

**Request for Qualifications and Proposals
For Case Management and Document Management Systems and Related Services
INQUIRIES AND RESPONSES**

INQUIRY RECEIVED	RESPONSE POSTED	INQUIRY	RESPONSE
02/25/2021 @ 7:55 AM	03/16/2021	1. Whether companies from Outside US can apply for this? (like, from India or Canada)	Companies from outside the U.S. can submit proposals.
02/25/2021 @ 7:55 AM	03/16/2021	2. Whether we need to come over there for meetings?	LCRAA will conduct in-person interviews of the highest ranking proposers, (RFQ&P p. 3.). LCRAA expects the selected proposer to be on-site to assess implementation sites and during implementation of the CMS and DMS at each site.
02/25/2021 @ 7:55 AM	03/16/2021	3. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)	Tasks related to the RFP can be performed outside the USA. Proposers specify which tasks will be performed outside the USA in the proposal.
02/25/2021 @ 7:55 AM	03/16/2021	4. Can we submit proposals via email?	Respondents must deliver an original and ten copies of the Statement of Qualifications and Proposals and an electronic copy on a USB 3.0 Drive in PDF format on or before Monday, April 5, 2021, no later than 12:00 p.m. CST in a sealed container marked as follows: LCRAA CMS and DMS Proposal 10202 Jefferson Highway, Building A Baton Rouge, LA 70809, (RFQ&P, p. 4)

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03/05/2021 @ 9:29 AM	03/16/2021	<p>5. In section 2, Background, the RFP states: <i>“Filers will access the E-filing System through the Portal, to file and process payments for filing fees. The E-filing System must be capable of: 1) forwarding documents to clerks of court for integration with existing CMS and/or DMS; 2) processing electronic payments; 3) disbursing funds to appropriate Clerks; and 4) adaptation to changes in legal requirements and current technology.”</i></p> <p>Is the intention of this RFP to integrate with the existing EFile portal or is the intention to replace the existing EFile portal?</p>	<p>LCRAA seeks a paperless case management system (“CMS”) and a paperless document management systems (“DMS”) to process all pleadings, documents and evidence in civil and criminal suits capable of integrating e-filings and in-person filings. LCRAA seeks a vendor to implement a CMS and DMS for integration with other software used by Clerks. Contractor shall coordinate with participating Clerks to provide for conversion from Clerks existing CMS and DMS to the selected CMS and DMS to ensure continuity in the effective operation of the Clerks’ offices and integration with related software including the E-Filing. Proposals should address CMS/ DMS capability to accept e-filing and the capability to integrate documents received through e-filing systems of third party vendors. (Emphasis added.) (RFQ&P, pp. 2 and 4)</p>
03/05/2021 @ 9:29 AM	03/16/2021	<p>6. In Section 2, Background, the RFP states: <i>“Since the Clerks operate independently, software related to the CMS and DMS including accounting systems, e-filing systems, recording software, jury management software and court registry software varies. CMS and DMS must be capable of integration with other software in use by Clerks.”</i></p> <p>What specific software products is the CMS/DMS expected to integrate with and does each software product have an interface available for use with a newly implemented CMS/DMS?</p>	<p>LCRAA is aware that the following software products are used by clerks; however, the following is not an exhaustive list of software currently in use which will require integration:</p> <ol style="list-style-type: none"> 1. Custom software developed for clerks of court 2. COTT Systems 3. Software and Services 4. Tyler e-filing system 5. Delta Harris 6. Avenu <p>LCRAA is not aware of the availability of an interface for use with any proposed CMS/DMS for the listed softwares.</p>

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03/05/2021 @ 9:29 AM	03/16/2021	<p>7. In Section 1, Introduction, the RFP states: “LCRAA seeks a paperless case management system (“CMS”) and a paperless document management systems (“DMS”) to process all pleadings, documents and evidence in civil and criminal suits capable of integrating e-filings and in-person filings to be implemented beginning on July 1, 2021 in parishes which choose to participate.”</p> <p>According to the Tentative Schedule included in the RFQ&P, LCRAA expects the selected contractor to begin work the week of May 10th – 14th of 2021.</p> <p>Is it expected for the implementation in the parishes which choose to participate will begin July 1, 2021 or is it expected that some parishes will begin actually using the CMS/DMS on July 1, 2021?</p>	<p>LCRAA expects selected contractor to begin implementation activities on July 1, 2021 and actual use of the CMS/DMS to begin as soon as practical. Proposers should include an anticipated date of actual use based on implementation activities beginning on July 1, 2021.</p>
03/05/2021 @ 9:29 AM	03/16/2021	<p>8. Does the LCRAA currently provide a CMS/DMS that will be replaced through this RPF process and if so, what is that system?</p>	<p>LCRAA does not currently provide a CMS/DMS.</p>

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<p>03/11/2021 @ 11:49 AM</p>	<p>03/16/2021</p>	<p>9. SECTION 2.0 BACKGROUND</p> <p>Filers will access the E-filing System through the Portal, to file and process payments for filing fees. The E-filing System must be capable of:</p> <ol style="list-style-type: none"> 1) forwarding documents to clerks of court for integration with existing CMS and/or DMS; 2) processing electronic payments; 3) disbursing funds to appropriate Clerks; and 4) adaptation to changes in legal requirements and current technology. <p>Currently, the processing of electronic payments and disbursing those funds to the Clerk of Court offices is managed by the eFileLA Portal rather than the CMS/DMS. Do you intend to replace the existing portal vendor or move this functionality to the CMS/DMS?</p>	<p>See Response to Inquiry No. 5, above.</p>

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03/11/2021 @ 11:49 AM	03/16/2021	<p>10. SECTION 2.0 BACKGROUND</p> <p>Since the Clerks operate independently, software related to the CMS and DMS including accounting systems, e-filing systems, recording software, jury management software and court registry software varies. CMS and DMS must be capable of integration with other software in use by Clerks.</p> <p>Provide a specific list of all software/associated vendors that the CM/DMS must integrate with, and specify if the CMS will be required to import from the listed software/vendor, export to the listed software/vendor, or perform both functions.</p>	See Response to Inquiry No. 6, above.
03/11/2021 @ 11:49 AM	03/16/2021	<p>11. SECTION 3.0 PROCUREMENT PROCESS REQUIREMENTS</p> <p>LCRAA seeks a Contractor to provide a CMS and DMS with the capabilities to Integrate with other databases in use by Clerks.</p> <p>Provide a specific list of databases and associated software vendors that will require integration; additionally, specify the type of integration for each database.</p>	See Response to Inquiry No. 6, above.

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03/11/2021 @ 11:49 AM	03/16/2021	<p>12. SECTION 6.0 GENERAL INFORMATION</p> <p>6A Project Requirements</p> <p>12. Contractor is required to design, develop, and maintain any software necessary to integrate the CMS/DMS with the Clerks’ other office technology.</p> <p>Provide specifics on software, vendor, and the required integration specifications for each that are currently in use in the Clerks’ offices.</p>	See Response to Inquiry No. 6, above.
03/11/2021 @ 11:49 AM	03/16/2021	<p>13. SECTION 6.0 GENERAL INFORMATION</p> <p>6B CMS and DMS Requirements</p> <p>LCRAA seeks an “off the shelf” CMS/DMS with currently existing and verifiable accounts. Required related services shall include but not be limited to installation of CMS and DMS, migration of legacy data to the CMS/DMS, training of Clerks’ designated personnel, court personnel and public users. The CMS and DMS shall be capable of supporting multiple court locations and outside agencies which interact with the Clerks and courts. The CMS/DMS shall include mobile applications for use by browsers on Android, IOS and Windows mobile devices and be able to support touch interfaces.</p> <p>Provide a list of browsers/programs and associated devices (Android, IOS and Windows mobile devices), as well as the devices for touch interfaces, that should be used as reference tests to demonstrate compliance with this requirement.</p>	Proposers should provide a list of browsers/programs and associated devices as well as devices for touch interfaces which the proposed CMS/DMS can be used with.

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<p>03/11/2021 @ 11:49 AM</p>	<p>03/16/2021</p>	<p>14. SECTION 6.0 GENERAL INFORMATION 6B CMS and DMS Requirements <u>Case Initiation function must have ability to:</u> Generate a case profile and register actions for a specific case Define “case profile” and “register actions for a specific case”. Partially initiate a case and flag for completion Define “partially initiate a case and flag for completion”. Transfer a case to another court Clarify if this requirement is for an electronic or manual transfer of a case.</p>	<p>“Case profile” means the attributes of a particular case including but not limited to case type, docket number, parties and assigned judge. “Register actions for a specific case” means tracking of all actions and funds associated with a case including the user who entered or modified the data. “Partially initiate” means to begin case initiation to be completed at a later time or date. “Flag for completion” means to provide a record of all partially initiated cases. Proposal should describe CMS’ ability to perform an electronic or manual transfer of a case.</p>
<p>03/11/2021 @ 11:49 AM</p>	<p>03/16/2021</p>	<p>15. SECTION 6.0 GENERAL INFORMATION 6B CMS and DMS Requirements <u>Case Initiation function must have ability to:</u> Set up advance actions or activities to occur upon the filing of a particular document Provide examples of an advanced actions and activities.</p>	<p>Some examples of advanced actions and activities are: Return date for appeal Payment of appeal cost No activity for a designated period Calendar for receipt of original and payment for fax filings. Notice of jury deposits Delay for suspensive appeals Hearing date or deadlines set by court</p>

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03/11/2021 @ 11:49 AM	03/16/2021	<p>16. SECTION 6.0 GENERAL INFORMATION</p> <p>6B CMS and DMS Requirements</p> <p><u>Documents Management System must have ability to:</u></p> <p>Generate docket sheets in PDF format</p> <p>Clarify if the docket sheet is to be saved as a PDF or filed into the DMS as a PDF.</p> <p>Electronically distribute and receive documents from the internet</p> <p>Clarify the intent of this item and provide examples.</p>	<p>CMS must be capable of generating docket sheets in PDF format for distribution.</p> <p>CMS must be capable of receiving documents forwarded to clerk from other court agencies in electronic format and ability to send documents to litigants via email</p>
03/11/2021 @ 11:49 AM	03/16/2021	<p>17. SECTION 6.0 GENERAL INFORMATION</p> <p>6B CMS and DMS Requirements</p> <p><u>Accounting function must have ability to:</u></p> <p>Transfer funds between accounts with audit trail</p> <p>Clarify the type of accounts you want to transfer funds between.</p> <p>Calculate fees using a schedule</p> <p>Clarify if this is referring to document filing fees.</p> <p>Generate trial balance reports</p> <p>Describe what is included in a trial balance report and how it will be used.</p>	<p>CMS must be capable of transferring funds from advance deposit accounts to agency accounts, i.e. Judicial Expense Fund, Sheriff's Office and Clerk's Operating Account.</p> <p>CMS must be capable of calculating document filing fees and fees for other services, i.e. mailing notices, copy fees based on number of pages.</p> <p>The following items are included in a trial balance report:</p> <p>Current balance</p> <p>Total deposits</p> <p>Total disbursements detailed by payee</p> <p>Reports – Daily, Monthly, Annually or a selected date range</p>

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03/11/2021 @ 1:02 PM	03/16/2021	20. Is LCRAA purchasing the initial system based on this RFP?	LCRAA seeks a CMS/DMS for use by clerks of court who chose to implement the selected CMS/DMS.
03/11/2021 @ 1:02 PM	03/16/2021	<p>21. a. Should this RFP be considered a contract for other Clerks/Parishes/Judicial Districts to purchase off of?</p> <p>b. If yes, how specifically should pricing be structured to represent the differences throughout each Parish?</p>	<p>a. See Response to Inquiry No. 20, above.</p> <p>b. LCRAA does not require a specific pricing structure. Proposers may use any type of pricing structure for implementation and use of CMS/DMS.</p>
03/11/2021 @ 1:02 PM	03/16/2021	22. How many courts does the LCRAA anticipate will purchase the new system along with the initial purchase made by the LCRAA?	LCRAA anticipates the number of clerks of court who will chose to participate will depend on the capabilities of the selected CMS/DMS, ease of use of the selected CMS/DMS and the costs related to implementation of the selected CMS/DMS. LCRAA expects the maximum number of participating parishes will not exceed 42.
03/11/2021 @ 1:02 PM	03/16/2021	23. Provide a list of systems used by the Clerks' that need to be integrated with?	See Response to Inquiry No. 6, above.

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03/11/2021 @ 1:02 PM	03/16/2021	25. Is there a preference for a web-based or an on-premise solution?	Proposal should describe the type of system.
03/11/2021 @ 1:02 PM	03/16/2021	26. Approximately how many documents/images will require auto-redaction?	All documents viewed by the public will require auto-redaction.
03/11/2021 @ 1:02 PM	03/16/2021	27. What fields of information should be auto redacted? Ex: Social Security numbers	Information to be auto redacted will not be in a particular field. Personal information including but not limited to social security numbers, dates of birth and drivers' license numbers.
03/11/2021 @ 1:02 PM	03/16/2021	28. On page 14, Evaluation Criteria lists "Schedule and Completion date" What requirements & expectations does LCRAA have for go live of the new CMS and DMS system?	See Response to Inquiry No. 7, above.
03/11/2021 @ 1:02 PM	03/16/2021	29. On page 14, Evaluation Criteria lists "Stability of Business" What requirements & expectations does the LCRAA have for the vendor to include in their response for this RFP to evaluate?	LCRAA seeks to do business with a vendor able to support the CMS/DMS after implementation. Proposals should include information to demonstrate stability of business necessary to demonstrate the selected CMS/DMS will be supported.
03/11/2021 @ 1:02 PM	03/16/2021	30. On page 14, Evaluation Criteria lists "Legal and financial requirements" How will LCRAA determine financial solvency of a vendor?	LCRAA seeks to do business with a vendor available to support the CMS/DMS once implemented. Proposers should include information to demonstrate stability of business sufficient to demonstrate the selected CMS/DMS will be supported by vendor.
03/11/2021 @ 1:02 PM	03/16/2021	31. Approximately how many cases are processed annually on average?	In 2019, approximately 800,000 civil, criminal and juvenile cases were filed.

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03/11/2021 @ 1:02 PM	03/16/2021	33. How many LCRAA users will utilize the new system?	See Response to Inquiry No. 22, above.
03/11/2021 @ 1:02 PM	03/16/2021	34. How many LCRAA databases are there to be converted?	LCRAA does not maintain databases to be converted. The databases to be converted are maintained each clerks.
03/11/2021 @ 1:02 PM	03/16/2021	35. What third party systems will need to be integrated with?	See Response to Inquiry No. 6, above.
03/11/2021 @ 1:02 PM	03/16/2021	36. Who is the current payment provider utilized by LCRAA?	LCRAA does not currently utilize a payment provider.
03/11/2021 @ 1:02 PM	03/16/2021	37. Can one vendor propose two separate CMS & DMS solutions that both fit the needs listed in this RFP? If yes- does LCRAA prefer that each offering be in one proposal or should the vendor supply two separate proposals?	One vendor can propose two separate CMS & DMS solutions. Each offering can be presented in a single proposal or in two separate proposals.
03/11/2021 @ 2:16 PM	03/16/2021	38. Features & platform integration Provide a list of the systems and applications we need to integrate with or migrate data from? If possible, note in the list what kind of data and, if known, in what format we should expect them?	See Response to Inquiry No. 6, above. LCRAA does not maintain a list of the kind of data or format.

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03/11/2021 @ 2:16 PM	03/16/2021	<p>39. Features & platform integration</p> <p>What kind of document or file formats do you want the platform to open and display natively (e.g. PDF, Word document) and what are enough to be opened in external apps (e.g. image formats like JPEG, PNG in defaults apps of the client-side operating system)?</p>	<p>Proposers should explain the kind of documents or file formats which the platform is capable of opening and displaying natively.</p>
03/11/2021 @ 2:16 PM	03/16/2021	<p>40. Features & platform integration</p> <p>Do you prefer the system to be able to manage hardware devices (e.g. document scanners) and if so, do you have existing devices we need to integrate?</p>	<p>Proposer should explain the capabilities of the CMS/DMS to manage hardware devices. Some clerks of court have existing hardware devices to be integrated and others would need to acquire hardware.</p>
03/11/2021 @ 2:16 PM	03/16/2021	<p>41. Features & platform integration</p> <p>a. Describe the user roles, case types and workflows (e.g. motions, cross-motions, petitions) or do you prefer having an initial discovery period at the beginning of the project?</p> <p>b. Is there anything that is unique to Louisiana's legal system?</p>	<p>a. Proposers should refer to the Louisiana Code of Civil Procedure for case types. An initial discovery and verification period at the beginning of the project will be required.</p> <p>b. Louisiana's legal system and the funding of the system is specified by law and is unique in many aspects.</p>

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03/11/2021 @ 2:16 PM	03/16/2021	<p>43. Features & platform integration</p> <p>Do you need a full audit log at individual document-level (tracking of each copy per document per user e.g. downloaded by, opened by etc.)?</p>	<p>Proposers should describe the ability of the CMS / DMS to maintain audit logs.</p>
03/11/2021 @ 2:16 PM	03/16/2021	<p>44. Features & platform integration</p> <p>Do you have (an) existing or preferred payment and escrow service providers you want to integrate, or do you prefer us to recommend and/or integrate any widely used, trusted US financial service provider?</p>	<p>See Response to Inquiry No. 36, above. LCRAA does not have a preferred payment or escrow service provider.</p>
03/11/2021 @ 2:16 PM	03/16/2021	<p>45. Networking & technical details</p> <p>Do you have a high-level description or at least an overview of your network architecture, how the sites are currently connected to each other?</p>	<p>The sites are not currently connected to each other and will remain separate.</p>

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03/11/2021 @ 2:16 PM	03/16/2021	<p>47. Networking & technical details</p> <p>Do you have specific requirements for the level of encryption, is it different for different features (document encryption, communication protocol encryption etc.)?</p>	<p>LACCRA does not currently have specific requirements for the level of encryption. Proposers should include available encryption levels in proposals.</p>
03/11/2021 @ 2:16 PM	03/16/2021	<p>48. Support & Training</p> <p>What is the minimum level of security clearance needed, if there's any, for support and help desk staff (e.g. our standard regular background check versus specific requirements)?</p>	<p>LACCRA does not currently have a specified level of security clearance for support and help desk staff. Proposers should describe the level applicable to the proposal.</p>
03/11/2021 @ 2:16 PM	03/16/2021	<p>49. Support & Training</p> <p>Do we know the required operating system types and versions, or can we recommend or require a certain level (e.g. Windows 10 Pro May 2020 Update or newer, MacOS 10.14 Mojave or newer, iOS 12 or Android 9 or newer) as a minimum requirement?</p>	<p>Proposers should provide a list of operating system types and versions recommended and required for use of the CMS/DMS.</p>

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03/11/2021 @ 2:16 PM	03/16/2021	<p>51. Support & Training</p> <p>Do you have an existing authentication-validation system we need to integrate, or do you prefer us to implement our own (e.g. ID & login w/ one-time authentication before engaging support)?</p>	<p>Proposer should explain the authentication-validation system for the CMS/DMS. Some clerks of court may have existing authentication-validation systems to be integrated.</p>
03/11/2021 @ 3:50 PM	03/16/2021	<p>52. Section 2.0 Background: (page 1 of 17)</p> <p><i>Filers will access the E-filing System through the Portal, to file and process payments for filing fees. The E-filing System must be capable of: 1) forwarding documents to clerks of court for integration with existing CMS and/or DMS; 2) processing electronic payments; 3) disbursing funds to appropriate Clerks; and 3) adaptation to changes in legal requirements and current technology.</i></p> <p>Is an E-Filing system part of the scope of this RFP?</p>	<p>LCRAA seeks a paperless case management system (“CMS”) and a paperless document management system (“DMS”) to process all pleadings, documents and evidence in civil and criminal suits capable of integrating e-filings and in-person filings. (RFQ&P, Section 1.0)</p> <p>Proposers should address the capability of the CMS/DMS to handle e-filing and to integrate with e-filing systems of other vendors.</p>
03/11/2021 @ 3:50 PM	03/16/2021	<p>53. Section 2.0 Background (page 2 of 17)</p> <p><i>CMS and DMS must be capable of integration with other software in use by Clerks.</i></p> <p>a. Is it possible to provide a list of the other software?</p> <p>b. Are you expecting the contractor to develop the integrations, or just provide the tools?</p>	<p>a. See Response to Inquiry No. 6, above.</p> <p>b. Contractor is expected to coordinate with other vendors and/or to develop integrations.</p>

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<p>03/11/2021 @ 3:50 PM</p>	<p>03/16/2021</p>	<p>54. Section 3.0 (page 2 of 17)</p> <p><i>Contractor shall coordinate with participating Clerks to provide for conversion from Clerks existing CMS and DMS to the selected CMS and DMS to ensure continuity in the effective operation of the Clerks' offices and integration with related software including the E-Filing, accounting systems, jury management systems and registry of the court.</i></p> <p>In reference to the conversion: Current Data (to better understand the scope of conversion)</p> <ul style="list-style-type: none"> • What is the name of the current database(s)? • For each database, what is the format(s)—e.g. SQL—and the approximate table count(s)? • Does the database contain or refer to a document image repository? • For each database, does this database contain case data? <p>If yes</p> <ul style="list-style-type: none"> • What case types? • Are cases of each type stored in separate tables? • If so, are the columns of the tables relatively the same? <p>If no</p> <ul style="list-style-type: none"> • What's in the database? • Are there links to parties, cases, or jailings? • Any case statistics—e.g. filing statistics—would also be helpful. 	<p>See Response to Inquiry No. 6, above.</p> <p>See Response to Inquiry No. 31, above.</p>

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03/11/2021 @ 3:50 PM	03/16/2021	<p>55. Section 3.0 (page 5 of 17)</p> <p><i>Design, develop, and maintain any software necessary to integrate the CMS and DMS with the Clerks' other office technology.</i></p> <p>Provide more information regarding the Clerk's other office technology. What system(s) is this referring to?</p>	See Response to Inquiry No. 6, above.
03/11/2021 @ 3:50 PM	03/16/2021	<p>56. Section 3.0 (page 5 and 6)</p> <p><i>Be responsible for all initial and recurring costs required for hosting, maintaining, and supporting the CMS and DMS, including but not limited to hardware, software, licensing, authorization for utilization of any patented or copyrighted materials, annual maintenance, support, and connectivity.</i></p> <p>Is LCRAA seeking a hosted (cloud) solution or an on-premise solution.?</p>	See Response to Inquiry No. 25, above.
03/11/2021 @ 3:50 PM	03/16/2021	<p>57. <i>Electronically distribute and receive document from the internet.</i></p> <p>Clarify documents from the internet.</p>	See Response to Inquiry No. 16, above.

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INQUIRY RECEIVED	RESPONSE POSTED	INQUIRY	RESPONSE
03/11/2021 @ 3:50 PM	03/16/2021	<p>58. General:</p> <p>Provide an anticipated number of clerks that are interested in replacing their current CMS?</p> <p>Will each of the clerk's office have designated resources, including project managers, Subject Matter Experts and technical resources to work alongside selected contractor?</p> <p>Does LCRAA expect one system that all clerks will access or independent systems for each clerk's office?</p>	<p>See Response to Inquiry No. 22, above.</p> <p>LCRAA and each clerk's office will have designated resources, including a project manager. The level of subject matter experts and technical resources to work alongside selected contractor will vary.</p> <p>The CMS/DMS will be set up and operate independently for each clerk's office.</p>