

# **FLATHEAD COUNTY ATTORNEY'S OFFICE**

## **Request for Proposal**



## **FLATHEAD COUNTY ATTORNEY CASE MANAGEMENT SYSTEM**

**Flathead County, Montana**

**February 9, 2016**

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# REQUEST FOR PROPOSAL FOR A CASE MANAGEMENT SYSTEM FOR FLATHEAD COUNTY MONTANA ATTORNEY, RFP FOR FY2016

## 1.0 Introduction

Flathead County Attorney is issuing this Request for Proposal (RFP) to acquire a computer-based case management system. Flathead County reserves the right to reject any or all proposals or parts thereof and to waive minor irregularities in responses. Flathead County intends to accept a proposal based on criteria including price and to make an award deemed in the best interest of the County. Proposals will be firm for 120 days. We will direct special attention to the qualifications of the respondents when awarding this proposal, as well as software architecture, software features, and past successful installations.

From the date this Request for Proposal (RFP) is issued until an offeror is selected and announced by the Board of Flathead County Commissioners, **offerors shall not communicate with any county staff regarding this procurement, except at the written direction of Vickie Eggum, [veggum@Flathead.mt.gov](mailto:veggum@Flathead.mt.gov)**, the person in charge of coordinating this solicitation. Any unauthorized contact may disqualify the offeror from further consideration.

**Review RFP.** Offerors shall carefully review the entire RFP. Offerors shall promptly notify the procurement coordinator identified above via e-mail or in writing of any ambiguity, inconsistency, unduly restrictive specifications, or error which they believe they have discovered. In this notice, the offeror shall include any terms or requirements within the RFP that preclude the offeror from responding or add unnecessary cost. Offerors shall provide an explanation with suggested modifications. The notice must be received by the deadline for receipt of inquiries set forth below. The County will determine any changes to the RFP. ***The final proposal must include this RFP in its entirety as part of the contract.***

**Form of Questions.** Offerors having questions or requiring clarification or interpretation of any section within this RFP must address these issues via e-mail or in writing to the procurement coordinator listed above on or before 5 pm, February 29, 2016. Clear reference to the section, page, and item in question must be included in the form. Questions received after the deadline may not be considered.

**County's Response.** The County will provide a written response by March 11, 2016 to all questions received by 5 pm, February 29, 2016. The County's response will be by written addendum posted by the close of business on the date listed. Any other form of interpretation, correction, or change to this RFP will not be binding upon The County. **Offerors shall sign and return with their RFP response an Acknowledgment of Addendum for any addendum issued.**

Submit sealed proposals to Flathead County by March 28, 2016 at 1:00 p.m. MST. Submit one original and five [5] copies. Clearly write "Proposal for a Flathead County Attorney's case management system" on the outside of the envelope.

Direct communication or questions concerning this RFP to: Vickie Eggum, Office Administrator, at [Veggum@flathead.mt.gov](mailto:Veggum@flathead.mt.gov). Only specific questions submitted in writing and answered in writing will be binding. Vendors may submit questions until end of business on February 29, 2016 at 5:00 p.m. MST.

Address the proposal to:

*Flathead County Attorney  
Case Management Software Proposal  
c/o Board of Commissioners  
800 South Main Street, Room 302  
Kalispell, MT 59901*

Flathead County reserves the right to alter the proposal specification prior to the proposal opening by issuance of an addendum to the respondents. If we deem necessary, we will extend additional time to comply with the specifications in the addendum.

## 2.0 Present System

*The current Flathead County Attorney's databases are hosted on a SQL Server 2008 R2 database server. It is anticipated that data from these databases will be converted and imported into the new system. Data can be extracted to text or .csv format as needed for the import.*

## 3.0 Contractual Terms and Conditions

### A. Standard Terms

**ALTERATION OF SOLICITATION DOCUMENT:** In the event of inconsistencies or contradictions between language contained in the County's solicitation document and a vendor's response, the language contained in The County's original solicitation document will prevail. Intentional manipulation and/or alteration of solicitation document language will result in the vendor's disqualification and possible debarment.

**CONFORMANCE WITH CONTRACT:** No alteration of the terms, conditions, delivery, price, quality, quantities, or specifications of the contract shall be granted without prior written consent of Flathead County. Supplies delivered which do not conform to the contract terms, conditions, and specifications may be rejected and returned at the contractor's expense.

**DEBARMENT:** The contractor certifies, by submitting this bid or proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction (contract) by any governmental department or agency. If the contractor cannot certify this statement, attach a written explanation for review by the County.

**DISABILITY ACCOMMODATIONS:** The County of Flathead does not discriminate on the basis of disability in admission to, access to, or operations of its programs, services, or activities. Individuals who need aids, alternative document formats, or services for effective communications or other disability-related accommodations in the programs and services offered are invited to make their needs and preferences known to this office. Interested parties should provide as much advance notice as possible.

**FORCE MAJEURE:** Neither party shall be responsible for failure to fulfill its obligations due to causes beyond its reasonable control, including without limitation, acts or omissions of government or military authority, acts of God, materials shortages, transportation delays, fires, floods, labor disturbances, riots, wars, terrorist acts, or any other causes, directly or indirectly beyond the reasonable control of the nonperforming party, so long as such party is using its best efforts to remedy such failure or delays.

**LATE BIDS AND PROPOSALS:** Regardless of cause, late bids and proposals will not be accepted and will automatically be disqualified from further consideration. It shall be solely the vendor's risk to ensure delivery at the designated office by the designated time. Late bids and proposals will not be opened and may be returned to the vendor at the expense of the vendor or destroyed if requested.

**PAYMENT TERM:** All payment terms will be computed from the date of delivery of supplies or services OR receipt of a properly executed invoice, whichever is later. Unless otherwise noted in the solicitation document, The County is allowed 30 days to pay such invoices. All contractors will be required to provide banking information at the time of contract execution in order to facilitate State electronic funds transfer payments.

**REFERENCE TO CONTRACT:** The contract number MUST appear on all invoices, packing lists, packages, and correspondence pertaining to the contract.

**REGISTRATION WITH THE SECRETARY OF STATE:** Any business intending to transact business in Montana must register with the Secretary of State. Businesses that are incorporated in another state or country, but which are conducting activity in Montana, must determine whether they are transacting business in Montana in accordance with sections 35-1-1026 and 35-8-1001, MCA. Such businesses may want to obtain the guidance of their attorney or accountant to determine whether their activity is considered transacting business.

If businesses determine that they are transacting business in Montana, they must register with the Secretary of State and obtain a certificate of authority to demonstrate that they are in good standing in Montana. To obtain registration materials, call the Office of the Secretary of State at (406) 444-3665, or visit their website at <http://sos.mt.gov>.

**SEPARABILITY CLAUSE:** A declaration by any court, or any other binding legal source, that any provision of the contract is illegal and void shall not affect the legality and enforceability of any other provision of the contract, unless the provisions are mutually dependent.

## **WARRANTIES:**

### **Warranty for Services:**

The contractor warrants that it performs all services using reasonable care and skill and according to its current description (including any completion criteria) contained in this contract. The County agrees to provide timely written notice of any failure to comply with this warranty so that the contractor can take corrective action.

### **Warranty for Software:**

For a period of one year after initial installation of the software, the contractor warrants that: (i) the unmodified software will provide the features and functions, and will otherwise conform to all published documentation including on the contractor's website; and (ii) the media upon which the software is furnished will be free from defects in materials and workmanship under normal use and service.

### **Warranty for Hardware:**

The contractor warrants that hardware provided is free from defects in materials and workmanship and conforms to the specifications.

The warranty period for provided hardware is a fixed period commencing on the date specified in a statement of work or applicable contract. If the hardware does not function as warranted during the warranty period and the contractor is unable to either: i) make it do so; or ii) replace it with one that is at least functionally equivalent, the County may return it to the contractor for a full refund.

The parties agree that the warranties set forth require 99% uninterrupted or error-free operation of hardware, software, systems and services unless otherwise stated in the specifications.

## **B. CONTRACT CLAUSES**

**CONTRACT TERM.** This contract shall take effect upon contract execution and end after expiration of the required warranty period. One year warranty period to begin after full acceptance of system installation unless terminated earlier in accordance with the terms of this contract. *The final proposal must include this RFP in its entirety as part of the contract to be recorded with the Flathead County Clerk & Recorder.*

**MAINTENANCE AGREEMENT.** Prior to expiration of this contract (one-year warranty period), the County retains the option of entering into a separate maintenance agreement with Contractor that will be written in accordance with the terms, conditions, and requirements of the RFP, as amended, and Contractor's response. The payment structure contained in said agreement will be subject to mutual agreement of both parties.

**WITHHOLDING OF PAYMENT.** The County may withhold disputed payments to the Contractor under the subject statement of work (or where no statement of work exists, the applicable contract) if the Contractor is in material breach of such statement of work (or

applicable contract). Such withholding cannot be greater than, in the aggregate, 15% of the total value of the subject statement of work or applicable contract. With respect to payments subject to milestone acceptance criteria, the County may withhold payment only for such specific milestone if and until the subject milestone criteria are met. The Contractor is not relieved of its performance obligation in the event such payment is withheld.

### **ACCESS AND RETENTION OF RECORDS**

**Access to Records:** The Contractor agrees to provide the County, Auditor, or their authorized agents access to any records required to be made available by 18-1-118 MCA, in order to determine contract compliance.

**Retention Period.** The Contractor agrees to create and retain records supporting the services for a period of three years after either the completion date of this contract or the conclusion of any claim, litigation, or exception relating to this contract taken by the County or a third party.

### **ASSIGNMENT, TRANSFER, AND SUBCONTRACTING**

The Contractor shall not assign, transfer, or subcontract any portion of this contract without the express written consent of the County.

### **LIMITATION OF LIABILITY**

The Contractor's liability for contract damages is limited to direct damages and further to no more than twice the contract amount. The Contractor shall not be liable for special, incidental, consequential, punitive, or indirect damages. Damages caused by injury to persons or tangible property, or related to intellectual property indemnification, are not subject to a cap on the amount of damages.

### **REQUIRED INSURANCE**

**General Requirements.** The Contractor shall maintain for the duration of this contract, at its cost and expense, insurance against claims for injuries to persons or damages to property, including contractual liability, which may arise from or in connection with the performance of the work by the Contractor, agents, employees, representatives, assigns, or subcontractors. This insurance shall cover such claims as may be caused by any negligent act or omission.

**Primary Insurance.** The Contractor's insurance coverage with respect to the Contractor's negligence shall be primary insurance with respect to The County, its coordinators, officials, employees, and volunteers and shall apply separately to each project or location. Any insurance or self-insurance maintained by The County, its officers, officials, employees, or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

**Specific Requirements for Commercial General Liability.** Contractor shall purchase and maintain occurrence coverage with combined single limits for bodily injury, personal

injury, property damage, premises, operations, independent contractor's protective, products and completed operations, and broad form property damage of \$1,000,000 per occurrence and \$2,000,000 aggregate per year to cover such claims as may be caused by any act, omission, or negligence of CONTRACTOR or its officers, agents, representatives, assigns or subcontractors.

**Certificate of Insurance/Endorsements.** A certificate of insurance from an insurer with a Best's rating of no less than B++ indicating compliance with the required coverage must be received by the Flathead County Attorney's Office, 920 South Main Street, Suite 201, Kalispell, MT 59901. The Contractor must notify the County immediately of any material change in insurance coverage, such as changes in limits, coverage, changes in status of policy, etc. The County reserves the right to require complete copies of insurance policies at all times.

### **COMPLIANCE WITH WORKERS' COMPENSATION ACT**

Contractors are required to comply with the provisions of the Montana Workers' Compensation Act while performing work for the County in accordance sections 39-71-401, 39-71-405, and 39-71-417, MCA. Proof of compliance must be in the form of workers' compensation insurance, an independent contractor's exemption, or documentation of corporate officer status. Neither the Contractor nor its employees are employees of the County. This insurance/exemption must be valid for the entire term of this contract. A renewal document must be sent to Flathead County Risk Manager, 800 South Main Street, Kalispell, MT, upon expiration.

### **COMPLIANCE WITH LAWS**

The Contractor must, in performance of work under this contract, fully comply with all applicable federal, state, or local laws, rules, and regulations, including the Montana Human Rights Act, the Civil Rights Act of 1964, the Age Discrimination Act of 1975, the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973. Any subletting or subcontracting by the Contractor subjects subcontractors to the same provision. In accordance with section 49-3-207, MCA, the Contractor agrees that the hiring of persons to perform this contract will be made on the basis of merit and qualifications and there will be no discrimination based upon race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, or national origin by the persons performing this contract.

### **INTELLECTUAL PROPERTY/OWNERSHIP**

**Mutual Use.** All patent and other legal rights in or to inventions first conceived and reduced to practice, created in whole or in part under this contract, must be available to the County for royalty-free and nonexclusive licensing if necessary to receive the mutually agreed upon benefit under this contract. Unless otherwise specified in a statement of work, both parties shall have a royalty-free, nonexclusive, and irrevocable right to reproduce, publish, or otherwise use and authorize others to use copyrightable property created under this contract including all deliverables and other materials,

products, modifications developed or prepared for the County by the Contractor under this contract.

The County shall retain ownership of all data and processes developed during the life of the contract. In the event of 'breach of contract' the vendor will promptly provide all databases to the County in a standard Microsoft format of Microsoft SQL database file or files.

### **PATENT AND COPYRIGHT PROTECTION**

**Third-Party Claim.** In the event of any claim by any third party against the County that the products furnished under this contract infringe upon or violate any patent or copyright, the County shall promptly notify the Contractor. The Contractor shall defend such claim, in the County's name or its own name, as appropriate, but at the Contractor's expense. The Contractor will indemnify the County against all costs, damages, and attorney's fees that accrue as a result of such claim. Such indemnification will be conditional upon the following:

- a. The County will promptly notify the Contractor of the claim in writing; and
- b. The County will allow the Contractor to control, and will cooperate with the Contractor in the defense and any related settlement negotiations, provided that:
  - i. The Contractor will permit the County to participate in the defense and settlement of any such claim, at the County's own expense, with counsel of its choosing; and
  - ii. The Contractor shall not enter into or agree to any settlement containing any admission of or stipulation to any guilt, fault, liability or wrongdoing on the part of the County, its elected and appointed officials, agents or employees without the County's prior written consent.

**Product Subject of Claim.** If any product furnished is likely to or does become the subject of a claim of infringement of a patent or copyright, then the Contractor may, at its option, procure for the County the right to continue using the alleged infringing product, or modify the product so that it becomes non-infringing or replace it with one that is at least functionally equivalent. If none of the above options can be accomplished, or if the use of such product by The County shall be prevented by injunction, the County agrees to return the product to the Contractor on written request. The Contractor will then give the County a credit equal to the amount paid to the Contractor for the creation of the Work Product. This is the Contractor's entire obligation to the County regarding a claim of infringement. The County is not precluded from seeking other remedies available to it hereunder, including **Section 8**, and in equity or law for any damages it may sustain due to its inability to continue using such product.

## **CONTRACT TERMINATION**

**Termination for Cause.** The County or the Contractor may, by written notice to the other party, terminate this contract in whole or in part at any time the other party fails to perform under his contract.

**Bankruptcy or Receivership.** Voluntary or involuntary bankruptcy or receivership by the Contractor may be cause for termination.

**Non-Compliance with Requirements.** The County retains the right to cancel or modify any contract, project, or activity that is not in compliance with any standard in effect as of the date of contract execution. In the event of such termination, the County will pay for conforming products and services delivered to date and any applicable termination fee specified in the statement of work or work order. Any modifications to this contract must be mutually agreed to by the parties.

**Reduction of Funding.** The County must terminate this contract if funds are not appropriated or otherwise made available to support the County's continuation of performance of this contract in a subsequent fiscal period.

## **EVENT OF BREACH – REMEDIES**

**Event of Breach.** Any one or more of the following acts or omissions of the Contractor shall constitute an event of breach:

- a. products or services furnished by the Contractor fail to conform to any requirement of this contract; or
- b. failure to submit any report required by this contract

**Actions in Event of Breach.** Upon the occurrence of any material breach of this contract, either party may take either one, or both, of the following actions:

- a. give the breaching party a written notice specifying the event of breach and requiring it to be remedied within, in the absence of a greater specification of time, thirty (30) days from the date of the notice; and if the event of breach is not timely remedied, terminate this contract upon giving the breaching party notice of termination; or
- b. treat this contract as materially breached and pursue any of its remedies at law or in equity, or both.

## **WAIVER OF BREACH**

No failure by either party to enforce any provisions hereof after any event of breach shall be deemed a waiver of its rights with regard to that event, or any subsequent event. No such failure or waiver shall be deemed a waiver of the right of either party to enforce

each and all of the provisions hereof upon any further or other breach on the part of the breaching party.

### **TRANSITION ASSISTANCE**

If this contract is not renewed at the end of this term, or is terminated prior to the completion of a project, or if the work on a project is terminated for any reason, the Contractor must provide for a reasonable, mutually agreed period of time after the expiration or termination of this contract, all reasonable transition assistance requested by the County, to allow for the expired or terminated portion of the services to continue without interruption or adverse effect, and to facilitate the orderly transfer of such services to the County or its designees. Such transition assistance will be deemed by the parties to be governed by the terms and conditions of this contract, except for those terms or conditions that do not reasonably apply to such transition assistance. The County shall pay the Contractor for any resources utilized in performing such transition assistance at the most current rates provided by this contract. If there are no established contract rates, then the rate shall be mutually agreed upon. If the County terminates a project or this contract for cause, then the County will be entitled to offset the cost of paying the Contractor for the additional resources the Contractor utilized in providing transition assistance with any damages the County may have otherwise accrued as a result of said termination.

### **CHOICE OF LAW AND VENUE**

This contract is governed by the laws of Montana. The parties agree that any litigation concerning this bid, proposal or subsequent contract must be brought in the Eleventh Judicial District in and for the County of Flathead, State of Montana and each party shall pay its own costs and attorney fees.

### **TIME IS OF THE ESSENCE**

Time is of the essence in the performance of all parties' obligations and duties under this Agreement.

### **SCOPE, AMENDMENT, AND INTERPRETATION**

**Contract.** This contract consists of 34 numbered pages, any Attachments as required, RFP for FY 2016, as amended, and the Contractor's RFP response as amended. In the case of dispute or ambiguity about the minimum levels of performance by the Contractor the order of precedence of document interpretation is as follows: 1) amendments to this contract, 2) this contract, 3) the applicable statement of work, 4) This RFP, as amended, and 5) the Contractor's RFP response, as amended.

**Entire Agreement.** These documents contain the entire agreement of the parties. Any enlargement, alteration or modification requires a written amendment signed by both parties.

If you wish to take exceptions to any of the terms and conditions outlined in this RFP, you should list these in section 8, “Terms and Conditions.”

## **4.0 Vendor Technical Response Format & Content**

Format your proposal as described below. Deviating from this format may result in disqualification from further consideration during the evaluation stages.

### **4.1 Executive Summary**

Include a brief executive overview of your proposal, the benefits you bring to the project, any partnering and subcontracting arrangements you plan to use for this contract, and any additional noteworthy information.

### **4.2 Vendor Qualifications, Financial Stability, and Litigation History**

Describe every lawsuit that has been brought against your company related to your proposed solution, either software or services. List the status of each lawsuit and any outcomes that have occurred.

Provide a brief history of your organization. Briefly provide information that highlights your organization’s particular abilities to successfully complete Flathead County’s requirements and how you will structure, develop, and manage the project.

The principle members and key personnel to be assigned to the project shall have referenced and verifiable experience in completing projects of equal scope, quality, type, and complexity. A resume or summary of qualifications, work experience, education, and skills must be provided for all key personnel, including any subcontractors, who will be performing any aspects of the contract. Include years of experience providing services similar to those required; education; and certifications where applicable. Identify what role each person would fulfill in performing work identified in this RFP.

If your company makes other software products besides Judicial Case Management Solutions, please provide a listing of what those products are.

Offerors shall demonstrate their financial stability to supply, install, and support the services specified by: (1) providing financial statements, preferably audited, for the three (3) consecutive years immediately preceding the issuance of this RFP;

### **4.3 Software Requirements**

Complete and return Case Management Software System Requirements with your proposal, as found in section 9.0 of this RFP.

### **4.4 Company Experience & References**

List 3 of your customers that are Montana based or adjoining State’s Attorney Offices, and have had the proposed software for at least 3 years, that we can contact for references related to the solution proposed, including contact names, addresses, phone numbers, and a brief project description.

Additionally, list at least one customer interfacing with New World Systems Aegis MSP, 3 for your customer support, and 3 for your implementation methodology

#### **4.5 Product Overview**

Provide an overview of your proposed product(s).

#### **4.6 Implementation & Training**

Describe your implementation process in detail.

#### **4.6 Customer Service**

Describe your customer service and support methodology, including what services you provide and for what period of time you will provide these services. State whether or not you offer a yearly support and maintenance contract.

### **5.0 Vendor Price Response Format & Content**

Provide detailed pricing for your solution.

Show expected five and ten year costs, including costs for:

- SaaS Installations and Self Hosted
- All major and minor version upgrades
- Annual support contract
- Building new reports, documents, business rules, and screens
- Hardware needs and hosting needs along with associated costs
- Importing/converting current data into the new system

Please state any assumptions you make in order to provide these figures.

### **6.0 Classification and Evaluation of Proposals**

**Initial Classification of Proposals as Responsive or Nonresponsive.** The County shall initially classify all proposals as either "responsive" or "nonresponsive". The County may deem a proposal nonresponsive if: (1) any of the required information is not provided; (2) the submitted price is found to be excessive or inadequate as measured by the RFP criteria; or (3) the proposal does not meet RFP requirements and specifications. The County may find any proposal to be nonresponsive at any time during the procurement process. If The County deems a proposal nonresponsive, it will not be considered further.

**Evaluation of Proposals.** An evaluator/evaluation committee will evaluate all responsive proposals based on stated criteria and recommend award to the highest scoring offeror. The evaluator/evaluation committee may initiate discussion, negotiation, or request a best and final offer. In scoring against stated criteria, the evaluator/evaluation

committee may consider such factors as accepted industry standards and a comparative evaluation of other proposals in terms of differing price and quality. These scores will be used to determine the most advantageous offering to the County. If an evaluation committee meets to deliberate and evaluate the proposals, the public may attend and observe the evaluation committee deliberations.

**Completeness of Proposals.** Selection and award will be based on the offeror's proposal and other items outlined in this RFP. Proposals may not include references to information such as Internet websites, unless specifically requested. Information or materials presented by offerors outside the formal response or subsequent discussion, negotiation, or best and final offer, if requested, will not be considered, will have no bearing on any award, and may result in the offeror being disqualified from further consideration.

**Opportunity for Discussion/Negotiation and Oral Presentation/Product**

**Demonstration.** After receipt of all proposals and prior to the determination of the award, the County may initiate discussions with up to the three top scoring Offerors. Offerors may be invited to make an oral presentation and product demonstration to clarify their RFP response or to further define their offer. In such event, Offerors should be prepared to send qualified personnel to Kalispell, Montana to discuss technical and contractual aspects of the proposal. Oral presentations and product demonstrations shall be at the Offeror's expense.

**Best and Final Offer.** Under Montana law, the procurement coordinator may request a best and final offer if additional information is required to make a final decision. The County reserves the right to request a best and final offer based on price/cost alone. Please note that the County rarely requests a best and final offer on cost alone.

**Request for Documents Notice.** Upon concurrence with the evaluator's/evaluation committee's recommendation, the procurement coordinator will request from the highest scoring offeror the required documents and information, such as insurance documents, contract performance security, an electronic copy of any requested material (e.g., proposal, response to clarification questions, and/or best and final offer), and any other necessary documents. Receipt of this request does not constitute a contract and **no work may begin until a contract signed by all parties is in place.** The procurement coordinator will officially notify all other offerors of the County's selection.

**Contract Execution.** Upon receipt of all required materials, a contract incorporating the Standard Terms and Conditions, as well as the highest scoring offeror's proposal, will be provided to the highest scoring offeror for signature. The highest scoring offeror will be expected to accept and agree to all material requirements contained in this RFP. If the highest scoring offeror does not accept all material requirements, the County may move to the next highest scoring offeror, or cancel the RFP. Work under the contract shall not begin until the contract is fully executed by the Flathead County Board of Commissioners.

**COUNTY'S RIGHT TO INVESTIGATE AND REJECT**

The County may make such investigations as deemed necessary to determine the offeror's ability to perform the services specified. The County reserves the right to reject a proposal if the information submitted by, or investigation of, the offeror fails to satisfy the County that the offeror is properly qualified to perform the obligations of the contract. *This includes the County's ability to reject the proposal based on negative references.*

### **OFFEROR QUALIFICATIONS**

To enable the County to determine the capabilities of an offeror to perform the services specified in the RFP, the offeror shall respond to the following regarding its ability to meet The County's requirements. **THE RESPONSE, "(OFFEROR'S NAME) UNDERSTANDS AND WILL COMPLY," IS NOT APPROPRIATE FOR THIS SECTION.**

Flathead County will award the contract to the vendor who provides the best value offer, as determined by Flathead County in its sole discretion. The evaluator/evaluation committee will review and evaluate the offers according to, but not limited to the criteria in the table below.

<b>Evaluation Factors</b>	<b>Points</b>
Compliance with functional and technical requirements	30
Configurability of solution	30
Customer services	10
Company financial stability and references	10
Project management approach	5
Interface- New World Systems – Aegis MS Products	10
Total Cost of Ownership	5
<b>Total Points</b>	

## 7.0 System and Vendor Requirements

This section lists the requirements for a case management software system and the successful vendor. Vendors should complete this matrix and insert it in section 3, “Software Requirements.”

Explicitly indicate whether your currently released product meets the requirement by placing an “X” in the appropriate column.

- **Yes:** Mark “yes” if the current release of your product meets every aspect of the requirement exactly as written. Comments elaborating on how you meet these items are encouraged.
- **Partial:** If you partially meet the requirement, mark “partial.” Provide comments in the related comments area regarding what aspects of the requirement you do or do not meet.
- **No:** If you do not meet the requirement, please mark “no.” If you do not currently meet the requirement but will in a future release, or feel that you meet the requirement in an alternative way, please mark “no” and provide comments regarding that item. Flathead County, in its sole discretion, will determine whether any alternative version is acceptable.

## Vendor Reliability & Commitment to Implementation Success

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>VR</b>	<b>Vendor Reliability &amp; Commitment to Implementation Success</b>			
VR-1	<b>Customers:</b> Vendor should have case management software customers in at least 200 locations in the United States, plus sufficiently demonstrate they meet the above stated financial stability requirements in section 3other.			
	<i>Response:</i>			
VR-2	<b>Training:</b> Vendor must provide sufficient detailed onsite training to allow Flathead County project team to participate in the configuration process, thus reducing overall project costs to Flathead County. In particular, vendor must provide instruction on building custom reports, automating documents, building business rules, and administering other aspects of the solution.			
	<i>Response:</i>			
VR-4	<b>Ongoing training:</b> After go-live, Vendor must provide regular training opportunities through webinars, user conferences, newsletters, etc.			
	<i>Response:</i>			
VR-5	<b>Professional organizations:</b> Vendor should be actively involved in professional organizations in order to determine most beneficial capabilities to add to solution.			
	<i>Response:</i>			
VR-6	<b>New releases:</b> Vendor will offer new software releases including added functionality at no additional charge, as part of maintenance contract.			
	<i>Response:</i>			
VR-7	<b>Customer input:</b> Vendor should employ a user experience team that regularly contacts users and asks for input on product as part of the SSMA (Software Service Maintenance Agreement).			
	<i>Response:</i>			

## Cost of Ownership

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>CO</b>	<b>Total Cost of Ownership for Solution</b>			
CO-1	<b>Create user-specific dashboards:</b> Software should allow Flathead County to create as many user-type specific dashboards as they wish, without having to rely on or pay the vendor to do this.			
	<i>Response:</i>			
CO-2	<b>Create screens:</b> Flathead County must be able to create screens and define required fields without having to rely on or pay vendor.			
	<i>Response:</i>			
CO-3	<b>Update statutes:</b> Flathead County must have ability to update all statutes, fees, etc. whenever new legislation is received without relying on or waiting for a vendor. Assistance will be provided by vendor under the SSMA at no additional cost.			
	<i>Response:</i>			
CO-4	<b>Build integrations:</b> Flathead County must be able to create an unlimited number of integrations to other applications or partner agencies through use of an API. Current integration with New World Systems Aegis MSP product will receive preference and must be included in proposal if available.			
	<i>Response:</i>			
CO-5	<b>Create new reports:</b> Flathead County must be able to build new reports or alter existing ones without vendor assistance.			
	<i>Response:</i>			
CO-6	<b>Build automated documents:</b> Flathead County must be able to build new automated documents or change existing ones without vendor assistance.			
	<i>Response:</i>			
CO-7	<b>Create workflow/ business rules:</b> Flathead County must be able to create new business rules or change existing ones without going through or paying vendor.			
	<i>Response:</i>			
CO-8	<b>Upgrades included:</b> Vendor must include all upgrades (both major and minor versions), service releases (patches), and updated system documentation at no additional cost as part of annual support contract.			
	<i>Response:</i>			
CO-9	<b>Rename and remove fields:</b> Flathead County must have the ability to rename or remove fields, and add new, alter, or delete			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
	coded values from drop-down options, without relying on or paying a vendor.			
	<i>Response:</i>			
CO-10	<b>Software and Hardware Format:</b> Vendor must include SaaS (Software as a Service) capabilities and associative cost compared to standard self hosted or API structure.			
	<i>Response:</i>			
<a href="#">CO-11</a>	<a href="#"><b>Browser Based:</b> Software must be able to run in any current internet browser.</a>			

## Case Tracking

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>CT</b>	<b>Case Tracking</b>			
CT-1	<b>Track event and case information:</b> The software must be able to track all relevant event information; charges and charge information; law enforcement, victims, witnesses, and other case-involved persons; sentencing information (including sentence credit and suspended time); court conditions; notes; and other case information.			
	<i>Response:</i>			
CT-2	<b>Track court information:</b> The software must track Flathead County-defined attorney and court information, including, but not limited to: court location, docket number, judge name, court notes, all attorney staff involved, and attorney date assignment.			
	<i>Response:</i>			
CT-3	<b>Track charges:</b> For statistical purposes the software must be able to track arresting charge, prosecuting charges, and final charge. Users must be able to track location information for the charge(s), as well as the sentence, sentence credit and suspended time, and location for each charge. For cases with multiple charges, the software must allow users to repeat similar charge information automatically.			
	<i>Response:</i>			
CT-4	<b>Track testing and results:</b> The software must be able to track substance abuse testing (including drug and alcohol) and test results. Software must auto-create Flathead County defined documents, events, and notifications based off these results.			
	<i>Response:</i>			
CT-5	<b>Track court conditions:</b> The software must be able to track court conditions placed on a case, including non-monetary provisions such as work programs, and community service.			
	<i>Response:</i>			
CT-6	<b>Track compliance:</b> The software must track progress, compliance, and completion on referrals for services and programs including counseling, treatment, education, and employment and allow for the auto-creation of Flathead County defined documents, reports, events, and notification based off progress, compliance, and referral statuses.			
	<i>Response:</i>			
CT-7	<b>Track modifiers:</b> The software must track statute enhancers and modifiers.			
	<i>Response:</i>			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
CT-8	<b>Assign and reassign cases:</b> The CMS must allow Flathead County to assign and reassign cases to individuals and teams/divisions both manually and automatically, individually and in bulk.			
	<i>Response:</i>			
CT-9	<b>Name swap:</b> When a case-involved name is changed on a case, the change should update throughout the entire case.			
	<i>Response:</i>			
CT-10	<b>Link related information:</b> Users must be able to link an unlimited number of related cases, numbers (e.g., law enforcement numbers, case numbers), case-involved individuals (e.g., defendants, witnesses, attorneys), and events.			
	<i>Response:</i>			
CT-11	<b>View all case involvements:</b> The software must allow users to view all involvements to a case on one screen. For instance, a case inquiry identifies the defendant(s), victim(s), witness(es), parent/guardian of juvenile, and any related cases. Users should be able to hyperlink directly from the list to the referenced case or name record.			
	<i>Response:</i>			
CT-12	<b>Multiple case identifiers:</b> The software must be able to categorize a case with multiple identifiers for reporting purposes (e.g., DWI, Domestic Violence, Drug Court, Capital Punishment, Divorce, Bond Forfeiture, and Eviction).			
	<i>Response:</i>			
CT-13	<b>Define numbering rules:</b> Flathead County should be able to define rules for case numbers and be able to include letters, numbers, and other symbols as part of the convention (e.g., JAN-010, CR-113-2004, etc.)			
	<i>Response:</i>			
CT-15	<b>Reopen cases:</b> The software must be able to reopen previously closed cases retaining previous case closure and current reopening information.			
	<i>Response:</i>			
CT-15	<b>Correspondence:</b> The software must be able to track correspondence by individual involvement to a particular case.			
	<i>Response:</i>			
CT-16	<b>Data formatting:</b> The software must apply data entry formatting in applicable number fields (e.g. Phone number (xxx)xxx-xxxx, ext. xx, zip code xxxxx-xxxx).			
	<i>Response:</i>			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
CT-17	<b>Multi-defendant:</b> The software must fully support multi-defendant base case tracking. For instance, each defendant has a unique and possibly different judgment, events, restitution, and/or attorney. However, all defendants can be managed from one screen.			
	<i>Response:</i>			
CT-18	<b>Copy case:</b> The software must be able to easily copy entire case information including charges and involved people for cases with multiple defendants.			
	<i>Response:</i>			
CT-19	<b>Notes:</b> Nearly all data entry screens must include a free text comments or notes fields. Additionally, every case and name record must include a spot to record detailed case notes and spell-check capabilities.			
	<i>Response:</i>			
CT-20	<b>Barcodes (Document Control &amp; Archival):</b> Software should have the capability for each name and case summary report to contain a unique software-generated barcode that users can scan to pull up the associated name or case record in the system immediately.			
	<i>Response:</i>			

## Name Tracking

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>NT</b>	<b>Name Tracking</b>			
NT-1	<p><b>Single name entry:</b> The software must accommodate single name/party record entry in a fully relational table (i.e., a name/party is entered only once and can then be linked with information anywhere else in the application). The software must provide a name table that contains ALL names entered. The name table must accommodate the names of people, businesses, and group names.</p> <p><i>Response:</i></p>			
NT-2	<p><b>Contact information:</b> The software must be able to track an unlimited number of addresses, phone numbers, and e-mails for any name. The software must track the dates any contact information is changed.</p> <p><i>Response:</i></p>			
NT-4	<p><b>Relationships:</b> The software must be able to track an unlimited number of relationships between name records (including multiple aliases/AKAs, spouse, ex-spouse, child, friend, brother, sister, business associate, acquaintance, birth parent, etc.). Flathead County must be able to configure the relationship-type options available for users to select.</p> <p><i>Response:</i></p>			
NT-5	<p><b>View all involvements:</b> The software must allow users to view all cases linked to a name, and from this view allow users to go directly to a specific case. A name inquiry identifies, at a minimum:</p> <ul style="list-style-type: none"> <li>• all aliases and cases</li> <li>• the person's relationship to each case (e.g., defendant, victim, witness, or parent/guardian of juvenile)</li> <li>• any associated charges</li> </ul> <p><i>Response:</i></p>			
NT-7	<p><b>Charges:</b> The software must record an unlimited number of charges per case or defendant.</p> <p><i>Response:</i></p>			
NT-8	<p><b>Rap sheet:</b> The software must be able to generate a 'rap sheet' for all case involvements for any individual.</p> <p><i>Response:</i></p>			
NT-10	<p><b>Notes:</b> For each name record, the software must provide comments and notes fields that have unlimited entry capacity (within disk storage limits).</p> <p><i>Response:</i></p>			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
NT-12	<p><b>Duplicate name:</b> The software should provide duplicate name detection to prevent the database from becoming cluttered with duplicate name records. Administrators should be able to search for duplicate name records using varying degrees of confidence. Administrators should have the capability to merge duplicate names once found.</p>			
	<i>Response:</i>			
NT-13	<p><b>Auto-populate city and state:</b> System should be able to auto-populate city and state when user enters the zip code.</p>			
	<i>Response:</i>			

## Configurability to Meet Flathead County's Specific Needs

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>CM</b>	<b>Configurability to Meet Flathead County's Specific Needs</b>			
CM-1	<p><b>Unlimited case types:</b> The software must support unified case management. For example, Flathead County can define an unlimited number of additional case types, without purchasing additional case type specific modules.</p> <p>Each Flathead County defined case type must support the following functionality:</p> <ul style="list-style-type: none"> <li>• When Flathead County case types are entered, only relevant codes and values (i.e., events, documents, statutes) are displayed.</li> <li>• Only Flathead County defined users or user groups can add or access Flathead County specified case types.</li> <li>• Each Flathead County defined case type can have different applicable Flathead County defined business rules.</li> </ul>			
	<i>Response:</i>			
CM-2	<p><b>Configure without source code:</b> Flathead County must be able to configure software, as well as have software configured by vendor, without recompiling software application or touching source code.</p>			
	<i>Response:</i>			
CM-3	<p><b>Configurable dashboards:</b> Flathead County must be able to create dashboards for their different user types, containing the reports, search tools, new/existing case lists, embedded websites/software programs, time-tracking reports, and/or other information most relevant to their users' roles.</p>			
	<i>Response:</i>			
CM-4	<p><b>Configurable screens:</b> Flathead County must be able to create screens for each of their different case types—including unique screen displays, fields, coded values, and system views.</p>			
	<i>Response:</i>			
CM-5	<p><b>Dynamic screens:</b> The software should have dynamic screen capability (i.e., the information in section 2 will vary depending on the information selected in section 1).</p>			
	<i>Response:</i>			
CM-6	<p><b>Case automation rules:</b> Solution must allow Flathead County to build case automation rules based on Flathead County's existing workflow procedures without having to go through vendor.</p>			
	<i>Response:</i>			
CM-7	<p><b>Triggers for workflow/ business rules:</b> Flathead County must</p>			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
	have the flexibility to trigger workflow or business rules in multiple ways, including on demand, based on an event, or at a specific time.			
	<i>Response:</i>			
CM-8	<b>Unlimited numbers:</b> The software must allow for an unlimited number of additional software-generated numbers that can be associated to the case and name (e.g., multiple SSN's, Driver License Numbers).			
	<i>Response:</i>			
CM-9	<b>Coded values:</b> The software must allow for all coded values to be hidden or visible based on a dependency to other fields. For instance, civil cases will only display those documents, matters, and events that apply to civil cases.			
	<i>Response:</i>			

## Document Capabilities

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>DC</b>	<b>Document Capabilities</b>			
DC-1	<b>Document Management System:</b> The software must allow for any file type to be linked and run from the “electronic” case file, including but not limited to documents, images, audio, video, and email correspondence. Administrators and/or users should be able to lock files to other users when they have them open.			
	<i>Response:</i>			
DC-2	<b>Document sealing:</b> System must allow for documents to be sealed and / or locked down by administrators.			
	<i>Response:</i>			
DC -3	<b>Search documents:</b> All files, documents, and other files that are stored in the “electronic” case file folders must be able to be indexed and searched.			
	<i>Response:</i>			
DC -4	<b>Document scanning &amp; image editing:</b> The software must contain a document scanning feature that allows users to scan documents directly into the CMS, redact sensitive information, clean or alter the document’s appearance, highlight information, and add notations, while retaining the original in its state.			
	<i>Response:</i>			
DC -5	<b>Document routing:</b> The software must provide a document routing function that allows Flathead County to move or copy files from the electronic case file of one name or case record to the electronic case file of another name or case record.			
	<i>Response:</i>			
DC -6	<b>Automate documents:</b> System must enable Flathead County to build an unlimited number and type of automated document templates (e.g., subpoenas, letters, receipts, appeals, etc.), using Flathead County’s standard templates and without manually opening the word processor program.			
	<i>Response:</i>			
DC -7	<b>Sub-documents:</b> In order to increase efficiency and minimize the number of documents Flathead County must maintain, document automation tool must have the ability for one document to call one or more sub-documents (e.g., allowing for multiple agencies to use the same base information, but each use a unique header).			
	<i>Response:</i>			
DC-8	<b>Generate documents:</b> System must be able to generate documents on demand, based on an event, or in batch at a specific time (including after-business hours). Automatically generated			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
	documents must be automatically linked to the appropriate case/person record for future reference.			
<i>Response:</i>				
DC-9	<b>Document editing:</b> The system should automatically open the document in the users' standard word processing program after it is generated to allow them to make further changes, including adding electronic signatures. Documents generated in batch, however, should not automatically open. Flathead County should have the ability to specify whether or not documents should open when generated.			
<i>Response:</i>				
DC-10	<b>Batch documents:</b> System must be able to print documents as part of a batch, either automatically or on demand.			

## Calendars and Dockets

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>C</b>	<b>Calendars and Dockets</b>			
C-1	<b>Calendars on dashboard:</b> The software must allow individual and/or team calendars (depending on the person's role) to be shown on an individual's main "dashboard."			
	<i>Response:</i>			
C-2	<b>Calendar for events:</b> The software must allow staff to view a calendar for their upcoming events and their office or division's upcoming events. Calendars must allow for daily, weekly, and monthly views (similar to Microsoft Outlook).			
	<i>Response:</i>			
C-3	<b>Microsoft Exchange:</b> The software must include one way integration with Microsoft Exchange. Events from an individual's CMS calendar should automatically be imported into his/her Outlook calendar.			
	<i>Response:</i>			
C-5	<b>Schedules:</b> The software must produce schedules for individuals, events, tasks, and dates upon user request. These schedules must be printable; web accessible; and exportable to Excel, RTF, Adobe Acrobat, and Microsoft Outlook.			
	<i>Response:</i>			
C-7	<b>Dockets:</b> The software must allow users to create and manage automatically re-occurring docket. Users must be able to specify docket names, start and end dates, times, docket frequency, and number of events in docket. The software should be able to display the docket calendar on a daily, weekly, or monthly basis, on a calendar similar to Microsoft Outlook. Users should be able to specify docket as either active or inactive. Future events in inactive docket should remain scheduled.			
	<i>Response:</i>			
C-9	<b>Scheduling &amp; rescheduling docket:</b> When scheduling a new docket, the software should provide a drop-down calendar to enable users to easily view and choose the correct dates. Users should be able to reschedule docket instances simply by dragging and dropping docket instances to new times and dates. Doing so should automatically change every docket event in that docket instance to the new time and should notify all event-involved parties in every case in the docket.			
	<i>Response:</i>			

## Time Saving & User-Friendly Features

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>TS</b>	<b>Time Saving &amp; User-Friendly Features</b>			
TS-1	<p><b>Workflow/Business Rules:</b> Solution must include a business rules engine that can be triggered based on an event, on a schedule, or on demand.</p> <p><i>Response:</i></p>			
TS-2	<p><b>Workflow/Business rules:</b> Business rules engine must be capable of automatically:</p> <ul style="list-style-type: none"> <li>• Closing cases automatically based on Flathead County-defined rules</li> <li>• Generating documents, events, system reports and notifications based on case closure or other event</li> <li>• Preventing users from closing cases unless other values are entered based on Flathead County-defined rules (e.g., a case cannot be closed without a disposition).</li> <li>• Initiating the schedule of future tasks based on occurrence of prior tasks or events as defined by Flathead County.</li> <li>• Notifying case-involved (and/or other) individuals of case status changes and other Flathead County-specified events.</li> <li>• Routing cases and work tasks based on Flathead County-specified rules and notifying users of those routed items.</li> <li>• Assigning attorneys based on a Flathead County-specified case weighting system.</li> <li>• Triggering events, case status changes, documents, and correspondence based on prior events.</li> <li>• Disallowing users from saving and exiting a case without first saving mandatory fields (as specified by Flathead County.)</li> </ul> <p><i>Response:</i></p>			
TS-3	<p><b>SSRS:</b> The software must have search/reporting tools within its design, allowing users to view, create new, and interact with reports from within the CMS. Standard reports (e.g., name and case summary reports) should already be integrated within name and case records, and Flathead County must have the ability to integrate any other reports they wish directly into name records, case records, and user dashboards.</p> <p><i>Response:</i></p>			
TS-4	<p><b>Build new reports:</b> Flathead County must be able to build new searches /reports or alter existing ones without vendor assistance. Users should not need highly technical skills in order to use report writing tool. Users must be able to format reports to accommodate multiple paper sizes and viewing layouts.</p>			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
	<i>Response:</i>			
TS-5	<p><b>Ad hoc tool:</b> The software must include an ad hoc reporting tool that provides the following functionality:</p> <ul style="list-style-type: none"> <li>• Drill down and hyperlink functionality</li> <li>• Automated, scheduled email reporting to staff and external stakeholders</li> <li>• Accessible within case management system (users should be able to view and create reports from within system)</li> <li>• Graphing functionality</li> <li>• Provides ability to export results to a number of different formats without purchasing additional third-party software (e.g., Word, Excel, XML, CSV, Acrobat, HTML)</li> </ul>			
	<i>Response:</i>			
TS-6	<p><b>Search tools:</b> The software must allow users to search for names, cases, and documents using both quick and advanced search tools. Users must be able to search based on any information they have available (e.g., partial names, ID numbers, phone numbers, date of birth, addresses, case numbers, date ranges, etc.) Software must include wildcard and Soundex search options.</p>			
	<i>Response:</i>			
TS-7	<p><b>Search within data fields:</b> Users should be able to search for cases and names from directly within data fields, find appropriate case or name in results, and link it back into the case or name on which they are working.</p>			
	<i>Response:</i>			
TS-8	<p><b>Search results:</b> The software must be able to rank, sort, and list search results to allow users to quickly locate case, name, or document for which they are searching. Users should be able to hyperlink directly from search results to a specific section of a case or name record (e.g., upcoming events).</p>			
	<i>Response:</i>			
TS-9	<p><b>Export results:</b> Users must be able to export search results into a number of different formats.</p>			
	<i>Response:</i>			
TS-10	<p><b>Ticklers:</b> The software must allow Flathead County to define structure, content, and frequency with which system displays ticklers, alerts, and prompts.</p>			
	<i>Response:</i>			
TS-11	<p><b>Quickly send to printer:</b> The software must allow users to right-click on any media stored in the system and send to Microsoft Outlook as an attachment, same to a local file, or send to the default</p>			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
	printer.			
	<i>Response:</i>			
TS-12	<b>Shortcuts:</b> Users must be able to navigate anywhere in the system using either shortcuts or a navigation bar. Navigation bar should be standard from screen to screen (but only show options relevant on an individual screen). Flathead County must also have the ability to alter built-in shortcuts to mimic ones already familiar to their users.			
	<i>Response:</i>			
TS-13	<b>Warnings:</b> When users choose to delete a name or case, a message should appear warning users of the implications of the delete operation and confirming that they wish to delete.			
	<i>Response:</i>			
TS-15	<b>Time tracking:</b> The software must allow for time tracking and reporting by case, assigned staff, task, and office-wide.			
	<i>Response:</i>			
TS-15	<b>Visual prompts:</b> The software must allow for visual alert prompts for users for key Flathead County-defined name and case information, such as if an individual is a juvenile.			
	<i>Response:</i>			
TS-16	<b>Tabs:</b> Users must be able to have multiple cases open simultaneously, using a tabbed layout (similar to most internet browsers). Users should be able to move away from cases/notes without saving to accomplish other tasks.			
	<i>Response:</i>			
TS-17	<b>User preferences:</b> Individual users should be able to set preferences on their own accounts that do not affect other users' screens. For example, they should be able to set color preferences, rearrange and resize columns or boxes of information, and "hide" information they do not use.			
	<i>Response:</i>			
TS-18	<b>Hyperlinks:</b> Case and name records should automatically hyperlink to other cases or names referenced within them, allowing users to open those as new tabs with a single keystroke.			
	<i>Response:</i>			
TS-19	<b>Minimize data entry:</b> The software must minimize data entry by allowing one name to be linked to an unlimited number of cases or other names, and one case to be linked to an unlimited number of other cases or names. Users should not need to duplicate entry of data elements.			
	<i>Response:</i>			
TS-20	<b>Microsoft tools:</b> The software should have the ability to save and			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
	update documents directly from Microsoft Word Add-ins. The software should also have the ability to file e-mails directly from Outlook using an Outlook Add-ins			
	<i>Response:</i>			
TS-21	<b>Easy installation:</b> When Flathead County installs new upgrades on server, users must be able to immediately download latest version simply by logging in to system (i.e., Smart Client). IT resources should not be required for this, nor should users require administrator privileges on their own computers.			
	<i>Response:</i>			
TS-22	<b>No thin clients:</b> Authorized users must be able to fully access and use the software via the web without purchasing additional thin-client software or requiring a client be downloaded on the remote machine.			
	<i>Response:</i>			
TS-23	<b>Client photo:</b> The software must have a method to display and link a photo of clients.			
	<i>Response:</i>			
TS-24	<b>Auto-populate city:</b> The software must auto-populate City and State by entering the zip code.			
	<i>Response:</i>			
TS-25	<b>Auto-filtering codes:</b> The software must support auto-filtering on all coded lookup fields. For instance, typing 'M' in the Gender fields automatically fills 'Male' in the data entry box.			
	<i>Response:</i>			
TS-26	<b>Automatic notifications:</b> The software must allow for automatic notification to users and of important case and event information. Flathead County must be able to set up notifications, including time in advance they are sent, specific wording, and notification type (e.g., email, pop-up, other).			
	<i>Response:</i>			

## Data Security

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>DS</b>	<b>Data Security</b>			
DS-1	<b>Security tools:</b> System must include allow for security profiles, row-level security rules, and unique login/passwords for each user. <i>Response:</i>			
DS-2	<b>Control of tools:</b> Flathead County must be able to have full control of security tools (e.g., adding existing users to or taking them from security groups, adding/removing specific row-level privileges) without going through vendor. <i>Response:</i>			
DS-3	<b>Create new profiles:</b> Flathead County must have the ability to create additional security profiles beyond any defaults that come with the system and control what functions or data an individual or group can view, edit, or otherwise access. <i>Response:</i>			
DS-5	<b>Multi-agency:</b> The software must provide multi-agency, multi-division, and multi-jurisdiction security for case records, such that employees of one agency can be restricted from viewing or modifying the case records of another agency using the application, while still using the same master name database. <i>Response:</i>			
DS-6	<b>Row-level tools:</b> The software must be able to restrict access by case type, name type, agency type, or sub-agency entry type and those case types' subsequent values. <i>Response:</i>			
DS-7	<b>Different levels:</b> The software must provide for security on at least the following levels: table, function (add, modify, etc.), fields, coded values, and case type. <i>Response:</i>			
DS-8	<b>Different access privileges:</b> The software must support various types of access privileges including at least read-only, update, and no access. <i>Response:</i>			
DS-9	<b>Auditing:</b> The software must provide comprehensive auditing & logging giving administrators a granular view of what data is being edited, viewed, deleted, and added by system users. For key records, such as name and case information, the software must track the date, time, and login of the person who added the record, and the date, time, and login of the person who last modified the record.			

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
	<i>Response:</i>			
DS-10	<b>Change password:</b> Users must be able to change user passwords from within the software.			
	<i>Response:</i>			
DS-11	<b>Set report permissions:</b> Administrators must be able to set permissions for which agencies, users, or divisions can access any report type.			
	<i>Response:</i>			
DS-12	<b>Seal case elements:</b> Users with sufficient privileges should be able to seal case elements, including the entire case, to other users not in the appropriate security group.			
	<i>Response:</i>			

## Data Sharing & E-Capabilities

#	REQUIREMENT	COMPLIES		
		YES	PARTIAL	NO
<b>DE</b>	<b>Data Sharing &amp; E-Capabilities</b>			
DE-1	<b>API included:</b> Vendor must include an API that Flathead County can use to integrate with other justice partners or software solutions. <i>Response:</i>			
DE-2	<b>API easy to use:</b> API must be intuitive enough to use by individuals with programming background, without requiring vendor assistance. <i>Response:</i>			
DE-4	<b>Number of Users:</b> Solution must be able to expand the number of users or seat licenses. <i>Response:</i>			
DE-6	<b>Multiple agencies:</b> Flathead County may wish to add additional justice partners onto solution in the future. Thus, solution should be able to be configured for multiple agency types, agencies, and divisions uniquely, with each group having unique screens, user-specific dashboards, and business rules that apply only to it, and are only visible to it. <i>Response:</i>			
DE-7	<b>Security rules:</b> Solution must have robust security rules, allowing multiple agencies or divisions to share specific data while restricting other data from view. <i>Response:</i>			

## 8.0 Terms and Conditions

*[If you wish to take exceptions to any of the terms and conditions outlined in this RFP, you should list these in this section.]*