

June 4, 2024

JACK COUNTY AUDITOR

JUN 04 2024

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iDocket's Response

*Approved in CCF
06/10/2024
contingent on
cybersecurity policy*



Quartz Cloud DC

**County Auditor's Office of
Jack County, Texas**

RFP: Case Management Software

TEAM: iDocket



📞 1-800-436-2538

✉ sales@idocket.com

📍 idocket.com llc, 447 hickory street, hereford, texas 79045

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STATEMENT OF WORK

Founded in 1999, iDocket is a Texas-based HUB-certified LLC that provides software to local government. iDocket provides software for court and land records in 101 counties in Texas. iDocket's 22 products operate as government offices database management and reporting systems, providing public access to search and download judicial information.

Projects include a Statement of Work, which includes:

- Project Initiation Objectives
 - Develop an understanding of the needs and challenges to implement the new solution's practical, seamless, and minimally disruptive implementation.
 - Engage with Jack County technical and business stakeholders to generate understanding and trust in the product and implementation team.
- Development and Configuration
 - Perform all necessary execution activities to implement the Solution, including integrations with external systems and converted data.
- Testing
 - Track expected versus actual test results and all defects and resolutions.
- Training and Knowledge Transfer
 - Train each user on the system functionality and how to perform their daily tasks.
- Deployment and Go-Live
 - Finalize and execute the activities identified in the Cutover Plan to cut software into production, according to a phased approach whereby each office will be deployed over time.
- Hosting and Production Services
 - iDocket will provide ongoing production operations, maintenance, and support services (including call support).

COST OVERVIEW

One-Time Implementation Fees	
Conversion One-Time Fees	Waived
On-Site Training Fees (Normally \$5,250)	Waived

Recurring Annual License and Production Fees	
Quartz (DC) – Discounted 8 Users (Additional Users \$125/User/Mo)	\$10,500
eFiling Integration (Normally \$12,000 Annually)	Waived

Summary Quote	
Total – Quarterly Payments	\$2,625

DATA CONVERSION

The ramifications of a poorly executed conversion can be the perception of unreliable data in the new system and the extra work to fix the problem if it is fixable. iDocket has a proven track record of providing complete data conversion for new and existing customers. iDocket's costs and benefits for the conversion activity consist of a proven conversion plan, including:

Phase 1 – Analyze the Data

- Create a checklist of hardware the current system uses/requires.
- Create a list of features the current system offers, such as integrated imaging.
- Create a list of features the user wants in the new system, such as automatic case numbering or batch scanning.
- Match current features to new system features to define the scope of the conversion.
- Identify those that will be converted and those that will not be going forward.

Phase 2 – Planning and Execution

- Identify the current codes and translate them accordingly, preferably keeping them as they are.
- Determine the best extraction tools/techniques that maximize accuracy.
- Data iterations to include new sections converted and to identify issues, such as incorrect or missing data, place the most vital emphasis on data correctness.

Phase 3 – Verification

- Validate the new system configurations.
- Review test migrations and document results.

Phase 4 – Completion

- Perform final conversion.
- Sign off and cutover (Go Live).

Phase 5 – Post Installation

- Provide training for the new system.
- Submit checklists to users to identify issues and measure success.
- Make resources available to handle any potential problems or questions.

iDocket has proven technology and tools ideal for this migration. The most effective way to avoid a misstep is to ensure all parties understand the issues and limitations and that they are addressed before Phase 4 – Completion, with a sign-off on these being the preferred method.

INITIAL SET UP

iDocket will confirm the overall readiness of the hosted infrastructure by reviewing internal status reports. iDocket ensures that all risks and issue plans are updated with notes of what will carry from the project to production.

TRAINING ON PRODUCTS

iDocket's training protocol involves hands-on training whenever possible. In our experience, this is the most effective way to train a new user. In addition, we provide other resources such as software manuals and training checklists that guide a user through the training and reinforce progress through breadcrumbs and affirmations (such as, "You have completed 5 of 6 modules. Ready for the next one?"), and a sandbox. A sandbox is a virtual environment where users can practice using the software without risk to actual cases. Typically, training is done over a week.

iDocket provides "train the trainer" training where we teach personnel the product in a way that enables them to train additional staff. This is usually hands-on, in-person training (or virtually through Zoom), as personal instruction is the most successful way to help the trainer gain confidence in teaching how to use the product.

Buy-in is essential to ensure the workflow changes are understood and adopted by users. It is critical to the success of the software for all officials to understand what is going on, how the system functions, and what the benefits are to the county, state, and public safety. iDocket provides a county kick-off meeting with all officials to ensure county buy-in.

iDocket will be responsible for training and meeting each office's objective to train each user on the system functionality and how to perform their daily tasks.

MAINTENANCE AND SUPPORT SERVICES

Our system is designed to notify support if there are any system errors. If any occur, they are immediately addressed. If the user runs into issues or has a request, they contact us. Our policy is to answer requests within one hour to give the client an update. iDocket will continually monitor the production environment and customer-submitted support tickets.

TRAINING AND KNOWLEDGE TRANSFER

An example of Initial Product Training is teaching the user how to create a case, search cases, create events inside a case, etc.

1. *How Our System Works:*

Tabs at the top of the screen are used to navigate the system. Once inside a case, tabs on the left screen guide throughout the case.

2. *Train the Trainer Sessions:*

Train the Trainer is our preferred method for training Users. We focus on training the key stakeholders in a county first (for example, the admin user and whomever they choose to be trained). From here, the Trainers and the iDocket Team can teach the rest of the users. We hold the training sessions with the Trainers before go-live, while the Conversion Specialist works on converting data on iDocket's system.

3. *Configuration Training Sessions:*

We do not train users to install the case management system themselves. Users are contacted to see which users and external offices they would like to have set up. Once we have that information, we take care of everything that needs to be set up for those users/offices. That way, when they go live, they have no issues.

4. *Application and System Administration Training sessions:*

Only users that were given authorization are trained on System Administration features. For example, if the office integrating the system is the user's office, the user will have access as well as any other person they choose to have the same access. This part of training is done a bit later, once the user has become somewhat familiar with the system, after the initial training but still before go-live. This part of the training includes how to add/ remove Attorneys, fees, and event codes, edit court information add users, and other features. This is taught during the monthly meetings when being converted.

5. *Accompanying Documentation:*

iDocket keeps a library of documents and videos on how certain features work, such as showing users how eFiling works in our case management. We also have an internal ticket system in which every instance of contact with customers is documented along with design, notes on progress with tasks, issues, and their resolutions.

The iDocket Team reserves a week to train a new user and the technical staff. We go through a complete overview of your system and how to navigate it; this takes approximately one day (8 hours). On subsequent days we focus on helping users with specific instances. Once complete, we are open to setting up personalized meetings at the user's discretion should they feel the need. Lastly, we also have training videos on how the system works at the user's disposal to review the system at any time. We continue to train every new county through this program similarly.

HARDWARE ENVIRONMENT OVERVIEW

Quartz Cloud is a leading cloud solutions software designed for accessibility and optimal performance. Users can access the application from any Internet-connected device with a standard web browser, utilizing a simple URL.

While Google Chrome is the recommended browser for optimal performance, Quartz Cloud remains compatible with a variety of browsers, allowing users to choose their preferred option.

To ensure the best experience, users are advised to adhere to recommended requirements, including compatibility with modern hardware and user computer operating systems.

Regular user computer updates and a stable Internet connection are also essential for maximizing functionality and responsiveness. By following these guidelines, users can unlock the full potential of Quartz Cloud, enhancing productivity and streamlining business operations.

Requirement	Type	Minimum	Recommended
Download Speed	Internet Access	50 Mbps	100 Mbps
Upload Speed	Internet Access	20 Mbps	100 Mbps
Scanner	Hardware	TWAIN Compatible ADF Duplex Scanning	TWAIN Compatible 40ppm for grayscale or 30 ppm for color scanning. 50-page ADF (Automatic Document Feeder) Duplex Scanning
Signature Pad	Hardware		Topaz IDGem Backlist LCD 1x5 HID-USB Fingerprint Capture
Antivirus	Software	Basic Antivirus	Complete AV Solution, Ransomware Protection

CLOUD-BASED SOLUTION

iDocket's cloud-based solution combines iDocket's proven CMS (already in use in support of 101 county offices throughout Texas), AWS (the leading cloud platform), Salesforce, and Jira.

iDocket's solution is hosted by Amazon Web Services (AWS). iDocket's technical solution provides these benefits to the Users:

- iDocket does the legwork to map the data for the CMS usage and extract information from their current CMS, not the users.
- Data is hosted in the cloud by AWS, the world's most comprehensive and reliable cloud platform with uptime that exceeds eleven 9s of reliability (99.999999999%) due to multiple failover servers located throughout the US.
- AWS' security is the industry standard; users are assured their sealed data is kept separate from the data repository, where only the data needing real-time access resides. Unredacted and sealed data is protected in a separate database only accessible to the users.
- Open source "out of the box" functionality simplifies the technology architecture.
- Access to iDocket's innovative County-Wide Judicial Suite of products that seamlessly integrate all County offices and eliminate retyping and rework.

You need to be aware, as well, that changes are in the works by regulatory authorities, which increases the importance of choosing the right provider for your Cloud solution. These changes include:

- Zero Trust. Zero Trust architectures are designed to protect modern environments using robust authentication methods for every transaction. Many agencies are moving in this direction (Federal agencies have already begun mandating agencies to implement zero trust architectures by 2024).
- StateRAMP-Ready Cloud Providers. The StateRAMP Risk and Authorization Management Program (StateRAMP) is a government-wide program that promotes the adoption of secure cloud services by providing a standardized approach to information security. Government agencies at all levels are using StateRAMP as the standard for assessing the safety of Cloud-based systems. iDocket's Cloud-based products are working towards our StateRAMP certification to prepare for future mandates our customers must meet.

**iDocket - Professional Services Agreement
County of Jack**

Project Description

The purpose of this contract is to provide the District Clerk of Jack County a license to utilize the Quartz Cloud judicial case management software from iDocket.com assisting the County in providing better services from their offices, hereinafter referred to as "Office".

The Case Management System (Quartz Cloud) will allow the Office to enter, edit and track trial court case information easily and efficiently. Additionally, the Office may display their information on the Internet.

Term

This agreement shall commence upon signature of both parties and shall remain in full force and effect for a period of one (1) year. This agreement will automatically renew annually unless either party notifies the other with at least 30 days' notice, prior to the renewal date, of its intent to not renew this agreement.

Services and Products provided by iDocket

Software: iDocket agrees to provide software (Quartz Cloud) for the entering, maintenance, tracking and management of Office's information. The software will provide a user interface for entering and editing data and generating reports and provide for the overall management of Office's information.

The installation process will include training and verification. Training will include demonstrating the features of the Quartz Cloud to staff, providing instructions on the use of the software and answering questions about its use.

Hardware: The County will provide PC and networking hardware for their office needs. The PCs will include an acceptable operating system on PCs used for utilizing the case management software. The County is responsible for all computer hardware, hardware maintenance, internet connectivity and speed. iDocket may provide some hardware (touch screens and receipt printers) upon request.

Data Conversion: iDocket will extract existing digital information from the current system in the County's office. iDocket is experienced in County's data extraction and will provide data conversion on a "best effort" basis and does not warranty or guarantee complete data conversion.

Accessibility: During Data Conversion iDocket will accept data, pdfs, and other agreed-upon system artifacts in their current states. No remediation or reverse engineering for Accessibility compliance will be performed on these artifacts except via an approved change order. The

approved change order must specify the artifacts to be remediated and include agreement between both parties as to the price/cost to the customer for said remediation.

Implementation: iDocket will install the software in the County's office. The installation process will include training and verification. Training will include demonstrating the features of the software to staff, providing instructions on the use of the software and answering questions about its use. Verification of the new applications will include integrity of newly entered data and functionality of the software.

Software Maintenance and Upgrades: iDocket shall provide maintenance for the software provided under this agreement and may be contracted directly between iDocket and County. Software Maintenance also includes any software updates made to the software. County agrees to allow iDocket to maintain the current release of software to ensure the latest enhancements and a uniform level of software for support. iDocket will coordinate and be responsible for the implementation of software upgrades. It is the understanding of County that iDocket may have other compatible modules available for use by County. iDocket is advised that any resulting contract may be extended to other products offered by the iDocket, with authorization of the iDocket, either through an addendum of the existing contract or possibly an additional contract for the County.

Internet access to case information: iDocket provides, at their own expense, an Internet website to display court case information for multiple counties. The County Clerk and District Clerk may elect to use this service by notifying iDocket by written request to begin (or discontinue) placing their information on the Internet. When the County Clerk and District Clerk does participate in the website service, iDocket will share with the County on a quarterly basis, 20% of subscription fees for subscribers that select the County Clerk and District Clerk's County as their primary County of interest. Any fees collected for viewing Clerks document images on the website are reported and paid monthly to the Clerk.

Quality of Services

The software as provided by iDocket, is designed for maximum uptime and stability. There may be times, however, when the system becomes unusable for a short period of time. In the event of a system problem, the County is responsible for contacting iDocket support with all relevant information to the problem. The iDocket technical support will respond to problems in a timely manner, and will make a good faith effort to repair the problems as quickly as possible.

General questions or comments about the Quartz Cloud software may be directed to iDocket's Customer Service by e-mailing cases@idocket.com or by calling 1-800-iDocket (1-800-436-2538) from 8 am -5 pm CST.

Services Provided by the County

Installation: If requested by iDocket, the county agrees to provide a staff member during the installation and conversion process for verification of the integrity of the software. Duties of the staff person may include, but are not limited to, specifying data content and location of data on

current system, verifying the accuracy of case information as displayed by the new software and providing workflow details on managing current information, i.e. what information is entered at each stage of data entry.

Costs

Year 1: Licensing, Training, Implementation, and Hosting for \$10,500. With payments of \$2,625 made quarterly.

The invoice includes:

1. Quartz (DC) 8 Users - Annual \$10,500
2. Quartz (DC) eFiling Integration - Annual \$0

Application Training On-site and Application Setup and Conversion – One-Time \$0.

Year 2 and ongoing: Annual license and production fees with iDocket \$10,500. With payments of \$2,625 made quarterly.

Hosting: AWS GovCloud will be designated as the "server" upon which the Quartz Cloud database and images will reside. iDocket is responsible for hosting and hosting maintenance agreements.

Any cost increases will not exceed 10% of the previous year's annual fees.

Use of Work Product

Except as specifically set forth in writing and signed by both iDocket and the County, iDocket shall retain all copyright and patent rights with respect to programs developed under this agreement. Data and documents stored in the Quartz Cloud shall remain the property and in the County's custody. Access to the data and documents stored in Quartz Cloud shall not incur any costs and will be provided in a standard industry format.

Confidential Information

iDocket shall hold in trust for County, and shall not disclose to any nonparty to the Agreement, any confidential information of the County. Confidential information is information that relates to County's research, development, trade secrets or business affairs, but does not include information which is generally known or easily ascertainable by non-parties of ordinary skill in computer design and programming.

iDocket hereby acknowledges that during the performance of this contract, iDocket may learn or receive confidential County information and therefore iDocket hereby confirms that all such information relating to the County's business will be kept confidential by iDocket, except to the extent that such information is required to be divulged to the iDocket clerical or support staff or associates in order to enable iDocket to perform contractual obligations. Acceptance of this

Agreement in no way limits or restricts the scope of services iDocket is able to perform outside this Agreement.

Termination of Agreement

Either party may terminate this agreement with written notice to the address stated herein in the event that either party fails to perform its obligations as stated within the above **Quality of Services** Provision. No such notice of termination shall be given, however, unless the party in default has been given prior written notice of its default and has failed to cure said default within ninety (90) days of notice.

The County can terminate this agreement by giving notice with at least thirty days prior notice to the anniversary of the agreement to not renew this agreement for another annual term. Upon termination of this agreement, 1) the County agrees to not use the software; and 2) iDocket agrees to provide the County with all their digital information (data) including document images on an electronic media in a standard industry format.

Disputes

Any disputes between the parties related to this Contract which is not resolved through informal discussion will be submitted to a mutually acceptable mediation service or provider. The parties to the mediation shall bear the mediation cost equally. This paragraph does not preclude a party from seeking equitable relief from a court of competent jurisdiction. Any such mediation shall be non-binding on either party hereto. Nothing contained in this agreement shall be deemed to be a waiver of any rights the county may have as a political subdivision of the state of Texas, including, but not limited to, the right to claim Sovereign Immunity or any other rights granted to it as a result of its status as a governmental entity.

Limited Warranty

iDocket warrants to the County that the material, analysis, data, programs, and services to be delivered or rendered under this agreement will be of the kind and quality designated and will be performed by qualified personnel. iDocket makes no other warranties whether written, oral or implied, including without limitation warranty or fitness for purpose of merchantability. In no event shall iDocket be liable for special or consequential damages, either in contract or tort, whether or not the possibility of such damages has been disclosed to iDocket in advance or could have been reasonably foreseen by iDocket.

Applicable Law

iDocket shall comply with all applicable laws in performing Services stipulated in the agreement, but shall be held harmless for violations of any government procurement regulation to which it may be subject but to which reference is not made. This Agreement shall be construed in accordance with the laws of the State of Texas.

Complete Agreement

This agreement embodies the entire understanding of the parties in relation to the design, development, implementation, support, and maintenance of a case management system.

Notices

Notices to iDocket shall be sent to:

Amelia Balderrama, CEO
iDocket.com, LLC
P.O. Box 31023
Amarillo, TX 79120.

Notices to the County shall be sent to:

Hon. Brian Keith Umphress
Jack County Judge
100 N. Main, Suite #206
Jacksboro, Texas 76458

In witness whereof, the party has signed this agreement.

County of Jack

iDocket.com

Hon. Brian Keith Umphress Date
Jack County Judge

Amelia Balderrama Date
CEO



JACK COUNTY, TEXAS

POLICY OF COMPLIANCE
SECTION 2252.908 TEXAS GOVERNMENT CODE
Approved by Commissioners' Court August 22, 2016

BACKGROUND

Section 2252.908 was added to the Government Code by the 84th Texas Legislature through the adoption of House Bill 1295. The law states that the County may not enter into a contract with a business entity unless a Certificate of Interested Parties (Form 1295) is provided to the county at the time the contract is considered for action by Commissioners' Court. The term "business entity" includes a sole proprietorship, partnership or corporation (whether for-profit or not-for-profit). The term "contract" includes amendment, extension or renewal of an existing contract. The law does not apply to a contract between the County and another governmental entity or state agency. The County is required to file Form 1295 with the state within 30 days of approving a contract with a business entity. Governmental transparency is the objective of the law.

The Texas Ethics Commission promulgated rules to implement the law and established an online portal https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm. A business entity will generate Form 1295 online. Jack County will acknowledge online the receipt of Form 1295 after a contract is executed. Within seven business days, Form 1295 will be available for public viewing on the Commission's website.

COMPLIANCE

Jack County Commissioners' Court will not consider for action any contract or bid with a business entity unless it is accompanied by a completed, signed and notarized Form 1295.

No later than 30 days after Commissioners' Court approves a contract or awards a bid with a business entity, the County Auditor will file acknowledgement of receipt of the Form 1295 with the Ethics Commission.

CONTRACT ID # 2024-0601

CERTIFICATE OF INTERESTED PARTIES

FORM 1295

1 of 1

Complete Nos. 1 - 4 and 6 if there are interested parties.
 Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

OFFICE USE ONLY CERTIFICATION OF FILING

1 Name of business entity filing form, and the city, state and country of the business entity's place of business.
 Jack County
 Jacksboro, TX United States

Certificate Number:
 2024-1170286

Date Filed:
 06/03/2024

2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.
 iDocket.com

Date Acknowledged:

3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.
 20240601
 Quartz Cloud

4 Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
		Controlling	Intermediary
Jack County District Clerk	Jacksboro, TX United States	X	
Jack County Justice Of the Peace	Jacksboro, TX United States		X

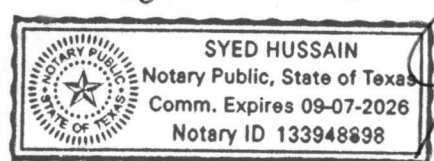
5 Check only if there is NO Interested Party.

6 UNSWORN DECLARATION

My name is AIJAZ HUSSAIN, and my date of birth is 01/15/72.
 My address is 447 Hickory St., Hereford, Tx, 79045.
(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in Williamson County, State of TX, on the 03 day of June, 2024.
(month) (year)



[Signature]
 06/03/24

[Signature]
 Signature of authorized agent of contracting business entity (Declarant)