



**REQUEST FOR PROPOSAL CLOUD-BASED ELECTRONIC FILING SOLUTION**  
**Questions and Answers # 3**  
**June 24, 2021**

1. Would you please consider our request to extend the submission date to 7/9/2021 - 5.00 p.m. pacific time?
  - The response due date has been extended to July 9, 2021.
2. Attachment A – Cost Proposal: The RFP mentions reference to Attachment A – Cost Proposal. Is there an Attachment/Cost Proposal template that could be provided? Or is it up to each vendors discretion on how to provide this as long as it is in .xls format?
  - Each vendor should include their cost proposal along with their response. No template is provided.
3. Submission via E-Mail: Could the e-mail response submission replace the Flash Drive submission entirely? Or, would an email submission also require a Flash Drive submission?
  - E-mail submission should be fine.
4. Payment Processing Solution Requirement: Would the State Bar be open to considering a payment processing platform other than CyberSource that provides an inherit integration with the proposed eFiling solution?
  - The State Bar prefers to use CyberSource as the payment processing solution, since it is already in use at the State Bar and fully integration with finance.
5. Section and Page #: General: E-Filing solutions (EFSP and EFM) are often priced according to a shared revenue model in which the cost of the system would be recovered through convenience fee charges to the filers, rather than a direct charge to SBC. According to the RFP, the users of the requested EFSP and EFM appear to be either indigent or government agency filers who will not be charged a filing fee. Is this interpretation correct?
  - That is correct. The State Bar will not be charging any fees for most filings. There are a few exceptions where the Court will charge for filings, but for the majority of the filers, there are no fees imposed to file with the State Bar Court.
6. Section and Page #: Section E. E-Filing Solution Requirements, page 5: The RFP contains some confusing references to attachments. Please respond to the following observations for clarification:
  - a. **The State Bar's Business Opportunity site for this RFP has posted "Attachment B: Vendor History Questionnaire." The RFP refers to "Nonfunctional Requirements (Attachment B)." Please confirm that "Attachment B: Vendor History Questionnaire"**

is correct and the reference to "Nonfunctional Requirements (Attachment B)" in the RFP is an error.

○ Attachment B is correct, and as posted it is "Vendor History Questionnaire."

- b. **The State Bar's Business Opportunity site for this RFP has posted "Attachment C: E-Filing functional requirements." The RFP refers to "Functional Requirements (Attachment A). Please confirm that "Attachment C: E-Filing functional requirements" is correct and the reference to "Functional Requirements (Attachment A)" in the RFP is an error.**

○ Attachment C: E-Filing Functional Requirements is correct. The reference to Functional Requirements as Attachment A is incorrect.

- c. **The RFP refers to "Attachment A: Itemized Cost Proposal." The State Bar's Business Opportunity site for this RFP does not have a posting for "Attachment A: Itemized Cost Proposal." Is "Attachment A: Itemized Cost Proposal" missing on the State Bar's Business Opportunity site for this RFP or are vendors to create their own "Attachment A: Itemized Cost Proposal"?**

○ The State Bar did not attach the Itemized Cost Proposal and would like vendors to submit their cost proposal for the solution as part of their response.

7. Section and Page #: Section D. Project Scope, page 5: According to the RFP, The State Bar is seeking a solution that "includes both an EFM and an I/GA EFSP." Is the State Bar using any EFSPs today? If so, please explain.

- The State Bar does not have any electronic filing solution in place at this time. The State Bar is seeking a complete electronic filing solution. SBC does not intend on using multiple service providers for this solution.

8. Section and Page #: Section E. E-Filing Solution Requirements, item 4.a, page 6: According to the RFP, the solution must "accept filings from all certified EFSP solutions." Does this requirement mean that vendors can respond to just the EFSP requirements and thus more than one provider may be chosen from this RFP?

- Please see response for question No. 7

9. Section and Page #: Section D. Project Scope, page 4: According to the RFP, the State Bar is seeking "pricing for electronic filing manager (EFM) and indigent/government agency (I/GA) electronic filing service provider (EFSP)." In this RFP, are you seeking a for-fee EFSP solution as well?

- As stated in the answer for question No. 7, the State Bar is seeking a full electronic filing solution, using one service provider. Also as stated in the answer for question No. 5, the State Bar Court does not charge for filings, except for a few matters, but for the majority of the filings, there are no costs to the filers. We are not seeking a for-fee solution.

10. Section and Page #: Section D. Project Scope, page 5: If the State Bar is not seeking a for-fee EFSP, please explain the following requirements:

- a. **Provide accounting support to allow the State Bar Court to reconcile for-fee EFSP filing.**

○ For those limited types of filings that have costs associated with them, the solution must have functionality that allows the State Bar Court to view the charges for these case types and reconcile them.

- b. **Provide a zero-cost e-filing option for indigent and government filers.**

- This requirement is to have an option in the solution that allows the State Bar Court to configure who pays and who does not pay for filings based on the type of filer. While we do not charge for most filings, should the State Bar Court rules change to include fees for filings, the State Bar Court would like the ability to select the types of filers that do not have to pay any fees for filing.
  - c. Integration to State Bar's payment processing solution, CyberSource.**
    - For the types of filings that the State Bar Court charges fees for, the payment processing should use the State Bar's payment processing solution.
11. Section and Page #: General: Would the State Bar consider a two-week extension to give vendors more time to respond to the Functional and Nonfunctional requirements, also allowing more time to take into consideration the State Bar's answers to vendors' questions, which may arrive within seven days of the response deadline?
- The response due date has been extended to July 9, 2021.
12. Section and Page #: General: What is your budget for this request?
- The State Bar cannot disclose the budget for the solution.
13. Can you clarify that our Proposal and attachments can be submitted via email in lieu of providing a flash drive? We read the Q&A post and just wanted to confirm that email submission instead of the mailed flash drive is okay, and not in addition to.
- That is correct. Email submission will be accepted.
14. On Attachment C, can you clarify the following requirements:
- a. EFI-014- What default values is the State Bar referring to?**
    - This requirement refers to the ability for the users to setup field defaults that they do not have to fill in each time they login to file.
  - b. EFI-071-Can the State bar provide an example of when an opt out email notification would be preferred or required in a case?**
    - This requirement refers to the ability for the e-file user to select which email notifications they want to receive based on the types of notifications (e.g. user does not want to be notified when the case has a new Event added (e.g. New witness identified). The gist of this requirement is to be able to have the flexibility in determining which notifications to include and which to exclude, so that it's not an "all of nothing" approach.