



Electronic Signature (E-Signature) Solutions

Invitation to Negotiate (ITN)

No. 21-43231500-ITN

**Questions and Answers
and ITN Addendum No. 4**

Questions and Answers

The Department has received the following questions from the vendor community through MFMP Sourcing and to the Procurement Officer and the Department's answers are provided in the following table:

No.	Question	Answer
1	Can you let us know who are the current vendors?	The Department of Management Services does not have an existing state term contract for Electronic Signature (E-Signature) Solutions.
2	Does the city intend to integrate the electronic signature and DTM solution with any existing technologies/systems or will it be a stand-alone deployment? If integrated, which systems does it need to be integrated with?	Customers may have a variety of systems. The use of other systems is up to the Customers.
3	Is there a requirement for dynamic routing capabilities where the workflow process is defined by data elements in the Document Package (e.g. a Purchase Request over \$x routes to additional levels of approval)	No, however Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
4	Is there a requirement for agreements to be initiated through a web link? If so, does this requirement include the need for all routing capabilities?	No, however Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
5	Does DMS require a policy specifying the method and monitoring of hardened product servers whereas all servers in the production environment are to be built using specific adopted recommendation from the CIS hardening standards and verified using credentialed network scans against the guideline?	Respondent is required to comply with the requirements of Contract Exhibit A, Scope of Work, Section 3.18.
6	Does DMS have expectations around Business Continuity, RTO (Recovery Time Objective) (e.g. must be less than 30 minutes).	See Contract Exhibit A, Scope of Work, Section 3.16, Maintenance, Technical Support, and Customization and ITN Revision 3 below.
7	What are DMS's expectations and definition of scheduled uptime?	See Contract Exhibit A, Scope of Work, Section 3.16, Maintenance, Technical Support, and Customization and ITN Revision 3 below.
8	Does DMS require all data to be stored in the US?	See Contract Exhibit A, Scope of Work, Section 3.18, Information Technology Standard and Contract Exhibit C, Special Contract Conditions, Section 9, Data Security.
9	Does DMS require all services and support to be performed in the US?	See Contract Exhibit A, Scope of Work, Section 3.18, Information Technology Standard and Contract Exhibit C, Special Contract Conditions, Section 9, Data Security.

<p>10</p>	<p>Does DMS wish for vendors to provide the following information?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Have you had any unplanned “outages” during the last twelve months? <input type="checkbox"/> If so, list each instance of partial or full-service interruption/disruption lasting more than a minute. Include how long each interruption lasted for, which cloud-based instance suffered the interruption and the date and time of each. <input type="checkbox"/> What is the average system availability for each of the last three (3) years up to today? <input type="checkbox"/> Please display in three (3) separate 12-month increments dated from today. <input type="checkbox"/> Clarify if this calculation includes your scheduled maintenance windows 	<p>Respondent’s Reply should contain information that the Respondent determines is the best representation of Respondent’s solution(s). Evaluators will evaluate Replies based on the evaluation criteria set forth in the ITN. See Section 5 of the ITN, Selection Methodology, Attachment C, Technical Reply Instructions, Evaluation Criteria, and ITN Revision 2, below.</p>
<p>11</p>	<p>Does DMS wish to view historical information regarding uptime?</p>	<p>Respondent’s Reply should contain information that the Respondent determines is the best representation of Respondent’s solution(s). Evaluators will evaluate Replies based on the evaluation criteria set forth in the ITN. See Section 5 of the ITN, Selection Methodology, and Attachment C, Technical Reply Instructions and ITN Revision 2, below.</p>
<p>12</p>	<p>Does your solution have scheduled maintenance windows?</p> <ul style="list-style-type: none"> <input type="checkbox"/> If so, how many times per year? <input type="checkbox"/> How long are they? <input type="checkbox"/> What were the dates and times of maintenance windows scheduled last year? <input type="checkbox"/> How far in advance do you notify customers of any maintenance windows? 	<p>See Contract Exhibit A, Scope of Work, Section 3.1.</p>
<p>13</p>	<p>Does your SLA include or exclude the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Maintenance windows? <input type="checkbox"/> Upgrade windows? <input type="checkbox"/> Emergency maintenance windows? 	<p>See Contract Exhibit A, Scope of Work, Section 13, for SLAs and ITN Revision 3, below. However, Customer(s) can incorporate additional SLAs into their purchase order(s).</p>
<p>14</p>	<p>Does DMS have any SLAs for support services they require their vendors to meet?</p>	<p>See Contract Exhibit A, Scope of Work, Section 13, for SLAs. However, Customer(s) can incorporate additional SLAs into their purchase order(s).</p>
<p>15</p>	<p>Does DMS require vendors to maintain any security certifications (e.g. SOC II, ISO 27001)?</p>	<p>See Contract Exhibit A, Scope of Work, Section 3.18, Information Technology Standard.</p>
<p>16</p>	<p>Does DMS require vendors to provide a tour of their datacenter as part of security audits?</p>	<p>See Contract Exhibit A, Scope of Work, Section 3.18, Information Technology Standard, and Contract Exhibit C, Special Contract Conditions, Section 12, Contract Audits. However, Customers may have additional</p>

		security or auditing requirements that coincide with their Purchase Order(s).
17	Does DMS require the ability to add supplemental documents to an envelope?	See ITN Revision 5, below. Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
18	Please provide clarification on the expectations on the SLAs: (2) Service Level Agreement Report - What are the expected service levels? Where is the Service Level Agreement referenced in Section 10, page 9? (4) Software Uptime and Network Availability - Please provide Service Level Agreement requirements. Contract Exhibit A Scope of Work: Section 13; Page 10	See Contract Exhibit A, Scope of Work, Sections 10, Service Level Agreement Report, and 13, Service Levels and Financial Consequences. Additionally, see Section 3.16.1 of Contract Exhibit A, Scope of Work.
19	How many document packages does DMS expect to send for signature each month or annually?	This will be determined by the Customer.
20	How many people does DMS intend to provision?	The Department does not have this information. The Customer will determine how to implement the contracted services to satisfy their specific needs.
21	Given documents may include confidential information on federally funded programs it is assumed that a solution which is FedRAMP Moderate certified is required. Please confirm.	Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s). Evaluators will evaluate Replies based on the evaluation criteria set forth in the ITN.
22	Please provide details on existing eSignature implementations within the State	The Department does not have this information. The Customer will determine how to implement the contracted services to satisfy their specific needs.
23	Attachment C, Section 9 addresses the delivery of Document Packages by email. In addition to email delivery, delivery via SMS is a common requirement for organizations. Is this capability a requirement?	No, however Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
24	What are the acceptable limits for system downtime, both scheduled and unscheduled?	See Contract Exhibit A, Scope of Work, Section 3.16, Maintenance, Technical Support, and Customization. Also see ITN Revision 3, below.
25	Please provide details on the requirements for the solution to leverage mobile devices including areas such as:	Please see the individual answers below.
26	The requirement for native mobile operating system applications	See Contract Exhibit A Scope of Work, Section 3. Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).

		Evaluators will evaluate Replies based on the evaluation criteria set forth in the ITN.
27	The ability to utilize the system with only mobile browsers and no mobile app	See Contract Exhibit A Scope of Work, Section 3. Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s). Evaluators will evaluate Replies based on the evaluation criteria set forth in the ITN.
28	The requirement for the platform to employ responsive signing (dynamic resizing of documents to optimize the experience based on the mobile platform)	See Contract Exhibit A Scope of Work, Section 3. Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s). Evaluators will evaluate Replies based on the evaluation criteria set forth in the ITN.
29	Does DMS require the solution provider's revenue from digital signature to represent a significant portion of its overall revenues?	No.
30	Given the recent number of cyber-attacks, does DMS or state agencies require Defense Information Systems Agency (DISA) Department of Defense (DoD) Impact Level 2 (IL2) for non-Controlled Unclassified Information (non-CUI), which includes all data cleared for public release, as well as some DoD private unclassified information not designated as CUI or critical mission data that requires some minimal level of access control.	Respondents are required to provide a secure process. See Contract Exhibit A, Scope of Work, Sections 3.3 and 3.18.
31	Given the recent number of cyber-attacks, does DMS or state agencies require Defense Information Systems Agency (DISA) provisional Department of Defense (DoD) Impact Level 4 (IL4) authorization adhering to rigorous security requirements for storing and handling controlled unclassified information (CUI) including For Official Use Only (FOUO) information?	Respondents are required to provide a secure process. See Contract Exhibit A, Scope of Work, Sections 3.3 and 3.18.
32	Does DMS or agencies require data portability for local data retention?	This will be determined by the Customer.
33	Will DMS require a list of the prebuilt connectors to third party applications currently available from solution provider?	Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s). Evaluators will evaluate Replies based on the evaluation criteria set forth in the ITN.
34	Will DMS or agencies require vendor obligation reporting/management ensuring vendor contract terms are being met?	The awarded vendor(s) will be required to meet all the requirements set forth in Contract Exhibit A, Scope of Work, and Contract Exhibit C, Special

		Contract Conditions, as negotiated.
35	Will DMS or state entities require collaborative forms allowing for changes in the workflow that enable error correction while form is in transit?	This will be determined by the Customer
36	Will DMS or state entities require eNotary capabilities?	Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
37	Does Florida DMS have limitations on the maximum email size of our response? If so, please provide the maximum MB allowed for an email response.	See ITN Section 7 for submission instructions.
38	In order to provide as much detail as possible and to accurately respond to the Florida DMS questions as accurately as possible, can you please provide additional information regarding use cases? What are the top use cases for the for the enterprise document routing system?	The Department does not currently have a state term contract for these services. Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s). Evaluators will evaluate Replies based on the evaluation criteria set forth in the ITN.
39	What departments within Florida DMS will be using this system?	This contract will be made available as a state term contract to all Customers, as defined in Section 1.5 of the ITN.
40	Is there a current system in place? If so, what is that system?	The Department does not currently have a state term contract for these services.
41	What are the current issues or problems that a new solution would be resolving?	The Department does not currently have a state term contract for these services.
42	Please provide additional information on the types of documents that are going to be included in the workflows discussed.	This will be determined by the Customer.
43	Is the Florida DMS looking for our responses to be provided based only on our individual capabilities, or can we provide a response based on a partner-based response?	Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
44	Does the city intend to integrate the electronic signature and DTM solution with any existing technologies/systems or will it be a stand-alone deployment? If integrated, which systems does it need to be integrated with?	Customers may have a variety of systems. The use of other systems is up to the Customers.
45	What are the specific use cases for the documents that will be routed?	This will be determined by the Customer.
46	Will the documents need to be edited during the routing process or will they be in a finalized state prior to routing?	See ITN Revision 6, below. Respondent's Reply should contain information that the Respondent determines is the

		best representation of Respondent's solution(s).
47	Is there an approval process that requires editing while signing?	This will be determined by the Customer.
48	Are there any specific pain points with the current process?	The Department does not currently have a state term contract for these services.
49	Please provide additional information on the documents which need to be converted?	This will be determined by the Customer.
50	Are these documents legacy paper-based documents which need to be added to a repository?	This will be determined by the Customer.
51	Are these documents, paper-based documents which need to be converted to an electronic format and attached during the routing process?	This will be determined by the Customer.
52	Please provide additional examples and use cases around the document creation statement?	The Department does not currently have this information.
53	For the creation of documents, will the Florida DMS be looking for a portal that can be accessed by citizens and employees for forms such as permits? Is it desired to have signatures presented to the citizens/employees upon the creation of these documents?	This will be determined by the Customer.
54	Will Florida DMS be using templates for the creation of contracts that can allow the users to enter the specifics of the contract and have collaboration capabilities?	Template use will be determined by the Customer.
55	In order to accurately scope the work effort and provide pricing to Florida DMS, please provide the following information on anticipated volume: a. Number of use cases b. Number of users c. Number of transactions per year d. Number of forms	The Department does not currently have a state term contract and does not have this information.
56	In order to fully respond to the RFP requirements, will Florida DMS allow vendors to submit an additional redacted proposal which will protect our confidential information?	See revised Section 19 of the PUR 1001, Public Records, within Section 3.1 of the ITN. Additionally, the solicitation is an ITN and not an RFP.
57	Does Florida DMS require a policy specifying the method and monitoring of hardened product servers whereas all servers in the production environment are to be built using specific adopted recommendation from the CIS hardening standards and verified using credentialed network scans against the guideline?	See answer to question #5 above.
58	Will Florida DMS be requiring a dedicated support team? OR In section X you requested a dedicated Account Manager, do you also want a dedicated senior level technical resource?	Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
59	Does Florida DMS require all services and support to be performed in the US? Only use this question if it is for an existing contract requirement. We typically do not provide all support and services in the US, and would prefer not to.	See answer to question #9 above.
60	What professional services does Florida DMS anticipate needing as part of this engagement?	See ITN Section 5.3, Evaluation Criteria; Contract Exhibit A,

		Scope of Work, Section 2, Definitions; and Section 3.17, Professional Services.
61	What are the internal VPN security requirements?	See Contract Exhibit A, Scope of Work, Section 3.18.
62	What are Florida DMS' requirements for a testing environment and what is Florida DMS' definition of a high-volume testing environment? Also, what are the testing frequencies and volumes of envelopes transactions that Florida DMS would require in a high-volume testing environment?	See Contract Exhibit A, Scope of Work, Section 3.13 and 3.18. The Department has not developed testing frequencies and volumes.
63	Does Florida DMS require support for Good for Enterprise Secure Browser? If so, what operating systems should be supported?	This will be determined by the Customer.
64	Can Florida DMS provide clarification on its criteria for vendor selection?	No. See ITN Section 5, Selection Methodology.
65	Can you share any identified gaps or needs in the current eSignature solution used by Florida DMS	The Department does not currently have a state term contract for these services.
66	Can you please provide the list of most likely 'Santander platforms' that you will want to interface with the eSignature platform (i.e. Salesforce, nCino, Appway, BlackKnight, SharePoint, Ariba, Workday, inhouse/homegrown, etc)	This will be determined by the Customer.
67	In 5. "Documents", section b) Describe the proposed E-Signature Software's mechanism for Users to allow Signers to upload documents and images as attachments to Document Packages. Can DMS elaborate on this requirement?	No, however Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
68	In 5. "Documents", section c) Describe the proposed E-Signature Software's mechanism for Customers (Administrators and Users) to view and download documents and attachments in a Document Package at any stage of the workflow process. Can DMS elaborate on their expectations?	No, however Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
69	In 5. "Documents", section d) Describe the proposed E-Signature Software's mechanism for Customers (Administrators and Users) to print documents and attachments in a Document Package at any stage of the workflow process. Can DMS elaborate on their request?	No, however Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
70	In 6. "Information Fields", section d) If Document Packages are being sent in batch, describe how the proposed E-Signature Software provides the option for fields to be prefilled with information provided in the batch file. Will DMS elaborate on this requirement?	No, however Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
71	In 6. "Information Fields", section e) Describe how the proposed E-Signature Software allows Users to conditionally control whether a specific field may be modified by the Signer, including a list of condition options. Will DMS clarify what options they are looking for?	No, however Respondent's Reply should contain information that the Respondent determines is the best representation of Respondent's solution(s).
72	We have some responses that require proprietary information and wondering if someone would sign an NDA to provide detailed responses.	No, however see section 3.1 of the ITN, Section 19, Public Records.

ITN Addendum No. 4

The Department hereby amends ITN No. 21-43231500-ITN and its attachments/exhibits as within this addendum. For revisions, underline represents additions and strikethrough represents deletions. All changes are highlighted. In the event of a conflict between previously released information and the information contained below, the information below shall control.

Failure to file a protest within the time prescribed in section 120.57(3), Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under chapter 120, Florida Statutes. Any protest concerning this agency decision must be timely filed with the Agency Clerk. Protests may be filed by courier, hand delivery, or U.S. mail at Department of Management Services, Office of the General Counsel, Attention: Agency Clerk, 4050 Esplanade Way, Suite 160, Tallahassee, FL 32399-0950. Protests may also be filed by fax at 850-922-6312 or by email at agencyclerk@dms.fl.gov. It is the filing party's responsibility to meet all filing deadlines.

The Procurement Officer should be copied in such filings.

Please Note: This addendum does not need to be returned with the reply.

1. Section 1.7, of the ITN, Procurement Officer, is hereby replaced in its entirety with the following:

The Procurement Officer is the sole point of contact for this procurement. The contact information for the Procurement Officer is:

Stephanie Wyland
Purchasing Analyst Supervisor, Division of State Purchasing
Florida Department of Management Services
4050 Esplanade Way, Suite 360
Tallahassee, FL 32399-0950
Phone: 850-488-1985
Email: Stephanie.Wyland@dms.fl.gov

PLACE THE SOLICITATION NUMBER IN THE SUBJECT LINE OF ALL EMAILS TO THE PROCUREMENT OFFICER

2. Section 4.2, of the ITN, Contents of Reply, is hereby amended as follows:

The Respondent should submit its Reply in the following format and organized with all information indicated in each part below. To the greatest extent possible (without affecting quality), Replies should be written in plain language which is clear, concise, and avoids unnecessary verbosity and jargon:

3. Contract Exhibit A, Scope of Work, is hereby amended to add the below to Section 2, Definitions.

r. **Uptime** - a period of time during which any system, application, software, equipment, network or any other part of the services is expected to be available during a measurement window established by the Department.

4. Contract Exhibit A, Scope of Work, is hereby amended to add the following Section 19, Contract Terms.

19. Contract Performance

In accordance with section 216.1366, F.S., the Department is authorized to inspect the: (a) financial records, papers, and documents of the Contractor that are directly related to the performance of the Contract or the expenditure of state funds; and (b) programmatic records, papers, and documents of the Contractor which the Department determines are necessary to monitor the performance of the Contract or to ensure that the terms of the Contract are being met. The Contractor shall provide such records, papers, and documents requested by the Department within 10 Business Days after the request is made.

- 5. Contract Exhibit A, Scope of Work, is hereby amended to add the following Section 3.7.5, Document packages.**

3.7.5 The E-Signature Software shall allow users to include, attach, and add supplemental documents within a Document Package.

- 6. Contract Exhibit A, Scope of Work, is hereby amended to add the following Section 3.8.8, Workflows.**

3.8.8 The E-Signature Software shall allow Customers (Administrators and Users) to modify, replace, and add documents in the Document Package during the Workflow.