CLARK COUNTY

RFP #846
SOFTWARE and IMPLEMENTATION SERVICES for a VITAL RECORDS (VR) SOLUTION
QUESTIONS and ANSWERS
UPDATED: JANUARY 4, 2023

	QUESTION	ANSWER
1.	Where it states CCPH Vital Records processes 4500 certificates per year, does that translate to total certificates or number of customers?	That number is the amount of total permits. The 4500 is the approximate monthly amount; for yearly it's about 45,000 instead.
2.	In Clark County, are there local hospitals with Labor/Delivery wards that we are certifying newborns in?	In the wards, they are given applications to fill out, then they either have to bring in or mail it in. We currently work with DOH/Whales system. Wouldn't need that function in this system, just need tracking purposes.
3.	Reading through the pdf, in part 1, item 3 (scope of project) – it calls out a cloud-based system to provide accounting applications for invoicing/receiving. Can you provide more context on what you are envisioning for accounting piece as far as invoicing/AR? For accounts receiving, is there another hardware component?	We have separate receiving machines. For the accounting side, vital records program does not have a large menu of options – there are about 10-11 different options, that will have very small variations. We also have a shipping charge and order processing fee. People come up to counter in our office and pay cash/credit card and we give receipt. For funeral homes, we also need to provide online payment options. For clarification, receipt is both an order confirmation and payment receipt Over-the-counter people will get receipt from kiosk CCPH uses; we still need to log/reconcile customer payments that come in throughout the day, to match at EOD. If kiosk came down or we stopped using them, we would still ability need to process through our system (receipts, invoicing)
4.	How do we provide receipt to funeral home that will have multiple requests?	Through our existing system.
5.	If funeral homes submit online, do we provide a paper receipt?	We give each funeral home an invoice per descendent (paper form even though they submit it online)
6.	Item 1 – cloud-based cash management system – is it just for reconciling or do we expect it to provide some sort of system here too?	We have cash drawers, provide audit for that employee (login). Will need to be able to provide report by employee.

7.	When would a payment need to be issued for orders?	We collect when they are ordering it – needs to take payment immediately. Examples of cases that we may issue a refund for the original order: a funeral home could order certs and the record isn't in system yet, or corrected copies not received yet.
8.	Is there some level of match for refunds? For example, if paid by check, will issue refund by check? Credit card payments refunded back on credit card?	Cards are what funeral homes pay with, will refund by card. If paid by check, need to do in ad-hoc form requested by Workday system, as we use Workday to cut checks. The processing of payments coming in, we need to apply that payment in new system, so it updates the aging. Need upload file from this system to workday to account for revenues, cash, refunds, etc. There is a running AR account on workday system specifically for Vital Records.
9.	What is the requested format needed for export data?	CSV. We will work with awardee on developing the upload file.
10.	What is the requested frequency of export?	Monthly. We would want to transmit by the 5th of the following month to ensure month-end work is complete.
11.	Is there a fee schedule by records document type? How do we use mechanism and how often do fees get modified/updated/added?	It's very rare to change/update fees for Vital Records. The state controls the actual fee rate itself. Fees can be loaded with anticipated date of launch, if they haven't taken effect yet.

12.	For the monthly summary of numbers of certificates/information of copies by event type – what is the format necessary?	Account by program element code – type of certificate and by account (summary of what is produced by certificate type)
		For example, a table:
		    Type 1 – X number
		    Type 2 – Y number

13.	Will the new system need to leverage the program element codes in the new system?	No, anything that will allow us to clarify and track how many of each type were processed will be fine.
14.	If we have more questions after this call, can we submit question still?	Yes, questions can be submitted to A'ndrea Lee via email after the call. Deadline to submit questions is Jan 11, 2023.
15.	Regarding Attachment D - For items we responded with "C", we often would like more information. How crucial is it that we get better understanding before we submit the RFP?	Attachment D does not require a response and was meant to be a guidance tool.
16.	Regarding Attachment D - Attachment H - Cost Worksheet, where can we find this attachment?	No Attachment H - processing an addendum to remove that from Attachment D.
17.	Regarding Attachment D - Regarding compliance with American Rescue Plan Act Requirements, are you aware of material items that would be best for us to call out in the contract if the RFP advances?	The project has been deemed an acceptable use of Federal American Rescue Plan Act (ARPA) funding. Requirements on the selected vendor will be a contract with clear benchmarks and sufficient

		backup documentation provided with invoices.
18.	**Regarding Attachment D - INT.1 Per the Q&A document (https://clark.wa.gov/sites/default/files/2022-08/RFP%20835%20Q%20A_0.pdf), an integration with Workday is not needed. Please confirm our understanding that this is correct**	Yes - that is correct.
19.	**Regarding Attachment D - INT.2 Import birth and death certificate requests, charges, and payments from VitalChek. Is CCPH's use of VitalChek expected to continue after the new system is implemented?**	Yes - we currently have 2 kiosks from VC in our lobby for the public to fill out an application on when they come in.
20.	**Regarding Attachment D - GT.8 Data entered into a field should populate throughout the record within the system. (Data entry for a data element should only happen one time.) What are some examples of the data that is in scope for this req?**	Any repeating information that is entered or needed on multiple times or pages on a record. (Decedent/date of death/date of birth)
21.	**Regarding Attachment D - GT.39 Registrar's name; Is this the same as the county user/processor?**	Yes
22.	**Regarding Attachment D - GT.44 Date of disposition; What is considered a disposition?**	Depends - on EDRS it's the date the body is being disposed of - or - currently in Envision Connect it is when the document/certificate was issued
23.	**Regarding Attachment D - GT.54 Batch number. What would be an example of a batch number? How is it used?**	Batches are currently used to bring in money received in from the funeral homes. My hope is that with this system we wouldn't use batches to bring the payments in. I would say this is NOT critical, depending on how the new system works.
24.	**Regarding Attachment D - GT.63 The system has the ability to provide editing, coding, and validation routines to minimize data entry errors and enforce data entry consistency (e.g., picklists, drop-down boxes, or other easy-to-use options to assist users in correctly entering data). What is the context of coding?**	This could be for several areas - when registrars have an option to pull/drop down menus with those instead of data entry. Also, a editing option or spell check if writing notes within a record.
25.	**Regarding Attachment D - GT.84 The system supports search of the incomplete order list. Is the desire here to be able to sort orders in different statuses for quicker processing?**	To ensure all orders/invoices are being fulfilled and certificates generated to "complete" the order.
26.	**Regarding Attachment D - GT.88 The system has the ability for master files to have an "Active" or "Inactive" status to simplify the look-up screens. Could you elaborate on the context of the desired functionality?**	Transactions that come in from the Funeral Homes are "active" until the certs are processed to them, then the service record is considered "inactive."
27.	**Regarding Attachment D - GT.90 The system has the ability to support Application Programming Interface (API). How are APIs expected to work?**	An API (Application Programming Interface) is simply some software that sends information back and forth between a website or app and a user.

		I think the EnvisionConnect Online (ECO) program fits this definition. It's our public-facing portal for funeral homes to order death certificates. The information entered into that portal goes into EnvisionConnect (EC), the software we use in the office. We have a Comments field in EC that also displays in ECO, when the registrar enters a comment in EC. (not sure we will be using this with the new system) The kiosks in the front office might be another example of one program sending data to another. There is also another online program that they may want to be able to interact with the new program – VitalChek. Point & Pay may also be another program that fits this description. ECO orders are paid through Point & Pay, through the online portal from ECO to Point & Pay, then back to ECO, then downloaded in batches the next morning by Alisha Batchelor. (Not sure we will be using this with the new system) I'm not sure exactly, but maybe the interface between EC and the users is also an API? There are page layouts they open, to see the data. They don't go directly to the tables; they have an interface between the tables and the user.
28.	**Regarding Attachment D - GT.96 The system has the ability to update all security roles automatically (user discretion) when a change in the "master" role is made. We believe our system supports this desired functionality today but would like to see if you could provide an example. What is a security role?**	The ability to set user access based on the role they hold within the company or department.
29.	**Regarding Attachment D - GT.107 The system has the ability for IDs and passwords to use alpha, numeric, lowercase, uppercase, and special characters, as defined by CCPH policy per the CCPH-defined minimum length and complexity. Is CCPH's ID and password policy available for us to review?**	https://clarknet.clark.wa.gov/system/files/media/document/2022-05/IT_2.00_Password_Standards_FINAL.doc.pdf
30.	**Regarding Attachment D - GT.111 The system has the ability to support single sign-on within the Vital Records system environment. How does CCPH achieve single sign-on today?**	The programs intention is that they login to the VR system once and they don't have to log in multiple times in the VR System. (Single ID/Login)
31.	**Regarding Attachment D - CO.17 The ability to make changes to the request/order until payment is issued. Is this from the requestor/citizens perspectives? If so, changes can be made until the order is submitted?**	Yes, from the requestors/Funeral Homes perspective. Yes, until they submit the order.

32.	**Regarding Attachment D - CO.28 The system has the ability for users to change the password with each log on. Could you elaborate on the value of the desired functionality?**	Forgot password link on the login screen so that each user isn't going to IT every time they need to reset or have issues getting into the system.
33.	**Regarding Attachment D - CO.47 System will show the records with a status of "Requires Validation." Could you elaborate on the context of the desired functionality?**	This would be referring to them needing to provide documentation to show eligibility to receive the record.
34.	**Regarding Attachment D - CO.54 The system has the ability to import document control numbers (certificate numbers) to track the printing of certificates. Could you elaborate on when the certificate numbers will need to be imported?**	We order boxes of certificates (1500 per box) and all those numbers need to be tracked and audited to account for each certificate. We need to be able to import those numbers as "ready to use" and then "issued" when they are printed with the certificate information on the doc/paper.
35.	**Regarding Attachment D - CO.66 The system provides ability to document follow-up requests related to order. Are these the follow-ups from the requestor/citizen that are needed by the registrar?**	Yes, this is information related to that request/order. Example: 12/7/2022 AL called Mr Barnes and requested a copy of his DL in order to complete this request. 12/8/2022 Mr Barnes called and said he would email the DL copy.
36.	**Regarding Attachment D - CO.67 Applications must be queued and processed when the customer comes to the office in person to complete the request. Could you elaborate on the context of the desired functionality?**	At times applicants don't have the required documents to be approved for getting the record/cert. The invoice and order then sits in a pending state until they provide that documentation within 30 days of the original invoice date.
37.	**Regarding Attachment D - CO.74 Additionally, system produces letters that auto-fill CCPH-defined rejection fields (as entered by registrar). Could you elaborate on the context of the desired functionality?**	When a person isn't qualified to receive the record, this would be a drop down with several options of why they aren't qualified. (Couldn't produce eligibility documentation, No relation to decedent, etc.) These would be generic letters that could prefill that applicant's information on it to send it to them.
38.	**Regarding Attachment D – CO. 12 System supports linking documents supporting qualifications to FH business and FH staff accounts. What are examples of FH business qualifications?**	Each quarter the FH has to send in a form stating who is a qualified person to order certificates from their facility and also send in each person's driver's license.
39.	**Regarding Attachment D – CO. 14 Portal supports notification of expiring ID (FH staff) and prompts user to update profile with the newly issued ID. What are examples of expiring ID?**	The FH sends in a copy of their driver's license showing that they are eligible to order certificates. These drivers' licenses expire, and we have to watch those to request new copies.
40.	**Regarding Attachment D – CO. 41 The portal system should not allow empty required fields (CCPH defined) prior to processing payment. Is a list of mandatories vs. optional fields available for us to review?**	Yes. This just means that they can't leave the "type of payment" blank. They need to choose one. (Cash, check, credit card, etc.)

41.	Regarding Attachment D – BP. 2 The system has the ability to produce a receipt containing fields stipulated by CCPH. Are the fields available for us to review?	Yes
42.	Regarding Attachment D – BP.17 The system has the ability to apply one item to multiple lines. Could you elaborate on the context of the desired functionality?	Example: Applying one payment of $60.00 to two lines, one line for a birth certificate for $30.00 and one line for a death certificate for $30.00.
43.	Regarding Attachment D – BP.18 The system has the ability to drill down and view specific account transactions prior to and/or while posting. Could you elaborate on the context of the desired functionality?	Drill down is a capability that takes the user from a more general view of the data to a more specific one at the click of a mouse. For example, a drill down report that shows sales revenue by certificate type and PE code, click on it and see sales revenue by certificate type and PE code.
44.	Regarding Attachment D – BP.46 The system has the ability to allow modification to or customization of invoices. Could you elaborate on the context of the desired functionality?	This would be the way the invoices look on paper when printed out. Adjusting the header, alignment etc.
45.	Regarding Attachment D – BP.51 The system has the ability to process corrections (free for citizens, $5 for funeral homes). Could you elaborate on the context of the desired functionality? Could this be set up as a separate certificate request with its own cost?	Yes, these would be set up with its own PE code "correction copy." Once birth certificates are corrected with the information requested, a person from the public, can exchange it at no cost within a year of issuance. FH can get a "corrected copy" for $5/per certificate as long as we are given the original certificates.
46.	Regarding Attachment D – BP.52 The system accepts payments and breaks down the payments into the fees payable to DOH. Is the break down available for us to review?	Yes
47.	Regarding Attachment D – RPT. 5 A monthly summary of the number of certifications and informational copies issued by vital life event type in a format prescribed by the state registrar (RCW 70.58A.570). Is the desired data format available for us to review?	Yes
48.	Regarding Attachment D – RPT. 6 A monthly log of all numbered paper certifications issued and destroyed in a format provided by the state registrar (RCW 70.58A.570). Is the desired data format available for us to review?	Yes
49.	Regarding Attachment D – RPT. 11 Charges, payments, adjustments by date range. What actions are considered adjustments?	Adjustments would be corrections made to the invoice. If they entered an incorrect PE code and need to adjust it.
50.	Regarding Attachment D – RPT. 17 The system has the ability to drill-down on fields to view more detailed information when appropriate. Could you provide a couple of examples of how you leverage drill-down?	Drill down is a capability that takes the user from a more general view of the data to a more specific one at the click of a mouse. For example, clicking on an invoice number and taking you to that invoice. Or clicking on a dollar amount and with a

		click it shows the information that was compiled to get that number.
51.	**Regarding Attachment D – RPT. 18 The system has the ability to create, retrieve, update, and report on structured and unstructured data. Could you elaborate on the context of the desired functionality?**	This might help explain: Structured vs. unstructured data can be understood by considering the who, what, when, where, and the how of the data: • Who will be using the data? • What type of data are you collecting? • When does the data need to be prepared before storage or when used? • Where will the data be stored? • How will the data be stored? These five questions highlight the fundamentals of both structured and unstructured data and allow general users to understand how the two differ.
52.	**Regarding Attachment D – RPT. 26 The system has the ability for analytic tools and reporting within the system to identify data duplication, discrepancies, and outliers. Could you provide a couple of examples of how you leverage the functionalities mentioned?**	We have to keep track of each numbered certificate. If the certificate number was already used and is a duplicate. If there are discrepancies with any information within the report being pulled.
53.	**Regarding Attachment D – DC.1 Funeral home name What is the proper way to interpret the value of "107-127" under the Quantity of Data Available column?**	This was the approximate number of Funeral Homes that we had ordering from us. We are now at approximately 150.
54.	**Regarding Attachment D – DC. 2 Site address (business address) For the data in DC. 2-21, is there a reason why no values have been given under the Quantity of Data Available and Quantity of Data Needed in Future System columns?**	This was left blank because it already explains the information we need to capture for each FH. In case we need to mail something, also so that information shows up on the invoices etc. It would also be for approximately 150 FH.
55.	**Regarding Attachment D – RF. 48 Mail-Combined Order Could you elaborate on the context of the desired functionality?**	FH will send in multiple orders for decedents and a "mail-combined order" would be mailed or shipped all together with their other orders. If it was designated "mail-individual order" it would be mailed by itself. For instance, to the family of the decedent. We also have orders designated to "hold for pickup." These are picked up by the FH.
56.	**Regarding Attachment D – RF. 58 Death correction - 1st copy Could you confirm if corrections only apply to death certificates and whether you charge for corrections, please?**	These would be set up with its own PE (program element) code "correction copy." This applies to birth and death certificates. FH can get a "corrected copy" for $5/per certificate as long as we are given the original certificates. After birth certificates are corrected with the information, a person can exchange it at no cost within a year of issuance.
57.	**Regarding Attachment D – RF. 59 Death correction - additional copies (each/count) Could you confirm if corrections only apply to death certificates and whether you charge for corrections, please?**	These would be set up with its own PE (program element) code "correction copy." This applies to birth and death certificates. FH can get a "corrected copy" for $5/per certificate as long as

		we are given the original certificates. After birth certificates are corrected with the information, a person can exchange it at no cost within a year of issuance.