from Teller otherwise it is on account for e-recording or G2G customer.
8.8.1	Provide phonetic and wildcard search selection		Integrate with Workday.
8.8.2	Department Name (populates when user makes a search selection)		Integrate with Workday.
8.8.3	Contact Name (populates when user makes a search selection)		Integrate with Workday.
8.8.4	Contact Phone Number (populates when user makes a search selection)		Integrate with Workday.
8.8.5	Customer account number (Workday generated)		Integrate with Workday.

ID	Requirement	Meets Requirement?	Notes
8.8.6	Amount Charged (auto populate)		Integrate with Workday.
8.9	The solution must provide authorized users with the ability to change any of the receipting field information prior to finalizing the transaction: Credit/Debit, Check, Cash, (ACH),		
8.10	The solution should provide users with the option to send the customer a transaction receipt by eMail.		
8.11	The solution must provide role-based user with the ability to reprint, edit, change and adjust receipts		
	Cashier Balancing- Ability for users and role based user to balance each till and to capture and track type of payment history.		
8.13	The solution must provide the user with automated daily balancing process.		Short-cut process just to reconcile with Teller on OTC transactions?
8.14	The solution should provide the role based user with an automated balance sheet that includes the following: - with the ability to disable printing		
8.14.1	Starting Cash On-Hand (system auto populates based on login)		Teller for OTC.
8.14.2	Cash Total (minus start-up cash)		Teller for OTC.
8.14.3	Check Total		Teller for OTC.
8.14.4	Total Number of checks per user		Teller for OTC.
8.14.5	Credit/Debit Total		Teller for OTC.
8.14.6	Drawer Total (minus start-up cash)		Teller for OTC.
8.14.7	Deposit (Drawer Total minus Starting Cash On-Hand)		Teller for OTC.
8.14.8	Overage		Teller for OTC.
8.14.9	Shortage		Teller for OTC.
8.15	The solution should provide the user with the running sum of all amounts entered		Teller for OTC. Want running totals for electronic submissions.
8.16	The solution should provide the user with the ability to enter the total number of each type of tender: with the ability to disable		We need option to use or not use.
8.16.1	100's		We need option to use or not use.
8.16.2	50's		We need option to use or not use.
8.16.3	20's		We need option to use or not use.
8.16.4	10's		We need option to use or not use.
8.16.5	5's		We need option to use or not use.
8.16.6	2's		We need option to use or not use.
8.16.7	1's		We need option to use or not use.
8.16.8	.50's		We need option to use or not use.
8.16.9	.25's		We need option to use or not use.
8.16.10	.10's		We need option to use or not use.
8.16.11	.05's		We need option to use or not use.
8.16.12	.01's		We need option to use or not use.
8.17	The solution should provide the user with the total of each tender type (quantity times tender type equals total) i.e. 2 x $100 = $200		We need option to use or not use.

ID	Requirement	Meets Requirement?	Notes
8.18	the system must provide the information to reconcile daily transactions with the county's current point of sale systems		
8.19	The solution must provide the RO user with the ability to log out even if they don't balance for the day.		Must provide report for supervisor that shows who hasn't balanced or closed.
8.20	The solution Must provide a flag to login users who were not balanced when they logged out that they must balance prior to proceeding.		
8.21	The solution must allow role based users the ability to close another users till		
	Adjustments - Must have ability to find a completed transaction and make an adjustment(s) that automatically re-calculates fees and historically keeps track of each adjustment for auditing purposes.		
8.22	The solution must provide role based users with the ability to make adjustments to all users transactions but not their own transaction adjustments.		
8.23	The solution must provide a flag to users and role based users who try to make adjustments to their own transactions; i.e. You are not authorized to make adjustments to your own transactions.		
8.24	The solution must provide role based users with the ability to add, delete and modify the users adjustment reason		
8.25	The solution must provide role based users with an adjustments search tool that allows them search by any one or more of the following:		
8.25.1	User		
8.25.2	Customer		
8.25.3	Payment amount		
8.25.4	Payment Type (Credit/Debit, Check, Cash, ACH, ePayment)		Teller is tender type.
8.25.5	Date Range		
8.25.6	Receipt number		
8.25.7	Document number		
8.26	The solution must provide role based users with the ability to perform the following adjustments to transactions: add payment, delete payment, void receipt, add shortages and overages.		
8.27	The solution must automatically recalculate revenue detail when users make adjustments.		
8.28	The solution must provide users with the ability to position a new recording label with the correct amount.		
8.29	The solution must provide automatic reconciliation to fees and revenue detail when overage and shortage adjustments are made by role based users.		
8.30	The solution must display the following on all adjusted receipts;		
8.30.1	Display the word "Adjusted Receipt" on adjusted receipts		
8.30.2	Adjustor (who made the adjustment)		
8.30.3	Adjustment Date		

ID	Requirement	Meets Requirement?	Notes
8.30.4	Adjustment Time		
8.30.5	Adjustment Reason		
8.31	The solution should provide role based user with the ability to create, edit and deleted the wording and positioning of information on the "Adjusted Receipt".		
8.32	The solution must provide the following history of all (multiple) adjustments made to a transaction;		
8.32.1	Date of adjustment		
8.32.2	Time of adjustment		
8.32.3	Who made the adjustment and the reason for adjustment		
8.33	The solution must provide the user with the ability to print and reprint adjustment receipts.		
8.34	The solution must provide role based users with the ability to track all adjustments made to receipts/transaction.		
	Distribution - Is the movement of funds to various external and internal systems.		
8.35	The solution must allow role based user to edit revenue distribution as needed to accommodate legislative changes.		
8.36	AR (1st business day of following month)		Can this integrate with Workday to provide a "push-button" invoice?

ID	Requirement	Meets Requriement?	Notes
	Software Interfaces		
9.1	The solution must interface with Teller point of sale for in-office processing		
9.1.1	The solution must transmit fee information to Teller.		
9.1.2	The solution must transmit recording number and other label data to Teller.		
9.2	The solution must interface with Workday GL		
9.2.1	The solution must provide data to GL (funds distributions)		All GL data comes from the solution.
9.2.2	The solution should interface with Workday AR		
9.2.	The solution should provide the ability to invoice within the application and have the data interface directly into the County's financial application (Workday) to eliminate duplicate data entry		
9.2.2	Department Name (populates when user makes a search selection)		
9.2.3	Contact Name (populates when user makes a search selection)		
9.2.4	Contact Phone Number (populates when user makes a search selection)		
9.2.5	Customer account number (Workday generated)		
9.2.6	Amount Charged (auto populate)		
9.2.7	The solutions should allow an authorized user to consolidate and send invoicing information to AR on a set (TBD) schedule		
9.2.8	The solution Should require an authorized user to reconcile all the consolidated transactions of AR charges.		
9.3	The solution must interface with GIS		
9.3.1	The solution must allow documents to be retrieved via API calls		
9.3.2	The API must be able to retrieve documents based on parcel number or property number		
9.4	The solution should provide the ability to interface with various scanners; Please provide a list of compatible scanners		
9.5	The solutions should allow an authorized user to consolidate and send invoicing information to AR on a set (TBD) schedule		Integrate with Workday.
9.6	The solution Should require an authorized user to reconcile all the consolidated transactions of AR charges.		Integrate with Workday.

9.7	The solution must automatically interface with various systems to distribute all types of collected fees (money) to the following revenue accounts according to regulatory requirements: Revenue Accounts (programs);		Integrate with Workday - GL and Teller
9.8	The solution must interface with PACS for processing excise in G2G function		
	Technical requirements		
9.9	The solution must provide the ability to have access to production and test at the same time.		
9.10	The solution must scale with concurrent users to maximize system processing speed up to 75 concurrent users to allow for flexibility and future expansion.		
9.11	The solution should provide help information throughout the solution to improve data input accuracy; such as: •Document Recording Types common grantor / grantee		we need the option to identify common indexing information to create a drop down for
9.12	The solution must provide the user with as many of the standard formatting requirements for recording documents pursuant to RCW 36.18.010 and 65.04.045 by providing users with guidelines, helpful hints and required actions.		
9.13	The solution should provide the RO staff with mouse over instructions and other helpful hints so that they know what and how something should be input into the fields.		

ID	Requirement	Meets Requirement?	Notes
	Customer Web Portal for document purchase		
10.1	The solution must provide on-line document search, request, and / or credit/debit card payment		
10.1.1	The solution must provide interface with third party vendor for credit/debit card payment from the web portal		Currently Point & Pay
10.1.2	The solution must interface with Workday with financial information from the web portal		
10.1.3	The solution must provide notification to RO user when customer orders are placed		
10.2	The solution must provide the ability to accept eRecording information through a web portal		G2G
10.2	The team implementing the solution should have experience implementing Government-to-Government application in a Washington county		
10.3	The solution must provide a web portal for submitting documents for recording		CC will determine system requirements / Government to Government
10.4	The solution must provide the role based user to create, edit, delete the electronic receipt message to the web portal customer.		
10.5	The solution should provide the user with reject slip workflow that provides status updates to the customer		
10.5	The solution must provide the ability for RO users to receive marriage license applications through a web portal for processing.		All applications must be submitted on-line before processing.

ID	Requirement	Meets Requirement?	Notes
11.0	Reports - are for various user to monitor progress, auditing, revenue tracking, ensure security, solve problems and ensure system efficiency.		
11.1	The solution must provide authorized users with the ability to create and schedule reports to run automatically.		
11.2	The solution should provide authorized users with the option to automatically have scheduled reports to be exported as an eMail attachment, go to a queue and/or print.		
11.3	The solution must provide role based users with the ability to run, view, print and export to Excel all reports		
11.3.1	eRecording status. Daily (Adjust workload - all staff can run)		
11.3.3	Open Indexing Report. Daily as needed (to determine which staff has open indexing and tasks - supervisors and managers can run)		
11.3.4	System Usage Report by System User. As needed (monitor user work progress- leads, supervisors and managers can run)		choose by date
11.3.10	Net Receipt Summary by System User. As needed (To audit user activity - users can run)		
11.3.11	Daily Activity Report		
11.3.12	Total Deposit Report		
11.3.13	Customer Transaction Summary. On a defined or Ad Hoc schedule (TBD)		
11.3.14	Customer Account Summary		
11.3.15	Document and title Count		
11.3.20	Receipt Summary Report totals		
11.3.22	Automated Stats (i.e. number of document tpes, number of pages,number of scans)		TBD by CC
	Scan duplicate and missing image reports		
11.4	The solution must provide role based users with the ability to run reports on system data checks		
11.4.3	Finds eRecording document(s) that didn't get the electronic stamp correctly. Daily		
11.4.10	Refresh image_content_type so that public can access after staff review and change. Daily		
11.5	The solution must provide the ability to search for the various reports using one or more user-defined parameters;		
11.5.1	Date/Date Range		
11.5.2	User		
11.5.3	Over the counter		
11.5.4	e-recorded		
11.5.5	G2G		

ID	Requirement	Meets Requirement?	Notes
11.6	Reports (please provide a list of your standard reports, as well as define the process to identify and develop custom reports		Reports must all be exportable to Excel and optionally other formats- ie PDF XML
11.7	The solution must provide role based users with a full audit history screen that displays user logon date and time, user logoff date and time, users transaction list, and user receipt edits		
11.8	The solution must allow eRecording submitter to extract a detail report		
11.9	The system must be able to report on errors identified and corrected during verification including the user who originally indexed the information		

ID	Requirement	Meets Requirement?	Notes
12.0	Data Conversion		
12.1	The solution must have a process and plan to convert the existing documents in Eagle Recorder to the new software.		We currently have over 5 million records
12.1.1	Document base information must be converted including but not limited to - Document Recording Number (AFN) - Document Recording Date - Document Type - Number of Pages - Etc.		
12.1.2	Document index information must be converted including but not limited to - Grantor - Grantee - Land Use information (Excise Number, Parcel, etc) - Etc.		
12.1.3	Document images must be converted		Document images are currently stored outside the database (but in the Eagle Recorder specific file structure) - The images take ~ 1.5 TB of disk space
12.2	The team implementing the solution should have expericence converting from Eagle Recorder to the new software in WA county with population of at least 100,000		Please provide - number of conversions from Eagle Recorder that you have done - contact information for at least one jurisdiction that was converted
12.3	The converion plan should be included in the initial project schedule, not as a later task or phase		Please provide a sample plan and timeline for a normal conversion from Eagle Recorder to the new software