Fresno County SECURE Implementation Project Schedule

Project Title	Fresno County Recorder's Statewide Electronic Courier Universal Recording Environment (SECURE) Implementation
Project Scope Abstract	Work will be done to carry out an audit that yields a California Department of Justice (DOJ) certificate of operation for SECURE/Fresno County. Additional work will be done to prepare submitters, Fresno County, and the SECURE System to take over daily electronic recording delivery system (ERDS).
Product Description / Deliverables	Re-certification of the SECURE ERDS with Fresno County as additional county (DOJ certificate). Acceptance of SECURE User Acceptance Training (UAT) and SECURE Production environment configuration by Fresno County.
Project Objectives	To transition the Fresno County ERDS from California Electronic Recording Transaction Network Authority (CeRTNA) to SECURE without interruption to electronic recordings prior to the Fresno County's withdrawal from CeRTNA effective July 1, 2021.
Business Case	Fresno County desires to migrate from CERTNA to SECURE because Fresno County believes the CERTNA business model is not sustainable, as evidenced by recent financial audit findings, a lack of management succession planning and the loss of their founding member county, San Bernardino County. Fresno County believes that SECURE does not have any of these challenges, and that County ERDS will be well served by what SECURE has to offer in the way of technology and business structure.
Pre-assigned Resources	Patrick Copland, Orange County Georgina Luna, Fresno County Luz Suazo, Orange County Michael Spriet, Fresno County Triet Nguyen, Orange County William Helton, Fresno County Simon Tran, Orange County Reyna Rodriguez, Fresno County Jessica Montano-ISD, Fresno County Shauna Swenson, Tyler Technologies

Stakeholders List

Name	Title	Role/Responsibility
Hugh Nguyen	Orange County Clerk-Recorder	Sponsor
Adam Steckler	Director of Administration, Orange County Clerk-Recorder	Co-Sponsor
Paul Dictos	Fresno County Assessor-Recorder	Sponsor
Jo Ann Ebisuda	Fresno County Assistant Assessor-Recorder	Co-Sponsor
Susan Evans	Chief Deputy Recorder, Orange County Clerk-Recorder	Contracts/Operations
Eliz Manoukian	Fresno County Assessor-Recorder Business Manager	Contracts/Finance
Robert Dorrough	Finance Manager, Orange County Clerk-Recorder	Contracts/Finance
Patrick Copland	SECURE Project Manager, Orange County Clerk-Recorder	Project Manager
Georgina Luna	Fresno County Recording Manager	Project Manager
Shauna Swenson	Tyler Technologies Project Manager	Project Manger

Summary Milestone Schedule

Description	Target Date
ERDS Preparation Phase	

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• Fresno County Board Resolution and Memorandum of Understanding (MOU) Signed with SECURE • ERDS forms completed and signed by Fresno County Recorder • Staff identified and ERDS forms completed • Fresno County computer security policy on file (SECURE only, no distribution) • SECURE Audit Report includes language for adding Fresno County to SECURE as additional county • SECURE Audit Report, Fresno County Board Resolution, & signed paperwork delivered to DOJ • Electronic submitters notified and testing coordination begins	11/25/20

Testing Requirements Phase	
• SECURE Support configures security to allow Fresno County connection to SECURE web services • Configure SECURE UAT (test) to match Fresno County business rules • Establish Fresno County test environment and connect to SECURE UAT environment • Fresno County staff will begin testing on test environment and SECURE County Administration interface • Begin testing with at least one electronic submitter	December 2020

User Acceptance, Training and Certification Phase	
• User acceptance of Fresno County test environment and SECURE UAT completed (environments accepted) • Certificate of Operation received from DOJ and on file with SECURE • SECURE Support to provide copies of signed submitter/agent contracts to Fresno County • Submitters/agents to sign Fresno County business rules document • Begin training of Fresno County staff on test environment and SECURE County Administration interface • Completion of electronic submitter testing	January 2021

Go Live and Lessons Learned Phase	
• User acceptance of Fresno County production environment and SECURE Production completed • Complete training of Fresno County staff on test environment and SECURE County Administration interface • Completion of electronic submitter testing • Disable ability for submitters/agents to submit to Fresno County through CERTNA • Enable submitters/agents ability to submit to Fresno County through SECURE • Fresno County goes live with SECURE	March-April 2021

Summary Budget	SECURE first year cost is fixed price for Fresno County: • Initial buy-in fee will be $50,000 • First year annual maintenance fee will be $47,626 • Tyler Technologies Professional Services Fee $19,500

Assumptions	**Constraints**
• SECURER will have sufficient resources to support testing and go live activities to meet go live date of July 1, 2021. • Tyler Technologies software is equal in function to San Bernardino County software. • SECURE System can handle the daily ERDS volume for Fresno County, as evidenced by ongoing Riverside County and San Bernardino County operations. • SECURE Support will have sufficient resources to support certification/audit activities and system configuration/ troubleshooting for go live activities. • Fresno County financial obligations can be met regarding SECURE buy-in and first year annual maintenance fee.	• DOJ has no set time limit to complete certification. Fresno County will be included in the upcoming DOJ audit for certification once the Board approves the MOU. • SECURE Support is actively working staggered implementation projects with 5 other counties. • Vendor Tyler Technologies is actively working staggered implementation projects with at least 2 other counties. • State submitter testing windows may require flexibility on the part of Fresno County.

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	Project Charter Signatures		
High-Level Project Risks	- If Board date for resolution is missed, it could necessitate a later audit/certification date that could impact the go live date beyond July 1st. - Tyler Tech vendor resource availability to support system testing and go live operations. - SECURE Support resource availability to support/guide system testing and go live operations. SECURE Support has taken the necessary steps to increase staffing to fully support/guide testing and go live operations. - If the five simultaneous county implementation projects are not properly staggered, delays could result due to intermittent lack of resources. - State submitter inability to produce test windows could require state agencies to revert back to paper recordings for a time. Fresno County will contact all State submitters and schedule test times to ensure availability.		
Success Criteria	- Fresno County goes live with SECURE prior to July 1, 2021 - Fresno County withdraws from CERTNA prior to July 1, 2021 - SECURE handling the daily ERDS volume for Fresno County without disruption to operations.		

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