Clerk-Recorder System Request for Proposal
Addendum #1

Clarifications and Questions

Clarifications

1. The word redaction should be exchanged for truncation throughout the RFP
2. Truncation ability must be adaptable to meet any legal requirement changes that are mandated or adopted by legislation.
3. The current truncation process does not alter the original image. It provides truncation based on vector placed overlays. When migration takes place the original images will not contain the truncation overlay and must be truncated before go live. Further information will follow in Addendum 3.
4. Vendors that would like to use a testing and training database should propose this as a separate/alternate cost in their proposal.
5. Clarification on Page 23 of the RFP. Data Conversion/Migration timeframe is approximately 3 months. Not 15 months as indicated in this section.
6. Item 2 Page 7 of the RFP should read:
   Data Conversion/Migration Services is defined as the conversion services/management of the migration and integration of the current online data into the proposed solution; and analysis of index-to-image availability.
7. Item b Page 13 of the RFP should read:
   Indexing and providing conversion services for current system data for the purpose of integration into the proposed system;

Questions

1. Would the County please describe in more detail the billing and invoice requirements?
   The system should generate a billing for charged/journal entry items. This function is tied to specific customers (typically other government agencies). Billing typically occurs monthly or quarterly. The ability to have a statement by client/customer that includes all invoices/transactions completed within a specified time period.

2. Would the County please describe in more detail the functions and requirements?
   - Upon entry of data associated with a filing the system will assign a unique sequential file number. The current file number format for a Fictitious Business Name filing is 2013F-001 (four digit year - the letter F - dash - three digit sequential number).
   o FBN Data: Business Name, Business Address, Business Mailing Address, Registrant Name(s), Registrant Address(es), Method of Doing Business, Publication Date, Abandonment Date, Withdrawal of Partner Date (tied to the withdrawing partner)
   - The business name(s) and registrant name(s) will be indexed and searchable.
   - The record will be stored and the associated paper document will be scanned and linked to the data record allowing copies to be produced from the image stored in the system.

- When an FBN is abandoned the abandonment date will be associated with the record.
- When a partner withdraws from a business the date of withdrawal will be associated with the record.
- Affidavits of publication will be scanned and associated with the filing.

3. The ability to truncate documents in compliance with GC 27300 – 27307.
    The County is unclear what the question is in this statement. The county requires functionality to comply with GC 27300 – 27307. The following is a link to the government code section.
    http://www.leginfo.ca.gov/cgi-bin/displaycode?section=gov&group=27001-28000&file=27300-27307

4. Are there other doc types that need to be printed with a border or frame?
    Only vital records are printed on banknote and require adjustments.

5. Would the County please explain what is meant by truncated images and explain why these exported?
    Truncated images represent public record images with the social security number truncated per government code requirements. These images are exported to contractual clients and other county departments.
    The County is required to maintain official record images and public record images. The public record images contain truncated social security numbers. The county must be able to provide the public images to individuals or organizations who have contracted to receive them and provide access at in-office kiosks. These public record images must be able to be exported for customers. The official record images which have no information truncated must be maintained and available to recording staff. The official record images must be able to be exported to send to outside vendor for conversion to film for archival purposes. In a disaster recovery situation the county must be able to restore both the official record image and the public record image.

6. Would the County please describe in more detail the functions and requirements for correspondence?
    The county would like the system to generate standard correspondence based on reason code selected for documents rejected. The correspondence generated should be MS Word compatible and editable. For example when rejecting a vital record request we would like the system to generate the appropriate correspondence based on the reason selected.

7. Would the County please describe current functionality. What type of reporting experience does the County have today?
    Report functionality is addressed separately in Addendum 2.

8.   Do all off line images need to be converted before go live?   Can images be processed post go live with our back post functionality?
Offline images are not required to converted before go live. The County would like the functionality to be able to add historical data and images after migration has occurred.

9.   Can Redacted images be exported in current software? Would the County prefer this be done during the conversion process?
The current truncation process does not alter the original image, it provides truncation based on vector placed overlays. When migration takes place the original images will not contain the truncation overlay and must be truncated before go live. If the overlay cannot be reapplied in the new system, all records would need to have truncation completed prior to go live in addition to the stored untruncated original document.

10.   Would the County please provide previous contract information for the existing vendor? Please provide name of your current vendor including any sub-contractors, inception date and term.
Current vendor is Fidlar. No subs. Internal resources will be utilized.
Contract began in 2004 and currently is renewed only for maintenance and support.

11.   Would the County please provide a total current contract cost? Please include maintenance and/or service and upgrade fees incurred?
Our current system does not provide all the functionality that we are looking for in this RFP and therefore that contract amount is not known for these services.

12.   Is the County firm on a 3 month installation or would they be open to alternative suggestions?
We are firm with the installation time frame given a month or so.

13.   Can the County provide additional information for the Recorder's Interfaces (Exhibit F) to assist in determining integration effort?
Please see Addendum 2.

14.   Would the County please provide your approximate database size?
Number of Documents: 466,544 (not pages or index items)
Number of Names: Unknown by CR
Number of Images: 1.6million images
Back to the Year: Images: 1990 / Index 1989

15.   Would the County please provide information regarding historical data? How far back does your digital index go?
Digital index is 1989 to current

16.   Where are the images stored currently, on the file system or in a database?

Images are currently stored on a file system, only the index information is stored in the database.

17. Does the County envision a future plan for image hosting: i.e. file system or database? Image hosting, either through file system or database, must be easily accessible for internal and external resources. This is based on our agreement with our customers to provide property information expeditiously without direct county employee interaction needed for each transaction.

18. Do all data/images exist through one system interface, or are they maintained through a multiple source systems?
All data and images exist on a single source system (currently Fidlar) and are accessed through multiple interfaces (e.g. iDocument and Laredo).

19. How many workstations do you currently use for Recording and Search? Is this number to remain constant in the near future?
19 workstations within the Clerk Recorders office are used in some capacity for recording and searching. The need to expand this number needs to be available without a significant impact to our resources.
This number does not include other departments who access public records.

20. Are there any non-numeric instrument numbers or file numbers in use?
Currently all records have a non-numeric instrument number to identify the record type. i.e.: R – Recorded documents, NP – Notary Public, FG – Fish and game.
The county would consider changing this format for identifying document types/records.

21. Does the County use A-pages?
The county does not currently use A pages but this practice was used in the past. (both vital and recorded)

22. Is there any data that does NOT have any associated images?
Yes

23. Are there any images that do NOT have any associated data?
No.

24. How are the instruments numbers formatted currently and how would you like them formatted going forward?
A sample of the current formatting is as follows:
Official & Public Records - 2013R-000001
Preliminary 20 day Notice: PL2013-00001
Birth Records: 1201358-000001
Death Records: 3201358-000001

Public Marriage Records: 4201358-000001
Conf Marriage Records: 5201358-000001
Fish & Game: 2013FG-0001
The county would consider changing this format for identifying document types/records.

25.   Are there any security level documents that need to be identified and converted over?
       The County requires further information to answer this question

26.   Are there duplicate file numbers?
       Yes. There are duplicate recorded instrument numbers.

27.   Does the County record sealed documents?
       No. Sealed vital records are not maintained at the County level.

28.   Does the County have recorded sealed names documents?
       If this is regarding birth certificates, the response is no.

29.   Does the County store social security numbers?
       Yes death certificates (data & image) and may be included on other document images.
       The county stores an exact copy of the original document that stores the social security
       number, the image presented to public kiosks and external resources does not include
       social security numbers (truncated)

30.   Are there documents with multiple titles? If yes, do these documents have a single set of
       images?
       Yes we do have multiple titles and yes they have a single set of images.

31.   Are there Filings (non-recorded) documents to be converted?
       No

32.   Does the County plan to consolidate document types during the conversion?
       If this is referring to multiple document tiles they would not be consolidated during
       conversion. Require additional information.

33.   CR System, page 9, section g: What is meant by general business documents
       This is general comment regarding the processes which we follow must be auditable and
       recorded according to proper procedures.

34.   Will this require DayForward (from the time of 2008 to Present) process only? Or will
       this include BackFile Truncation (1980 – 2008)?
       All documents from 1990 forward are truncated in the current CR system. Digital Reel
       documents from 1980 through 1989 are truncated on Digital Reel. The proposed system

does not have to provide truncation for the images in Digital Reel which will not be converted/migrated.

35. Will all index data be provided in standard text format (fixed length, comma delimited, tab delimited, or other)?
All index data is currently stored in a SQL database and is not encrypted. The data can be exported to any of the stated formats.

36. Can you provide more details on the data conversion/migrations? What system/s is the county using to store images and redaction? Is there a plan to export images from the current system/s?
Further information will be necessary. This will follow in another addendum.

37. What images are currently available as tiff images?
All images are currently in tiff format.

38. What data is available in other electronic formats? What data and how much must be converted from paper? How many CDs are estimated to be converted? How many DVDs are estimated?
None in this current migration project.

39. How far back does Yuba County have electronic indexes?
1989

40. Does Yuba County want Auto Indexing part of the RFP responses?
This is not an RFP requirement. The county does not currently auto index but would be interested in including this functionality.

41. Are the paper documents, books and land records all Official Records?
   a. If they are, is there archive film available for the conversion instead of these media types?
   b. Could you estimate the quantity of CD, DVD, paper documents, books and land records that will need to be converted?
   c. Could you please provide more details as to the other "offline Medium" types and quantities?
This will not be a part of the migration. This could/will be performed at a later date.

42. Since much of the AtPac Database Schema is confidential, will there be a problem with AtPac performing all of the database administration functions with the exception of Backup and Recovery?

All is public information with the exception of truncated data. Further discussions regarding this will be made with the awarded contractor during contract creation.

43. Will there be a problem using a database other than MSSQL?
The county has current datacenter licensing for MSSQL. The county does not wish to purchase additional database server licensing or support open source products.

44. What information is printed on the labels produced from the Dymo label printers? If the labels are attached to documents, what type of documents (official documents, vitals, maps, etc.) are the labels attached to?
The current system does not use a Dymo label device for the endorsement process. We currently endorse on the document itself using the Epson receipt printers.

45. You indicate 10 External Department users. What information should these users have access to?
Truncated public land records only. Clerk information is not accessed by external department users.

46. What specific Fujitsu Scanner models do you have?
Fujitsu FI—6770 ADF Scanners

47. What scanning device does Yuba County Recorder scan large maps with
HP DesignJet 820MFP. Note: Map images are not included in the current CR system and are not required to be a part of the RFP proposal.

48. What printing device does Yuba County print large maps with?
HP DesignJet 800PS Note: Map images are not included in the current CR system and are not required to be a part of the RFP proposal.

49. How is the digitized map linked to the official record index data?
Digitized maps are not linked to index data Note: Map images are not included in the current CR system and are not required to be a part of the RFP proposal.

50. In the section F. Deliverables / Reports, it is mentioned that within 3 weeks of contract signing, the bidder will provide a project life cycle plan. Does this mean that the project life cycle plan should be created in 3 weeks time?
The same section specifies that the project will be completed within 3 months?
Which project? The Data Migration Project?
Yes the life cycle plan should be created within 3 weeks from contract execution. The entire system deployment and migration should be completed approx.3 months from contract completion.

51. Does Yuba County Recorder want a manual truncation process or an automated process similar to one offered by Extract Systems ID Shield?
The County would prefer an automated process over a manual process however manual truncation (addition & removal) must be available.

52. The Section E. 2. Data Conversion/Migration requirements include that conversion services from different media like 'CD, DVD, paper, books, land records and other offline medium is needed.
Questions:
How many CD's require conversion?
What size are each one of the CD's?
How many DVD's require conversion?
What size are each one of the DVD's?
How much paper requires conversion?
Does the paper need to be scanned?
Does the paper need to be indexed?
How many books are required to be scanned?
How many pages are approximately in each book?
What size are the books pages?
What other offline medium is anticipated to be used for conversion?

All of the data to be converted during this project is currently in electronic format for the period 1989 through today. The proposed system should include functionality to convert paper and other media at a later date.

53. Include Exhibit E in the RFP Response?
Yes

54. Page 8, item 2: Are there specific needs or requirements for the conversion of paper, books and index cards that are to be addressed in this RFP response. Can Yuba County define the specific requirements in this area, if there are any?
No.

55. Page 8, item 3: Does Yuba County currently make use of any Enterprise Content Management solutions that have been deemed by the County to meet the requirements for California's Trustworthy Electronic Document and Record Preservation regulations?
Will be addressed in Addendum 3.

56. Page 11, item I (1) Electronic Recording: Which of the current California-approved e-Recording portals does Yuba County plan to integrate with (Secure or CERTNA?) Do you require that the vendor involved have prior experience in integrating with the e-Recording portal?

Not at this time, but future requirements are to include e-recording.

57. Page 14, item 1 b.: Does Yuba County have plans to convert existing paper or books within the scope of this RFP? If so, can the County describe the requirements with regard to specific items and volumes?
No.

58. Page 40, Megabyte Property Tax System: Can Yuba County describe in detail the custom process that was created in-house to copy images and index data to the Assessor's server? Does the Megabyte Property Tax System have web-services capabilities to facilitate the transfer of data to the Assessor's server?
Will be addressed in Addendum 3.

59. General – There does not appear to be a requirement or a plan noted in the RFP for Disaster Recovery Services. Are those necessary, and should vendors plan on describing such services in their responses?
Disaster recovery services will be provided by the County.

60. General – Can Yuba County provide information regarding the index data and images that are to be converted into the new system? (example – number of years of index data or date range, and numbers of documents (and/or pages) of images to be converted to the new system?) Additional information regarding the storage currently required for conversion in GB would be helpful in assessing the conversion costs.
The index data is stored in SQL and is approx 4.2 GB in size. There are 1.6 million images at a total of 146GB.

61. General – There does not appear to be a requirement for any testing or training databases included within the RFP. Is there a need for a test or training database, and for the support of such a database?
This is not a requirement but may be included as a separately priced option.

62. General – Is the county currently using an Auto-Indexing and Redacting program? If so What is the current redaction tool?
Auto indexing is not currently implemented. Truncation is done through a proprietary OCR technology provided by current vendor (Fidlar).

63. Page 10 item m. What specific metrics are required to be in your productivity report?
Please see Addendum 3 for reporting requirements.

64. Exhibit F –What specific systems interfaces will the county need with third party vendors in addition to MegaByte?
   System interfaces only include Megabyte. All interfaces are handled through Fidlar/Laredo client.

Is the use the Virtual rescan software the only current capability acceptable scanner or would the county approve of a scanner that has like capabilities?
   The County has invested significant resources on current scanner technology. Existing Fujitsu FI6770 scanners must be utilized by new system.

Questions shall be directed to:

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