



ADDENDUM #1

May 18, 2022

RFP Title: Register of Deeds – Recording, Imaging and Indexing System

Owner: County of Wake – Melissa England, Procurement

RFP Bid No.: #22-048

The following items provide answers to questions that were submitted for RFP #22-048. Wake County answers are in blue.

1. Whether companies from Outside USA can apply for this?
(like, from India or Canada)

Yes, any company whether inside or outside the US can submit a bid as long as they can meet the requirements.

2. Whether we need to come over there for meetings?

Some meetings will be required to be on-site

3. Can we perform the tasks (related to RFP) outside USA?
(like, from India or Canada)

No, the services related to this RFP need to be provide in the US.

4. Can we submit the proposals via email?

No, hard copy proposals must be submitted. See page 45 "Response Format" and Page 2 "Submit RFP Response to:"

5. Objective Summary - Does Wake County ROD want the vendor to maintain the on-site hosting?

Yes

6. Objective Summary - Is Wake County ROD interested in an off-site cloud-based solution?

No

7. RFP Timeline - Will Wake extend the RFP response due date to June 14th?

The RFP Response due date is changed to June 16, 2022 by 3:00 PM EST, see new dates below.

RFP Timeline	
Task Due	Date
Release RFP	April 29, 2022
Questions from Vendors	May 12, 2022 by 5:00 PM EST
Answers to Vendor	May 18, 2022

RFP Response Due	June 16, 2022 by 3:00 PM EST
Evaluation of Responses	July 1, 2022
Demonstrations	July 11-15, 2022
Site Visits	July 18-22, 2022
Contract Award	July 2022

8. Maintenance Program (15.0) - Is the request to provide maintenance support in Marshall, NC? If not, what is Marshall?

Disregard "in Marshall"

9. Cost Quotations (19.0) - Section 20.0 only lists attachments A - I, is attachment J missing?

Section 19.0 Cost Quotations. Last sentence on #4 should read "Vendors are required to use the Cost Tables provided in Attachments D through I."

10. Cost Quotations (19.0) - What is the contract type for this award (e.g., FFP, T&M, milestone, etc.)?

I don't know that we have a preference, vendors can submit whichever way works best with their services and product.

11. Testing/Training Environment (4.1) - Does the HW Requirements on page 82 include the hardware for the training room?

Yes

12. Testing/Training Environment (4.1) - Could the current hardware (BooksWeb and BooksManagement) in DEV and TEST be used for the Testing/Training Environment?

No

13. Testing/Training Environment (4.4) - Will ROD provide the furniture (e.g., laptops, monitors, TV displays, networking, projector, desks, chairs, etc.) for the training room?

Yes

14. Testing/Training Environment (4.1) - Can we repurpose one of the non-prod environments for post system implementation ad-hoc training? Doing so will reduce the cost by eliminating numerous instances.

Yes

15. Cashiering (10.16 - 10.17) - Please define what an instant return is and provide the process flow for an instance return? Can a shared scanner be used to process the instant returns? Or is one scanner required for each cashier?

Instant return: When a document or documents is presented over the counter, the cashier will complete the process including scanning and return the original with statutory stamps to the customer. The preference is a scanner for each cashier but other alternatives will be considered.

16. Cashiering (10.22) - Does the courtesy copy label/stamp requirement need a scale for determining postage? Or is the courtesy copy label/stamp another copy of the recording label placed on the recorded documents?

No scale is needed. The courtesy label is intended to be a copy of the original label that the customer may apply to their own copy of the document.

17. Public Inquiry (21.1) - Does the definition of Public Inquiry mean searching public land records?

Yes

18. Public Inquiry (21.20 - 21.24) - The Weight Column was left blank, will a "C" or "I" be provided?

Item	Weight
21.20	I
21.21	I
21.22	C
21.23	C
21.24	C

19. Indexing (Key), Verify (Double-Key) and Automated Indexing (AI), Redaction (23.17) - Please define what is meant by Rubber Banding? What is the intent of the Rubber Banding index data?

Example: The user may select a name from the image with their mouse.

What is the expected behavior of Rubber Banding index data?

Example: After selecting a name from the image with the mouse, that value will be placed in the field that has focus. If focus is on the grantee field, the value will be returned to the grantee field.

20. Indexing (Key), Verify (Double-Key) and Automated Indexing (AI), Redaction (23.11, 23.31 - 23.32) - The Weight Column was left blank, will a "C" or "I" be provided?

Item	Weight
23.11	C
23.31	C
23.32	C

21. Web Services – Public Access (28.10) - The Weight Column was left blank, will a "C" or "I" be provided?

Item	Weight
28.10	C

22. Servers (34.4) - The Weight Column was left blank, will a "C" or "I" be provided?

Item	Weight
34.4	C

23. Cash Drawer and Receipt Printers (38.4) - Is the receipt/validation printer required for every cash station?

Yes

24. System Security (39.5) - Will the vendor be responsible for maintaining client workstations?

No

25. Maintenance Support - What are the operational hours for the systems?

M-F 8:30 – 5:30, 24 X 7 Public Search

26. Data Conversion and Upgrades (42.5) - The Weight Column was left blank, will a "C" or "I" be provided?

Item	Weight
42.5	C

27. Workstations (32.X and 35.X) - Will the vendor be required to support hardware and software for the Workstations? Yes

Does the proposed solution need to support the listed hardware and software?

Yes, including software releases and patches.

28. Is this award for a Base + 4 option years? If not, then what is the POP? What is the intended start date of the contract?

Wake prefers the vendor describe the pricing options that are available.

29. Will Wake require all contractors providing support for this solution to be US Citizens?

Yes.

30. What is the go live date for the new solution?

Wake will work with the selected vendor to select the go live date. The preference is 6 months after contract is finalized.

31. We normally don't supply hardware and hardware MN, and often times counties can often get more competitive prices directly from a vendor. Is the ROD open to purchasing hardware outside of this RFP? Will a proposal response be disqualified if a vendor does not include hardware maintenance as part of the response?

Wake will likely purchase their own hardware but the vendor must list all necessary components required by the proposed solution.

32. If the vendor is required to supply hardware, who is responsible for loading the anti-virus software on all relevant servers and workstations.

Wake will load the anti-virus software.

33. Does proof of insurance need to be provided with the RFP response, or upon signing of contract?

Proof of insurance will be required at contract processing and is not required to submit a proposal.

34. Does Exhibit A need to be signed as part of RFP submission?

No it does not, this was provided as a sample of language that will be included in a Wake County contract.

35. For on call support, is a pager the recommended communication method vs. SMS text?

Phone is preferable.

36. Estimate of total project hours with separate estimates for vendor and County staff. Please be more specific to this, are total hours spent by vendor/county as an entire project or would an estimate suffice? To avoid scope creep, HRS provides a more detailed layout of hours after Process Mapping.

Estimate of project hours are confined to vendor hours.

37. Does the county have any expectations with disaster recovery? Do you currently have any backups that you currently run right?

Yes – Please provide your disaster recovery options. Wake has backups of servers and database.

38. Hardware Requirements-

- How many stations would be processing paper transactions?

9

- How many stations would be used for cash drawers?

9

- How many standard printers?

9

- How many network printers?

3

- Lexmark model of printers available?

Toshiba Copier (ES457), Lexmark MS 711 DN, CS 720, HP Plotter T790

- Does the county need a quote on label printers or do you intend to utilize the current Zebra printers?

The county prefers to use existing Zebra printers if they are supported by your solution

- How many label printers will you need a quote on?

9

39. Section 14.0 - When referencing Project Org. Chart, are you looking for a chart of relevant employees to the project, or an org chart for the whole business?

Project organization chart related to the project.

40. Requirement 2.50 - The system provides links to Wake County SOP's which are maintained by the Wake County ROD office. Please clarify what link needs to be provided. Is this via a webpage? How do you expect to use these links?

See Question 41

41. Requirement 3.30 - System will have ability to incorporate County written procedures **Please clarify the methods to which the incorporation of written procedures are provided or provide an example of what is expected for the system to do.**

Wake County has an extensive collection of Standard Operating Procedures. The format of the SOPs are currently MS Word documents. They are located on a shared folder. Major topics include: Recording requirements, Indexing Requirements and miscellaneous. The purpose of this requirement is to link your application to the SOPs so they are readily accessible. Example: There is an SOP to "Requirements for Indexing a Quitclaim deed". The user can open this document from the proposed solution.

42. Requirement 4.20 - The hardware and software workstations in the testing room must include at least one representation of any unique system area or function including importing indexed data from outsourced operations. **Please clarify what imported indexed data from outsourced operations means?**

From time to time, Wake may have special projects that are outsourced. The work product will need to be imported into the system. The work product could include document index data and or images.

43. Requirement 5.18 – Please clarify what you mean by “deletions.”

Certain information may not be deleted unless authorized and controlled by system security.

44. Requirement 5.19 – What data are you looking for when performing an audit?

To make sure that users have appropriate security especially after system upgrades and patches.

45. Requirement 5.20 - In 5.2, "All Official Records documents will be imaged and linked to the Official Records index." Does this indicate a conversion/digitization project will occur?

There is an initial conversion required. All images are currently digitized.

46. Requirement 5.80 - What is the need? Does it need to be by year, or can it be by a specific status, such as permanent/released docs or In process documents?

The key item is security. A user must have proper security to update an entry that has completed the workflow and is considered permanent.

47. Requirement 6.40 - Document Status levels must be achieved automatically by the completion of a particular process, or by the user updating a field when a manual procedure is completed. **Please expand on document status levels or provide an example of what the system should do in this case.**

Example: When a document is recorded over the counter and scanned, the index status might be blank. When the entry is index or Keyed, the index status is automatically updated. When the document is verified or double-keyed, the index status is automatically updated.

48. Requirement 6.60 – Please explain further the desired process or reason behind this request.

See page 34 of the 22-048 RFP "Tax Administration Process"

49. Requirement 6.80 - Tax Admin and GIS Workflows, Please expand of this workflow. Does this only include specific document types associated with the Tax Admin/GIS Workflow? Are the statements requirements?

No statements are involved. Yes – Only certain document types are included in this workflow. Document types are user defined. See page 34 of the 22-048 RFP "Tax Administration Process"

50. Requirement 7.60 - In 7.6 and 21.23, they are very similar to 7.5. Please explain the requirement further.

The requirements are very similar. One refers to the public facing application, and the other is internal. After search criteria is entered and a result set is displayed, the user may look at the detail. From the detail screen, the user may move to the next document recorded (7.6 and 21.23). From the detail screen, the user may move to the next document in the results (7.5 and 21.22) without returning to the results.

51. Requirement 10.14 – Please explain the receipt/invoice validation further.

Example: When a check is presented for payment, the printer will stamp the back of the check with "For Deposit only" plus other information such as receipt number, account number etc.

52. Requirement 10.19 - The Register of Deeds fee schedule is table driven and access is restricted. **Please clarify how the fee structure would be restricted?**

The user must be authorized to make a change in a fee.

53. Requirement 10.36 - In 10.36 and 22.13, Do you expect the system to identify and mark out previous recording information?

No. The user should be able to perform this function with tools (22.13). Requirement 10.36 is a manual process.

54. Requirement 10.5 - Cashier workstations must have a cash drawer, which is opened programmatically or by manual key. **What cash drawer model do you have?**

Made by Bematech and being replaced.

55. Requirement 17.18 - In 17.18, please identify what Wake County considers an “exception.”

These statuses are illustrative. Exception is where the user identified a problem the image such as missing a page, extra blank page, too light, etc.

56. Requirement 21.00 - A system user will require a specific Security Profile setting in order to access and execute this software module. **Acclaim has an expansive list of roles and permissions related to individual users. Please clarify what type of security profile is expected.**

The user must have security rights to execute this module and maintain/administrate the system.

57. Requirement 21.20 – Public Inquiry – **Please clarify, is this the search mechanism?**

Yes

58. Requirement 21.21 – Do not have Weights assigned to them. Is this intentional?

See Question 18

59. Requirement 21.22 - Do not have Weights assigned to them. Is this intentional?

See Question 18

60. Requirement 21.23 - Do not have Weights assigned to them. Is this intentional?

See Question 18

61. Requirement 21.24 - Do not have Weights assigned to them. Is this intentional?

See Question 18

62. Requirement 22.3 – In 22.3, please expand on the definition of a “fee document type.”

For recording cashiering, Wake uses “Fee Codes” or “Fee Document Types” to calculate the recording fee as opposed to a document type. Also, see requirement 10.33 “Fee Groups used during Recording”

63. Requirement 23.1 – In 23.1, please explain the requirement, specifically what is turned off for names.

During the recording (traditional and eRecording) process, 1st grantor, 1st grantee are entered or included. These names are currently not seen at the indexing step. 1st grantor/grantee are part of the “temporary” index available to the public. Once the entry is Keyed and double-keyed, the public sees double-keyed names.

64. Requirement 23.14 – Is blank, is this intentional?

Yes

65. Requirement 23.2 – In 23.2, please explain what you mean by “command entries.”

Users can use “hot keys” or “ctrl+X” to perform operations. Some users prefer hot keys as opposed to mouse clicks.

66. Requirement 23.3 - In 23.3, it states “Support modification of the previously entered data with the appropriate security level for modification.” Please explain further.

The key item is security. A user must have property security update an entry that has completed the workflow and is considered permanent.

67. Requirement 28.5 – What is Wake’s contracted CC provider?

Currently not accepting credit card payments.

68. Requirement 28.7 – Are you referring to Captcha?

Wake is looking for your method to protect the system for unauthorized use.

69. Requirement 32.9 – In 32.9, is the Bombgar requirement only used for remote access by Wake County?
[Other secure remote access applications may be considered.](#)
70. Requirement 32.13 – In 32.13, please describe what counts as a restriction
[Some tools and applications have conflicts with anti-virus packages. Wake wants to make sure your solution can operate with commonly used anti-virus packages.](#)
71. Requirement 33.1 - In 33.1, the requirement references Wake County IT Standards. Could these standards be provided to the vendors?
[Pending. Wake is working on getting these and will post them when available.](#)
72. Requirement 34.1 – Is Linux required?
[“Prefers”](#)
73. Requirement 35.1 – Do you intend to run the recording client or the search on a tablet?
[Recording client on windows, Search on tablet and other platforms](#)
74. Objective/Summary: The County specifies the request is for an onsite hosted application. Considering the incidents of ransomware and cyber-attacks nationwide, would the County be interested in learning about a vendor-hosted, SaaS model?
[No](#)
75. Functional Requirement, Item 34.4: The requirement is for 3 identical environments (Dev, Test, Production). Why does the county need a third environment for Dev? Is there a reason why the Test environment could not be used as the Dev environment as well?
[Wake’s preference is to have 3 identical environments.](#)
76. Function Requirement, Item 40.11: The requirement states the vendor approach and recommended installation time frame must meet required County deadlines. Can the County please provide the applicable deadlines?
[The county prefers to be in production within 6 months after contract finalized.](#)
77. Is there a required Go Live Date?
[The county prefers to be in production within 6 months after contract finalized.](#)
78. How many reports is the ROD office currently utilizing?
[15 + reports](#)
79. What integrations are required?
[eRecording submitter vendors](#)
80. How many databases are there to be converted? What size?
[1 DB, 2 schemas, LandRecords = 81 GB, eRecording = 4.6 GB](#)
81. Would Wake County like for vendors to show the total 5-year cost of the solutions proposed including any maintenance increases?
[Yes](#)
82. Can the County provide a page count on the average documents that need to be indexed annually?
[Document count for 2020 of 245,378 with 1,586,406 pages](#)

83. Is it the County's intent to have the selected vendor supply hardware or just hardware recommendations to be purchased by the County?

Hardware recommendations

84. What is the current CAMA system?

a. Is the current CAMA vendor willing to integrate with the new ROD system?

Yes – Inhouse CAMA system

85. Functional Requirements, Items 1.1 and 1.4 - Specifically what custom functionality is required for NC statutes?

Related to NC General Statutes – NCGS 161 Section 22.3

North Carolina Minimum Indexing Standards – The Wake County Register of Deeds is in compliance with the North Carolina Department of the Secretary of State's current indexing standards. NCGS 147 Section 54.3.

Electronic recording providers that would like to become an authorized eRecording provider for the Wake County Register of Deeds must be approved as required by N.C.G.S §47-14(a1).

NCGS 47 Section 16 Article 1a Uniform Real Property Electronic Recording Act

<http://ncard.us/wp-content/uploads/2016/04/NorthCarolinaUniformRealPropertyElectronicRecordingStandards.pdf>

86. Functional Requirements, Item 1.10 - What workflow needs to be tracked?

The system should track the status of each document.

87. Functional Requirements, Item 6.7 - Provide an example of when a user will route the item to a supervisor or other staff member with clarifying notes.

If an indexer is unsure how to index a document, the indexer will route the entry to a supervisor for assistance.

88. Will the county extend the due date? This is a very extensive and detailed request and we need more time to respond.

See question 7

89. Is the county expecting the vendor to provide the hardware, networking and communications systems or just hardware recommendations? If so, are you also expecting the vendor to provide installation and support of said equipment? If so, will county consider proposals without the vendor providing hardware and installation and support of hardware?

Wake will likely purchase their own hardware but the vendor must list all necessary components required by the proposed solution.

90. Do you want the vendor to supply pricing for creating microfilm?

No

91. Please further describe Item 4.0 Operating model analysis.

Please show:

1. Recording Process with/without scanning at cash station
2. Scanning Process as a separate item.
3. Indexing
4. End of day balancing

5. Customers requesting copies/certified copies.
6. Rejection process
7. Return document (Mail Back)
8. Document Correction (Index or Image)
9. External files for Microfilm production

92. Can the county provide the images in Multi-page TIFFs instead of single page?

No. Current system stores all images as single page tiffs.

93. Please describe the re-recording process (10.36 and 22.13) Why does the previous information need to be crossed out instead of recording a new instrument and voiding the previous instrument?

Wake crosses out the prior recording information to show which label is current.

94. Item 3.3 – can the current County written procedures be provided to determine the correct response code?

See question 41

95. Item 6.9 – please elaborate on where the “link” would exist for Tax Administration and GIS departments? Native to other systems, or within the proposed Land Record System?

The web link will be part of the Tax Administration and GIS systems. It is a means to view index and images for a source document in the ROD system related to these departments.

96. Please clarify requirements regarding document recording checklist requirements (10.33, 10.31, 22.8, 23.23)

When recording documents (traditional or eRecording), fee groups are used to calculate the fee and provide a checklist of requirements the user must acknowledge for each document.