



AMENDMENT 3

This amendment 3 ("Amendment") is effective as of the date of signature of the last party to sign as indicated below ("Amendment Effective Date"), by and between Tyler Technologies, Inc. with offices at One Tyler Drive, Yarmouth, Maine 04096 ("Tyler") and San Bernardino County, CA, with offices at 222 West Hospitality Lane, San Bernardino, CA 92415 ("Client").

WHEREAS, Tyler and the Client are parties to an agreement dated May 7, 2018 ("Agreement"); and

WHEREAS, Tyler and Client desire to amend the terms of the Agreement as provided herein.

NOW THEREFORE, in consideration of the mutual promises hereinafter contained, Tyler and the Client agree as follows:

1. The items set forth in the sales quotations attached hereto as Schedules A and B to Exhibit 1 are hereby added to the Agreement as of the Amendment Effective Date. Payment of fees and costs for such items shall conform to the following terms:
 - a. Fees for services set forth in Schedule A to Exhibit 1, are invoiced upon completion of the milestones set forth therein.
 - b. Fees for services set forth in Schedule B to Exhibit 1, are invoiced as provided.
 - c. Applicable expenses are invoiced in accordance with the Agreement.
 - d. Hardware and Transaction fees for Tyler Payments are invoiced in accordance with the terms and conditions for Tyler Payments at the link indicated in Schedule B to Exhibit 1.
 - e. Payments Annual PCI fees are invoiced annually in advance commencing on the first day of the first month following the Amendment Effective Date.
2. The Statements of Work for the items indicated in Schedules A and B to Exhibit 1 are attached hereto as Schedules A and B to Exhibit 2.
3. This Amendment shall be governed by and construed in accordance with the terms and conditions of the Agreement.
4. Except as expressly indicated in this Amendment, all other terms and conditions of the Agreement shall remain in full force and effect.

5. This Amendment and the Tyler Payment Processing Agreement may be executed in any number of counterparts, each of which shall be deemed an original, and such counterparts shall together constitute one and the same Amendment or Tyler Payment Processing Agreement, as applicable. The Parties shall be entitled to sign and transmit signatures of this Amendment and Tyler Payment Processing Agreement (whether by facsimile, PDF, or other mail transmission), which signature shall be binding on the party whose name is contained therein. Each party providing an electronic signature agrees to promptly execute and deliver to the other party an original signed Amendment or Tyler Payment Processing Agreement upon request.

IN WITNESS WHEREOF, the parties hereto have executed this Amendment as of the dates set forth below.

Tyler Technologies, Inc.

San Bernardino County, CA

By: _____

By: _____

Name: Katie M. Gray

Name: Dawn Rowe

Title: Senior Corporate Attorney

Title: Chair, Board of Supervisors

Date: _____

Date: _____



Exhibit 1
Amendment Investment Summary

The following Investment Summary details the software, products, and services to be delivered by us to you under the Agreement. This Investment Summary is effective as of the Amendment Effective Date.

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Quoted By: Erin Walker
 Quote
 Expiration: 11/1/24
 San Bernardino County,
 CA - P&R - Milestone
 Project: Image Upload
 Conversion Services
 Quote Name:

Sales Quotation For:

San Bernardino County
 222 West Hospitality Lane
 San Bernardino, CA 92415-0225
 Phone: +1 (888) 818-8988

Professional Services

Description	Extended Price	Maintenance
Records Management		
System Review & Analysis	\$ 7,200	
Milestone 1 - Phase 4	\$ 111,150	
Milestone 2 - Phase 3	\$ 111,150	
Milestone 3 - Phase 2	\$ 32,850	
Milestone 4 - Phase 1	\$ 14,350	
Milestone 5 - Phase 5	\$ 14,350	
Milestone 6 - Phase 10	\$ 33,150	
TOTAL	\$ 324,200	\$ 0

Summary	One Time Fees	Recurring Fees
Total Tyler Software	\$ 0	\$ 0
Total Annual	\$ 0	\$ 0
Total Tyler Services	\$ 324,200	\$ 0
Total Third-Party Hardware, Software, Services	\$ 0	\$ 0
Summary Total	\$ 324,200	\$ 0
Contract Total	\$ 324,200	

Unless otherwise indicated in the contract or amendment thereto, pricing for optional items will be held For six (6) months from the Quote date or the Effective Date of the Contract, whichever is later.

Customer Approval: _____ Date: _____

Print Name: Dawn Kowe, Chair, Board of Supervisors P.O.#: _____

San Bernardino County, CA - Image Upload Services - Milestone Project

System Analysis

Document current infrastructure relevant to Records Management, including:

1. Number of servers
2. Memory allocations
3. CPU specs
4. Tomcat versions
5. Thread allocations

Review current system load, including:

1. Number of simultaneously logged in users.
2. Recording volume.
3. Large reports.
4. Number of contexts and load to Records Public Access (Self Service)

Provide recommendations based on <https://check.tyler-tech.com/>, and experience with other installs. To include:

1. Executive Summary
2. Encrypted PDF of current architecture relevant to Records Management
3. List of recommendations required to standardize
4. List of recommendations to further improve environments

San Bernardino County - Image Upload Scope/Quote

MILESTONE 1

Phase 4 – 1995, 1997-2002 Official Records

- Existing/Replace Image Only
- 12,188,406 images

MILESTONE 2

Phase 3 – 1980-1994 Official Records

- Existing/Replace Image Only
- 12,045,779 images

MILESTONE 3

Phase 2 – 1925-1958 Official Records

- Existing/New Records
- Roughly 3 million images

MILESTONE 4

Phase 1 – 1853-1925 Deed Records

- Existing/New Records
- 524,627 images

MILESTONE 5

Phase 5 – Mining Records

- Existing/New Records
- 442,796 images

MILESTONE 6

Phase 10 – Redact and Full Index Deed & Official Records (phase 1-2 & 5)

- 1,959,067 total Documents
- Adding Recorded Date, Grantor and Grantee
- USI will deliver whatever they can finish by June 2024.



Quoted By: Erin Walker
 Quote
 Expiration: 8/28/24
 San Bernardino County,
 CA - Move to Tyler
 Payments, Add
 Quote Name: eCertify/Vitals Access

Sales Quotation For:

San Bernardino County
 222 West Hospitality Lane
 San Bernardino, CA 92415-0225
 Phone: +1 (888) 818-8988

Transaction Fees

Description	Transaction Fees
Payments Core	\$ 0
Payments Core POS	\$ 0
Vitals Access	\$ 5
ID.Me	\$ 5
eCertification	\$ 3

Professional Services

Description	Extended Price	Maintenance
Records Management		
Project Management Implementation		
Eagle		
eCertification Service		
Vitals Access Service		
	<i>Total Hours</i>	<i>152</i>
	TOTAL	\$ 22,800
		\$ 0

Third-Party Hardware, Software and Services

Description	Quantity	Total Price	Total Maint.
Tyler Third Party			
Lane 7000 EMV Units	29	\$ 15,341	\$ 0
Records Management - SSL Certificate, 3 Yrs	1	\$ 897	\$ 0
Tyler One			
Payments Annual PCI Fee	29	\$ 0	\$ 5,220
TOTAL		16,238	\$ 5,220

Summary	One Time Fees	Recurring Fees
Total Tyler Software	\$ 0	\$ 0
Total Annual	\$ 0	\$ 0
Total Tyler Services	\$ 22,800	\$ 0
Total Third-Party Hardware, Software, Services	\$ 16,238	\$ 5,220
Summary Total	\$ 39,038	\$ 5,220
Contract Total	\$ 44,258	

Unless otherwise indicated in the contract or amendment thereto, pricing for optional items will be held For six (6) months from the Quote date or the Effective Date of the Contract, whichever is later.

Customer Approval: _____ Date: _____

Print Name: Dawn Rowe, Chair, Board of Supervisors P.O.#: _____



TYLER PAYMENTS:

Your use of Tyler Payments and any related items included on this order is subject to the terms found in that certain Payment Processing Agreement of near or even date herewith.

By signing this order or the agreement in which it is included, you agree you have read, understand, and agree to such terms. Fees for year one of any hardware maintenance are invoiced upon delivery of the hardware, with subsequent years' fees billed annually, in advance (if applicable).

Note:

San Bernardino County, CA will accept Visa and Mastercard for transactions.

Payer Electronic Payment Costs If passing transaction costs to the payer	
<p><u>Payer Card Cost</u> – Service Fee – per card transaction with Visa, MasterCard, for transactions.</p> <p>Applied to: Records Public Access, eCertify, Vitals Access - Online Records Records Management Cashiering – In Person ***\$1.50 min does not apply to eCertify or Vitals Access transactions***</p>	<p>3.5%</p> <p>\$1.50 min</p>
Miscellaneous Costs	
<p><u>Technology Fee</u> – Flat fee per document, payable to Tyler Technologies. Can be passed to submitter or absorbed by County.</p> <p>Applied to eCertify transactions, per document.</p>	<p>\$3.00</p>
<p><u>Technology Fee</u> – Flat fee per document, payable to Tyler Technologies. Can be passed to submitter or absorbed by County.</p> <p>Applied to Vitals Access transactions, per order.</p>	<p>\$5.00</p>
<p><u>Credit Card Chargebacks</u> – if a card payer disputes a transaction at the card issuing bank (e.g. stolen card)</p>	<p>\$15.00</p>
<p><u>Card Terminal Purchase</u> – Maintenance fee is an annual fee per device. Covers cost of PCI compliance, service, maintenance, real-time integration, and support</p>	<p>Lane 7000: \$529 (one-time fee) Plus \$180 Device Annual Support</p>



Exhibit 2
Amendment Statements of Work

The following Amendment Statements of Work describe the services to be performed pursuant to this Amendment. The Statements of Work are effective as of the Amendment Effective Date.

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San Bernardino County – Image Upload Conversion Services Statement of Work

Milestones 1-6

Image Upload Conversion Services provided by Tyler Technologies,
Image

Scanning and Digitization by U.S. Imaging

Contacts

Tyler Technologies

Erin Walker, Account Representative
Eddie McWhirter, Senior Analyst
Larry Mitchell, Project Management
David Price, Software Support

US Imaging

Tina Arundel, Production Manager

San Bernardino County

Lorelay Faussier, Lynne Ward
Shanique Roberts, Genevieve Preston
Michael Laib, Carlos Rincon
Sean Morton



System Analysis

Performed by Eddie McWhirter

Scope of Work:

1. Document current infrastructure relevant to Records Management (Assessor Plus, Treasurer Plus) including

- Number of servers
- Memory allocations
- CPU specs
- Tomcat versions
- Thread allocations
- Disk Space

2. Review current system load including:

- Number of simultaneously logged in users.
- Recording volume.
- Large reports.
- Number of contexts and load to Records Public Access (Self Service)

3. Provide recommendations based on <https://check.tylertech.com/>, and experience with other installs. To include:

- Executive Summary
- Encrypted PDF of current architecture relevant to Records Management
- List of recommendations required to standardize
- List of recommendations to further improve environments

Image Upload Conversion Services

Milestone Details

MILESTONE 1

Phase 4 – 1995, 1997-2002 Official Records
Existing/Replace Images Only

MILESTONE 2

Phase 3 – 1980-1994 Official Records
Existing/Replace Images Only

MILESTONE 3

Phase 2 – 1925-1958 Official Records
Existing/New Records



Milestone Details (cont'd)

MILESTONE 4

Phase 1 – 1853-1925 Deed Records
Existing/New Records

MILESTONE 5

Phase 5 – Mining Records
Existing/New Records

MILESTONE 6

Phase 10 – Redact and Full Index Deed & Official Records (phase 1-2 & 5)

Image Upload Conversion Services

San Bernardino County, CA has been working with US Imaging

Image Uploads will be handled in two parts; the Pilot Upload (Sample Set) and the Bulk Upload. Tyler will upload images, as provided in a format that meets Tyler's data and imaging requirements, previously provided to US Imaging. Pilot and Bulk Uploads to be completed until project completion.

San Bernardino will be providing Data Extracts to USI for any existing images needing to be replaced by higher quality scans.

Pilot Upload

Scope of Work:

Project Management is included in each Pilot Upload

Image and Data Conversion Services – PILOT, SAMPLE SET

- County will provide all images to Tyler Technologies for project items listed within phases of each milestone.
- Tyler will upload Sample Set images and data (defined/provided by USI) into San Bernardino QA Environment.
- County to review images and data for quality assurance in within 5 days upon receiving notice of completion.



Bulk Upload

Scope of Work:

Project Management is included in each Bulk Upload

Image and Data Conversion Services – Bulk Upload

- Tyler Technologies to upload images and data to production
- Tyler Staff to monitor upload progress
- County to review images in production environment

Tyler will verify the images are in the correct format, but is not responsible for verifying the validity of the data.

Additional charges would apply for additional milestone upload, on a time and materials basis, and terms that designate a need for an additional upload include vendor error in format, or client error in review of images to ensure quality.

If excessive time for upload is required due to large file size, or excessive interaction with client vendor, additional charges could apply on a time and materials basis



Statement of Work - Professional Services

Tyler Payments for Records Management Web Portal

Project Objective

Provide credit card transaction services through integrated Tyler Payments for Records Public Access Web.

Scope of Work Includes:

Project Management

Official Records/Certified Copy

- Configuration for Certified Copies workflow
- Training

eCommerce Module Services - Records Public Access - Tyler Payments

Allows citizens to download and purchase document copies, request certified copies, via credit card on-line.

Integration with Records Management assumes County has established agreements with Tyler Payments and a merchant provider.

Web Transactions Only:

- Configuration of Tyler Payments
- Integration with Records Management, incl. setting up administrator Workstation, merchant accounts and file-drop directory
- Testing (done remotely with client interaction)
- Training (remote)
- Go Live assistance (remote)



Professional Services

Tyler Payments for Records Management Over the Counter

Project Objective

Provide credit card transaction services through integrated Tyler Payments for in house, over the counter.

Scope of Work Includes:

Project Management

Over the Counter Transactions:

- Information regarding hardware purchases
- Configuration of Tyler Payments
- Integration with Records Management, incl. setting up administrator Workstation, merchant accounts and file-drop directory
- Configuration of workstations with EMV swipers
- Testing (done remotely with client interaction)
- Training (remote)
- Go Live assistance (remote)

eCertify

Tyler Technologies will provide remote services to San Bernardino as follows:

Scope of Work:

Project Management

1. Install and Configure Signing Certificate
2. Update Records Management Software to 2023.1+
3. Create the certification image and configure the certification stamps
4. Configure Records Public Access to offer eCertification as a purchase option
5. Install Tyler Payments
6. Configure Tyler Payments

*Please note - a renewal for the SSL certification at the end of the 3-year term will be required.



Vitals Access

Project Objective

Vitals Access provides a secure, easy-to-use portal for county customers to request and pay for copies of vital records online, via Self Service. Once verification of identity has taken place, customers can pay for the copies via credit card or eCheck.

Vitals Access requests flow seamlessly into the Self Service request queue for review by county staff to verify identification documentation, print requested document(s), then finish and receipt them.

Once complete, the customer will receive an email notification which informs them their document is on the way. If the request/order could not be fulfilled, the county customer would receive an email explaining the issue and instructions for correcting the issue.

Project Overview

- Add the county to the Vitals Access portal and connect with Eagle Recorder
- Create the fillable PDF forms and configure the request types
- Configure fees for each request type
- Configure shipping options offered by the county
- Obtain and configure merchant accounts in Tyler Payments
- Create links between the county's website and the Vitals Access portal

Project Prerequisites and Requirements

- Eagle Recorder must be on version 2022.1, and have the necessary modules and web services installed and enabled.
- Self Service Actions need to be configured for the request types that will come be submitted through the Vitals Access portal.
- County will need to obtain merchant account agreements through the Tyler Payments team.
- County will need to create a fillable PDF form for each request type. This can be done using 3rd party tools such as Adobe Acrobat.

Outside of Project Scope

- Tyler staff may assist or offer guidance on creating the PDF forms, but the county is ultimately responsible for the forms they present to their customers.
- Vitals Access is intended to be used for copies of Birth, Death, Marriage, and DD214 documents. Other document types, such as marriage license applications and fictitious business names should be processed using the existing Self Service module.
- House accounts cannot be used for payment in the Vitals Access portal.

Process

Task	Owner
Project Kickoff	Tyler Project Manager
Obtain merchant account agreements	Tyler Payments Consultant
Training on Tyler Payments reports and tools	Tyler Payments Consultant
Review forms to be accepted	Tyler Implementation Consultant
Create the fillable PDF forms and send to Tyler	County Staff
Configure the connection between TEST Eagle Recorder and TEST Vitals Access portal	Tyler Implementation Consultant
Configure the forms, fees, fee parameters, and shipping methods in TEST Eagle Recorder and TEST Vitals Access	Tyler Implementation Consultant
Training on how to use Vitals Access	Tyler Implementation Consultant
Acceptance test the submission and fulfillment process in TEST	County Staff
Configure PRODUCTION Tyler Payments	Tyler Payments Consultant
Configure PRODUCTION Eagle Recorder and Vitals Access based on test systems	Tyler Implementation Consultant
Acceptance testing in PRODUCTION	County Staff
Share promotional materials with the county	Tyler Implementation Consultant
Share support information with the county	Tyler Implementation Consultant
Add links from the county web site to Vitals Access	County IT
Go Live	Tyler Implementation Consultant
Handoff to support	Tyler Implementation Consultant/Support Manager



Acceptance

The following process will be used for accepting Deliverables and Control Points:

1. County shall have five (5) business days from the date of delivery, or as otherwise mutually agreed upon by the parties in writing, to accept each Deliverable or Control Point. If county does not provide acceptance or acknowledgement within five (5) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld Tyler deems the Deliverable or Control Point as accepted.
2. If county does not agree the particular Deliverable or Control Point meets requirements, county shall notify Tyler project manager(s), in writing, with reasoning within five (5) business days, or the otherwise agreed-upon timeframe, not to be unreasonably withheld, of receipt of the Deliverable.
3. Tyler shall address any deficiencies and redeliver the Deliverable or Control Point. County shall then have two (2) business days from receipt of the redelivered Deliverable or Control Point to accept or again submit written notification of reasons for rejecting the milestone. If county does not provide acceptance within two (2) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deem the Deliverable or Control Point as accepted.

Additional Notes

The enclosed scope is good-faith estimate. Any changes in scope may require an additional scope of work with additional cost. Any additional consultation from Tyler may increase scope and may require additional billable time done on a time and materials basis.

