

Clay County, TX

Election Administration Election Document Management & Election Document Vault Services (EA EDM-EDV) v1

Clay County, Texas

Clay County Elections
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Date: 2/1/25

ECM Today!

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ADDENDA – Provided in a Second Document

- Addendum A: TSLRM Regulations for Electronic Documents of Record
- Addendum B: EDV Security Info Graphic
- Addendum B1: Image Capture Jobs Detail
- Addendum C: Imagesilo Product Sheet
- Addendum D: EA EDM-EDV TEAM Overview Diagram
- Addendum E: Sample Bar Code Separator Sheet
- Addendum F: EDV Quick Reference Guide QRG v1
- Addendum G: DigiTech-Systems-Imagesilo-Buyers-Lab-Product-Review

This Agreement between Clay County Elections (the County), located at 215 N. Houston St., Henrietta, TX 76365 and ECM Today! (ECM-T), with offices at 1999 Gulfmart, San Antonio TX 78217, is for designing, configuring, and implementing a Cloud Election Document Management System and Election Document Vault (EDM-EDV) powered by Digitech Systems Inc. and assisting the County with the conversion of existing VISTA documents into the EDV. This agreement is for March 1, 2025 through December 31, 2026.

This document provides Objectives, ECM-T and County requirements, System Set-up, Procedures for Ongoing Image Capture and Processing, Procedures for Backfile Digitization, Specifications and Functionality of the Election Document Vault, TEAM Integrations, Election records processing Workflows and Other Utilities, a High-Level Timeline, Pricing and Payment terms, Terms and Conditions, and Acceptance page. Addenda follow the Acceptance page:

- A. TSLRM Regulations for Electronic Documents of Record
- B. EDV Security Info Graphic
- B1. Image Capture Jobs Detail
- C. ImageSilo Product Sheet
- D. EA EDM-EDV TEAM Overview Diagram
- E. Sample BC Separator Sheet
- F. Sample EDV Quick Reference Guide QRG v1
- G. Digitech-Systems-ImageSilo-Buyers-Lab-Product-Review

Objectives

To Improve document security and processing efficiency by implementing a Cloud Electronic Document Management System and Cloud Election Document Vault integrated with TEAMS. To utilize advanced Document Capture & Image Processing as well as a comprehensive Electronic Document Management system (EDV) offering extensive functionality not provided by Civix, VISTA and other existing systems. To Provide Backfile Digitization Services for hardcopy and existing images in other systems or file servers for export onto the Election Document Vault. To Provide ongoing scanning services as needed during peak processing periods. To provide an Electronic Document Management infrastructure for use for other county departments with minimal set-up and implementation costs.

ECM-T and County Requirements

ECM-T Requirements

- 1) Capture / Image Processing, Electronic Document and Vault hardware, software and procedures meets requirements for creating electronic documents of records from hardcopy documents. *See Addendum A - TSLRM Regulations for Electronic Documents of Record*
- 2) EDM/EDV is a TX-RAMP Certified Cloud product (Texas Risk and Authorization Management Program)
- 3) The system is software agnostic (interoperable across other systems), to allow for integration with any Voter Registration application.
- 4) All data is held in a non-proprietary format, managed and controlled solely by the County.

(ECM-T and County Requirements – continued)

- 5) Archive Security – ECM-T and Digitech Imagesilo provide the highest level of security from Image Capture through Image Processing to Image Archive / Retrieval. (See Addendum B - EDV Security Info Graphic)
- a) Application Security
- b) Physical Security
- c) Data Security
- d) System Security
- e) Transmission Security

- 6) ECM Today provides a dedicated Project Manager responsible for meeting the requirements as outlined in this Agreement. The ECM-T Project Manager will work with the County Project Manager to define weekly reporting requirements, milestone charts, progress reports, documentation, and deliverables.

- 7) ECM Today meets all requirements included in this and any subsequent Scope(s) of Work.
- 8) The system provides the following baseline functionality:
 - a) Advances Image Capture including OCR, Bar Code, Direct Import of documents from TEAMS
 - b) Secure Cloud Storage, Records Management, Electronic Workflows (See Below), Reporting
 - a) 20 Metadata fields including Voter Returned & USPS Returned fields
 - b) Access to Archived Docs from within TEAM
 - c) Voter Records, BBM, Election Records, Public Access document vaults
 - d) Notes capability provided for each voter – textual notes can be added and tracked
 - e) Annotations ("Post-It" notes, Redactions, Standard Information Stamps etc.)
 - f) Unlimited additional doc types / archives
 - g) Includes a Verification step pre-archive
 - h) Nightly refresh of archive Metadata using the Voter List (can be as often as required)
 - i) Does not require a folder created for each Voter - Eliminates Duplicate Folders
- 9) Working with the County we will develop the procedures for the import of images from Vista, existing VREMS, images stored on file servers, and scanning and processing of hardcopy backfile for export to the County's Election Document Vault.
- 10) ECM-T will provide pricing and installation for new scanners if required.

County Requirements

- 1) Assign a County Project Manager – Key point of contact within the County to liaise with ECM-T Project Manager to exchange ideas, project directives, change notices, and other critical communications.

- 2) Provide SQL on and ECM-T Server. May be a Virtual Machine.
- 3) Provide TEAM reports and access for ECM-T as needed to support the EDM-EDV.

System Set-Up: Capture, EDV, MM Database, RPA, BBM Label Utility

- 1) **Capture:** Define the required metadata for each document type, define parameters for creation of each metadata field, define means of populating data for each metadata field.
 - a) Install SQL Server (may be SQL Express, depending on volume)
 - b) Capture Software installed and configured on Capture Workstation(s) and Scanner(s)
 - c) Map each w/s to SQL on an ECM-T Server (may be VM) for Match and Merge (MM) – See 3) below
 - d) The Following Capture Jobs are included – See Addendum B1: Image Capture Job Details
 SCAN – 1 Page Front (only the front page is needed) | SCAN – 2 Sides 1 Doc (1 Front and Back Page Doc – e.g., VR Card, USPS, FPCA, Returned Notices) | SCAN – Multi-Page Manual (Scan all docs in as one doc and Manually break using Thumbnails) | SCAN – Multi-Page Separator (Insert a Bar Code separator page to create Documents) | IMPORT – DPS-TOA | IMPORT - Outgoing Notices
- 2) **EDV – Voter Records, BBM, Election Records, Public Access:** We create a “Voter Records” Project using Capture metadata (See Table - may be modified as part of Analysis-Assessment) – We define Security Groups for Access & Functionality - We set up Records Management protocols. We also create an “BBM” and “Elections Records” cabinets as part of this project. An optional “Public Access” cabinet can be added to give access to records such as Ballot, CVR, Campaign Finance, and other records. – See Addendum C – ImageSilo Product Sheet

EDV #	Description	Entry	Field Type	Sticky	Reqrd	PVC	EDV	Notes
1	VUID	BC - Man	Numeric	No	Yes	Yes	Yes	RPA BOT Creates and Moves to MM
2	Name	Db Pull	Text	No	Yes	Yes	Yes	VL MM Last, First Middle
3	DOB	Manual	Date	No	No	Yes	Yes	mm/dd/yyyy
4	Precinct	Db Pull	Text	No	No	Yes	Yes	VL Db Pull
5	Doc Type	Drop Down	Text	Yes	Yes	Yes	Yes	Drop Down See Below
6	Voter Returned	Manual	Text	No	No	Yes	Yes	Drop Down "Yes" for auto-fill
7	USPS Returned	Manual	Text	No	No	Yes	Yes	Drop Down "Yes" for auto-fill
8	TDL	Manual /ZOCR	Numeric	No	No	Yes	Yes	From DPS or Manual
9	SSN	Manual /ZOCR	SSN	No	No	Yes	Yes	From DPS or Manual
10	Phone	Manual /ZOCR	Phone	No	No	Yes	Yes	
11	EDR	Db Pull	mm/dd/yyyy	No	No	Yes	Yes	Effective Date of Registration - VL Db Pull
12	Status Code	Db Pull	Text	No	No	Yes	Yes	Specific Docs? Trigger 22 Mo.
13	Status Date	Db Pull	Text	No	No	Yes	Yes	
14	Election Name	DD / Man	Text	No	No	No	Yes	Manual Add by EA for Specific Docs
15	City	Db Pull	Text	No	No	No	Yes	Naming Conflict in Ppflw - MM in EDV
16	School	Db Pull	Text	No	No	Yes	Yes	VL Db Pull
17	District	Db Pull	Text	No	No	Yes	Yes	VL Db Pull
18	Date Created	Sys	Date	No	Yes	No	Yes	ECM-T - Populated at export to EDV
19	Batch Name	Sys	TBD	Yes	Yes	No	Yes	ECM-T - Populated at export to EDV
20	Doc ID	Sys	Number	No	Yes	No	Yes	ECM-T - Populated at export to EDV

- 3) **Match and Merge (MM):** Set-up SQL Db for Voter List used for MM – Map to SQL and Capture w/s. This data is also used to run a nightly refresh of archive metadata using the VUID as a Key Reference

(System set-up – continued)

4) RPA (Automations)

- i) Saving Voter List to MM (Match and Merge) SQL Db
- ii) Image-Enable TEAM to pull document from the EDV from within TEAM
- iii) Pull Status Code from TEAMS, update EDV, start 22 mo. Email alert generated to delete from EDV
- iv) Future Phases:
 - (1) Electronic Workflows for Tracking Approval and Return of documents
 - (2) Pull ABBM address data from TEAMS and create Labels with BC

Procedures for Ongoing Image Capture / Processing

See Addendum B1 Image Capture Jobs Detail

- 1) Capture: SCAN jobs: Batch Scanning – Documents separate automatically and insert UUID as Index data (Quick Click Scan or manual for documents without TEAM UUID bar code)
 - a) In PaperFlow create a new Batch. Select the appropriate Scan job for the documents scanned
 - b) 200-300 dpi b/w, color – pdf – Group IV Compression – Backfile digitization will utilize software that detects b/w or color automatically. (Set for Optimal image quality)
 - c) Scan to Batch created in Step 1
 - d) If using the job "SCAN Multi Page Separator Break" insert a Bar Coded separator sheet between each documents. See Addendum E – Sample Bar Code Separator Sheet
 - e) Insert All documents and separator sheets inserted into scanner
 - f) Scan documents into PaperFlow for processing – Can Rescan and insert image as necessary
- 2) Capture: TEAM Direct Document Import jobs:
 - a) For DPS / TOA documents, print to download folder as PDF. For Outgoing Notices, and other TEAMS Docs, create Batch Print File in TEAMS - Print to Download folder as multi-page PDF
 - b) In PaperFlow, create a Batch using a "IMPORT:" job
 - c) Drag files from Download folder to Batch created in Set-Up 1) or Click "Open" to move images into the Capture application for processing
 - d) Documents are now in the Capture application, PaperFlow, for processing
- 3) Capture: Process / Index / Verify – These steps are the same for Scanned and Imported documents
 - a) Auto-Processing steps are defined by the job and may include:
 - i) Image Process – Optimizes legibility – De-speckle, de-skew, enhance contrast
 - ii) Document Separation – On Bar Code or Page Count (Note: Can be manually separated at Index Step)
 - iii) UUID Bar Code Read – Insert data in UUID Field
 - iv) Auto-processing is also used as part of Indexing

(Capture: Process / Index / Verify – continued)

- b) Indexing
 - i) Match and Merge – VUID pulls data from MM Db (Batch MM step)
 - ii) Confirm separation and MM completion
 - iii) Manually Separate Docs as required – Use F5 to pull individual doc MM data
 - iv) Rotate docs if required
 - v) Use Doc Type Drop Down – Only need to choose for 1st document of each to Doc Type
- c) Export Batch to EDV – If required, ECM-T will set up a dual export of data to a County Server
- 4) Verification in Election Document Vault – Using the Capture Batch #, review & verify each doc in the Batch

Election Document Vault (EDV) – Powered by ImageSilo a Digitech Systems Product

Our Cloud Electronic Document Management (EDM) service, powered by Digitech Systems' ImageSilo application, provides secure cloud-based archiving and records management to the County in the event that your network becomes compromised, or your facility becomes unusable. The Election Document Vault contains the electronic documents of record created using ECM-T services, from the County's hardcopy documents, from TEAMS documents, and from existing image files. The EDV provides secure access and can be made immediately available to multiple users as required.

Users can search by any field or combination of fields. With the proper permissions, the user can email or grant access to specific documents and can annotate or attach notes to documents. All access is auditable and trackable. Your documents are archived in a non-proprietary format. You have sole control of your documents. Your documents cannot be accessed by anyone outside your organization without your permission.

This service provides the functionality to Integrate access to your records with TEAMS by "image- enabling" the TEAM application. This functionality will not be affected by Civix/TEAMS. Using ECM-T services, there is no need for exporting your images and importing them to Civix TEAMS.

Please see the Addenda for additional information about ImageSilo and the Election Document Vault.

- Addendum B: Illustrates how ECM Today! and Digitech provide Security for your Documents
 - Application Security
 - Physical Security
 - Data Security
 - System Security
 - Transmission Security
- Addendum C: The Image Silo Technical Specification provide information for your IT staff
- Addendum F : ECM Today! provides Quick Reference Guides similar to this sample to show the County's Users how to access Voter Records in ImageSilo, your Election Document Vault
- Addendum G: Digitech-Systems-ImageSilo-Buyers-Lab-Product-Review - Our Electronic Document Vault is powered by Digitech's Systems ImageSilo. ImageSilo is a 2024 Buyers Lab Platinum Pick for Outstanding Cloud Information Management System.

EDM Processing Services and the Election Document Vault – EA EDM-EDV v1

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TEAMS / Civix Integrations

1) Creating Voter's List and saving to MM (Match and Merge) SQL DB

2) Updating your EDV metadata using the Voter's List data

3) Pull ABBM address data from TEAMS and create Labels with 2D BC

4) Retrieval of Docs from EDV from the "Inquiry – View Voter Registration / View Correspondence" screens and other locations within TEAMS through "Image Enabling"

5) Voter List Data & the Cancellation Utility: Status Code, Status Date, EDR, District, City, and Precinct metadata is pulled from the Voter List – EDV Status code is refreshed using the Voter List MM dataset to trigger our Cancellation Utility. When Status is changed to Cancelled, a 22 Month clock starts at the end of which the system administrator will be asked if the documents associated with the cancelled UUID should be deleted from the EDV.

Election Document Processing Workflows and Other Utilities

The ECM Today system includes a robust, easy to use Workflow component. Workflow is an optional service to be priced based on the workflow(s) requested.

Workflows can replace manual processes and simplify tracking of documents sent and documents returned. Doc Type can trigger different Workflows. ECM-T will work with the County to develop ways to use electronic workflows to replace hardcopy processes. Here are some Examples:

- Notice of Examination
 - o All into workflow as received from TEAMS
 - o When returned – "Voter Returned" field changed to Yes
 - o Data entered in TEAMS and TEAMS Date field populated
 - o If not returned within 10 days – "Cancelled" field changed to Yes in TEAMS – Voter List MM populates "C" in Status Code field to start a 22-month clock at end of which a notification is sent that the document is ready for deletion
- TOA Signature Tracking
- Audit / Maintenance
- Cancellations
- ABBM/BBM – Contact to Count Tracking

High Level Timelines

We will add detail to this high-level timeline as part of the project kick-off.
Election Document Management – Election Document Vault

Wk. 1	Project kick-off – Process and Procedures finalized
Wk. 2	EDV Built and Tested – Ready for Import of Existing Documents – Image Scanning / Import and Image Processing procedures reviewed and approved by the County
Wk. 3	Set-Up Capture on-site – Set-up TEAM DB RPA Begin Internal Testing, County Testing and Training
Wk. 5	County can start processing ongoing records into EDV
TBD	Dependency: Existing Files Received: Begin Importing Existing File Images into the Election Document Vault – Users Trained – Completion of Import TBD

Pricing and Payment Terms

See tables on next page for pricing details.

\$4,368.00	One Time EDM-EDV Set-Up: Analysis-Assessment, Design, Configuration, Define Security Parameters, Implementation, Internal Testing, UAT Testing, Training and Documentation, User Acceptance Testing, and Roll-Out
\$878.00 1st Yr \$3,510.00 2nd Yr	Annual EDM-EDV System Fees: Includes all Hardware & Software for the Election Document Management System and Election Document Vault (excluding scanners provided by the County) - Includes all Upgrades, Maintenance and Support. Includes User Support and Ongoing Training on demand.
\$0.00	Conversion of Existing Vista Documents included. County downloads existing VISTA Images from Vista to a flash-drive. ECM-T will import to the EDV at no charge.
Scanner TBD	\$649 Epson DS-770 II - 65 ppm / 90 ipm - 100 Sheet adf - 7,000 Sheet daily Duty Cycle \$1,099 Epson DS-870 - 65 ppm / 130 ipm - 100 Sheet adf - 10,000 Sheet daily Duty Cycle

Other Professional Services Hours: \$185 per Hour

- Add new EDV Projects and Capture Jobs
- Create New Projects and Capture Jobs
- Modify existing implementation due to future changes in the County's network or TEAMS application
- Add Electronic Workflows or other Election Document Management functionality

Payment Terms

- Pricing Includes travel, shipping, handling, and tax
- \$5,246 – One-Time Cost due at Signing Set-Up, Implementation etc.
- Subsequent EDM-EDV System fees billed Annually January 1.
- Invoices payable upon receipt

See Next Page for Pricing Detail

EDM Processing Services and the

Election Document Vault – EA EDM-EDV v1

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Pricing Detail

1st Yr	2nd Yr	1st Yr	2nd Yr	1st Yr	2nd Yr
3/1/25 - 12/31/25	1/1/26 - 12/31/26	0			
One-Time Set-Up Implementation, Testing, Training		\$4,368		\$3,510	
Image Capture and Election Document Vault		\$878		\$3,510	
TOTAL		\$5,246		\$3,510	
Installation, Configuration, Implementation		Hours	Rate	One-Time	
EDM-EDV Set-Up		24	\$195	\$4,680	
- Analysis / Assessment					
- Configure Project Archives					
- Configure 1 Capture Workstations and Scanners					
- Set Security Parameters - Set-Up 2 Users					
- Implementation, Internal Testing					
- Training, Documentation					
- User Acceptance Test (UAT) and Roll-out					
TEAMS Integrations		8	\$195	\$1,560	
- Integrate TEAMS to EDV for doc Retrieval w/in					
- RPA to pull OLRV / Voter List to use in Capture					
30% Discount				\$1,872	
One-Time				\$4,368	

Ongoing Services		Monthly	Annual
Electronic Document Capture Services - Scanning and Image Import		\$200	\$2,400
- 1 Image Capture 120k w/s - Scanning/Image Processing - \$165 user/mo.			
- Software Support, Maintenance, Upgrades, & Training on Demand			
Election Document Vault: Archive, Retrieval, & Doc Management Services		\$250	\$3,000
- 2 Named Users - \$125 user/mo.			
- Software Support, Maintenance, Upgrades, & Training on Demand			
Includes 10GB under Management (Currently 6 GB archived) - Additional GB over 10GB, \$25 per month			
35% Discount			\$1,890
Total			\$3,510

Terms and Conditions

Acceptance of this Agreement is intended to create a legal binding agreement between ECM Today and Clay County (Client). This Agreement represents the entire agreement between the parties. Any changes to the terms of this Agreement must be in writing and signed by both parties.

Pricing does not include travel, shipping, handling, or tax unless otherwise specified. Pricing is valid for 60 days from date of proposal. Invoice terms are on receipt. Project Work will be performed Monday through Friday 8 am to 5 pm CST. After-hours support is available for an additional fee.

- This Agreement will be effective as of the date it is signed by both parties. The Client will be invoiced per the billing schedule and payment terms and conditions.
- Project delays resulting from the Client inability to meet agreed-upon responsibilities and deadlines/milestones will impact the timeline of this Agreement and will be considered outside ECM Today's control. Client will be invoiced for all timelines and milestones that are postponed or delayed where ECM Today resources were in place. Delays or missed established SLA's will not impact ECM Today, the project delivery or penalize ECM Today in any way if caused by Client.
- In the event the assistance of Client's 3rd Party vendors is required, Client will make all necessary advanced communications, delivery arrangements and service requests in a manner which will not impact or delay ECM Today in delivering services in this agreement. Delays associated with Client's 3rd party vendors will be billed at ECM Today's time and materials rate per hour.
- The cost herein is based on delivering the services and deliverables as described in this Agreement. Changes to the scope, deliverables and/or assumptions will require a Change Request executed by both parties.
- Services that require weekend or holiday work will be charged at one and a half times (1.5) the normal rate unless otherwise agreed in this statement of work.

Termination

Either party may terminate this Agreement in the event of a breach by the other party or non-performance. However, before exercising its right to terminate, the non-breaching party shall send written notice to party allegedly in breach, describing in what way such party is allegedly in breach. The party claimed to be in breach shall have a reasonable time not to exceed seven (7) business days in which to cure the alleged breach. Each party will deal with the other in good faith to attempt reasonably to resolve any problems or disputes that may arise in order to try to prevent a breach from occurring. If it is mutually determined that termination of this Agreement is the final recourse, ECM Today will be made whole for all expenses incurred by ECM Today under this Agreement. ECM Today will return all intellectual property to Client shared in this Agreement. The provisions of Sections "Billing Schedule, Terms & Conditions, Termination, Confidentiality, Notices, Governing Law, Successors and Assigns, Waiver, and Modification" shall survive termination or expiration of this Agreement.

Confidentiality

During the term of this Agreement, Client may disclose to ECM Today confidential and proprietary information relating to its business operations ("Confidential Information"). All Confidential Information disclosed by Client to ECM Today under this Agreement shall be (i) received in confidence, (ii) used only for purposes of this Agreement, and (iii) protected in the same manner as ECM Today protects its own confidential information of like kind (which shall be at least a reasonable manner). ECM Today shall always comply with applicable professional standards with respect to Client's Confidential Information.

(Confidentiality – continued)

Confidential information does not include information that (i) is or becomes generally available to the public without breach by ECM Today of its confidentiality obligations, (ii) is received by ECM Today from a third party without restriction against disclosure, or ECM Today can demonstrate (iii) was known to ECM Today without restriction prior to disclosure by Client, ECM Today's obligation of confidentiality shall survive the expiration or termination of this Agreement.

Notices

All notices and other communications required or permitted hereunder shall be in writing and, unless otherwise provided in this Agreement, shall be deemed to have been duly given when delivered in person or when dispatched by electronic facsimile transfer, confirmed in writing by mail simultaneously dispatched, or one business day after having been dispatched by a nationally recognized overnight courier service to the appropriate party at the address specified below:

(a) If to Clay County, to:

Clay County Elections
214 N. Main Street
Henrietta, TX 76365
(Attn: Val McClain)
val.mcclain@co.clay.tx.us

(b) If to ECM Today, to:

ECM Today
1999 Gulfmart St. Suite 507
San Antonio, TX 78217
(Attn: Casey Mcclain)
Casey@ecmtoday.com

or to such other address or addresses as any such party may from time to time designate as to itself by like notice.

Acceptance

IN WITNESS WHEREOF, the parties have executed this Agreement the day and year first above written.

Accepted by:

Clay County, Texas

ECM Today!

MIKE CAMPBELL, COUNTY JUDGE
Print Name and Title

Casey L. McClellan, CEO
Print Name and Title


Signature

Signature

2/10/2025
Date

Date