

The State Bar of California  
**Online Payment Services**  
Request for Proposal: Questions and Responses

**7. Which financial institution is currently processing in person credit card transactions for the State Bar of California?**

*Wells Fargo Bank currently processes in person credit card transactions for the State Bar of California.*

**8. What is your billing cycle?**

*The annual billing cycle of membership fees and registration fees is in mid-November of each year.*

**9. What electronic payment methods do you offer today (e.g., auto debit, web payments, phone payments)?**

*The State Bar of California currently offers ACH (electronic check), credit card and debit card payment option through our website at <http://www.calbar.ca.gov>. Members, registrants and the general public can also make credit card or debit card payment by faxing in their credit card or debit card information to the State Bar of California.*

**10. Which other channels are you interested in offering your customers (Internet, IVR and/or Call Center)?**

*The State Bar of California intends to continue to offer our members, registrants and the general public the option to accept payments through our website at <http://www.calbar.ca.gov>, mail, fax and in person. We do not have immediate plans to establish payment methods through Integrated/Interactive Voice Response (IVR) and/or a Call Center. However, we may decide to implement these payment methods in the future if they prove to be necessary.*

**11. Do you plan to accept ACH (eCheck), credit/debit cards or both?**

*The State Bar of California currently accepts ACH (eCheck), credit card and debit card transactions. We intend to continue to accept these three forms of payments.*

**12. Is the California State Bar interested in charging a convenience fee? If so, do you plan to keep the convenience fee or would you like to consider having the prospective vendor act as an agent on your behalf (some industries may require this)?**

*The Board of Governors of the State Bar of California has elected to eliminate the convenience fee charge for the 2007 Billing Cycle.*

**13. Is the timeline for implementing a new payment-processing program set to go live on February 28, 2007?**

*It is ideal to have the new payment processing system to go live before February 28, 2007. However, there is a chance that the State Bar of California to extend the February 2007 due date if it is necessary that the development and testing effort to go beyond that date.*

**14. What else should we know in order to better understand your situation?**

*The Online Payment Services RFP should have provided a detail description of our situation and our intent. However, if you have any further questions and/or any part of the RFP is not clear, please do not hesitate to present your questions to Amy Tsui at [Amy.Tsui@calbar.ca.gov](mailto:Amy.Tsui@calbar.ca.gov). All questions from prospective vendors will be answered and the responses will be posted on the State Bar of California website.*

**15. Is the State Bar willing and able to establish a checking account with the prospective vendor to settle the transactions, charge-backs and fees?**

*The State Bar of California is open to negotiation to establish a checking account with the finalist to settle any transactions, charge-backs and fees.*

**16. With regard to Section B Item 1 End User's Experience, is the Bar pursuing a system that will allow the End User to build their own profile which includes the member number to be used as a key reference field. Would this profile also be used for selecting one time or recurring payments? Or would the Bar provide an End User database with payment due detail by member number?**

*The State Bar of California is interested in knowing what the prospective online payment vendor can offer in terms of end user's experience:*

- What kind of payment option, such as, ACH (electronic check) and types of credit card does your online payment system accept?*

- *Does your online payment system offer an interface for end user to set up his/her account information, such as name on credit card, billing address, credit card number, and credit card expiration date?*
- *Does your online payment system provide an interface for end user to view and edit his/her account information?*
- *Does your online payment system allow end user to review his/her payment history?*

*We are also interested in understanding the general architecture and the database schema as to how the data of the end user is stored and how it can be retrieved.*

*The State Bar of California currently stored payment detail by member number in our database system.*

**17. With regard to Credit Card acceptance does the Bar also intend to accept Debit Card transactions?**

*The State Bar of California currently accepts debit card transactions and we would like to continue to offer this payment option to our members, registrants and the general public.*

**18. Clarify the statement “The second phase will incorporate credit card transactions hosted by third party companies” in the second paragraph on page 8 of the RFP.**

*There are applications available on our website (<http://www.calbar.ca.gov>) that are being developed and hosted by organizations outside of the State Bar of California. Some of these applications offer online payment method through online payment vendor that are associated with these organizations. We would like to eventually coordinate all online payments through our chosen online payment vendor with these organizations.*

**19. What cards are now accepted?**

*The State Bar of California currently accepts both Visa and Master Card.*

**20. Who is the current card processor?**

*Wells Fargo Bank provides the current online payment services to the State Bar of California.*

**21. Please describe any proprietary software, and the Internet gateway provider.**

*The online payment services currently used by the State Bar of California is developed as a joint effort between the Information Technology Department and the current online payment service provider.*

**22. Does the Bar receive card transaction reports in paper or electronically?**

*The State Bar of California receives electronic credit card transaction reports from our current online payment services provider.*

**23. Please describe the second phase processing:**

**a. When will the second phase be implemented?**

*The Information Technology Department does not have a definite start date to begin the second phase implementation at this moment.*

**b. How does this differ from the existing online processing?**

*There should not be too much difference from the existing online processing. The development effort, however, may involve the third party companies that developed the applications the State Bar of California currently uses.*

**c. Are the third party companies outside organizations that are providing services and products to the Bar members?**

*Yes, the third party companies referenced in the RFP are outside organizations that are providing services and products to the State Bar of California members and registrants, and to the general public.*

**d. Please describe the manual transactions, are these telephones, or face to face, mail?**

*The manual transactions include mail-in, fax-in credit card and debit card, and walk-in.*

**e. Will the second phase also have ACH transactions?**

*Yes, the second phase should also include ACH transactions.*