



**ADDENDUM #1  
Clerk and Recorder, Recording Division  
Document Management System  
RFP # 7363-22**

July 26, 2022

The attached addendum supersedes the original Information and Specifications regarding RFP # 7363-22 where it adds to, deletes from, clarifies or otherwise modifies. All other conditions and any previous addendums shall remain unchanged.

**Please note: Due to COVID-19, BIDS will only be accepted electronically by emailing [purchasing@bouldercounty.org](mailto:purchasing@bouldercounty.org).**

**NOTE: State your compliance with the Terms and Conditions in the Sample Contract contained in this RFP. Specifically list any deviations and provide justification for each deviation.**

1. Question: Does the County require the software vendor to supply all the hardware?
  - a. Servers, storage, printers, scanners, desktops

**ANSWER: The County would prefer a cloud-based SaaS solution using SSO with Azure AD. If the vendor doesn't have a cloud-based solution we do have an on-premises Cisco UCS and VMWare virtual infrastructure environment with backend SAN storage. For either of these solutions we do want the software to use either Azure AD or Microsoft AD authentication.**

2. Question: If the county does not expect the vendor to supply all of the hardware is there a list of hardware the county expects the vendor to provide?
  - a. Servers, storage, printers, scanners, desktops

**ANSWER: The County has on-premises virtual infrastructure that would support the servers and storage. The County may have to expand that as needed for this new solution.**

3. Question: Is the county able and willing to provide all necessary hardware either bare metal or virtual?

**ANSWER: The County can provide printers, scanners and desktops. If the solution is on-prem the County can provide the VMWare servers and SAN storage but may need to expand the server hardware and SAN storage if needed.**

4. Question: Does the statement below mean we are to provide both of these options or are we to provide one or the other?

“marriage and civil union applications must be completed in person or using approved virtual processes including an online application and electronic signature capability”

**ANSWER: Both. The county needs the ability to provide these licenses in person and remotely. An online-filled application would be used for both processes that completes the state required forms. Electronic signature capability for in-person is necessary, and desired for virtual applicants.**

5. Question: Questions in the Service Requirements area
- a. Q22.b: Is the outside source on the internet or outside of our system but inside the counties firewall?
  - b. Q22.e -In the sentence below is the user a deputy using our system or a county office directly submitting?

“Is there a process for a user to manually scan or upload an image as an eRecording, adding to the list in the same order of date and time submitted?”

- c. Q22F: Is the outside system outside of the counties firewall?

“Are Transfer Declarations processed with deeds, and can they be mapped to an outside source upon recording of deed?”

**ANSWER:**

**Q22b: This refers to a title company who submits electronically through a direct interface instead of through a 3<sup>rd</sup> party vendor such as Simplifile. They are outside the county, submitting to the recording vendor interface just like other eRecording vendors.**

**Q22e: This is a deputy using our system with a scan from a private citizen.**

**Q22f: Images of Transfer Declarations, upon recording the accompanying deed, are saved in a different network file location than the recorded images. They are not a public document, but we need access to them as reference after recording. The Assessor's office has a nightly FTP that includes the Transfer Declarations with the deeds; however, they also use the alternate network location for reference as well, when needed.**

6. Question: How many users will utilize the new system?

**ANSWER: We have 10 users; nine full-time, one temporary.**

7. Question: Approximately how many documents are recorded annually?

**ANSWER: Our 5-year average is 74K, though we recorded 90,979 last year.**

8. Question: Is there a required Go Live date?

**ANSWER: The county would like a Go Live date of 12/28 but recognizes that that may not be a reasonable expectation.**

9. Question: What integrations are required?

**ANSWER:**

**Assessor's office – Currently, a property record has a link to the image of the recorded plat from our system and shows as an unofficial copy.**

**They also have an FTP set up for recorded documents to transfer to another location on the county network. Their system accesses these to process and update changes in property ownership.**

**CSC eRecording vendor –Currently has a web service agreement for access to recorded Deeds of Trust enabling CSC to submit them to the Public Trustee along with their Releases of Deeds of Trust documents.**

10. Question: Is the County interested in auto-indexing and/or auto-redaction?

**ANSWER: Yes, the county would be interested in Auto-indexing if there is a verification process in place; however, Auto-redaction is not yet supported by statute, but the county would be interested once that was statutorily acceptable.**

11. Question: Can vendors provide additional content to supplement the required Specifications?

**ANSWER: Yes**

12. Question: Does the County have an interest in the digitization of archive documents? If so, approximately how many documents?

**ANSWER: We have already digitized our historical records, with a few minor exceptions.**

13. Question: Is it the County's intent to have the selected vendor supply hardware or to only provide hardware recommendations to be purchased separately by the County?

**ANSWER: See Question #1, #2, and #3**

14. Question: What is the County's existing workstation equipment?

**ANSWER: In office: Lenovo PC, Dual Monitors, Fujitsu desktop scanner, Zebra label printer, access to shared laser printer.  
Remote workers use Lenovo laptops, docking stations, and second monitors, no peripherals.**

15. Question: What is Document scanning without proprietary file ending (17a)?

**ANSWER: Scanned images must be in an open format such as TIFF that is easily sharable and accessible to all users. Proprietary formats have program specific file extensions that restrict users and would not work with a public access system.**

16. Question: Do you prefer an on-premises solution or a vendor-hosted/SaaS solution?

**ANSWER: Our priority is cloud/SaaS based with SSO using Azure AD. We can go with either option. We have on-premises Cisco UCS and VMWare ESX environment. For either option we do prefer SSO with Azure AD or Microsoft AD on-prem authentication.**

17. Question: What is the anticipated date of award for the RFP?

**ANSWER: RFP award is anticipated to occur on or before September 1, 2022. Timeline is subject to change.**

18. Question: What is your desired go-live date for the new system?

**ANSWER: See Question #8.**

19. Question: RFP page 8, Item 15: Could you clarify what you mean by and what you are trying to solve by "map to an outside source"?

**ANSWER: See Question #5 (c)**

20. Question: RFP page 8, Item 17.a: Could you clarify what you mean by "Document scanning without proprietary file ending"?

**ANSWER: See Question #15**

21. Question: RFP pages 8-9, item 22.b: Could you explain further what kind of direct interface you are asking for, such as with Land Title?

**ANSWER: See Question #5**

22. Question: 16. DMS (Document Management Systems) / ECM Enterprise Content Management systems functionality is different than applications that generate labels. Those software applications designed for creating and printing of document labels/barcodes and/or mailing labels can integrate with our platform but is not a native component of DMS/ECM. Are you looking for vendors to quote both or are you looking for DMS/ECM that can integrate with your label / mailing label technologies?

**ANSWER: We need a recording system that incorporates both; we do not have a separate labeling system. When eRecording, electronic labels are added to the recorded Deed and the Transfer Declaration that is processed with it. The Transfer Declaration label states it is a Transfer Declaration.**

**When recording paper documents, we have a barcode label for the Deed and a non-barcode label for the Transfer Declaration. The transfer declarations need to have the reception/document number of the deed on them, so the Assessor knows which deed it goes with.**

03969960      07/05/2022 07:57 AM  
RF: \$13.00    DF: \$45.00    Page: 1 of 1  
Electronically recorded in Boulder County Colorado. Recorded as received.

23. Question: 19. DMS/ECM are not financial applications for credit card/debit card processing, ACH payment processing, etc. Our DMS/ECM platforms can integrate with those types of application as the system of record for the transaction data generated by those types of applications. Credit card / Debit card / ACH systems are usually purchased through payment processing companies. Are you wanting a DMS/ECM to simply integrate with those types of applications to store the records data from those applications or are you looking for a vendor to be able to quote and supply both DMS/ECM and payment processing software applications?

**ANSWER: We currently use a state system for credit card processing. Transactions with credit card payments are entered into the recording system to assist with reconciling a day's activity and revenue. They do not need to be tied together. ACH payments are received by our Treasurer's office, so in the recording system, a transaction simply has an ACH payment type used for the daily reconciliation purpose. Reports are run to reconcile system transactions with the actual payments to the Treasurer, and with the credit card transactions in the state system.**

24. Question: 22 (f). Please describe in more granular detail regarding "mapping to an outside source"?

**ANSWER: See Question #5 (c)**

25. Question: 22 (h). Can you please provide more detail and/or a sample format of what this label type should look like?

**ANSWER: The electronic label or digital annotation of the label should be transparent, meaning you can see the verbiage of the document through the label to ensure we do not cover it. It should be able to be moved by the recorder to the left or right or down to accommodate certain documents.**

**Example: some court documents we move the label to the bottom margin instead of the top to accommodate the form that the submitter cannot change. Re-sizing refers to recording a plat electronically. They are a large format document, 24"x36", so if the label is only sized for a letter or legal page, it would be disproportionate to the document itself, and could cause difficulty in placement of the label without covering verbiage on the plat.**

26. Question: 24. Please describe in detail what is meant by "updating historical records"?

**ANSWER: Once a document has been recorded whether 5 days ago or 50 years ago, we need the ability to upload an image if there isn't one or replace a bad image with a legible one. We also need the ability to change the indexed data if incorrect or if not entered in today's standard formats.**

27. Question: In addition to documents and data stored and managed in a centralized DMS/ECM system of record, are there media types that would need to be stored and "related" to documents/data stored? (i.e. pictures, audio, video, CAD files, etc)

**ANSWER: No**

28. Question: What types and how many “digital signature / eWet signature” requirements are there per document type? (i.e. 1 doc type, 5 doc types, - 10 doc types, etc)

**ANSWER: We don’t check for signatures when recording a document; it’s not a statutory requirement for us to record. Nor do we sign documents that we are recording. We capture digital signatures for marriage and civil union applicants when done in person using a signature pad.**

29. Question: Please describe any and how many digital review/workflow approval processes might possibly need to be created?

**ANSWER:**

**Paper Submissions:**

**Scanning/Recording – non eRecording documents are scanned as part of the transaction creation, previewed by the scanner.**

**Indexing – clerk reviews image and enters indexing data from the image**

**Verifying – clerk review image and verifies indexed data from the image. This cannot be done by same person who indexed.**

**Mailback – clerk confirms image is clear and legible before returning document to submitter.**

**Electronic Submissions:**

**Recording – clerk review image to determine legibility and compliance before recording.**

**Indexing – same as above**

**Verifying – same as above**

30. Question: Do any reviews and/or approval workflows include outside personnel? If yes, please describe.

**ANSWER: No, workflows are for internal personnel only.**

31. Question: Is there a need for notifications and auto-escalations for reviews and workflows created?

**ANSWER: Documents are recorded in the order in which they are received, so eRecordings must show date and time submitted to ensure they are not taken out of order. We currently index documents in the order they arrive in the queue or list. The same applies to verifying. We do not currently use any**

**notifications but welcome information regarding how they facilitate your workflows.**

32. Question: Are there retention policy flagging and workflows that need to be created on record/documents? If yes please describe how many documents need a retention policy workflows/notifications to be created?

**ANSWER: All recorded documents and applications for marriage or civil union are permanent record. Any temporary files or downloads can be or are on a regular cycle of deletion.**

33. Question: Please list any systems, current application version, on-premise or SaaS that our DMS/ECM platform would need some type 1-way or 2-way data communication/integration?

**ANSWER: Data/Image is shared with our Assessor's office through a nightly FTP. We have another FTP that is processed nightly for SKLD, a local title plant/resource for title companies.**

- **Other entities such as title companies, researchers and law firms have paid access to search our records online and view the images. Unlimited downloading of unofficial copies is included with that access.**
- **Other entities have escrow account on which the deposit funds on which they can draw down from to pay for downloaded copies when searching our records online.**
- **Public users can search the documents online, but not view the images. They can download copies and pay with a card online.**

34. Question: Are these systems supported by all internal IT personnel? If not, please describe those that are supported by 3rd party VARs and whom those VARs are?

**ANSWER: Boulder County Enterprise IT supports Microsoft Windows OS and Microsoft SQL Server.**

35. Question: In order to provide the requested information regarding pricing, would you mind letting us know how many employees would need access to the new software?

**ANSWER: See #6**

36. Question: We came across the RFP posted by you and are wondering if you are open to receiving proposals from an Indian and Canadian agency. We would be



happy to send you our proposal, which we think is a great fit for your requirements.

**ANSWER: Proposals from non-U.S. entities are welcome. The selected company must adhere to applicable Federal and Colorado law.**

**Submittal Instructions:**

Submittals are due at the email box only, listed below, for time and date recording on or before **2:00 p.m. Mountain Time on August 2, 2022.**

**Please note that email responses to this solicitation are limited to a maximum of 50MB capacity.**

**NO ZIP FILES OR LINKS TO EXTERNAL SITES WILL BE ACCEPTED. THIS INCLUDES GOOGLE DOCS AND SIMILAR SITES. ALL SUBMITTALS MUST BE RECEIVED AS AN ATTACHMENT (E.G. PDF, WORD, EXCEL).**

**Electronic submittals must be received in the email box listed below. Submittals sent to any other box will NOT be forwarded or accepted. This email box is only accessed on the due date of your questions or proposals. Please use the Delivery Receipt option to verify receipt of your email. It is the sole responsibility of the proposer to ensure their documents are received before the deadline specified above. Boulder County does not accept responsibility under any circumstance for delayed or failed email or mailed submittals.**

Email            **purchasing@bouldercounty.org**; identified as **RFP # 7363-22** in the subject line.

All proposals must be received and time and date recorded at the purchasing email by the above due date and time. Sole responsibility rests with the Offeror to see that their bid is received on time at the stated location(s). Any bid received after due date and time will be returned to the bidder. No exceptions will be made.

The Board of County Commissioners reserve the right to reject any and all bids, to waive any informalities or irregularities therein, and to accept the bid that, in the opinion of the Board, is in the best interest of the Board and of the County of Boulder, State of Colorado.



**RECEIPT OF LETTER  
ACKNOWLEDGMENT**

July 26, 2022

Dear Vendor:

This is an acknowledgment of receipt of Addendum #1 for RFP #7363-22, **Clerk and Recorder, Recording Division - Document Management System.**

In an effort to keep you informed, we would appreciate your acknowledgment of receipt of the preceding addendum. Please sign this acknowledgment and email it back to [purchasing@bouldercounty.org](mailto:purchasing@bouldercounty.org) as soon as possible. If you have any questions, or problems with transmittal, please call us at 303-441-3525. This is also an acknowledgement that the vendor understands that **due to COVID-19, BIDS will only be accepted electronically by emailing [purchasing@bouldercounty.org](mailto:purchasing@bouldercounty.org).**

Thank you for your cooperation in this matter. This information is time and date sensitive; an immediate response is requested.

Sincerely,

Boulder County Purchasing

**Signed by:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Name of Company** \_\_\_\_\_

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