



SEDGWICK COUNTY, KANSAS

DIVISION OF FINANCE

Purchasing Department

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ADDENDUM #2

RFP #23-0031

RECORDS MANAGEMENT SYSTEM FOR THE REGISTER OF DEEDS

June 21, 2023

The following is to ensure that vendors have complete information prior to submitting a proposal. Here are some clarifications regarding the proposal for *Records Management Systems* for the Register of Deeds.

Questions and/or statements of clarification are in **bold** font, and answers to specific questions are *italicized*.

1. **Can companies from outside USA (like from India or Canada) apply for this?**

Yes. All information must be stored within the continental United States.

2. **Does the company need to come here for meetings?**

No. Meetings can be done via zoom. Would prefer training to be done face-to-face.

3. **Can the tasks related to the RFP be performed outside of the US (like from Canada or India)?**

Yes. All information must be stored within the continental United States.

4. **Can we submit proposals via email?**

Yes.

5. **What county actions are expected to be integrated with the above payment processor?**

All credit card and debit card payment transactions are required to go through MSB. This includes payments for recording fees, certification fees, filing fees, and any other fees the Register of Deeds may charge.

Vendor must be able to work with the county's payment processing provider, Municipal Services Bureau, MSB, for web-based payments, terminal payments, and batch payments.

6. **The above behavior is expected once the document(s) is deemed recordable?**

The physical documents are blocked before we know if they are recordable. For documents that can't be recorded, a reject letter is attached and returned to the title company.

Ability to block document numbers for future title company batches.

7. **What is the expected behavior of the alert or report and how SVQ would be using it?**

It is preferred the report be automatically generated and sent to the Appraiser's Office and Clerk's Offices once the document is recorded.

Prefer a method of creating an alert or report for Sales Validation Questionnaires (SVQ) for the Appraiser's Office and Clerk's Office.

8. What is the expectation that all connected data to the PIN will be displayed at Indexing?

If the PIN is available, data should automatically be populated/communicated within the RMS including to the other land record departments with access to the RMS.

Automated indexing with PIN.

9. Please give detail on the expectation of the interface with the above systems.

We have two (2) current interfaces with SAP that that will need to be maintained, one (1) for creating journal entries in SAP for deposits and one (1) for creating direct pays for refunds. If the new RMS system is implemented before implementation of our new financial system, the new RMS system will need to be able to produce a .txt file with specific data briefly until our new financial system is implemented. The requirement then is at least one (1) of two (2) options. Option one (1) is to connect directly to our financial system, SAP Business By Design, and passing a .wsdl file (web services description language). Option one (1) may require the new RMS vendor have technical staff or software involvement to create this type of communication if they do not have a built-in standard connection. Option two (2) is to deliver a standard formatted file such as .txt, .csv, etc. where the file can be uploaded using CPI to transform and upload the data.

Aumentum is the county's current tax system used by the Treasurer's Office, Tag Office, Clerk's Office, and Appraiser. Once information is entered into Aumentum and verified, there is an unidirectional interface from Aumentum to the RMS. If a cloud solution is selected, we would need to explore the option of delivering a standard formatted file such as .txt, .csv, etc. to upload or save the data as needed.

OnBase is the county's document storage and management system. It is anticipated that an interface may be required in the future as additional historical images are imported into the system.

ESRI should not have been included in the RFP. There is no interface between ESRI and the RMS.

Ability to interface with the following systems: Aumentum, SAP – Business ByDesign, OnBase, ESRI.

10. Is the county willing to receive e-mailed electronic versions of responses instead of the requested hardcopy/USB submittal currently outlined in the RFP?

Yes.

11. Please provide more details regarding the Aumentum interface and the expected interface schedule.

See question 9.

12. Are the District Court records, for example DocumentIDs 2022DM05896 and 2022PR01823, recorded by the Register of Deeds or are they imported as recorded court documents so they may be available for Search?

They are imported as recorded court documents so they are available for search.

13. Please explain the Death Certificate workflow. Are these vital records recorded separately?

The workflow is just like all other documents.

14. Is the county currently able to sell (or issue) certified copies of Death Certificates?

No.

15. Regarding automated indexing with PIN: Will the county Register of Deeds be able to provide the PIN data to import?

PINs are created through the Clerk's Office and entered into the RMS. The data associate with the PINs comes in part from the interface with Aumentum.

- 16. Regarding automated indexing with PIN: Will the AIN, GeoCd identifiers and Metes/Bounds data found in the "Document Details" on the Sedgwick County online document search be included?**
Yes.
- 17. Regarding title company number blocking requirement - Cloud Records doesn't support blocking document numbers by design but will allow to time stamp any number of orders (group of documents) with an 8:00 am recorded timestamp. Will this be acceptable?**
No, the solution will need to have real-time blocking capabilities.
- 18. Please explain the Rejected document workflow. How rejected documents are different from VOIDs and at what point in the workflow are the document legal descriptions indexed?**
Rejected documents have not/do not meet recording standards. A cover letter is used detailing the reason for the rejection. The cover letter can only be viewed by internal users. The image is not externally viewable but can be viewed internally. Void documents are not viewable internally or externally.
- 19. Please provide more details regarding the ESRI interface and the expected interface schedule.**
See question 9.
- 20. Please provide more details regarding the OnBase interface and the expected interface schedule.**
See question 9.
- 21. Please provide more details regarding the SAP – Business By Design interface and the expected interface schedule.**
See question 9.
- 22. How many Register of Deeds office users will utilize the new system?**
27 in the RoD Office. There are other internal departments that will need access.
- 23. Does the county want the system to include auto redaction? If so, of the annual recordings processed how many would be redacted? What fields need to be redacted?**
Yes, the solution should include auto redaction. The number of annual recordings that would need redacted varies and the fields needing to be redacted is dependent on the document type.
- 24. How many fields are required for auto-indexing?**
Grantor, Grantee, Date, Legal, and Document Date.
- 25. Where in the system does the county want spell check functionality?**
Data Entry.
- 26. Are there any other required or desired integrations?**
None at this time.
- 27. How does the county envision using fax capabilities within the system?**
The capabilities will be used to send documents to external customers. E-mail will be the preferred option.
- 28. Is the county interested in vendors who can also provide the digitization services for the records dating back to the 1800's?**
Yes. It is anticipated that a separate RFP will be issued later.
- 29. How many databases are there to be converted? What size?**
In the current system there are two (2) databases. One (1) database is for eRecording, which allows external clients to submit documents with images and information. A new system may not need this database depending on how the system works. The main database is around 55 GB. The eRecording database is around 590 GB.

- 30. Is the county interested in ecommerce capabilities?**
The county is contracted with MSB for their merchant services.
- 31. Are you looking for a Hosted or On-Premise solution?**
The county is open to either solution. Hosted is preferred.
- 32. Will on-site demos be part of the evaluation?**
Yes.
- 33. How many anticipated workstations for staff do you expect?**
27-30.
- 34. Regarding the requirement for mobile access capabilities for data entry, are you referring to tablet entry or a remote staff setup?**
This is referring to tablet entry such as at offsite events including to records DD214s. It will also be used for remote staff.
- 35. Please further explain or expand the desired integration with Aumentum, SAP, OnBase, and ESRI.**
See question 9.
- 36. Will the conversion effort include the additional documents the county is digitizing from the 1800s up through 1968? Will these documents include both indices and images?**
It is anticipated that the historical documents yet to be scanned will part of a separate RFP issued at a later date.
- 37. Regarding the conversion effort, what is the total number of images to convert, and the total number of indices?**
See question 36.
- 38. Regarding the COI, please provide the certificate holder details, name and mailing address.**
*Sedgwick County Kansas
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- 39. What is the timeframe for the county?**
ASAP. Please provide a timeline appropriate for the solution being offered.
- a. Contract?**
- b. Kickoff?**
- c. Go-Live?**
- 40. County requires “reliable and responsive technical support” (pg. 6). Do you have specific Service Level Agreement requirements in terms of 1) response time to inquiries; 2) resolution times for issues; 3) specific days of week/hours per day that support resources be available?**
Proposals should include best options available for support. See page 6 of the RFP for the expected days and hours of operation. Inquiries should be responded to the same day with at minimum an acknowledgement of the inquiry.
- 41. We do require remote access to support the system (pg. 11). Will the county provide their own solution or are they open to solutions provided by us?**
The county will work with you to provide a solution and determine the best solution for all parties involved.
- 42. Auto indexing with PIN – is the county expecting an integration to receive this data, so that when a user enters a PIN, it brings in data from another office?**
Yes.

- 43. Please expand on the real-time updates and workflows with partner offices. How many and which kind of offices to perform which duties? Are these the same as the desired integrations with Aumentum, SAP, OnBase, and ESRI?**

This is primarily referring to work-flows with the Clerk's Office as they use the same system to enter additional information. These updates should occur in real time to ensure that multiple people are not editing the same record simultaneously and that the Clerk is notified as records are available for review.

- 44. Training mentions a train the trainer approach but also that all end users receive individual training. Will the vendor be training just the trainers, or all end users?**

Proposals should include the best training options for the proposed solution. We are open to a train the trainer approach as long as supervisors, technical staff, the office manager, and Chief Deputy Register all receive training.

- 45. How much and what kind of post implementation training is expected?**

Proposals should include the best training options for this type of solution. Staff using the system should feel comfortable with the new system upon the training completion.

- 46. Page 4 of the RFP: Of the designated 138 internal users, how many will need "read only" access to the images and indexes? How many will need full or partial access to the general recording functions?**

The number of users that need full and partial access is to be determined. At least 30 users will need full access.

- 47. Page 4 of the RFP: Regarding the requirement for autocomplete fields and word wrap capabilities: can you expand on exactly what these functions do or the task you are trying to complete?**

Autocomplete and word wrap functionality is desired for all fields possible. Word wrap capabilities are especially desired for fields such as legal description which generally contain a large amount of text.

- 48. Page 5 of the RFP: Regarding the statement "Prefer built in OCR capabilities": what fields are you looking to capture using OCR and for what purpose? i.e., social security numbers for redaction? Grantor/Grantee? Etc.**

It is preferred these capabilities be available for all fields including legal descriptions.

- 49. How do you currently handle day forward redaction needs?**

Redaction needs are handled manually with the current process.

- 50. Have all of your current images and the images for the back file conversion project been through or will go through a redaction process?**

Only current images have been redacted.

- 51. Page 6 of the RFP: Regarding the requirement for "automated indexing with PIN": can the county explain what it means by automated indexing? Is this the same as OCR?**

See question 8. It is not the same as OCR as OCR capabilities would be used to pull data from a scanned copy of a document.

- 52. Page 6 of the RFP: Can the county please explain what type of integration is required with Aumentum? Currently what do you have and what you would prefer? Does the current or future integration state include integration with Orion?**

See question 9. There is no current integration with Orion nor plans for future integration with Orion.

- 53. Page 6 of the RFP: Can the county please explain what type of integration is required with SAP? Currently what do you have and what you would prefer?**

See question 9.

- 54. Page 6 of the RFP: Can the county please explain what type of integration is required with OnBase? Currently what you have and what you would prefer?**
See question 9.
- 55. Page 6 of the RFP: Can the county please explain what type of integration is required with ESRI? Currently what do you have and what you would prefer?**
See question 9. An integration may be desired with ESRI in the future and would likely be part of a larger integration project.
- 56. Does the county prefer an on-premises solution or a true SaaS (Hosted) model? If a hosting model solution and costs is to be provided will the weight of the financial scoring be accounted for in the evaluation?**
The county is open to either on-premises or hosted. A hosted solution is preferred. The financial costs of the different solutions will be considered during scoring.
- 57. Is the county asking for a Test database instance?**
Yes.
- 58. Is the county asking for disaster recovery and data backup solution?**
Yes.
- 59. The day forward ingestion of records into the system will primarily be what type of document (Paper, digital, email, or something else)?**
All of the above.
- 60. Does Internal Users mean they will be the ones adding documents to the RMS?**
Internal users are those that are part of the county organizational structure and have a county email address.
- 61. What does it mean External users? Will these users be outside of the county network and accessing records via the Internet?**
Yes, external users are outside of the county network and organizational structure including real estate professionals, title companies and researchers.
- 62. Please elaborate on "Property fraud alert capabilities – Text capabilities and/or call from a live person preferred" this is found on page 5 of the RFP.**
This is an alert sent to a customer when any documents for their property are recorded. The alerts must include document number, name, and document type.
- 63. What is the use case for tablets or smartphone devices, as mentioned on page five of the RFP?**
See question 34.
- 64. Please also elaborate on the ability to "void transactions" and "fraud alerts". Our understanding is that this is dealt with by the existing payment processor of the county.**
See questions 18 and 62.
- 65. What does "with PIN" mean on automated indexing with PIN on page six?**
See question 8.
- 66. Does the county already have a fax solution or do we need to propose one?**
The solution should offer fax capabilities from within the system.

67. **Is there an expectation of the scanning operation happening outside of the county's premises or outside of the intranet?**
Scanning capabilities for new deeds would occur onsite. Older deeds yet to be recorded will be part of a separate RFP at a later time.
68. **Does the county plan on exporting the local database to film?**
Yes, we already have our documents on film.
69. **Does the county already have an effective demilitarized zone/network for public-facing connections?**
Yes.
70. **Does the county need disaster recovery abilities, as opposed to regular backup and recovery**
 - **The difference between these solutions is ultimately time-to-recovery, but their implementations are distinct and may require additional product licensing. The RFP appears to conflate these two solutions.**
 - **Disaster recovery typically presumes a separate parody environment that can immediately take the place of production in the case of critical failure without impact or notice.**
 - **Backups, in our understanding, preserve the necessary data in such a way that, regardless of the recovery path of the servers and products taken, the environment does not need to be reconfigured. i.e. The application-server(s) fails or is lost, but new application-server(s) can be deployed. The products are reinstalled and populated by the most recent backup taken.***If on premise the county will handle disaster recovery abilities. If the system is hosted, then we prefer disaster recovery abilities as well as regular backups.*
71. **Does the county require new hardware or servers for the proposed solution or will the solution be deployed into the existing infrastructure?**
There is the potential for the solution to be deployed into the existing infrastructure on a shared server. Depending on CPU usage there may be a need for additional server licenses to be purchased. If a separate, dedicated server is required for the solution, then full new licenses with Software Assurance would need to be purchased.
72. **Please elaborate on “What level of system availability is recommended for the RMS?” found on the bottom of page 6 of the RFP.**
Other than being down for minor maintenance or updates, the system should be available 24 hours a day, 7 days a week.
73. **How much data is stored in the legacy system?**
See question 29.
74. **What file format will all the data be that is coming out of the legacy system?**
TIFF and SQL
75. **Are the legacy documents already indexed?**
The documents already in the system are indexed. There are additional scanned images that need to be uploaded and indexed. There are also historical images that have yet to be scanned; this work will likely be part of a separate RFP.
76. **This historical back file conversion is what type of documents (loose paper, Folders, Boxes of paper, Books, film, or some other type)?**
Books and film.
77. **Can the documents in the back file conversion be transported to Vendor headquarters for digitization?**
It is preferred that all documents stay onsite or at the current storage location. The digitization of historical records will likely be part of a later RFP.

78. What is the county's expectations on overall time needed to complete the project?

The county would like the project to be completed ASAP. Proposers should provide a timeline that they feel meets the needs of the project.

79. Are you able to provide the number of users?

See page 4 of the RFP under Mandatory Project Requirements and question 33.

80. Are we able to get clarification on the following requirements?

- a. Cashiering that includes the ability to take cash, check, credit card, escrow account, journal entry and ACH transactions; correct errors; manage customer accounts; and allow payers to print receipts online or receive receipts through email.**
Vendor must be able to work with the county's payment processing provider, Municipal Services Bureau, MSB, for web-based payments, terminal payments, and batch payments.
All credit and debit card payments must be processed by MSB as they are our preferred vendor. The system should have the ability to integrate seamlessly with MSB to accept payments. Other payments should be able to be processed via the selected solution and then integrate with SAP.
- b. Robust reporting -Flexible input/output and ad hoc reporting.**
The system should be capable of creating various reports and customizing reports to the users' needs.
- c. Timekeeping report that details how long employees spend working in each record.**
The timekeeping report is used by management to assess employee training needs and determine if employees are working at peak performance. It should detail how long an employee spends working on each deed, etc.
- d. Auditing capabilities.**
It is preferred that the solution selected be able to show what user was in each record and when.
- e. Tracking of skills per individual to tabulate how quickly an employee is performing work in order to provide feedback to staff.**
This information can be in a report format and is used to assist with training needs.
- f. Tracking of customer interactions and purchases.**
The solution should provide a report of other documentation detailing customer interactions.
- g. Addendum-based corrections/audit trail.**
See d above.
- h. Property fraud alert capabilities.**
See question 62.
- i. Text capabilities and/or call from a live person preferred.**
This is part of the property fraud alert preferred capabilities.
- j. Increased efficiency specifically with relation to reports and data entry o Prefer a method of creating an alert or report for Sales Validation Questionnaires (SVQ) for the Appraiser's Office and Clerk's Office.**
See question 7.
- k. Automated indexing with PIN.**
See question 8.
- l. 24/7 online availability.**
Other than being down for minor maintenance or updates, the system should be available 24 hours a day, 7 days a week.

m. In Ability to interface with the following systems: o Aumentum o SAP – Business ByDesign o OnBase o ESRI?

See question 9.

82. Do you plan to replace OnBase?

No.

Firms interested in submitting a *proposal* , must respond with complete information and **deliver on or before 1:45 pm CDT, July 11, 2023**. Late *proposals* will not be accepted and will not receive consideration for final award.

“PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM ON THE *PROPOSAL* RESPONSE PAGE.”



Lee Barrier
Purchasing Agent

LB/ch