



St. Tammany Parish Clerk of Court Request For Proposal

REQUEST FOR PROPOSAL

Issued by: St. Tammany Parish Clerk of Court

RFP No.: 2025-#001

Case Management System Proposal

Date: July 9, 2025

PART I. ADMINISTRATIVE AND GENERAL INFORMATION

1.1 Background

The Clerk of Court is responsible for maintaining and preserving the official records of St. Tammany Parish, among other tasks. This includes processing and recording all land records, UCC documents, and civil and criminal court proceedings for the 22nd Judicial District. Additional duties include issuing marriage licenses, providing copies of birth and death records, processing passports, overseeing elections, and managing election equipment and personnel. The office operates as a fee-for-service agency without any direct support or funding whatsoever.

1.2 Purpose

The St. Tammany Parish Clerk of Court seeks to identify and retain a qualified vendor to provide a high-quality, cost-effective Case Management System (CMS). The CMS must be compliant with Louisiana Supreme Court CMIS reporting standards, with CMIS reporting automated. The selected system must enable efficient access to civil, criminal, land, marriage records, and historical index books through a single constituent portal.

This system is necessary to modernize the Clerk's ability to serve the public through a unified, user-friendly portal that allows constituents to access all civil, criminal, land, marriage, and historical records in one place. Additionally, the new case management system must enhance the Clerk's internal ability to process documents efficiently and meet the growing demands of our courts and community. The Clerk's office seeks to improve transparency, streamline operations, and provide digital services that match the expectations of today's public. The current programs previously selected by the prior clerks of court are either unusable, obsolete, or unsupported.



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1.3 Goals and Objectives

- Acquire a robust, cloud-hosted CMS in active use in Louisiana.
- Ensure automated LASC CMIS reporting compliance.
- Provide unified, public-facing access to multiple records with no profit sharing.
- Enable seamless data migration, full auditing, and future-forward integration.
- Successfully import existing data from Odyssey, GRIDS, and any other legacy platforms the clerk is currently using.
- Ensure necessary support, maintenance, and updating services are at a set and reasonable cost.

1.4 Definitions

- **CMS:** Case Management System
- **CMIS:** Louisiana Supreme Court Case Management Information System
- **GRIDS:** An older case management system previously used for civil and criminal cases. It is currently used only for non-support (child support enforcement) cases.

1.5 Schedule of Events

- **RFP Issue Date:** Wednesday July 9, 2025
- **Electronic Inquiries Receipt Deadline:** Friday, July 18, 2025, 3:30 PM
- **Electronic Inquiries Response Deadline:** Wednesday, July 23, 2025, 3:30 PM
- **Proposal Submission Deadline:** Monday, August 11, 2025, 3:30 PM
- **Evaluation and Demonstrations:** Tuesday, August 12 – Thursday, August 28, 2025
- **Notice of Intent to Award:** Thursday, September 25, 2025, 3:30 PM
- **Contract Execution Date:** Monday, November 24, 2025
- **All dates are in compliance with the laws and/or internal policies governing requests for proposals**

1.6 Inquiry Submittal



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All inquiries concerning this Request for Proposal must be submitted in writing to the contact listed in Part VI. Inquiries must be received no later than July 18, 2025, at 3:30 PM. Official responses to all written inquiries will be issued in the form of an addendum to the RFP and posted publicly, if applicable. No negotiations, decisions, or actions shall be initiated by any vendor because of any verbal discussion with a Clerk of Court employee.

1.7 Proposal Submittal

Proposals must be submitted electronically via email to the designated contact listed in Part VI. All proposals must be received by the Proposal Submission Deadline stated in Section 1.5. Late submissions will not be considered.

Each proposal must include:

- One (1) signed digital version in PDF format
- All attachments and appendices clearly labeled
- Subject line of the email must state: **“RFP No. 2025-#001 – Case Management System Proposal”**

Vendors are responsible for ensuring successful and timely electronic delivery. Confirmation of receipt will be provided via email.

PART II. EVALUATION

Proposals will be evaluated based on the following criteria:

- Compliance with RFP specifications
 - Demonstrated experience and references
 - Total cost of ownership
 - Usability and scalability of the proposed system
 - Vendor’s support, training capabilities, and live demo quality
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PART III. PROPOSAL RESPONSE FORMAT

3.1 Cover Letter

Include a signed summary by an authorized representative confirming the ability to meet specifications and contract obligations.

3.2 Proposal Format

- Project Plan with Timeline and Milestones
- Demonstrated Experience and Louisiana Implementations
- CMIS Compliance Documentation
- Implementation and Support Plans
- Live Demonstration Schedule and Access
- Detailed Pricing and Licensing Structure
- Detailed support program for maintenance and updates, including clear cost parameters
- Completed Compliance Matrix (see “Specifications Checklist” in Part VI)

3.3 Number of Digital Files

Each vendor shall submit:

- One (1) signed complete proposal in PDF format
- One (1) completed compliance matrix (Excel or PDF)
- Any supporting documents clearly labeled and attached separately, if needed

All documents must be attached to a single email and submitted per Section 1.7.

3.4 Legibility/Clarity

Responses must be legible, organized, and presented in a clear and coherent manner. All information must be complete and easily verifiable. The Clerk of Court reserves the right to disqualify any proposal that does not meet these standards.

3.5 Confidentiality



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The contents of all proposals will be kept confidential until the selection process is complete, and a contract is executed. Vendors should mark any proprietary or confidential information accordingly. However, all documents submitted in response to this RFP are subject to the Louisiana Public Records Act and may be released if required by law. The vendor will be responsible for asserting any objection to the release of information.

3.6 Proposer Inquiry Periods

The inquiry period for this RFP will close on the date listed in Section 1.5. Proposers are encouraged to submit inquiries early to ensure sufficient time for response and preparation. No further questions or requests for clarification will be accepted after the inquiry deadline. Responses to inquiries will be shared with all known potential proposers via a public addendum, if applicable.

3.7 Changes, Addenda, Withdrawals

The Clerk of Court reserves the right to modify this RFP by issuance of one or more addenda. Any changes or clarifications will be issued in writing and distributed to all known potential proposers. It is the responsibility of each proposer to ensure receipt of all addenda prior to submitting a proposal.

Proposers may withdraw or revise a proposal after submission, provided the revision or written notice of withdrawal is received by the Clerk of Court prior to the proposal submission deadline.

3.8 Cost of Offer Preparation

The Clerk of Court shall not be liable for any costs incurred by proposers in the preparation or submission of proposals. All costs associated with the development of a proposal and any other related activities are solely the responsibility of the proposer.

3.9 Non-Negotiable Contract Terms

By submitting a proposal, the proposer acknowledges and agrees to the non-negotiable contract terms outlined in Part V of this RFP. Any proposal that fails to accept or attempts to materially alter these terms may be deemed non-responsive and rejected at the Clerk of Court's discretion.

3.10 Taxes



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The Clerk of Court is exempt from Louisiana state and local sales and use taxes to the extent allowed by law. Vendors should not include these taxes in their cost proposals unless required by applicable law.

3.11 Proposal Validity

All proposals submitted in response to this RFP shall remain valid for a period of **ninety (90) days** from the date of submission. This period may be extended by a mutual written agreement between the Clerk of Court and the proposer.

3.12 Prime Proposer's Responsibilities

The selected proposer shall be required to assume responsibility for all services offered in the proposal, regardless of whether the proposer performs them directly. The Clerk of Court will consider the selected proposer to be the sole point of contact regarding contractual matters, including payment of all charges resulting from the contract.

3.13 Acceptance of Proposal Content

The contents of the selected proposal, including any commitments, representations, and pricing, shall become contractual obligations if a contract is awarded. Failure to accept these obligations may result in cancellation of the award. The Clerk of Court reserves the right to negotiate final terms and conditions with the selected proposer prior to contract execution.

3.14 Ownership of Proposal

All materials submitted in response to this RFP shall become the property of the Clerk of Court. Selection or rejection of a proposal does not affect this right. The Clerk of Court shall have the right to use any or all intellectual property or adaptations of intellectual property presented in any proposal unless otherwise restricted by law.

3.15 Contract Negotiations

The Clerk of Court reserves the right to negotiate a contract with the selected proposer that includes the final scope of work, project schedule, payment terms, and other relevant provisions as determined by the Clerk of Court at her sole and exclusive determination. If contract negotiations cannot be concluded successfully, the Clerk of Court reserves the right to negotiate with the next highest-rated proposer or reissue the RFP.

3.16 Cancellation of RFP or Rejection of Proposals



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Issuance of this RFP in no way constitutes a commitment by the Clerk of Court to award a contract. The Clerk of Court reserves the right to reject all proposals or to cancel this RFP at the sole and exclusive discretion of the clerk of court. Such action may occur at any time prior to the execution of a contract with the selected proposer. This RFP does not create a contractual obligation by the clerk of court.

3.17 Evaluation and Selection

The Clerk of Court will evaluate all proposals in accordance with the criteria outlined in Part II of this RFP. Final selection may include an invitation for a live demonstration and clarification which shall be made by the vendor. The Clerk of Court reserves the right to verify any part of a vendor's proposal and to reject any proposal not in compliance with the RFP requirements. This RFP does not create a contractual obligation by the clerk of court.

3.18 Award

The contract shall be awarded to the proposer whose proposal is determined to be the most advantageous to the Clerk of Court, taking into consideration price and the evaluation factors set forth in this RFP. The Clerk of Court reserves the right to award in whole or in part, and to negotiate final terms with the selected proposer.

3.19 Notice of Intent to Award

After the evaluation of proposals and completion of any necessary demonstrations or clarifications, the Clerk of Court will issue a Notice of Intent to Award to the proposer whose proposal is determined by the clerk of court to be the most advantageous. The notice will be sent to all proposers and will include the anticipated awardee and any applicable next steps. This notice does not constitute a binding contract.

3.20 Indemnification

The proposer agrees to indemnify, defend, and hold harmless the St. Tammany Parish Clerk of Court, its elected officials, employees, and agents from and against any and all claims, damages, losses, and expenses (including attorney's fees) arising out of or resulting from the proposer's performance under this RFP or any resulting contract, provided such claim is caused by the negligent act, omission, or willful misconduct of the proposer or its employees, subcontractors, or agents.

3.21 Payment for Services



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The Clerk of Court shall make payments to the successful proposer in accordance with the terms of the negotiated contract. Payment will be made based on satisfactory completion of deliverables and milestones as outlined in the implementation plan as approved by the clerk of court. No advance payments will be made. Invoices must be itemized and include appropriate supporting documentation.

3.22 Termination

The Clerk of Court reserves the right to terminate any contract resulting from this RFP for cause or for convenience at the sole and exclusive discretion of the Clerk of court. Termination for cause shall include, but not be limited to, failure to meet performance requirements, failure to deliver within the specified time frame, or failure to comply with the terms and conditions of the contract. Termination for convenience shall be made with written notice provided at least thirty (30) days in advance. In the event of termination, the Clerk of Court shall only be liable for payment for services satisfactorily rendered up to the termination date.

3.23 Assignment

The selected proposer shall not assign, transfer, convey, or otherwise dispose of the contract or any part thereof, or its right, title, or interest therein, without the prior written consent of the Clerk of Court. Any unauthorized assignment shall be null and void.

3.24 EEOC and ADA Compliance

The selected proposer shall comply with all applicable local, state, and federal laws and regulations relating to nondiscrimination and accessibility in employment and public services. This includes, but is not limited to, ensuring equal opportunity regardless of race, color, religion, sex, national origin, disability status, or other classifications as may be protected under law.

PART IV. SCOPE OF WORK / DELIVERABLES

4.1 Case Management System Requirements

The CMS must:



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- Be cloud-hosted and secure
- Be actively in use in Louisiana
- Be compliant with automated Louisiana Supreme Court CMIS reporting
- Provide unified public portal (no profit sharing)
- Be fully auditable and scalable to a minimum of 150 concurrent users
- Include dashboards, system logs, and integration flexibility

4.2 Legacy Data Conversion

The vendor must:

- Convert all legacy land records, metadata, and any other records which the clerk of court is required to maintain
- Convert GRIDS support enforcement data
- Convert all historical financial data
- Certify data accuracy and integrity post-migration

4.3 System Features and Functionality

- Public Portal with secure, user-friendly interface including easy to print capabilities
- Automated indexing using machine learning
- E-Recording capabilities
- Financial, operational, and compliance reporting
- Full audit trails including review capability in real time
- Desired components: jury management and cash register/payment module
- Vendor must identify and list any required third-party components, licenses, or other items not provided

4.4 Technical Requirements

- Integrations with all necessary external systems as determined by the clerk of court (e.g., DA, Sheriff, Assessor, and others)



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- Intuitive UI with self-guided help
- Secure storage, hosting, and document management
- High availability and load performance
- Secure and protect sensitive user data

4.5 Vendor Responsibilities

- Act as primary point of contact and full-service provider
- Deliver end-user and administrator training
- Maintain \$5 million E&O insurance coverage
- Provide comprehensive documentation and references
- Provide update, update, rapid response, and repair capabilities

PART V. CONTRACT TERMS AND CONDITIONS

The following terms shall be non-negotiable:

- LASC CMIS reporting compliance
- Cloud-hosting requirement
- Data migration obligations (Odyssey, GRIDS, all legacy programs in use by the clerk)
- No profit sharing between clerk and vendor for public access
- Auditing and financial transparency features
- Must fulfill all present and future legislative requirements for data sharing and reporting

PART VI. CONTACT INFORMATION AND TECHNICAL SPECIFICATIONS

All questions regarding this RFP must be submitted in writing to:

St. Tammany Parish Clerk of Court

Email: rfp@sttammanyclerk.org



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Specifications Checklist

The following specifications will be used for vendor evaluation and grading. Vendors must indicate compliance and provide detailed responses where applicable.

A. General System Architecture

- Vendor provided test, stage, and production environment
- Open architecture: Proposed solution shall incorporate the use of open systems architecture to allow for integration with existing information systems.
- System should utilize Microsoft .NET framework or another modern, widely supported technology compatible with Windows-based environments.
- Microsoft SQL Server compatibility (preferred, or ability to export to and integrate with SQL-based reporting environments) Non-proprietary database access for analytics
- Cloud-hosted with scalable architecture
- Supports Windows-based client workstations
- Redundant, non-optical storage architecture ensuring high availability and fault tolerance (e.g., RAID 1 or cloud-based equivalent)
- System does not rely on add-on components for core functionality
- System has the ability to export system, application, SQL, or DBMS logs for independent review

B. Case Management Core Features

- Intuitive, user-friendly interface (browser-based or modern client-based interface acceptable)
- Public portal (with no profit sharing) for access to civil, criminal, land, marriage, and historical index books
- Support for jury management module
- Support for point-of-sale cash register/payment collection
- Machine learning indexing automation



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- Real-time dashboards and reports (financial, operational, compliance)
- Full audit trail logging
- Integrations with all necessary external systems as determined by the clerk of court (e.g., DA, Sheriff, Assessor, and others)
- Ability to manage civil, criminal, probate, family, and appellate case types
- Support for integration with external subpoena systems, including notice generation and service return sharing
- Ability to open multiple windows/tabs to support concurrent tasks
- Ability to report or list active/open warrants by defendant, date range, or case type.
- Searchable dockets by courtroom, date, or assigned officer
- Searchable by first name, last name, and date range
- Interface should provide docket-style entry screen for easy case tracking
- System must support sentencing entries tied to specific charges
- System may optionally include sentence calculation or integrate with external computation tools
- Support integration with local jail management systems to receive booking, release, and bond information.
- Ability to record and display defendant booking details, bond status, and release dates
- System should flag active warrants at time of case creation if applicable
- System should support secure access and docket viewing for judicial users
- Ability to track hearing types, outcomes, and associated case events.
- System must support compliance with Louisiana Public Records Law regarding retention, access, and disclosures.
- Validate charges against Louisiana Revised Statutes (RS) and OMV list
- Maintain original charges while tracking amendments and final outcomes.



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- Record and report on 892.1 indicators and other statutory flags.
- Track multiple charges per case with sequencing and classification.
- Support full sealing, soft deletion, and expungement of records from public view while maintaining internal audit trails.
- Apply role-based access restrictions to expunged records to ensure only authorized users can view them.
- System allows custom flags with custom color indicators

C. Legacy Data and Conversion

- Vendor has the ability to consolidate existing parties
- Full conversion of land, civil, criminal historical records, and any other records identified and maintained by the clerk of court
- GRIDS support enforcement data conversion
- Financial and cashiering records migration
- Validation and certification of conversion accuracy

D. Document Management

- Integrated imaging system
- OCR and barcode scanning capabilities
- Digital signature and document redaction
- PDF/TIF generation and association with case events
- Document templates and versioning
- Support for validation stamping, barcode cover sheets, and document intake automation
- Support for full-text search of OCR'd documents
- System should allow scanned and indexed documents to automatically trigger docket entries
- Ability to flag documents for retention scheduling or destruction review



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E. Cashiering and Financials

- Integrated POS/cash register system with receipt generation
- Fee schedule editor with multiple fund support
- Multiple cashier support with transaction security
- Daily reports, check tracking, end-of-day summaries
- Support configurable payment plans with due dates, amounts, and balances.
- Accept and track partial payments with remaining balance tracking.
- Support tracking of outstanding balances and collection activity.
- System must support transaction voids, reversals, and refunds with appropriate permissions and audit trail.
- Prioritize financial payments based on Louisiana Revised Statutes or local ordinances.
- Process real-time online payments, including partial payments and receivable adjustments.

F. Indexing and Workflow

- System has a party consolidation tool
- Unlimited fields and flexible document types
- Re-key verification and index audit tracking
- Integrated document workflow visibility and reporting
- Partial and batch indexing at the time of receipting
- Connection of related documents during indexing
- Support for Soundex or phonetic searching to improve name-based queries.
- Support for searches using name, date of birth, address, and secured SSN fields where appropriate
- Search by case number, court division, or associated officer (if applicable)



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- Autocomplete suggestions based on prior party name entries
- Autofill of current date/time in appropriate fields
- Warn users when entering duplicate case numbers
- Configurable judge assignment rules and automation
- Ability to record proceedings by date, courtroom, and judge
- Track cases by status and assigned courtroom
- Generate docket views or calendars by judge and courtroom
- Support for concurrent, consecutive, and split sentence structures
- System can automatically generate victim notifications
- Track sentencing details including sentence type, monetary penalties, duration, and special conditions
- Generate reports filtered by sentence type or disposition
- Ability to index charges with varying numbers of counts

G. Internet and Intranet Access

- Secure public search portal
- Index/image viewability controls
- Unlimited intranet licenses
- Role-based security controls
- Optional subscription-based remote access
- Hosting by vendor with high uptime SLA
- Role-based security must allow distinct permissions for scanning, indexing, and redaction
- Printable daily or future hearing lists per courtroom

H. Technical Support and Training

- In-state trained support personnel



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- Documentation and training for all staff roles
- Responsive ticketing system and escalation procedures
- System must include secure password reset functionality for end users and administrators.

I. Warrant Management

- System must support creation, issuance, and cancellation of arrest and bench warrants with audit trail.
- Track warrant service status and generate reports by served/unserved status and date range.
- Record and associate warrant returns to relevant case events.
- List active warrants
- Generate warrant reports filtered by date range, judge, or issuing officer
- Support tracking of incarceration events linked to specific case numbers or warrants.
- Real-time data exchange with warrant repositories and enforcement systems

J. Reporting

- System must generate printable docket calendars by courtroom, date, or judge.
- Support for case aging reports based on filing date, status, or last activity
- Generate reports by disposition type and frequency
- Report caseload metrics by assigned judge or courtroom.
- Generate statistical reports filtered by case type, filing officer, or department.
- Generate active warrant reports
- All reports must be exportable to PDF and Excel formats.
- Include scheduled, automated OMV data extracts in approved ASCII format.
- Support all necessary CMIS triggers required for OMV and Supreme Court compliance.
- Maintain integrity of probation conditions and data elements necessary for compliance.
- Generate ad hoc reports with customizable filters and export options (PDF, Excel, CSV).
- Support reports for charges, dockets, convictions, and other critical case data.



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- Allow statute-based conviction reports with masking of sensitive personal data (e.g., SSNs).
- Support bond forfeiture tracking, hold tracking, and associated reports.

Vendors must provide a completed compliance matrix along with detailed supporting documentation.