



ELECTRONIC RECORDING TECHNOLOGY BOARD

July 1, 2023

Candace Rivera
Pueblo County Clerk & Recorder
215 W 10th St 1st Floor
Pueblo, CO 81003

Dear Clerk Rivera:

On behalf of the Electronic Recording Technology Board, we are pleased to inform you that your county has been awarded a grant in the amount of \$274,371.00 from the Electronic Recording Technology Fund.

Attached to this letter are the terms and conditions of your Grant. Please review these terms and conditions as they are requirements of this Grant to which the County agrees by accepting the Grant Funds.

Once you have reviewed the Grant Award Letter, please email Executive Director Michelle Batey at ertbexecutivedirector@gmail.com with the name, title, and email address of the County Commissioner who will sign the grant agreement. He or she will then be routed a grant agreement to sign through DocuSign. There will be no need to mail any hard copies of the grant agreement.

Additionally, please email an invoice to ertbexecutivedirector@gmail.com.

If you have questions regarding this Grant, please contact: Executive Director Michelle Batey at 303-356-2174 or by email ertbexecutivedirector@gmail.com.

Sincerely,

DocuSigned by:

Christopher Beall

7C7BA4DE09A543F...

Christopher Beall

Electronic Recording Technology Board

GRANT AWARD LETTER
SUMMARY OF GRANT AWARD TERMS AND CONDITIONS

State Agency Electronic Recording Technology Board, Colorado Department of State	Grant Amount State Fiscal Year 2023-2024: \$274,371.00 Total Grant Amount for all State Fiscal Years: \$274,371.00 Total Grant Amount will be disbursed upon full execution of this Grant Award Letter.
Grantee Board of County Commissioners of Pueblo County	CT. VAAA, ERTB, 2024-2130 CMS 185475
Grant Issuance Date The later of July 1, 2023 or the date the State Controller or an authorized delegate signs this Grant Letter	
Grant Expiration Date June 30, 2026	
Grant Authority §§ 24-21-401 et seq., C.R.S., particularly § 24-21-404, C.R.S.	Grant Purpose By statute, Grant Funds are awarded to establish, maintain, improve, or replace a County's electronic filing system. The purpose of this grant is described more fully in the County's grant application (Exhibit A, Statement of Work).
Exhibits and Order of Precedence The following Exhibits and attachments are included with this Grant: <ol style="list-style-type: none"> 1. Exhibit A, Statement of Work. In the event of a conflict or inconsistency between this Grant and any Exhibit or attachment, such conflict or inconsistency shall be resolved by reference to the documents in the following order of priority: <ol style="list-style-type: none"> 1. The provisions of the other sections of the main body of this Grant. 2. Exhibit A, Statement of Work. 	

SIGNATURE PAGE

THE SIGNATORIES LISTED BELOW AUTHORIZE THIS GRANT

<p style="text-align: center;">STATE OF COLORADO Jared Polis, Governor Jena Griswold, Secretary of State Electronic Recording Technology Board (ERTB)</p> <p>DocuSigned by:  <small>7C7BA4DE09A543F...</small></p> <p>By: Christopher Beall, Treasurer</p> <p>Date: <u>July 28, 2023</u></p>	<p style="text-align: center;">PUEBLO COUNTY Board of County Commissioners of Pueblo County</p> <p>DocuSigned by:  <small>317D59A33032433...</small></p> <p>By: Epimenio Griego Commissioner</p> <p>Date: <u>July 28, 2023</u></p>
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In accordance with §24-30-202 C.R.S., this Grant is not valid until signed and dated below by the State Controller or an authorized delegate.

STATE CONTROLLER
Robert Jaros, CPA, MBA, JD

DocuSigned by:

66856698CC1A43A...

By: Nathan Manley Central Contracts Specialist

Date: August 1, 2023

1. GRANT

As of the Grant Issuance Date, the State Agency shown on the first page of this Grant Award Letter (the “State”) hereby obligates and awards to Grantee shown on the first page of this Grant Award Letter (the “Grantee”) an award of Grant Funds in the amounts shown on the first page of this Grant Award Letter. By accepting the Grant Funds provided under this Grant Award Letter, Grantee agrees to comply with the terms and conditions of this Grant Award Letter and requirements and provisions of all Exhibits to this Grant Award Letter.

2. TERM

A. Initial Grant Term and Extension

The Parties’ respective performances under this Grant Award Letter shall commence on the Grant Issuance Date and shall terminate on the Grant Expiration Date unless sooner terminated or further extended in accordance with the terms of this Grant Award Letter. Upon request of Grantee, the State may, in its sole discretion, extend the term of this Grant Award Letter by providing Grantee with an updated Grant Award Letter showing the new Grant Expiration Date.

B. Early Termination in the Public Interest

The State is entering into this Grant Award Letter to serve the public interest of the State of Colorado as determined by its Governor, General Assembly, or Courts. If this Grant Award Letter ceases to further the public interest of the State or if State, Federal or other funds used for this Grant Award Letter are not appropriated, or otherwise become unavailable to fund this Grant Award Letter, the State, in its discretion, may terminate this Grant Award Letter in whole or in part by providing written notice to Grantee that includes, to the extent practicable, the public interest justification for the termination. If the State terminates this Grant Award Letter in the public interest, the State shall pay Grantee an amount equal to the percentage of the total reimbursement payable under this Grant Award Letter that corresponds to the percentage of Work satisfactorily completed, as determined by the State, less payments previously made. Additionally, the State, in its discretion, may reimburse Grantee for a portion of actual, out-of-pocket expenses not otherwise reimbursed under this Grant Award Letter that are incurred by Grantee and are directly attributable to the uncompleted portion of Grantee’s obligations, provided that the sum of any and all reimbursements shall not exceed the maximum amount payable to Grantee hereunder. This subsection shall not apply to a termination of this Grant Award Letter by the State for breach by Grantee.

3. DEFINITIONS

The following terms shall be construed and interpreted as follows:

- A. “**Business Day**” means any day in which the State is open and conducting business, but shall not include Saturday, Sunday or any day on which the State observes one of the holidays listed in §24-11-101(1) C.R.S.
- B. “**CORA**” means the Colorado Open Records Act, §§24-72-200.1 *et. seq.*, C.R.S.
- C. “**Grant Award Letter**” means this letter which offers Grant Funds to Grantee, including all attached Exhibits, all documents incorporated by reference, all referenced statutes, rules and cited authorities, and any future updates thereto.

- D. **“Grant Funds”** means the funds that have been appropriated, designated, encumbered, or otherwise made available for payment by the State under this Grant Award Letter.
- E. **“Grant Expiration Date”** means the Grant Expiration Date shown on the first page of this Grant Award Letter.
- F. **“Grant Issuance Date”** means the Grant Issuance Date shown on the first page of this Grant Award Letter.
- G. **“Exhibits”** exhibits and attachments included with this Grant as shown on the first page of this Grant
- H. **“Extension Term”** means the period of time by which the Grant Expiration Date is extended by the State through delivery of an updated Grant Award Letter
- I. **“Goods”** means any movable material acquired, produced, or delivered by Grantee as set forth in this Grant Award Letter and shall include any movable material acquired, produced, or delivered by Grantee in connection with the Services.
- J. **“Incident”** means any accidental or deliberate event that results in or constitutes an imminent threat of the unauthorized access or disclosure of State Confidential Information or of the unauthorized modification, disruption, or destruction of any State Records.
- K. **“Initial Term”** means the time period between the Grant Issuance Date and the Grant Expiration Date.
- L. **“Party”** means the State or Grantee, and **“Parties”** means both the State and Grantee.
- M. **“PII”** means personally identifiable information including, without limitation, any information maintained by the State about an individual that can be used to distinguish or trace an individual’s identity, such as name, social security number, date and place of birth, mother’s maiden name, or biometric records; and any other information that is linked or linkable to an individual, such as medical, educational, financial, and employment information. PII includes, but is not limited to, all information defined as personally identifiable information in §§24-72-501 and 24-73-101 C.R.S.
- N. **“Services”** means the services to be performed by Grantee as set forth in this Grant Award Letter, and shall include any services to be rendered by Grantee in connection with the Goods.
- O. **“State Confidential Information”** means any and all State Records not subject to disclosure under CORA. State Confidential Information shall include, but is not limited to, PII and State personnel records not subject to disclosure under CORA. State Confidential Information shall not include information or data concerning individuals that is not deemed confidential but nevertheless belongs to the State, which has been communicated, furnished, or disclosed by the State to Contractor which (i) is subject to disclosure pursuant to CORA; (ii) is already known to Contractor without restrictions at the time of its disclosure to Contractor; (iii) is or subsequently becomes publicly available without breach of any obligation owed by Contractor to the State; (iv) is disclosed to Contractor, without confidentiality obligations, by a third party who has the right to disclose such information; or (v) was independently developed without reliance on any State Confidential Information.
- P. **“State Fiscal Rules”** means the fiscal rules promulgated by the Colorado State Controller pursuant to §24-30-202(13)(a) C.R.S.

- Q. **“State Fiscal Year”** means a 12 month period beginning on July 1 of each calendar year and ending on June 30 of the following calendar year. If a single calendar year follows the term, then it means the State Fiscal Year ending in that calendar year.
- R. **“State Records”** means any and all State data, information, and records, regardless of physical form, including, but not limited to, information subject to disclosure under CORA.
- S. **“Subcontractor”** means third-parties, if any, engaged by Grantee to aid in performance of the Work. “Subcontractor” also includes sub-grantees.
- T. **“Work”** means the delivery of the Goods and performance of the Services described in this Grant Award Letter.
- U. **“Work Product”** means the tangible and intangible results of the Work, whether finished or unfinished, including drafts. Work Product includes, but is not limited to, documents, text, software (including source code), research, reports, proposals, specifications, plans, notes, studies, data, images, photographs, negatives, pictures, drawings, designs, models, surveys, maps, materials, ideas, concepts, know-how, and any other results of the Work. “Work Product” does not include any material that was developed prior to the Grant Issuance Date that is used, without modification, in the performance of the Work.

Any other term used in this Grant Award Letter that is defined in an Exhibit shall be construed and interpreted as defined in that Exhibit.

4. **STATEMENT OF WORK**

Grantee shall complete the Work as described in this Grant Award Letter and in accordance with the provisions of Exhibit A. The State shall have no liability to compensate or reimburse Grantee for the delivery of any goods or the performance of any services that are not specifically set forth in this Grant Award Letter.

5. **PAYMENTS TO GRANTEE**

A. **Maximum Amount**

Payments to Grantee are limited to the unpaid, obligated balance of the Grant Funds. The State shall not pay Grantee any amount under this Grant that exceeds the Grant Amount for each State Fiscal Year shown on the first page of this Grant Award Letter. Financial obligations of the State payable after the current State Fiscal Year are contingent upon funds for that purpose being appropriated, budgeted, and otherwise made available. The State shall not be liable to pay or reimburse Grantee for any Work performed or expense incurred after the Grant Expiration Date.

B. **Close-Out.**

Grantee shall close out this Grant within 45 days after the Grant Expiration Date. To complete close out, Grantee shall submit to the State all deliverables (including documentation) as defined in this Grant Award Letter.

6. **REPORTING - NOTIFICATION**

A. **Performance and Final Status**

Grantee shall submit all financial, performance and other reports to the State no later than the end of the close out described in §5B, containing an evaluation and review of Grantee’s performance and the final status of Grantee’s obligations hereunder.

B. Violations Reporting

Grantee shall disclose, in a timely manner, in writing to the State, all violations of federal or State criminal law involving fraud, bribery, or gratuity violations potentially affecting the award.

7. GRANTEE RECORDS

A. Maintenance and Inspection

Grantee shall maintain records that provide a complete audit trail of funds received and expended, and Grantee shall cooperate and participate in any audits conducted under authority of the Electronic Recording Technology Board or the Colorado State Auditor.

Grantee shall maintain an accounting system and financial records that accurately account for the receipt and disbursement of Grant Funds. For this purpose, Grantee may use either general ledger fund accounting that tracks Grant Funds separately from other county funds or use a tracking spreadsheet. All payments and expenditures must be tracked. Each expenditure must be classified by budget category, such as Personnel, Supplies and Operating, Travel, Equipment, and Professional Services. All financial records must be supported by source documentation (such as invoices, time sheets, etc.).

In addition, Grantee shall provide proof of purchase by a signed contract for any new purchase. Contracts may be emailed to ERTB.Grants@sos.state.co.us.

Grantee shall make, keep, and maintain, all records, documents, communications, notes and other written materials, electronic media files, and communications, pertaining in any manner to this Grant for a period of three years following the completion of the close out of this Grant. Grantee shall permit the State to audit, inspect, examine, excerpt, copy and transcribe all such records during normal business hours at Grantee's office or place of business, unless the State determines that an audit or inspection is required without notice at a different time to protect the interests of the State.

B. Monitoring

The State will monitor Grantee's performance of its obligations under this Grant Award Letter using procedures as determined by the State. The State shall have the right, in its sole discretion, to change its monitoring procedures and requirements at any time during the term of this Agreement. The State shall monitor Grantee's performance in a manner that does not unduly interfere with Grantee's performance of the Work.

C. Final Audit Report

Grantee shall promptly submit to the State a copy of any final audit report of an audit performed on Grantee's records that relates to or affects this Grant or the Work, whether the audit is conducted by Grantee or a third party.

8. CONFIDENTIAL INFORMATION-STATE RECORDS

A. Confidentiality

Grantee shall hold and maintain, and cause all Subcontractors to hold and maintain, any and all State Records that the State provides or makes available to Grantee for the sole and exclusive benefit of the State, unless those State Records are otherwise publically available at the time of disclosure or are subject to disclosure by Grantee under CORA. Grantee shall not, without prior written approval of the State, use for Grantee's own benefit, publish, copy,

or otherwise disclose to any third party, or permit the use by any third party for its benefit or to the detriment of the State, any State Records, except as otherwise stated in this Grant Award Letter. Grantee shall provide for the security of all State Confidential Information in accordance with all policies promulgated by the Colorado Office of Information Security and all applicable laws, rules, policies, publications, and guidelines. If Grantee or any of its Subcontractors will or may receive the following types of data, Grantee or its Subcontractors shall provide for the security of such data according to the following: **(i)** the most recently promulgated IRS Publication 1075 for all Tax Information and in accordance with the Safeguarding Requirements for Federal Tax Information attached to this Grant as an Exhibit, if applicable, **(ii)** the most recently updated PCI Data Security Standard from the PCI Security Standards Council for all PCI, **(iii)** the most recently issued version of the U.S. Department of Justice, Federal Bureau of Investigation, Criminal Justice Information Services Security Policy for all CJ, and **(iv)** the federal Health Insurance Portability and Accountability Act for all PHI and the HIPAA Business Associate Agreement attached to this Grant, if applicable. Grantee shall immediately forward any request or demand for State Records to the State's principal representative.

B. Other Entity Access and Nondisclosure Agreements

Grantee may provide State Records to its agents, employees, assigns and Subcontractors as necessary to perform the Work, but shall restrict access to State Confidential Information to those agents, employees, assigns and Subcontractors who require access to perform their obligations under this Grant Award Letter. Grantee shall ensure all such agents, employees, assigns, and Subcontractors sign nondisclosure agreements with provisions at least as protective as those in this Grant, and that the nondisclosure agreements are in force at all times the agent, employee, assign or Subcontractor has access to any State Confidential Information. Grantee shall provide copies of those signed nondisclosure restrictions to the State upon request.

C. Use, Security, and Retention

Grantee shall use, hold and maintain State Confidential Information in compliance with any and all applicable laws and regulations in facilities located within the United States, and shall maintain a secure environment that ensures confidentiality of all State Confidential Information wherever located. Grantee shall provide the State with access, subject to Grantee's reasonable security requirements, for purposes of inspecting and monitoring access and use of State Confidential Information and evaluating security control effectiveness. Upon the expiration or termination of this Grant, Grantee shall return State Records provided to Grantee or destroy such State Records and certify to the State that it has done so, as directed by the State. If Grantee is prevented by law or regulation from returning or destroying State Confidential Information, Grantee warrants it will guarantee the confidentiality of, and cease to use, such State Confidential Information.

D. Incident Notice and Remediation

If Grantee becomes aware of any Incident, it shall notify the State immediately and cooperate with the State regarding recovery, remediation, and the necessity to involve law enforcement, as determined by the State. After an Incident, Grantee shall take steps to reduce the risk of incurring a similar type of Incident in the future as directed by the State, which may include, but is not limited to, developing and implementing a remediation plan that is approved by the State at no additional cost to the State.

E. Safeguarding PII

If Grantee or any of its Subcontractors will or may receive PII under this Agreement, Grantee shall provide for the security of such PII, in a manner and form acceptable to the State, including, without limitation, State non-disclosure requirements, use of appropriate technology, security practices, computer access security, data access security, data storage encryption, data transmission encryption, security inspections, and audits. Grantee and its Subcontractors shall maintain security procedures and practices consistent with §§24-73-101 *et seq.*, C.R.S.

9. CONFLICTS OF INTEREST

Grantee shall not engage in any business or activities, or maintain any relationships, that conflict in any way with the full performance of the obligations of Grantee under this Grant. Grantee acknowledges that, with respect to this Grant, even the appearance of a conflict of interest shall be harmful to the State's interests and absent the State's prior written approval, Grantee shall refrain from any practices, activities or relationships that reasonably appear to be in conflict with the full performance of Grantee's obligations under this Grant. If a conflict or the appearance of a conflict arises, or if Grantee is uncertain whether a conflict or the appearance of a conflict has arisen, Grantee shall submit to the State a disclosure statement setting forth the relevant details for the State's consideration.

10. INSURANCE

Grantee shall maintain at all times during the term of this Grant such liability insurance, by commercial policy or self-insurance, as is necessary to meet its liabilities under the Colorado Governmental Immunity Act, §24-10-101, *et seq.*, C.R.S. (the "GIA"). Grantee shall ensure that any Subcontractors maintain all insurance customary for the completion of the Work done by that Subcontractor and as required by the State or the GIA.

11. REMEDIES

In addition to any remedies available under any exhibit to this Grant Award Letter, if Grantee fails to comply with any term or condition of this Grant, the State may terminate some or all of this Grant and require Grantee to repay any or all Grant funds to the State in the State's sole discretion. The State may also terminate this Grant Award Letter at any time if the State has determined, in its sole discretion, that Grantee has ceased performing the Work without intent to resume performance, prior to the completion of the Work.

12. DISPUTE RESOLUTION

Except as herein specifically provided otherwise, disputes concerning the performance of this Grant that cannot be resolved by the designated Party representatives shall be referred in writing to a senior departmental management staff member designated by the State and a senior manager or official designated by Grantee for resolution.

13. NOTICES AND REPRESENTATIVES

Each Party shall identify an individual to be the principal representative of the designating Party and shall provide this information to the other Party. All notices required or permitted to be given under this Grant Award Letter shall be in writing, and shall be delivered either in hard copy or by email to the representative of the other Party. Either Party may change its principal representative or principal representative contact information by notice submitted in accordance with this §13.

14. GOVERNMENTAL IMMUNITY

Liability for claims for injuries to persons or property arising from the negligence of the Parties, their departments, boards, commissions committees, bureaus, offices, employees and officials shall be controlled and limited by the provisions of the Colorado Governmental Immunity Act, §24-10-101, et seq., C.R.S.; the Federal Tort Claims Act, 28 U.S.C. Pt. VI, Ch. 171 and 28 U.S.C. 1346(b), and the State's risk management statutes, §§24-30-1501, et seq. C.R.S. No term or condition of this Contract shall be construed or interpreted as a waiver, express or implied, of any of the immunities, rights, benefits, protections, or other provisions, contained in these statutes.

15. GENERAL PROVISIONS

A. Assignment

Grantee's rights and obligations under this Grant are personal and may not be transferred or assigned without the prior, written consent of the State. Any attempt at assignment or transfer without such consent shall be void. Any assignment or transfer of Grantee's rights and obligations approved by the State shall be subject to the provisions of this Grant Award Letter.

B. Captions and References

The captions and headings in this Grant Award Letter are for convenience of reference only, and shall not be used to interpret, define, or limit its provisions. All references in this Grant Award Letter to sections (whether spelled out or using the § symbol), subsections, exhibits or other attachments, are references to sections, subsections, exhibits or other attachments contained herein or incorporated as a part hereof, unless otherwise noted.

C. Entire Understanding

This Grant Award Letter represents the complete integration of all understandings between the Parties related to the Work, and all prior representations and understandings related to the Work, oral or written, are merged into this Grant Award Letter.

D. Modification

The State may modify the terms and conditions of this Grant by issuance of an updated Grant Award Letter, which shall be effective if Grantee accepts Grant Funds following receipt of the updated letter. The Parties may also agree to modification of the terms and conditions of the Grant in a formal amendment to this Grant, properly executed and approved in accordance with applicable Colorado State law and State Fiscal Rules.

E. Statutes, Regulations, Fiscal Rules, and Other Authority.

Any reference in this Grant Award Letter to a statute, regulation, State Fiscal Rule, fiscal policy or other authority shall be interpreted to refer to such authority then current, as may have been changed or amended since the Grant Issuance Date. Grantee shall strictly comply with all applicable Federal and State laws, rules, and regulations in effect or hereafter established, including, without limitation, laws applicable to discrimination and unfair employment practices.

F. Digital Signatures

If any signatory signs this agreement using a digital signature in accordance with the Colorado State Controller Contract, Grant and Purchase Order Policies regarding the use of digital signatures issued under the State Fiscal Rules, then any agreement or consent to use

digital signatures within the electronic system through which that signatory signed shall be incorporated into this Contract by reference.

G. Severability

The invalidity or unenforceability of any provision of this Grant Award Letter shall not affect the validity or enforceability of any other provision of this Grant Award Letter, which shall remain in full force and effect, provided that the Parties can continue to perform their obligations under the Grant in accordance with the intent of the Grant.

H. Survival of Certain Grant Award Letter Terms

Any provision of this Grant Award Letter that imposes an obligation on a Party after termination or expiration of the Grant shall survive the termination or expiration of the Grant and shall be enforceable by the other Party.

I. Third Party Beneficiaries

Except for the Parties' respective successors and assigns described above, this Grant Award Letter does not and is not intended to confer any rights or remedies upon any person or entity other than the Parties. Any services or benefits which third parties receive as a result of this Grant are incidental to the Grant, and do not create any rights for such third parties.

J. Waiver

A Party's failure or delay in exercising any right, power, or privilege under this Grant Award Letter, whether explicit or by lack of enforcement, shall not operate as a waiver, nor shall any single or partial exercise of any right, power, or privilege preclude any other or further exercise of such right, power, or privilege.

K. [Reserved]

L. Authority

Each Party represents and warrants to the other that the execution and delivery of this Agreement and the performance of such Party's obligations have been duly authorized.

**EXHIBIT A, STATEMENT OF WORK
(GRANT APPLICATION)**



ELECTRONIC
RECORDING
TECHNOLOGY
BOARD

Grant Application

Updated 9-24-21

Background

In the state of Colorado, a one-dollar per document technology fee was implemented in the early 2000's to aid County offices across the state in funding technological advancements in recording. As a result, Colorado was the first multi-jurisdictional state in the nation to adopt e-Recording across the state.

In the spring of 2014, a working group made up of real estate, lending, legal professionals as well as counties conducted a statewide needs assessment and a request for information to evaluate the state of recording systems in Colorado.

In the spring of 2016, legislation was passed, and this board and a funding structure were created from Senate Bill 16-115.

Our Vision

To create, support, and maintain a statewide land records environment that promotes accessibility and consistency for the public in an efficient and user-friendly manner.

Our Mission

To develop, maintain, improve, replace, or preserve land records systems in our state.

Business Purpose

The business purpose of the board is to develop and modernize electronic filing systems throughout the state as defined in 24-21-402 (2).

Our Core Goals (24-21-403 (1))

- Assure the security, accuracy, and preservation of public records required to be maintained by a Clerk and Recorder.
- Maintain the privacy of personal identifying information, online public access to which is not necessary to the proper functioning of land title records or other public records required to be maintained by a clerk and recorder.
- Assure that the sequence in which documents are received by a clerk and recorder is accurately reflected to the greatest extent practicable.
- Provide for online public access to public documents while maintaining the privacy of personal identifying information when applicable.
- Assure that electronic filing systems used in different counties are similar so as to facilitate the submission and searching of electronic records.

Our Objectives

1. Develop a strategic plan that incorporates the core goals and establish the administration of the Electronic Recording Technology Fund and Board.
2. Determine functionality standards for an electronic filing system that supports the core goals.
3. Issue a Request for Proposal (RFP) for electronic filing system equipment and software that the counties may choose to acquire.
4. Develop best practices for an electronic filing system.
5. Provide training to Clerk and Recorders related to electronic filing systems.
6. Develop a grant program, prepare reports and promulgate any necessary rule-making.
7. Develop subcommittees and project timelines for implementation.

Board Members

Susan Corliss Kit Carson County Clerk and Recorder

Representing County Clerk & Recorders



Gary Zimmerman Sr. Program Director, CO Secretary of State	Representing Secretary of State
George Stern Jefferson County Clerk and Recorder	Representing County Clerk & Recorders
Angela Myers Larimer County Clerk and Recorder	Representing County Clerk & Recorders
Charles Calvin Calvin Law Firm	Representing Colorado Bar Association
Trish Gilbert Saguache County Clerk and Recorder	Representing County Clerk & Recorders
Lloyd Booth , Mead Technology Group	Representing Mortgage Lending Industry
Robert Howe Title Company of the Rockies	Representing Title Industry
Molly Fitzpatrick Boulder County Clerk and Recorder	Representing County Clerk & Recorders

Who is eligible for grants?

Any Colorado County Clerk and Recorder.

What projects are available for grants?

Any project that establishes, maintains, improves, or replaces a County Electronic Filing System, the electronic document management system that enables a county clerk and recorder to accept electronic recording of land records and to provide online access to recorded documents.

Eligible projects may include digitization and indexing of documents received for recording in the office of the county clerk, especially documents that affect rights in real property.

In addition, the ERTB may approve a grant application when a portion of the grant funds will be used to digitize public documents that are not related to real property but that are managed by the county's electronic filing system. See CRS § 24-21-404(2)(b)(II), as enacted by HB 21-1225. For further information, see the Board's Policy Governing Grants for Digitization and Indexing.

In addition to projects that establish, maintain, improve, or replace an Electronic Filing System, eligible projects may include improvements to the security of a county's general information technology systems, if the improvement is necessary to improve the security of the county's electronic filing system. (Added by HB 21-1225)

For the purpose of this grant application and as defined in 24-21-401:

- (1) "Board" means the Electronic Recording Technology Board created in Section 24-21-402 (1)
- (2) "Electronic" means relating to technology having electrical, digital, magnetic, wireless, optical, electromagnetic, or similar capabilities.
- (3) "Electronic Filing System" means the document management system used by a Clerk and Recorder to comply with the statutory requirements set forth in part 4 of article 10 of title 30 C.R.S., for:
 - (a) Electronic documents received for recording or filing in the Clerk and Recorder's office; and
 - (b) Paper documents received for recording or filing in the Clerk and Recorder's office that are converted from paper, microfilm, or microfiche into an electronic format.
- (4) "Fund" means the Electronic Recording Technology Fund created in section 24-21-404 (1).

Deadline and Important Application Process Reminders

Grants will be considered on a monthly basis. In order to be considered for a grant, please submit your completed application via the on-line application or downloadable PDF at www.ertb.org by the first business day of the month. PDF applications can be emailed to ERTB.Grants@Coloradosos.gov. Counties will be notified by a grant award letter within 60 days and will be asked to sign a grant agreement. Please direct any questions about the application to ertbexecutivedirector@gmail.com.

Quotes/bids that support the grant-funding amount being requested must be included. Similar detail regarding past expenditures must be provided if reimbursement is being requested.

In order to improve a county's application, the county is encouraged but is not required to submit "letters of support" for the grant. It is recommended that these letters come from various sources, including (but not limited to) county government officials, industry partners or customers, chambers of commerce, or business leaders, etc.

Conditions for Receiving Grants

Before applying for any grant funds, please read the following conditions that will be included (but not limited to) as part of your grant agreement:

- Counties will cooperate with the Electronic Recording Technology Executive Director and Board and in their statutory reporting requirements.
- Any vendor contracts must include training on any equipment being purchased.
- Counties agree to participate in recording best practices, as defined in 24-21-403 (3) (d).
- If grant funds are not used in the first year, counties must submit to the Electronic Recording Technology Board a request for approval regarding how and when the funds will be spent. The Electronic Recording Technology Board will respond within 60 days. All funds must be expended by June 30, 2026.
- Counties will be required to provide proof of purchase by a signed contract or paid invoice for any new purchase along with a completed audit form to be provided. Audit forms must be completed within 30 days of receipt. These can be emailed to ERTB.Grants@Coloradosos.gov.
- Counties must be current and timely on their transmission of Recording Technology Fees to the Fund. Counties may submit comments to the Electronic Recording Technology Board for exceptions due to factors outside their control.
- The County agrees to maintain recordkeeping that provides a complete audit trail of funds received and expended, and the County agrees to cooperate and participate in any audits conducted under authority of the Electronic Recording Technology Board or the Colorado State Auditor. The County must maintain an accounting system and financial records that accurately account for the receipt and disbursement of Grant Funds. For this purpose, the county may use either general ledger fund accounting that tracks Grant Funds separately from other County funds, or use a tracking spreadsheet. All payments and expenditures must be tracked. Each expenditure must be classified by budget category, such as Personnel, Supplies and Operating, Travel, Equipment and Professional Services. All financial records must be supported by source documentation (such as invoices, time sheets, etc.).
- Counties may apply for reimbursement of funds that have already been expended if the expenditure establishes, maintains, improves or replaces a County Electronic Filing System as defined in 24-21-404 (2) and meets the core goals listed on Page 2. Additionally, the expenditure of funds must have taken place after the effective date of SB 16-115, June 10, 2016. Counties must provide proof of purchase.
- Counties may apply for funding to hire temporary staff for the completion of an eligible project. Counties must provide a closed quote and a statement of work.
- Counties may apply for funds more than one time.
- Any applications that are not completely filled out will be returned to the county and can be resubmitted once completed. All application questions should be answered, even if they do not pertain to the specific grant request. Part of the Board's function is to gather information about hardware and software used by counties.
- Counties should include any invoices or proposals if applicable.
- The Electronic Recording Technology Board reserves the right to partially fund a grant request.
- County tiers in the application refers to the classes listed in statute 30-1-101 and provided below:



30-1-101. Classification of counties - fixing fees

(1) For the purpose of fixing fees, chargeable and to be collected by county and other officers, and for no other purpose, the several counties of this state are divided into five classes, which classes shall be known as the first, second, third, fourth, and fifth, as follows:

- (a) The city and county of Denver is a county of the first class;
- (b) The counties of Adams, Arapahoe, Boulder, Douglas, El Paso, Jefferson, Pueblo, and Weld are counties of the second class;
- (c) The counties of Delta, Garfield, Larimer, Las Animas, Logan, Mesa, Montezuma, Montrose, Morgan, and Otero are counties of the third class;
- (d) The counties of Alamosa, Archuleta, Bent, city and county of Broomfield, Chaffee, Cheyenne, Clear Creek, Conejos, Costilla, Crowley, Eagle, Elbert, Fremont, Gilpin, Gunnison, Huerfano, Kit Carson, Lake, La Plata, Lincoln, Ouray, Park, Phillips, Prowers, Rio Grande, Routt, Saguache, San Miguel, Sedgwick, Teller, Washington, and Yuma are counties of the fourth class;
- (e) The counties of Baca, Custer, Dolores, Grand, Hinsdale, Jackson, Kiowa, Mineral, Moffat, Pitkin, Rio Blanco, San Juan, and Summit are counties of the fifth class.

ELECTRONIC RECORDING TECHNOLOGY FUND GRANT APPLICATION CHECKLIST

- Complete the entire application regardless of whether it applies to a specific grant request. Incomplete applications will be returned to the county and can be resubmitted once completed.

- Include any bids, invoices or proposals that are applicable to the grant application. For digitization and indexing, make sure that bids include the number of pages and/or documents to be digitized and/or indexed.

- Do not include any requests that would include expenditures past June 30, 2026, since the grant program is scheduled to be statutorily repealed on September 1, 2026.

- Grants can only be awarded for goods or services that fall under the statutory definition of “electronic filing system” in 24-21-401.

General Information		
County Name: Pueblo County		
County Clerk & Recorder Name: Candace Rivera		
Phone: (719) 583-6014	Email: riverac@pueblocounty.us	
Alternant contact Karen Long		
Phone (719) 583-6520	Email klong@pueblocounty.us	
Mailing Address: 215 W. 10th Street, 1st Floor		
City: Pueblo	State: CO	Zip: 81003
County Tier 2		
County budget cycle (calendar, fiscal) including dates: Calendar January - December		
How many recordings do you do in a year? In 2021 ERecording 39,117(81%) OTC 9,302 (19%) In 2022 ERecording 28,617 (76%) OTC 9,306 (24%)		
How much do you collect of the \$1 Recording Technology Fee in an average year (over the last three years)? 42,065		
How much money is in your technology fund? \$117,028.00		
Recording Equipment Information		
Is your county currently recording documents <input checked="" type="checkbox"/> Electronically <input type="checkbox"/> Manually		
What is the age of your current software? What is the age of the equipment (hardware) for which you are applying? What is the expected life of the software and hardware? Software was installed in 2007. Software receives quarterly updates and releases. Current county server is 1 year old. However, the SaaS purchase will change the entire recording environment for Pueblo County by providing Tyler hosted Data Center with more security, backups, power protections and multiple cyber security measures.		
What is the condition of your current software? Excellent. What is the condition of the equipment (hardware) for which you are applying? Current County server is in good condition, however the strategic technology policy of Pueblo County is moving toward SaaS based apps for any new county application.		
Who is your current vendor? What product and version do you currently use? Tyler Technologies, currently running version 2022.1.24		
What is your current annual payment to your vendor and how is it calculated? Annual Maintenance - \$52,583		
How and what kind of hosting is done with any parts of your recording system? None, currently. Requesting funding to move to a Hosted environment, which includes Disaster Recovery Services, Systems Management, Cyber Security and Hosted Servers in the Tyler Data Center. Moving forward, Pueblo County would no longer need to purchase, maintain, or support their servers, as it would be handled by Tyler Technologies.		



What is the term of your contract (dates) with your current vendor?
Annual Maintenance/Support, Pueblo County owns Eagle Recorder/Records Management Software.

What percentage of your documents have been digitized? What percentage of your documents have been indexed? What will the percentage be if this grant application is approved?
This application is not intended for any digitization projects but does include the adoption of the Historical Index Module. Pueblo County will adopt the Historical Index Module which will be used for viewing historical indexes by the public and other county internal offices.

What percentage of your land documents are accessible online? What will the percentage be if this grant application is approved? **Approximately 30%**
Land documents accessible online would increase approximately 10% with the acquisition of this new system. Our current system will not accommodate the inclusion of the entire digitization project we are currently working on. Ultimately, when the SaaS system is up and running, digitized documents can/will become totally accessible online, but only with the purchase of the new SaaS system.

Grant Information

Why are you applying for grant funds?
To upgrade the software/hardware to the much more secure SaaS environment and increase the accessibility of the historical documents online to the public

Amount of grant request (no funding requests involving expenditures past June 30, 2026).

Product	One Time Costs	Years 1-3 SaaS Fee	Total Grant Request:
Annual SaaS fee (includes all hosting & Addition of Self Service, Payments, Fraud Notify, eMarriage, Historical Index and software support for all applications		May 2023- April 2024: \$80,790.25 May 2024- April 2025: \$80,790.25 May 2025- April 2026: \$80,790.25	
Disaster Recovery		Included	
Cyber Security		Included	
Quarterly Software Updates		Included	
Implementation/Hosted Technical Services	\$32,000		
Total:	\$32,000	\$242,371	\$274,371

What do you want to use the grant money for? Break out the expenses and include bids, invoices, or proposals with your request. What specific equipment and software do you want to purchase?

We'd like to update existing system to offer more flexibility in searching for document images online, as well as provide opportunity to securely purchase document copies online, apply for marriage applications, register for Fraud Notify, record documents through the online portal, provide access to our historical indexes, as well as move to hosted environment as noted above.

If you are requesting grant funding for digitization and indexing, please provide a general description of the documents to be digitized and/or indexed, the approximate date ranges, the total number of pages or documents, and an estimate of the percent of documents that are not related to interests in real property. If there are documents not listed in the Board's Policy Governing Grants for Digitization and Indexing, as examples of real property documents but the Clerk believes are related to interests in real property, please provide an explanation of why the documents are related to real property. Attach supporting bids if applicable. Bids should include the number of pages and/or documents to be digitized and/or indexed. For further information, see the Board's Policy Governing Grants for Digitization and Indexing.

No digitization project funding requests.

If you are requesting grant funding to improve the security of your county's general information technology systems, please describe generally the security measures to be undertaken with grant funds and explain why/how the improvement is necessary to improve the security of your electronic filing system.

A flip to SaaS means we would be hosted in Tyler's Data Center - with a fully redundant data center. Our records would no longer be stored on the county's servers. Being hosted would provide more security in our county, with the ability to have backups, redundancies for power, and added cyber security measures that the county currently does not have in place.

Additional Hosting Benefits:

- Handling of all server hardware
- Services to migrate to Tyler's hosted environment
- Services for any server OS upgrades, application upgrades. i.e. Tomcat, Search DB, SSL certs, etc.
- Disaster recovery planning and services - 24/7 support by a dedicated team who maintain the servers
- Infrastructure management, storage allotment, backups, as well as load balancing (if needed)

From a security standpoint, hosted clients receive:

- Intrusion detection, and firewall management
- A cloud-based secure hosted environment
- PCI security compliance (helpful if clients utilize eCommerce)
- SS AE 18: (which is an audit of controls and software license management and serves as the extra layer of controlled security against virus and ransomware attacks)

If the grant is for temporary staff, what specific project will the staff be working on? (Please attach a Statement of Work). **Not applicable.**

How do you plan to segregate grant funds from county funds?

The Pueblo County Budget Office will create a separate line item in the county budget for the grant funds.

Will any monies from your technology fund be used for the purpose(s) contained in the grant request? If yes, how much? **No**

If no, explain the plans for the use of your technology fund.

We have this money earmarked for specific projects.

Will this be (or was this) a competitive bid process (RFP) or an upgrade to an existing system?

Not a competitive bid process, this would be an upgrade to our existing system.



Will the grant award increase your annual maintenance costs? If so, do you have a long-term plan to budget for the increase?

Yes.

Maintenance cost will be covered till 2026. By adding self-service, recording access and marriage license access this will create new revenue streams to the county from the sale of those documents. At that time of the annual maintenance costs we will add to our county budget or apply for grant money.

Describe how the funds will be used to achieve the stated business purpose and core goals.

A) To assure the security, accuracy, and preservation of public records

Cyber security is an increasing concern for Pueblo County. We would feel more comfortable and secure with 24/7 monitoring, cyber security benefits from Tyler Technologies' Hosted Solution, and the accessibility of Disaster Recovery if need be.

B) To maintain the privacy of personal identifying information, online access.

Confidentiality and security is a crucial component of Tyler's Hosted Solution, and provides a home for Records Public Access, which has robust capabilities to protect our documents, and our citizens – including enhanced document securities, reporting, subscriptions, offerings such as Fraud Notify, watermarking, image degradation, etc.

C) To assure that the sequence in which documents are received by a clerk are accurately reflected to the greatest extent practicable

Pueblo County diligently records documents, closely following policies and procedures. This process will not change with a move to Hosted Environment, or addition of these new modules.

D) To provide for online public access to public records

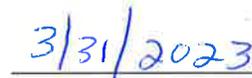
We currently provide online public access, but upgrading from Eagle Web to the Records Public Access system will enhance the searching capability, convenience, and increase traffic which in turn will increase the county's revenue.

E) To assure that electronic filing systems used in different counties are similar so as to facilitate the submission and searching of electronic records.

Pueblo County would like to offer additional options and flexibility to our constituents, following in the footsteps of other CO counties that offer a variety of ways to have a document recorded.

With my signature below, I do hereby certify that I have read, understand, and support the above application for grant funds through the Electronic Recording Technology Board.


Signature of County Clerk & Recorder


Date



Quoted By: Erin Walker
 Quote Expiration: 9/30/23
 Quote Name: Pueblo County - Flip to SaaS, Add eMarriage, Fraud Notify, Recording Access, Upgrade to RPA, Vitals Access, Tyler Payments, Historical Index Module

Sales Quotation For:
 Pueblo County
 215 W 10th St
 Pueblo, CO 81003-2945
 Phone: +1 (719) 583-6000

Tyler Software

Description	# of Years	Annual Fee
Records Management		
Annual Fees		
Records Management Base		
License Full-Use Licenses		
Public View Licenses		
Forms Printing		
eCommerce		
Records Public Access		
eRecording		
Historical Index Module		
eMarriage		
Fraud Notify	May 2023-April 2024:	\$80,790.25
Recording Access	May 2024-April 2025:	\$80,790.25
Vitals Access	May 2025- April 2026:	\$80,790.25
TOTAL		\$ 242,371

Transaction Fees

Description	Transaction Fees
Payments Core	
Payments Core POS	

Description	Transaction Fees
Recording Access Technology Fee	\$3.00
(\$3.00 technology fee will be charged to the submitter and applied to each document submitted via Recording Access)	
Vitals Access Technology Fee	\$4.00
(4.00 technology fee will be charged to the requestor and applied to each transaction requested via Vitals Access)	

Unless otherwise indicated in the contract or Amendment thereto, pricing for Optional items will be held for six (6) months from the Quote Date or the Effective Date of the Contract, whichever is later.

PLEASE NOTE: Per agreement between Tyler Technologies and Pueblo County, initial invoice for annual subscription fee will be first payable when Tyler makes the software available for download by the client, or on the first day of the month following the date of execution of this proposal, whichever is later.

All primary values quoted in US Dollars

Professional Services

Description	Extended Price	Maintenance
Records Management		
Professional Services		
Deployment Services		
Conversion Services, Historical Index Module		
Project Management		
TOTAL	\$ 32,000	\$ 0

Summary	One Time Fees	Recurring Fees
Total Tyler Software	\$ 0	\$ 0
Total Annual - 3 Years	\$ 0	3X: \$ 80,790.25
Total Tyler Services	\$ 32,000	\$ 0
Total Third-Party Hardware, Software, Services	\$ 0	\$ 0
Summary Total	\$ 32,000	\$ 242,371
Contract Total	\$ 274,371	



Pueblo County, CO – Records Management *powered by Eagle*

Flip to SaaS, Migrate to Self Service, Add eMarriage, Recording Access, Fraud Notify, Historical Index Module, and Payments

ERTB Grant Funding Requested

Pueblo County Contacts:

Candace Rivera
Pueblo County Clerk
719-583-6014
riverac@pueblocounty.us

Karen Long
Chief Deputy Clerk & Recorder
719-583-6520 Office
719-601-7673 Cell
longk@pueblocounty.us

Brandi Mears
Operations Manager
719-583-6515 Office
719-415-0783 Cell
mearsb@pueblocounty.us

Deployment Services: Move from On-Premise to Hosted Environment

Tyler Technologies will provide remote services to Pueblo County, CO. to move the Records Management application to a hosted environment, provided all suites are involved in one contract, as follows:

Scope of Work:

Deployment Services

1. Data migration
2. Data Testing
3. Configuration of application in house functionality
4. Assistance with deploying clients to connect to hosting instance
5. Create client users
6. Configure data to new hosted instance and load new hosted users
7. Data Transfer and sync to data center
8. Testing for Go-Live

Move to Records Public Access from Eagle Web

Provide enhanced customer services and improve the efficiency and timeliness of the delivery.

Tyler's Records Public Access allows you to offer managed access to data, and other content of your Records Management application. With Tyler's Records Public Access (FKA: Self Service), customers can search and purchase records online, based on viewable criteria established by Pueblo County.

1. Project Management
2. Official Records/Certified Copy Setup
3. Configuration for Certified Copies workflow, and training

Tyler Payments – Records Public Access Web, and Over the Counter

Pueblo County will be adopting Tyler Payments in conjunction with their move to Records Public Access.

Scope of Work:

- 1) Configuration of Tyler Payments within Records Management, for Records Public Access.
- 2) Integration with Records Management
- 3) Testing
- 4) Training
- 5) Go-Live

*** Please note: Pueblo County will be responsible for purchasing POS units preconfigured and compatible with Tyler Payments. ***

Supported Hardware: Ingenico Lane 300, Ingenico Lane 7000

Purchasing Contact: Laurie Murray – laurie.murray@tylertech.com

Additional notes regarding Tyler Payments mentioned later in the SOW to support Vitals Access and Recording Access

Fraud Notify

Tyler Technologies integrated application for use via current Self Service Web application, includes:

1. Public registration of name(s) both personal and business
2. For use with records in Eagle Recorder (Land, Lien, Marriage, etc.)
3. Automated email notification to recipient when documents are recorded in registered name(s)
4. Notification provides link back to Pueblo County Self Service, where index information or index and image information can be viewed (if images are allowed for public view)

Scope of Work:

1. Project Management
2. Implementation Services
3. Training

eMarriage Module

1. Configuration for up to two prompted presentations that support forms.

2. Please note: Additional presentations and forms would require additional hours.
3. Services include set up of in house existing kiosks, if any.
4. Training done remotely.

Historical Index Module, Conversion Services

The Records Management Historical Index Module provides digital access to index books and records, ensuring they remain protected and accessible. The Historical Index module allows scrolling through digital index book pages to find book/page of recorded information.

Once located, the book/page can be entered into the search fields, and the user can view the associated document index and/or image, if it resides in Records Management.

Index books that contain a high volume of pages can be broken down to a more granular level, in the Search Criteria. For example, when drilling down into Grantor/Grantee name of A, B, C, etc. Criteria can be set to AAg, Ah-Am, etc. This helps avoid having to scroll through hundreds of pages to find the names being sought.

Pueblo County will be utilizing the Historical Index Module for Books from US Imaging. Project consists of roughly 100,000 images.

Formatting:		
	Year Range	
	1800-1955	
Reception Book	1955-1987	Document number range
Grantor Index	Year Range	Alpha Tab Letter
Grantee Index	Year Range	Alpha Tab Letter

Tyler Technologies will provide remote services to Pueblo County, to configure the Historical Index Module as outlined below:

Project Management

Scope of Work:

- 1) Implementation
- 2) Configuration
- 3) Training

Conversion Services for Historical Index Module Upload:

Import of images of Index Book pages and configuration of path/search terms. (Conversion fee assumes data/images are delivered to Tyler Technologies in the correct format, as outlined in the Historical Index Conversion Specifications, provided to USI)



Recording Access

Project Objective

Enables local and small filers to electronically submit documents to the County Recorder office. This feature allows your local community to file documents online with Credit Card and eCheck options to streamline recordings and increase online offerings and automated processes.

Project Overview

- Create online portal access for citizens (small filers) to file documents.
- Connect citizen portal to Eagle Recorder.
- Ensure accounts and workflows are mapped.
- Configure payment options for online payments.
 - Partner with Tyler's payment services to complete this activity.

Project Prerequisites and Requirements

- Eagle Recorder must be on version 2020.2 or greater.
- Activate eRecording webservice. Requires an open portal to access the eRecording server.
 - Requires eRecording and eRecording workflows be configured.
- Requires an agreement with Tyler's merchant provider.
 - Determine payment options (credit card and/or eCheck options)
- Provide a Memorandum of Understanding (MOU), (optional). If not desired, Tyler will provide terms and conditions.
- Define document types desired for eRecording.
 - Determine fees needed for each document.
 - Determine workflows desired to use for eRecording packages.

Outside of Project Scope

- Creation of county MOU is not provided by Tyler.
- Non-UCC forms. Including, new form creation filings.
- Additional document types (non-PRIA types).
- House Account support for non-government-to-government filings.
- Creation of new workflows not defined in the project scope/schedule.

Methodology/Process

Task Owner	Task
Tyler Project Manager	Project Kickoff
Tyler Implementation Consultant Customer	Conduct Business Process Evaluation and Review Requirements
Tyler Implementation Consultant	Recording Access Configuration
Tyler Implementation Consultant	Eagle Recorder Connection
Tyler Implementation Consultant	Connect Payment Information
Customer	Test Features, Functionality and Business Processes
Customer	Perform Acceptance Criteria

Acceptance

The following process will be used for accepting Deliverables and Control Points:

1. Customer shall have five (5) business days from the date of delivery, or as otherwise mutually agreed upon by the parties in writing, to accept each Deliverable or Control Point. If Customer does not provide acceptance or acknowledgement within five (5) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld Tyler deems the Deliverable or Control Point as accepted.
2. If Customer does not agree the particular Deliverable or Control Point meets requirements, Customer shall notify Tyler project manager(s), in writing, with reasoning within five (5) business days, or the otherwise agreed-upon timeframe, not to be unreasonably withheld, of receipt of the Deliverable.
3. Tyler shall address any deficiencies and redeliver the Deliverable or Control Point. Customer shall then have two (2) business days from receipt of the redelivered Deliverable or Control Point to accept or again submit written notification of reasons for rejecting the milestone. If Customer does not provide acceptance within two (2) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deem the Deliverable or Control Point as accepted.

Additional Notes

The enclosed scope is good-faith estimate. Any changes in scope may require an additional scope of work with additional cost. Any additional consultation from Tyler may increase scope and may require additional billable time done on a time and materials basis.



Tyler Payments

- Your use of Tyler Payments and any related items included on this order is subject to the terms found at: <https://www.tylertech.com/terms/payment-card-processingagreement>. By signing this order or the agreement in which it is included, you agree you have read, understand, and agree to such terms.
- Fees for year one of hardware maintenance are invoiced upon delivery of the hardware, with subsequent years' fees billed annually, in advance (if required).
- Please see Tyler Payments fee schedule below.

Electronic Payment Costs	
If passing transaction costs to the payer	
<u>Technology Fee</u> – Flat fee per document, payable to Tyler Technologies. Can be passed to submitter or absorbed by County.	\$3.00
<u>Payer Card Cost</u> – per card transaction with Visa, MasterCard, Discover, and American Express	3.50% per transaction
<u>Payer eCheck Cost</u> – per electronic check transaction	\$1.95
Miscellaneous Costs	
<u>Credit Card Chargebacks</u> – if a card payer disputes a transaction at the card issuing bank (e.g. stolen card)	\$15.00
<u>eCheck Rejects</u> – when an eCheck transaction comes back as declined (e.g. bounced check)	\$5.00





Vitals Access

Project Objective

Vitals Access provides a secure, easy-to-use portal for county customers to request and pay for copies of vital records online, via Self Service. Once verification of identity has taken place, customers can pay for the copies via credit card or eCheck.

Vitals Access requests flow seamlessly into the Self Service request queue for review by county staff to verify identification documentation, print requested document(s), then finish and receipt them.

Once complete, the customer will receive an email notification which informs them their document is on the way. If the request/order could not be fulfilled, the county customer would receive an email explaining the issue and instructions for correcting the issue.

Project Overview

- Add the county to the Vitals Access portal and connect with Eagle Recorder
- Create the fillable PDF forms and configure the request types
- Configure fees for each request type
- Configure shipping options offered by the county
- Obtain and configure merchant accounts in Tyler Payments (please see information on page 3)
- Create links between the county's website and the Vitals Access portal

Project Prerequisites and Requirements

- Eagle Recorder must be on version 2022.1, and have the necessary modules and web services installed and enabled.
- Self Service Actions need to be configured for the request types that will come be submitted through the Vitals Access portal.
- County will need to obtain merchant account agreements through the Tyler Payments team (please see information on page 3)
- County will need to create a fillable PDF form for each request type. This can be done using 3rd party tools such as Adobe Acrobat.

Outside of Project Scope

- Tyler staff may assist or offer guidance on creating the PDF forms, but the county is ultimately responsible for the forms they present to their customers.
- Vitals Access is intended to be used for copies of Birth, Death, Marriage, and DD214 documents. Other document types, such as marriage license applications and fictitious business names should be processed using the existing Self Service module.
- House accounts cannot be used for payment in the Vitals Access portal.

Process

Task	Owner
Project Kickoff	Tyler Project Manager
Obtain merchant account agreements	Tyler Payments Consultant
Training on Tyler Payments reports and tools	Tyler Payments Consultant
Review forms to be accepted	Tyler Implementation Consultant
Create the fillable PDF forms and send to Tyler	County Staff
Configure the connection between TEST Eagle Recorder and TEST Vitals Access portal	Tyler Implementation Consultant
Configure the forms, fees, fee parameters, and shipping methods in TEST Eagle Recorder and TEST Vitals Access	Tyler Implementation Consultant
Training on how to use Vitals Access	Tyler Implementation Consultant
Acceptance test the submission and fulfillment process in TEST	County Staff
Configure PRODUCTION Tyler Payments	Tyler Payments Consultant
Configure PRODUCTION Eagle Recorder and Vitals Access based on test systems	Tyler Implementation Consultant
Acceptance testing in PRODUCTION	County Staff
Share promotional materials with the county	Tyler Implementation Consultant
Share support information with the county	Tyler Implementation Consultant
Add links from the county web site to Vitals Access	County IT
Go Live	Tyler Implementation Consultant
Handoff to support	Tyler Implementation Consultant/Support Manager



Acceptance

The following process will be used for accepting Deliverables and Control Points:

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2. If county does not agree the particular Deliverable or Control Point meets requirements, county shall notify Tyler project manager(s), in writing, with reasoning within five (5) business days, or the otherwise agreed-upon timeframe, not to be unreasonably withheld, of receipt of the Deliverable.
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Additional Notes

The enclosed scope is good-faith estimate. Any changes in scope may require an additional scope of work with additional cost. Any additional consultation from Tyler may increase scope and may require additional billable time done on a time and materials basis.

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- Fees for year one of hardware maintenance are invoiced upon delivery of the hardware, with subsequent years' fees billed annually, in advance (if required).
- Please see Tyler Payments fee schedule below.



Electronic Payment Costs	
If passing transaction costs to the payer	
<u>Technology Fee</u> – Flat fee per document, payable to Tyler Technologies. Can be passed to submitter or absorbed by County.	\$4.00
<u>ID.Me (if applicable)</u> – Fee for identification authentication (this would be in place of notarized documentation for identity authentication)	\$2.00
<u>Payer Card Cost</u> – per card transaction with Visa, MasterCard, Discover, and American Express	3.50% per transaction
<u>Payer eCheck Cost</u> – per electronic check transaction	\$1.95
Miscellaneous Costs	
<u>Credit Card Chargebacks</u> – if a card payer disputes a transaction at the card issuing bank (e.g. stolen card)	\$15.00
<u>eCheck Rejects</u> – when an eCheck transaction comes back as declined (e.g. bounced check)	\$5.00

