

## Attachment A

# FUNCTIONAL REQUIREMENTS CHECKLIST

Since RFI's are research-oriented, additional functionality that is available in Respondent's Solution, but not listed, should also be included in its response [e.g., hardware specifications, cloud services (if applicable), mobile applications/device connectivity, etc.]

Req #	Desirable Functional Requirement	Meets Requirement	Configuration/ Customization Required	Describe Functionality (Include the number of forms/screens/transactions to accomplish requirement)
<b>REQUEST SUBMISSION</b>				
1.	The Solution must provide a user-friendly public-facing portal that allows for the following:			
1a.	Users must be able to submit requests for records online via desktop, mobile, or tablet.			
1b.	Users must be able to attach files with their request submission (e.g., notarized release, attorney declaration).			
1c.	Users must be able to register for an account.			
1d.	The Solution must provide a verification process that requires users to upload proof of identification (e.g., driver's license, passport).			
1e.	The Solution must support customizable request forms that require users to fill out the following information:			
1e(i).	Name of requester.			
1e(ii).	Date of birth.			
1e(iii).	Driver's license.			
1e(iv).	Social Security number.			
1e(v).	Type of request (e.g., clearance letter, incarceration record, copy of report).			
1e(vi).	Incident date (if applicable)			
1e(vii).	Incident location (if applicable)			
1e(viii).	Type of incident (if applicable)			

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1f.	The Solution must incorporate real-time status updates, which will allow users to view the progress of their requests.			
1g.	The Solution must provide a frequently asked questions (FAQ) section on the user interface to address commonly asked questions.			
<b>REQUEST MANAGEMENT</b>				
2.	The Solution must provide an internal centralized dashboard for staff to:			
2a.	Manage requests for intake, tracking, processing, and delivery of public records.			
2b.	View statuses.			
2c.	Prioritize workloads by categorization, prioritization, and assignment.			
3.	The Solution must be capable of identifying duplicate requests.			
4.	The Solution must allow for the ability to set priorities based on factors such as requester status, request type, or legal deadlines.			
5.	The Solution must allow for the verification of records sealing.			
6.	The Solution must allow the following functionalities when processing a record request:			
6a.	Offer automated redaction tools that allow staff to identify and redact sensitive information.			
6b.	Include version control, which tracks and manages document versions throughout the request process.			
6c.	Allow staff to leave internal notes or comments on requests.			

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7.	The user interface must be intuitive and have a clear and straightforward application workflow for approval, which includes:			
7a.	Initial review and submission by staff to supervisor for review.			
7b.	Approval or modification of requests: if changes are needed, the Solution returns the request to the assigned staff with notes.			
7c.	Allow for electronic signature upon supervisor review and approval.			
<b>STATUS TRACKING AND NOTIFICATIONS</b>				
8.	The Solution must allow for real-time status updates, enabling users to view the progress of their requests.			
9.	The Solution must allow for automated notifications via email or SMS at key stages (e.g., when a request is received, in process, or completed.)			
10.	The Solution must allow for notifications of incomplete requests to gather missing information from users.			
11.	The Solution must allow for automatic deadline reminders to be sent to staff as key dates approach.			
<b>DOCUMENT MANAGEMENT AND REDACTION</b>				
12.	The Solution must allow users to upload documents, emails, attachments, and photos for research purposes.			
13.	The Solution must enable identification and redaction of sensitive information, such as Personally Identifiable Information (PII), using predefined patterns.			

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14.	The Solution must permit the ability to set expiration dates on document access links to maintain security.			
<b>REVIEW AND APPROVAL</b>				
15.	The Solution must allow for an initial review by staff to ensure the accuracy and completeness of documents.			
16.	The Solution must allow for legal or compliance approval by routing documents for review to verify adherence to regulatory requirements.			
17.	The Solution must allow for approval or modification requests by returning items to assigned staff with notes when changes are needed.			
18.	The Solution must allow for the use of electronic signatures to facilitate streamlined approvals.			
<b>COMMUNICATIONS AND COLLABORATION</b>				
19.	The Solution must allow for internal notes and comments, enabling staff to document information directly within each request.			
20.	The Solution must allow for direct messaging between requesters and staff to facilitate clear and efficient communication.			
21.	The Solution must allow for the use of template-based responses, providing predefined replies to streamline communication on common inquiries.			

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<b>SOLUTION ARCHITECTURE AND SECURITY</b>				
22.	The Solution architecture must support the ability to customize security authorization based on user roles by assigning application functionalities to specific user roles or groups.			
23.	The Solution must authenticate against Active Directory (AD) or Azure AD to delegate access control.			
24.	The Solution must maintain an audit trail logging all user activity.			
25.	The Solution must provide monitoring and alerts for service disruptions or failures.			
<b>FEE CALCULATION AND PAYMENT PROCESSING</b>				
26.	The Solution must include a dynamic fee calculation, which automatically calculate fees based on the type of request.			
27.	The Solution must provide integration with the County-approved payment gateway (WorldPay, formerly FIS), and allow for the processing of online payments.			
<b>COMPLIANCE, REPORTING, ANALYTICS AND METRICS</b>				
28.	The Solution must adhere to data privacy and transparency laws in conjunction with applicable Public Records Act (PRA) compliance.			
29.	The Solution must be capable of producing the following reports:			
29a.	Audit logs: detailed logging of all actions taken on each request, including access and edits.			
29b.	Performance metrics: tracks metrics such as average response time and number of requests completed by each staff.			

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29c.	Ad-hoc reports, including but not limited to, operational reports by section or user activity within specific parameters (e.g., dates/times).			
<b>CUSTOMER SATISFACTION</b>				
30.	The Solution must provide post-fulfilment feedback forms to gauge requester satisfaction.			
31.	The Solution must include an option to send follow-up surveys after requests are fulfilled.			

\*\* Please append additional functionalities for your Solution to this Attachment. \*\*