

## **Amendment No. 2 to Non-Standard Annual Software Support Agreement between the County of Monterey and Tyler Technologies, Inc.**

**THIS AMENDMENT No. 2** to the Non-Standard Software-as-a-Service (“SaaS”) Services Agreement (A-15637) (hereinafter referred to as “Agreement”) between the County of Monterey, a political subdivision of the State of California (hereinafter, “COUNTY”), and Tyler Technologies, Inc. (hereinafter, “CONTRACTOR”) is hereby entered into between the COUNTY and CONTRACTOR (collectively, the “parties”).

**WHEREAS**, on March 3, 2023, the COUNTY Board of Supervisors ratified the December 7, 2021 execution of the Agreement between COUNTY and Tyler Technologies, Inc. effective December 1, 2021 through November 30, 2026, in an amount not to exceed \$669,475; and

**WHEREAS**, the parties amended the original agreement via Amendment No. 1 on March 2, 2023 to strike future automatic renewal provisions and to provide a fixed term; and

**WHEREAS**, now, the parties wish to amend the Agreement via Amendment No. 2 for the addition of the Advanced Records Processing software application for term effective July 1, 2025 through and including November 30, 2026 (hereinafter, “Amendment No. 2”); and

**WHEREAS**, this “Amendment No. 2” is necessary due to the COUNTY CLERK/RECORDER’s business need to maintain compliance with Assembly Bill 1466 through the continued operation of a program to assist with the redaction of unlawfully restrictive covenants.

**NOW THEREFORE**, COUNTY and CONTRACTOR hereby agree to amend the AGREEMENT as follows:

1. The AGREEMENT shall be amended to add Exhibit D – Scope of Work and Quote – Advanced Records Processing software application.
2. The total amount payable by COUNTY to CONTRACTOR for all services performed during the term of July 1, 2025 through and including November 30, 2026 shall not exceed the sum of **\$228,771**, pursuant to the quote which is attached and incorporated by this reference as Exhibit D.
3. The total amount payable by County to CONTRACTOR under this Agreement shall not exceed the sum of: **\$898,246**.
4. If there is any conflict or inconsistency between the provisions of the Agreement or its subsequent amendments, the following shall have precedence:
  - Amendment No. 2 over both Amendment No. 1 and the Agreement, and
  - Amendment No. 1 over the Agreement.
5. A copy of this Amendment No. 2, shall be attached to the original Agreement ratified by said Board on February 28, 2023, effective from December 1, 2021, through November 30, 2026.

Amendment No. 2  
Tyler Technologies, Inc.  
June 2025

6. All other terms and conditions in the Agreement remain in full force and effect.
7. This Amendment No. 2 shall become effective on July 1, 2025 through and including November 30, 2026.


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**IN WITNESS WHEREOF**, the parties have executed this Amendment No. 2 on the last date opposite the respective signatures below.

COUNTY OF MONTEREY

Tyler Technologies, Inc.

Assessor – County Clerk/Recorder

By:   
Signature of Chair, President, or  
Vice-President

Dated:

William Van Asselt Chief Legal officer

*Approved as to Fiscal Provisions:*

Printed Name and Title

6/9/2025 | 1:50 PM PDT


DocuSigned by:

*Patricia Ruiz*

Deputy Auditor/Controller

Dated:

Dated: 6/10/2025 | 1:58 PM PDT

By:   
(Signature of Secretary, Asst. Secretary, CFO,  
Treasurer or Asst. Treasurer)\*

Katie Gray Senior Corporate Attorney

*Approved as to Liability Provisions:*

Printed Name and Title

Risk Management

Dated: 6/9/2025 | 12:48 PM PDT

Dated:

*Approved as to Form:*

Signed by:

*Shane Ellen Strong*

Office of County Counsel

Dated: 6/10/2025 | 7:58 AM PDT

**\*INSTRUCTIONS:** If CONTRACTOR is a corporation, including limited liability and non-profit corporations, the full legal name of the corporation shall be set forth above together with the signatures of two specified officers. If CONTRACTOR is a partnership, the name of the partnership shall be set forth above together with the signature of a partner who has authority to execute this Agreement on behalf of the partnership. If CONTRACTOR is contracting in an individual capacity, the individual shall set forth the name of the business, if any, and shall personally sign the Agreement.

**Exhibit D:**  
**Quote and Scope of Work**



Quoted By: Erin Walker  
Quote Expiration: 10/26/25  
Quote Name: County of Monterey  
(Hosted), ARP Year 1  
(Historical: 1978-Present)

Year 1: Day Forward; 17 Mos  
July 1, 2025 - June 30, 2026  
July 1, 2026 - November 30, 2026

**Sales Quotation For:**

County of Monterey  
County Clerk Recorder  
168 W Alisal St Fl 1  
Salinas, CA 93901-2487  
Phone: +1 (831) 755-5115

**Tyler Software**

Description		
Records Management		
Software		
ARP, Historical Records: 1978-Present (One-Time Fee) Year 1		\$ 199,138
12 Months; Day Forward ARP - Annual Fee Year 1 (July 1, 2025 - June 30, 2026)		\$ 12,447
5 Months; Aligning with Fiscal Year - One Time Fee (July 1, 2026 - November 30, 2026)		\$ 5,186
TOTAL		\$ 216,771

**Professional Services**

Description		Extended Price	Maintenance
Records Management			
Project Management			
Implementation			
Total Hours		80	
TOTAL		\$ 12,000	\$ 0

<b>Summary</b>	<b>One Time Fees</b>	<b>Recurring Fees</b>
<b>Total Tyler Software</b> <i>(Historical-Present, + 5Mos for FY Alignment)</i>	\$ 204,324	\$ 0
<b>Total Annual Recurring Yr 1 (12 Mos FY)</b>	\$ 0	\$ 12,447
<b>Total Tyler Services</b>	\$ 12,000	\$ 0
<b>Total Third-Party Hardware, Software, Services</b>	\$ 0	\$ 0
<b>Summary Total</b>	<b>\$ 216,324</b>	<b>\$ 12,447</b>
<b>Contract Total</b>	<b>\$ 228,771</b>	

## Advanced Records Processing

### Project Objective & Approach

Tyler Technologies will provide remote project management and professional services to Monterey County, CA. Monterey County is Hosted.

### Project Management

Kick off meeting

Version Update (2024.2) if needed

### Proposed Scope of Work

- Records Management configuration
  - \*Connection Information
  - \*County ID from ARP configuration
  - \*Document types identified for upload
- Workflow configuration
- Work with County to set schedule for mass processor
- Configuration of document type
- Add administrative user
  - \*Work with County to create initial word list
  - \*Work with County to create the ARP template
  - \*Upload into ARP configuration
- Training - Including:
  - \*General workflow
  - \*Managing Recorder and Counsel users
  - \*Uploading documents
  - \*Document review (resizing, add/remove redactions, comments, digital signature)
  - \*Searching and analyzing results (managing word list, review of AI false positives)
  - \*Reports
  - \*Auditing

- Go-Live
  - \*Recorder & Counsel Users
  - \*ARP Link for users
- Upload of Documents - Work with County on plan
  - \*Recommendations could include:
    - \*\*Upload 1 week of documents to test connections and OCR processing
    - \*\*Run word search and AI - review results. Adjustments if needed.
  - \*Upload 1 month of documents
    - \*\*Adjust if needed
  - \*Upload 3 months of documents
    - \*\*Adjust if needed
  - \*Upload 6 months of documents
- Continue uploads - 1 year at a time
  - \*Run AI search before uploading the next year
- Uploads - Each Round
  - \*Generate Restrictive Language Data
    - \*\*Enter date range and document types
- Searching
  - \*Assist County with searching and the results
- Recording
  - \*Monitor first few recordings
  - \*Assist County with viewing the recorded documents

