



COUNTY OF SANTA CRUZ

General Services Department Purchasing Division

701 OCEAN STREET, SUITE 330, SANTA CRUZ, CA 95060-4073

ADDENDUM #3

Request for Proposal (RFP)

FOR 24P1-002

Case Management System for the Public Defender's Office

Issued 01/31/2025

This addendum (#3) is being issued to answer questions posed by prospective vendors regarding RFP 24P1-002.

Vendor #1

1. Question: To allow enough time to create a really strong bid, would the County of Santa Cruz consider extending the proposal submission deadline?

Answer: Per Section 2.3, the submission deadline may be changed if the change is released in the form of an addendum. As of Addendum 2, the deadline has been updated.

2. Question: Does the County of Santa Cruz have a set budget for this project? If so, could you share any details about the budget allocation or constraints

Answer: At this time, the budget for the Case Management System is still under review and subject to adjustment based on final scope and services contracted with a selected vendor.

Vendor #2

Data Storage Questions	Answers
1. Are you looking for the chosen vendor to store all 100 Terabytes noted from the outset of the project?	Yes. However, files from closed cases can be moved to a cold storage with a maximum of a week retrieval time.
2. If no to question 1, what is the estimated amount of storage required in the first year for <u>open cases</u> ?	We are averaging around 40TB of new data per year. We expect this amount to grow each year.
3. If the chosen vendor is storing all the unstructured data, please elaborate on what is stored in Axon Evidence.com, and if it's stored in Axon Evidence.com why you would store it in two places.	We receive data from various sources including Axon Evidence.com. Our preference is to have a central repository for all of our discovery and case-related files.
4. If the chosen vendor is storing all 100 Terabytes can you please segment the amount of storage of the 100 Terabytes between active (open) and non-active (closed) cases	A rough estimate is 30TB for open cases.

<p>1. On the January 9 call it was stated the only external system that should be integrated prior to 'GoLive' is Tyler Odyssey. Please confirm.</p>	<p>Correct.</p>
<p>2. Have you spoken with Tyler Technologies and have they agreed to be cooperative in sharing the data needed via API?</p>	<p>Yes. They do not have an API to use. Instead, they send real-time XML updates that the chosen system will need to consume.</p>
<p>3. 3.4 K states an interest in 'interoperability with Workday.' Please provide a use case (user story example description) of how the system would interface with Workday.</p>	<p>We don't have a specific use case. This item is informational, as these are the County's current Finance and estimated replacement Timecard/Payroll system after 2026 go-live.</p>
<p>4. Section 7, J, asks if 'the system can interface with a financial management system (Finance Enterprise). Please provide a use case (user story example description) of how the system would interface with Finance Enterprise. And, as added confirmation to question 1, is this integration needed prior to 'Golive?'</p>	<p>We don't have a specific use case. This item is informational, as these are the County's current Finance and estimated replacement Timecard/Payroll system after 2026 go-live.</p> <p>Not needed prior to going live.</p>
<p>5. Have you spoken with Axon Evidence.com and gotten their cooperation to integrate with the chosen system?</p>	<p>No.</p>
<p>6. What is the name of the Jail System used?</p>	<p>Executive Information Services, Inc. EIS JMS Web Jail Viewer Version 19.5.0.0</p>
<p>7. Does the Jail System software have open APIs available for integration?</p>	<p>We currently use direct SQL to query information from the jail system.</p>
<p>You are only migrating data from one system - LegalEdge? If more than one system has data to be migrated please list.</p>	<p>Only LegalEdge.</p>
<p>The system we will be proposing prices data migration based on the number of fields [first name, last name, zip code are three example field names] you'd like to migrate from the current database. Only counting the same field name once, please estimate the total number of fields with "meaningful data" that needs to be migrated to live on in the new system. Drop down pick lists and case notes are treated as one field.</p>	<p>The County estimates around 380 fields:</p> <ul style="list-style-type: none"> Case Info 30 Court Info 5 Note / Time 8 Intake Information 115 Events 10 File Locations 10 Advocacy 50 Incidents 18 File / Email Attachments 20 Person 25 Identifiers 7 Criminal Defendant 15 Attorney Assignment 6 Appearances 10 Charges 20 Sentence 25 Requests / Tasks 12

Vendor #3

Questions	Answers
1. Your invitation states you are accepting proposals from “fully licensed and insured manufacturers or distributors of Case Management System Software.” Are you only looking for a COTS application or are you open to exploring the option of a be-spoke Case Mgmt Solution that meets the requirements stated in your functional specifications document?	The County is not open to having a custom solution built only for the PDO.
2. Can you please share the technical details e.g. Technical/ Data Architecture diagram of the current system and the systems to be merged or interfaced with?	The current system uses a relational database running on MS SQL Server. We are not able to share the database architecture at this time.
3. How many internal and external users will use the new system?	Up to 100 at this time.
4. Is there any preference on hosting of solution on-premise or cloud. If cloud, is there a preferred cloud solution – AWS or Azure?	We are interested in exploring both options. The County currently has Azure setup but not AWS.
5. What is the volume and quality of data to be converted and migrated to the new system? Is there a need for data cleanse for all system data to be migrated from existing system? Is that in scope for this implementation?	We have many years of historical and current case data that will need to be migrated into the new system. The data was previously cleansed before being imported into our current system. Our existing data is ready to be converted but will obviously require careful implementation which we will expect the vendor to lead with support from our IT Lead and other staff resources as necessary.
6. What phase is the project currently in? Has there been any initial scoping, stakeholder engagement or market research completed to date?	We are just beginning the process with this RFP.
7. Is there any budget allocated to the project? Is there a cost threshold for the proposal?	The Public Defender’s Office is looking for the most cost-effective service that will meet our requirements.
8. Have you done any market research about existing solutions meeting the needs of the new system? Is there a preference on a particular tech stack from IT?	We are aware of various public defender software solutions. We have no preference on a tech stack however the main county operating system is Windows.
9. Does the Department have a preference for any specific SaaS platforms/ vendors, or is this fully open to exploration during the market research phase?	Open to exploration.
10. What is the timeline anticipated for the implementation of this project? Are there any critical milestones or deadlines that need to be met?	We do not have any anticipated or necessary deadlines for the implementation.
11. Does the county already has a scanner product to scan documents that they would like new system to be integrated with?	No.
12. Is there a preferred project methodology (Agile, Hybrid or Waterfall) for this project?	No preference.

13. Is there a preference for a fixed timeline/ price model or would a flexible and incremental delivery approach (e.g., Agile) will be considered?	We are open to the vendor presenting what they believe to be the most effective approach.
14. Are there any requirements for vendors to be on-site?	We would prefer an on-site training if possible.
15. Is there an incumbent or existing vendors working on this project?	No.

Vendor #4

Questions	Answers
3.1: The Microsoft Office Suite needs to be used for document generation.	
3.1 Question 1: What are the specific reasons for utilizing the Microsoft Office Suite for document generation? Are there particular advantages or considerations that necessitate its use?	MS Office is the standard at the county of Santa Cruz.
3.1 Question 2: Would the county be receptive to adopting a native workflow within the vendor's CMS system, provided that the document output is in the required file format?	The proposed solution must be able to support our current workflow. We are open to discussing potential process improvements.
3.2 B: The Public Defender's Office has recently merged with the County of Santa Cruz and currently uses LegalEdge. The County utilizes connections to other Legal Case Management Systems as well as other Law Enforcement Systems whenever possible. These connections require data receiving and data sending when appropriate. These systems include but are not limited to: <ul style="list-style-type: none"> • Santa Cruz County Sheriff SDO Jail Management System • Santa Cruz County Court's Tyler Odyssey System • Axon Evidence.com 	<p>The system can query the JMS using SQL and update booking and release data.</p> <p>Odyssey will send an XML file for every "event" or update to a case. This data will need to be imported into the current system and update the corresponding case records.</p> <p>The system can link to view discovery on evidence.com.</p>
2.1 Question 1: Is the data transmission between the systems one-way or two-way? Additionally, how are the endpoints structured (e.g., APIs, file drops)? How does the vendor integrate with the data feed? Could the county please provide a use case for each integration?	The only critical integration is with Odyssey. PDO does not have additional use cases at this time.
3.4 K: Ability to allow for robust timekeeping with the flexibility to require timekeeping only in certain kinds of cases or for certain users. Ability for interoperability with Workday	
3.4 K Question 1: What specific functionality is required to interact with Workday software? This information is essential for accurately estimating the effort required to achieve this objective. Please provide a detailed use case of how the county would like to integrate with the Workday software.	Nothing specific. We are exploring what might be possible since the county is preparing to implement Workday.

Technical Requirements Questions	
GT.24: The system has the ability to interface to an external document management system.	
GT.24 Question 1: Which external document management system does the application need to integrate with? This information will assist the vendor in determining whether any additional effort is required.	None in particular.
GT.26: The system has the ability to identify records with imaged documentation.	
GT.26 Question 1: Could you please provide a use case for identifying image documentation records? This information will help the vendor evaluate whether any additional effort is required.	No additional effort is expected for this. The PDO does not have a specific use case.
GT.33 The system has the ability to inherit groups from Active Directory for application authentication.	
GT.33 Question: To gain a clearer understanding of this use case objective could the county elaborate on the requirement? Is the use case to allow the active directory defined roles to drive security in the CMS application? Or are there other reasons that the county is wanting to integrate active directory roles in the CMS?	Yes as way to potentially drive security roles.
GT.52: Other administer-configurable information.	
GT.52 Question 1: Specifically what other administer-configurable functionality is required? Could you please provide specific details and use cases of what the county would like to administer.	User accounts, security roles, module access at least. PDO does not currently have a use case.
GT.54: The system has the ability to update all security roles automatically (user discretion) when a change in the "master" role is made.	
GT.54 Question 1: Is the expectation that the security will cascade to all users with the altered role? Please provide any additional expected functionality if the question does not encompass all functionality.	Yes.
GT.82: The system has the ability to provide integration with Office 365 (e.g., Word and Excel), with appropriate security permissions. Vendor to specify all functionality.	
GT.82 Question: Could you please clarify the level of integration required for each use case, so the vendor can gain a clear understanding of the specific integration needs with each Office 365 application?	The County uses MS Office and any integration with that platform could be beneficial.
GT.86: The system has the ability to provide configuration options to the System Administrator with the level of detail that is logged in error logs.	
GT.86 Question: To provide accurate estimates, further details regarding error reporting and its level of granularity are needed. How detailed would the administrative users prefer the error logs to be? Could you provide specific examples of the type of error messages you would like to receive, and the level of detail required?	We will let the vendor decide the appropriate level of detail in error reporting to ensure robust operation.

GT.101: The system has the ability to provide the user with standard field editing capabilities including but not limited to: navigation forward and backward to complete data entry and the ability to correct spelling mistakes.	
GT.101 Question: Does the above requirement indicate that inputs should be retained through caching, rather than being saved directly to the database, prior to navigation between screens for reference checking? Alternatively, would it be acceptable to use two concurrently opened instances of the application—one for referencing and one for data entry—rather than caching the data?	This requirement is simply referring to using navigation keys to move between fields on the same screen.
GT.103: The system has the ability to provide predictive text capability with the ability to turn this functionality on or off.	
GT.103 Question: Could you provide a list of areas within the CMS where predicted text functionality is expected to be implemented, such as case notes or any other specific fields?	Case notes, requests, comment boxes
GT.111: The system has the ability to allow an administrator to configure which business process are prompted with a warning to proceed, with appropriate security permissions.	
GT.111 Question: Could you please define the types of business processes you are referring to in requirement GT.111, in order to provide clarification for work estimation?	This requirement is for sensitive business processes, i.e. changing employment status. A similar use case for the PDO could be restricted access to certain cases and/or discovery.
GT.148: Severity Level 1, system is down. Attention required immediately, maximum of 30-minute response time.	
GT.148 Question: Concerning Severity Level 1, does the word response time mean acknowledgment time? Or resolution time?	Acknowledgement time. Resolution time is hopefully even sooner.
GT.192: The system has the ability to allow reports to be generated that have "drill down" capabilities.	
GT.192 Question: Is the referenced 'drill down' capability referring to a tree node that expands to display additional data, or does it refer to a link that navigates to another location within the application?	Navigation through the data points.
GT.202: The system has the ability to create a personalized screen that is configurable by system admin, group of users, and individual users.	
GT.202 Question: Is the intent of the requirement to enable the creation of entirely new personalized screens, or to provide functionality for adding fields and personalizing existing screens?	For example, different roles could have different dashboards to display data relevant to them.
GT.261: Allow easy data entry of the same log entry to multiple related case records.	
GT.261 Question: Could you please provide specific use cases to help the vendor understand which records require multiple copy record insertions?	The only use case I can think of currently is if clients are charged under a specific penal code and then that code changes (for example 1170(d)1 got changed to 1172.6)

GT.263: Ability to request: A research assignment, a request for a Writ. Designate Felony v. Misdo.	
GT.263 Question: Our system includes robust tasking and request management features. Could you please provide a detailed use case and workflow for the requirements outlined above?	Attorney would submit a request for a complex legal document. For example, a suppression motion. There would be a specific court required due date (would be nice if automatically calculated based on court rules); date to meet/draft due date (meet with L&M attorney/Law clerk).
GT.264: Ability to integrate multiple deadlines such as Final filing date, Date for initial draft, Date for final draft. Also a link to Portal case	
GT.264 Question: Could you please specify which areas of the CMS should have deadlines tracked? Additionally, could you provide further details regarding the expected functionality related to providing a link to Portal Case?	The Portal lists next court dates/hearing dates in a case. A link there would set dates (say next hearing is 2/25/25). Would be nice to, for example, calculate that a motion must be filed and served 10 court days in advance of the court hearing date (2/11).
GT.289: Product must include the functionality of referring cases from one practice to another.	
GT.264 Question: Does the above workflow pertain to an internal transfer of cases, or is it an external transfer, moving the case outside the system to an external organization?	We definitely need the ability to move a case between staff but this requirement is assigning the case to a different external organization.
GT.302: Input offenses on each referral from a global offense table.	
GT.302 Question: Does the above requirement specify that the CMS will store all statutes, with users selecting from this list on a case-by-case basis? Or do the references to offenses pertain to something else; If so, could you please clarify what the global offense table should include?	We need the ability to store and update all statutes relevant to CA law.

Vendor #5

Questions	Answers
1. Rather than submitting one (1) hardcopy original signed in blue ink and marked "ORIGINAL" and one (1) electronic copy (USB drive) of the completed proposal, will the county accept a PDF version electronically?	The submittal process was changed to a web-submittal portal through OpenGov as of Addendum #2. Any additional changes would need to be released in the form of an addendum.
2. What is the budget for this project?	PDO is looking for the most cost effective service that will meet our requirements.
3. How many total named users will be using the software?	Up to 100.
4. What is the current version of LegalEdge?	Build ver 2.0
5. What are the main reasons why the county is replacing the system?	PDO wants a highly specialized system that cannot be easily provided on any existing agreement

6. Will you extend the due date?	The County has already extended the due date per Addendum 2, but additional extensions may only be authorized by further addendums to be released before the existing submittal deadline.
7. Does the county wish to leverage Laserfiche as a document management solution for this project?	No preference. However if there's an external solution that has cost implications, that needs to be outlined in the proposal.
8. For cloud solutions does the county have a preferred cloud environment such as AWS GovCloud or Microsoft Azure GovCloud?	The County has Azure. That would be preferred but we are open to other solutions.
9. Have you evaluated or viewed any other vendor's products? If yes, please provide details.	We have not reviewed any vendors as part of this RFP process.
Technical Questions	
1. Will preference be given to browser-based applications?	The County prefers browser and mobile friendly applications
2. Are solutions that utilize VDI technology (Citrix, RDP, VMware View) acceptable?	We are open to all proposals.
3. Will any users be accessing the system via VPN? If yes, please provide technical requirements.	Users will need to be connected to the County intranet via VPN which will allow users access to an on-prem system.
4. If planning on migrating data to the new system what sample data, record layouts, schema, ERD, etc. is available for analysis?	The County can provide the relevant database architecture upon awarding of the contract.
Implementation Questions	
1. What is the desired timeframe for implementation?	The County is open to the most efficient and robust implementation timeline.
2. Will any consultant be assisting with product selection or implementation? If a consultant is involved please identify them. If assisting with the implementation, what systems have they had experience with in the past?	The County does not currently have any outside consultants anticipated for this contract.
Functionality Questions	
1. What are the functional and technical requirements for each of the following integrations?	
• Santa Cruz County Sheriff SDO Jail Management System	The system can query the JMS using SQL and update booking and release data.
• Santa Cruz County Court's Tyler Odyssey System	Odyssey will send an XML file for every "event" or update to a case. This data will need to be imported into the current system and update the corresponding case records.
• Axon Evidence.com	The system can link to view discovery on evidence.com
2. What other systems will be integrated into the new case management system? For each provide functional and technical requirements.	None currently.

3. What is being used for file room/records management to track physical paper-based files? Is the desire to replace or integrate with it?	There is no need to track physical evidence.
4. Does the county wish to create and maintain court rules internally or to use a third-party service?	Not applicable this RFP.
5. Is legal hold functionality a requirement?	No.

Vendor #6

Questions	Answers
What is the impact you expect this project to have on your constituency?	A key desire is to have accurate data easy to report on to support the PDO in serving our clients.
What is the impact you expect this project to have on your internal users?	To make managing their caseload as easy as possible.
What key performance indicators (KPIs) do you expect to measure to demonstrate the impact of this project?	Ability to generate easy to read reports on number and type of holistic needs identified, number and type of holistic referrals made, status of pending referrals, and outcomes relating to holistic case factors at case closure.
Has a budget been allocated or approved for this project?	Since final budget depends on the solution present, there is no officially allocated amount
Will you please share the budget for the project?	PDO is looking for the most cost-effective service that will meet the RFP requirements.
Can a two week extension be granted?	The County has already extended the due date per Addendum 2, but additional extensions may only be authorized by further addendums to be released before the existing submittal deadline.
Do you have a preference for a COTS or a Low-Code solution?	No.
Has an attempt been made to implement a solution to this problem before? Was it successful?	This is the first RFP to replace the case management software at the PDO.
Are you open to an agile development methodology?	Yes.
Do you have a technology preference for the solution, integration, document management or reporting? If so, please list out the preferred vendor and solution name.	Yes, Laserfiche for Document Management, and PowerBI for analytics. But we are open to reviewing other options.
Are we correct in our understanding of 65 Employees + up to 30 interns and volunteers?	Yes currently.
Are there any external users? Can you provide an estimate of how many external users of the application are expected? What is their usage profile? (i.e., do a large number of external users login infrequently, or do a small number login 3 or more times a month? What is the seasonality or events that trigger use?	None currently.

Do you have current, documented processes for each of the processes described in the RFP?	Some but not all.
How many business processes / programs will need to be supported by the solution?	PDO opens approximately 6500 cases a year, with that number potentially growing with new Calif. specific laws being enacted (for example, Prop 36 and CARE Act which will increase cases)
Do you have a preferred requirements repository that should be used? If not, are you willing to work within our requirements repository, Jira?	No preference and Jira would be acceptable.
Can you estimate how many unique notifications need to be generated?	Unknown.
Should users be able to receive notifications via text messaging?	That could be a useful feature.
How many unique documents need to be generated from the system? How many documents should the solution be capable of handling?	Unlimited.
Approximately how many new records are created each year?	6000 case records.
Approximately how many new documents will be created or uploaded each year?	50TB+ of discovery documents.
Have you previously seen product presentations from other vendors? If so, can you provide a list of vendors and products?	We have not completed any product presentations as part of this RFP process.
Do you have a preferred web platform to which the solution should integrate or does the solution need to bring a portal technology?	No.
Can you please identify the team roles you are planning to provide to this project? (e.g., Project Manager, Product Owner, Subject Matter Experts, User Acceptance Testers...)	IT Lead, SMEs, user testing, project manager
From how many legacy data sources does data need to be migrated?	Just our main system, LegalEdge.
Can you please identify the technology data source(s) for each legacy data set?	MS SQL Server
Do all records or a subset of records need to be migrated?	All records.
How many tables and records per table need to be migrated from each data source?	There are around 350 fields in 50 different tables. We have about 6000 active and 100k closed case records that need to be migrated.
Is there a documented data dictionary for those systems?	No.
Who will be responsible for extracting data from the legacy system?	The chosen vendor with support from the IT Lead at the PDO and any support from LegalEdge as needed.
Who is responsible for data quality assurance of migrated data?	The selected vendor with support from in-house staff.

Who is responsible for remediation of data quality issues?	The selected vendor.
Do you have an existing electronic signature provider that should be used? Are the new users of this system already licensed to use the products or should the respondent provide licensing costs?	DocuSign, which all employees use.
Approximately how many electronic signatures will be required annually?	Unlimited.
Do web services exist for each of the systems mentioned? Are they all included in the pricing you expect or are you looking for the capability to integrate?	Capability to integrate.
Does this solution need to integrate into a data warehouse? If so, what data warehouse technology? Does all or a subset of data need to be integrated?	N/A
Will we have all the needed access to technical and business resources that understand the integration endpoints? Is there a documented integration specification for that endpoint?	N/A
Do you have a middleware solution available or preferred to be used to support integrations? If so, can you please provide the vendor and software?	N/A
What are your change management expectations for this project? Are you looking for end-user training or train-the-trainer training?	Both.
Do you already have an existing DevOps process and technology? If so, can you please provide the name of the technology and an outline of your process?	No.
Is the use of offshore consultants and developers allowed? If so, what are the constraints around their work (i.e., no access to production data)?	<p>Per the Purchasing Policy Manual: 2.7 Off-Shore Outsourcing - Purchases of Services</p> <p>(a)Goal: It is the Board’s goal to promote the purchase of services provided by United States companies and employees.</p> <p>(b)Definition: Off-shore services as defined in this policy are services provided from an off-shore location (foreign country). Examples of such services may include, but are not necessarily limited to, customer support service, telemarketing, and financial auditing.</p> <p>(c)Policy: It is the County’s policy to not purchase services from off-shore companies or where company employees are located off-shore. Contracts for services shall contain a clause that requires contractors and subcontractors to certify that all work done under such contracts will be performed solely by workers within the United States.</p> <p>(d)Waiver: The Purchasing Agent may waive this requirement to respond to an emergency or operational need where no contractor within the United States is immediately available; or the contract is necessary to provide a unique service that is mandatory and cannot be performed adequately by workers within the United States. The department will be responsible for disclosure of these circumstances in a subsequent board letter.</p>

<p>Who will be responsible for maintaining the system? Should we expect a full administrative transition to your staff? Should we expect to be wholly responsible for application support? Or will there be a hybrid approach to support?</p>	<p>There will be a hybrid approach. Our IT Lead will field the majority of support-related questions and will be a liaison with the vendor's support team.</p>
<p>For how long is the respondent required to provide post-deployment support as a warranty period for the solution?</p>	<p>We would expect to define details of the postproduction support and warranty in the contract. Generally, we would expect support from the implementation team for 3 months after go live, and transition to the standard support during that period. We would expect the system to be warrantied from defects for the duration of the contract.</p>
<p>Does the respondent need to provide a support plan as part of our response?</p>	<p>Yes.</p>
<p>Does the client have a designated administrator for the new system? Will they be able to devote part-time or full time to the maintenance of the system?</p>	<p>Part-time.</p>
<p>Did you use a vendor to help develop the RFP? If so, can you please share the name of the vendor?</p>	<p>No.</p>
<p>Did you evaluate solutions that could meet its requirements through vendor demonstrations leading up to the RFP release? If so, can you share the vendors and solutions that were evaluated?</p>	<p>No vendors were evaluated leading up to this RFP process.</p>
<p>Beyond the 2-3 months to implement the core solution, what is the expected timeline for the full implementation to be complete?</p>	<p>6 months.</p>
<p>Are you willing to divide the scope of the effort contained within the two phases, a discovery phase and an implementation phase, so that the implementation can be more accurately estimated?</p>	<p>Yes.</p>
<p>Do you expect a mobile app to be delivered as part of this project? Does it need to have the same functions as the desktop application or a subset of features? Does it need to support offline access?</p>	<p>No but are open to the possibility.</p>
<p>Can you please provide a list of reports that will need to be built or migrated to the new system from existing systems? Or, an estimated count of reports would be helpful if a list is not available?</p>	<p>We require a variety of reports including case details, case loads, office-wide case activity, court appearances, holistic activity, investigation requests, and others. All of these should be filtered by date range, staff, and any other related criteria. We also prefer a robust solution for ad-hoc reporting.</p>

<p>Would you consider waiving the requirement for a hard copy and thumb drive submission altogether in favor of vendors submitting PDF's for the Technical Proposals and Cost Workbook separately? If not, would you grant a three (working day) extension to get the hardcopy submission in as long as the emailed version was submitted by the due date?</p>	<p>This has been changed and all responses are to be uploaded into OpenCog per Addendum 2.</p>
--	--

Vendor #7

Questions	Answers
Odyssey Integration	
<p>Regarding integration with the Tyler Technologies Odyssey system, we understand it often transmits entire records or updates rather than providing only updated fields. This may necessitate implementing a comparison mechanism between the PD system and the Court system to identify updated fields.</p>	<p>Odyssey will send an XML file for every "event" or update to a case. This data will need to be imported into the current system and update the corresponding case records.</p>
<p>Is the vendor expected to develop such a comparison mechanism to filter updates?</p>	<p>The XML will make it clear which record to update.</p>
<p>Alternatively, would the Public Defender's Office prefer to overwrite records received from the court system? Note, historical changes to cases (e.g., bail amounts, custody status) may be lost.</p>	<p>All data should be backed up and preserved. No historical data should ever be lost.</p>
<p>4. Please provide the number of fields currently utilized in the existing LegalEdge implementation and how many need to be migrated into the new system, as referenced in section 3.2(B).</p>	<p>Approximately 380 fields currently utilized and the majority will need to be migrated.</p>
11. API Documentation for Integrations:	
<p>12. Could you provide API documentation or sample payloads for the integrations mentioned in section 3.2(B), including</p>	
<p>13. Sheriff's SDO, Court's Odyssey, and AXON Evidence.com?</p>	<p>The system can query the JMS using SQL and update booking and release data. Odyssey will send an XML file for every "event" or update to a case. This data will need to be imported into the current system and update the corresponding case records. The system can link to view discovery on evidence.com. We do not have API documentation or examples at this time.</p>
19. Health Services Agency Integration:	
<p>20. For section 3.4(F), does the "Health Services Agency" integration utilize a known application that will need to be integrated? If so, could you provide API documentation or sample payloads?</p>	<p>No specific application.</p>

27. Grant Tracking Requirements:	
28. Section 3.4(J) references tracking grants, but no corresponding technical specifications are provided. What are the specific requirements for this functionality?	We have no specific requirements for this.
35. Interoperability with Workday:	
36. What is the nature of the interoperability with Workday (e.g., sending data, receiving data, or both)? Please	The County is moving to implement Workday in 2026 and we are investigating any possible integrations but this functionality is not necessary for any initial system.
37. provide API documentation and/or a sample payload.	We do not have API documentation for Workday available.
43. AI Policies:	
44. Could you provide the County of Santa Cruz's policies on AI mentioned in section 3.4(L)?	Click the link to view the 2023.09.13 County of Santa Cruz Artificial Intelligence Appropriate Use Policy
50. Exclusion of Work Outside the U.S.:	
52. 51. Section 4.11 excludes work done outside the United States. Does this restriction apply solely to interactions involving County of Santa Cruz data?	Restrictions apply per the Purchasing Policy Manual: 2.7 Off-Shore Outsourcing - Purchases of Services (a)Goal: It is the Board's goal to promote the purchase of services provided by United States companies and employees. (b)Definition: Off-shore services as defined in this policy are services provided from an off-shore location (foreign country). Examples of such services may include, but are not necessarily limited to, customer support service, telemarketing, and financial auditing. (c)Policy: It is the County's policy to not purchase services from off-shore companies or where company employees are located off-shore. Contracts for services shall contain a clause that requires contractors and subcontractors to certify that all work done under such contracts will be performed solely by workers within the United States. (d)Waiver: The Purchasing Agent may waive this requirement to respond to an emergency or operational need where no contractor within the United States is immediately available; or the contract is necessary to provide a unique service that is mandatory and cannot be performed adequately by workers within the United States. The department will be responsible for disclosure of these circumstances in a subsequent board letter.
58. Indexing Documents (GT.21):	
59. Could you elaborate on what is meant by indexing in "The system has the ability to index documents to the system"?	Yes if possible but not necessary.
60. Does this mean making documents searchable?	Yes if possible.
66. Imaged Documentation (GT.26):	
67. For GT.26, does "The system has the ability to identify records with imaged documentation." refer to whether a PDF has Optical Character Recognition or not?	Yes if possible.

72. Please elaborate on GT.29 “The system has the ability to support a hierarchy for archival of data records.” Does this refer to keeping archived files in “Cold Storage” and current files more readily available?	Yes.
76. Please elaborate on GT.204 “The software application must be able to link cases to other cases.” What is the desired functionality or use case for the linking?	A client will often be involved in multiple cases.
81. Please elaborate on GT.218 “The system should provide the ability to enter, upload from MS Word, and track notes and comments made on cases from various data entry screens.”	The Public Defender’s Office uses MS Word.
87. 86. Please elaborate on GT.289 “Product must include the functionality of referring cases from one practice to another.” Does this mean the ability to engage with holistic defense resources? Or if a criminal case is related to a dependency case?	Ideally both.

All other information remains the same.

01/17/2025 was the deadline for all questions regarding this RFP. No further questions will be accepted by Purchasing.

RFP SUBMITTAL DEADLINE HAS CHANGED AS OF ADDENDUM #2.

RFP DUE:

Friday, February 14, 2025, by 5:00 PM Pacific Time
via the OpenGov link.



Shauna Soldate
Shauna.Soldate@santacruzcountyca.gov

01/31/2025
Date