

Topic: New Filing System Question

Question by: Tom Riley

Jurisdiction: Tennessee

Date: October 24, 2019

Jurisdiction	Question(s)
	<p>We are starting the process of obtaining a new filing system for our business services division. The system will allow for total online filing of all business entity documents, UCC filings as well as charitable registrations and several other things that we do in our division here in Tennessee. I've spoken with many of you over the years about this topic, but our IT department has a series of questions that they would like me to put to you all as part of their due diligence. I would appreciate it if you would indulge us by responding sometime in the next week if possible. Thanks for your help.</p> <p>What is the name of the person responding to this request, what is your contact information, and what state do you represent?</p> <p>What is the name of your current vendor and what is the name of the system?</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated?</p> <p>What types of filings are currently processed in your current filing system?</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product?</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization?</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)?</p>
Manitoba	
Corporations Canada	
Alabama	
Alaska	
Arizona	

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Arkansas	
California	
Colorado	
Connecticut	
Delaware	
District of Columbia	
Florida	
Georgia	
Hawaii	
Idaho	
Illinois	

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<p>Indiana</p>	<p>David Maxwell, INBiz Deputy Director, Indiana, (317) 234 – 9662, drmaxwell@sos.in.gov</p> <p>Vendor: PCC Technology Group, Inc., (A GCR Company) Online System Name: INBiz Backend System Name: BSD In-house Vender System: Cenuity Platform</p> <p>Initial Production Release: April 2016 - Released New Business Registration System Online (INBiz) and new backend business registration system. Updates to Production: January 2017 -Added new functionality to allow for Series LLCs to both INBiz and BSD. January 2018 - Updated INBiz and BSD to meet newly enacted Statute as Indiana Adopted HUB, META and Commercial Registered Agents. . June 2018 - Added Trademark functionality to INBiz and BSD August 2019 - Added UCC functionality to INBiz and BSD</p> <p>All Business Entity Transactions, All Trademark Transactions, All UCC Transactions</p> <p>Vendor</p> <p>Base product was off the shelf customized to meet Indiana needs and requirements.</p> <p>Vendor completed the customizations. INBiz accepts Credit Cards (excluding AMEX) and eCheck (up to \$2,500). BSD In-house we accept, Cash, Check, Money Order and Credit Card (including AMEX).</p>

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Iowa	<p>What is the name of the person responding to this request, what is your contact information, and what state do you represent? Kyle Phillips, Iowa Sec of State, kyle.phillips@sos.iowa.gov</p> <p>What is the name of your current vendor and what is the name of the system? "Fast Track Filing" is a collaborative effort between IA SOS IT staff, and a local company.</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated? May 2018. The system was launched with business formation documents only. Since then, we'd added additional business documents, and the UCC filing system. Biennial Reports launching in Jan. Eventually, all documents filed in SOS will be handled through "Fast Track Filing" (business entities, UCC, liens, notaries, gov to gov agreements, ag reports, etc)</p> <p>What types of filings are currently processed in your current filing system? Business formation, UCCs, change of agent, fictitious name resolutions</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product? Collaborative, with vendor doing most development. Custom product.</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization? --</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)? By the hour (reduced rate based on large volume of hours).</p>

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Kansas	
Kentucky	

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<p>Louisiana</p>	<p>What is the name of the person responding to this request, what is your contact information, and what state do you represent? Brad Harris, brad.harris@sos.la.gov, Louisiana</p> <p>What is the name of your current vendor and what is the name of the system? PCC Technology Inc., CORA</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated? Business registration/renewal 2009, UCC 2010, Notaries 2012. We update monthly.</p> <p>What types of filings are currently processed in your current filing system? Business registration/renewal, Notaries, UCC</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product? PCC built with in-house contributions, customized product.</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization?</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)? Hourly rate for enhancements. We host the system and code. We only have enough staff to maintain not grow or make major changes. Vendor does heavy lifting.</p>

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Maryland	

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<p>Massachusetts</p>	<p>What is the name of the person responding to this request, what is your contact information, and what state do you represent? Marissa N. Soto-Ortiz, Director & Attorney, Corporations Division of the Secretary of the Commonwealth's Office, marissa.soto-ortiz@sec.state.ma.us<mailto:marissa.soto-ortiz@sec.state.ma.us>.</p> <p>What is the name of your current vendor and what is the name of the system? Our current system was built in house and is maintained by our office.</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated? The system was put into production in 2001. There have been several updates; for a detailed response on this I will need to get more information from our IT Division. But almost every aspect of the system has been updated since 2001.</p> <p>What types of filings are currently processed in your current filing system? Every filing may be processed electronically.</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product? Developed in-house in partnership with a vendor. However, the code is owned by this office.</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization?</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)?</p>

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<p>Michigan</p>	<p>Alexis Derrossett, Director Corporations Division Corporations, Securities & Commercial Licensing Bureau Department of Licensing and Regulatory Affairs State of Michigan (517) 241-6448 derrossetta1@michigan.gov<mailto:derrossetta1@michigan.gov></p> <p>Through an interlocal agreement between the Governors of the State of Michigan and the Commonwealth of Massachusetts, the Michigan Corporations, Securities and Commercial Licensing Bureau (CSCL) Corporations Division purchased software developed by the Commonwealth of Massachusetts, called the Business Entities Electronic Filing and Imaging System. This software replaced the existing the software and associated databases used in Michigan.</p> <p>DMI, Inc. is the vendor who assisted with our customization of the system, implementation, maintenance, and support.</p> <p>The system is called the Corporations Online Filing System (COFS).</p> <p>The system was placed into production on October 30, 2017. There have been bug fixes and continuous updates since it was implemented.</p> <p>Our most frequently submitted filings, for example: entity formation documents, annual reports and annual statements, change of registered office address and/or resident agent, amendments, name reservations, and certificates of assumed name.</p> <p>See above.</p> <p>See above.</p> <p>Payment structure for the software system was a flat-rate, one-time cost. The payment structure for the development team was by competitive contract.</p>

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Mississippi	
Missouri	
Montana	
Nebraska	

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<p>Nevada</p>	<p>What is the name of the person responding to this request, what is your contact information, and what state do you represent? Kim Perondi, Deputy Secretary for Commercial Recordings, Nevada 775-684-5714 kperondi@sos.nv.gov<mailto:kperondi@sos.nv.gov></p> <p>What is the name of your current vendor and what is the name of the system? PCC Technologies - Cenuity</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated? Went live July 2019. Yes, last update 10/23/2019.</p> <p>What types of filings are currently processed in your current filing system? All Business Entity filings, Charitable Registrations, Trademarks/Tradenames, UCC, Notary, and XML Bulk Filing.</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product? Customized solution.</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization? State designed, Vendor developed.</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)? Fixed price contract.</p>

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<p>New Hampshire</p>	<p>Thomas B. Connolly, Assistant Secretary of State, State House, Room 204, Concord, New Hampshire 03301 Thomas.Connolly@SOS.NH.GOV, 603.271.0716 direct</p> <p>PCC Technology Group, LLC. Our system is called "NH QuickStart."</p> <p>October 3, 2015. The first release supported eight (8) online filing types. Additional releases added UCC filing and search requests, dissolutions, limited partnerships, benefit corps.</p> <p>Name Reservation Name Reservation Transfer Domestic Corp Formation (incl. Professional and Benefit Corp.) Domestic Corp Amendment (incl. Professional and Benefit Corp.) Domestic Corp Dissolution (incl. Professional and Benefit Corp.) Foreign Corp Qualification Foreign Corp Amendment Foreign Corp Withdrawal Corp. Annual Report Benefit Corporation Report Trade Name Registration Trade Name Renewal Trade Name Add/Remove a Partner Trade Name Discontinuance Business Information Change Domestic LLC Formation (incl. Professional) Domestic LLC Amendment (incl. Professional) Domestic LLC Cancellation (incl. Professional) Foreign LLC Qualification (incl. Professional) Foreign LLC Amendment (incl. Professional) Foreign LLC Withdrawal (incl. Professional) LLC Annual Report Domestic Nonprofit Formation Domestic Nonprofit Amendment Domestic Nonprofit Dissolution Foreign Nonprofit Registration Foreign Nonprofit Amendment Foreign Nonprofit Cancellation Domestic LP Formation Domestic LP Amendment Domestic LP Dissolution Foreign LP Registration Foreign LP Amendment Foreign LP Cancellation Quinquennial Nonprofit Report Change of Registered Agent and/or Registered Office Registered Agent Resignation Commercial Registered Agent Address Change Trademark Registration Trademark Assignment Insignia Registration Insignia Amendment Trademark/Insignia Cancellation UCC-1 Financing Statement UCC-3 Amendment UCC-5 Information Statement UCC-11 Search Request Form</p> <p>Developed by vendor, custom product</p> <p>N/A</p> <p>Design and development billed hourly, professional services contract</p>

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New Jersey	
New Mexico	
New York	
North Carolina	

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<p>North Dakota</p>	<p>Jim Silrum, Deputy Secretary of State</p> <p>What is the name of your current vendor and what is the name of the system?</p> <p style="padding-left: 40px;">For all UCC, Farm Products Central Notice, Statutory, Agricultural, Federal and State Tax liens - PCC's solution For all business, licensing, lobbyist, charitable organization filings and soon to be notary and list subscription modules - Tecuity's SOS Enterprise for the backend solution and FirstStop for the customer interface.</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated?</p> <p style="padding-left: 40px;">UCC - March of 2016 with minor updates SOS Enterprise and FirstStop - January 2019 and we are continuing to add modules.</p> <p>What types of filings are currently processed in your current filing system?</p> <p style="padding-left: 40px;">See the answer above.</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product?</p> <p style="padding-left: 40px;">Tecuity is our vendor and we worked with them to configure their system to our needs.</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization?</p> <p style="padding-left: 40px;">Same as above.</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)?</p> <p style="padding-left: 40px;">Fixed-priced contract.</p>

Jurisdiction	Question(s)
	<p>We are starting the process of obtaining a new filing system for our business services division. The system will allow for total online filing of all business entity documents, UCC filings as well as charitable registrations and several other things that we do in our division here in Tennessee. I've spoken with many of you over the years about this topic, but our IT department has a series of questions that they would like me to put to you all as part of their due diligence. I would appreciate it if you would indulge us by responding sometime in the next week if possible. Thanks for your help.</p> <p>What is the name of the person responding to this request, what is your contact information, and what state do you represent?</p> <p>What is the name of your current vendor and what is the name of the system?</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated?</p> <p>What types of filings are currently processed in your current filing system?</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product?</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization?</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)?</p>
Ohio	<p>What is the name of the person responding to this request, what is your contact information, and what state do you represent? Allison DeSantis, Director of Business Services and Deputy Assistant Secretary of State from Ohio</p> <p>What is the name of your current vendor and what is the name of the system? Current business registry was built in house</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated? Originally developed in 2003 and has been re-written within the last 3 years and an online system was added to the existing system.</p> <p>What types of filings are currently processed in your current filing system? All business filings and trademark applications are processed in the system and available to submit online.</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product? In-house</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization? NA</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)? NA</p>

Jurisdiction	Question(s)
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Oklahoma	
Oregon	
Pennsylvania	
Rhode Island	
South Carolina	
South Dakota	
Tennessee	
Texas	
Utah	
Vermont	
Virginia	

Jurisdiction	Question(s)
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<p>Washington</p>	<p>What is the name of your current vendor and what is the name of the system? PCC was the vendor, CCFS is the system name (Corporations and Charities Filing System)</p> <p>What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated?</p> <p>We went live November 2017, several subsequent releases during the final 1.5 year build out. Currently working on enhancements with internal team.</p> <p>What types of filings are currently processed in your current filing system? All corporations and charities filings, copy order fulfillment, we do not process UCC in our office.</p> <p>Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product? Was built by the vendor as a design build. We now own the code and are no longer under contract with the vendor.</p> <p>If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization? It was not a COTS system since we bought it as a design build. Although some parts resemble COTS from the vendor used in other states, it is not the same code.</p> <p>What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)?</p> <p>Competitive contract. Now that the contract is clear we have full ownership of the entire code, our development team has taken over maintenance and will build the enhancements and additional features we desire.</p>

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West Virginia	
Wisconsin	
Wyoming	

Additional comments:

Full text of email:

Good afternoon.

We are starting the process of obtaining a new filing system for our business services division. The system will allow for total online filing of all business entity documents, UCC filings as well as charitable registrations and several other things that we do in our division here in Tennessee. I've spoken with many of you over the years about this topic, but our IT department has a series of questions that they would like me to put to you

all as part of their due diligence. I would appreciate it if you would indulge us by responding sometime in the next week if possible. Thanks for your help.

What is the name of the person responding to this request, what is your contact information, and what state do you represent?

What is the name of your current vendor and what is the name of the system?

What date was your current filing system placed into production? Have there been updates to the system and if so what date and what was updated?

What types of filings are currently processed in your current filing system?

Was your current filing system developed in-house or by a vendor? If by a vendor, is it a customized product or a commercial off the shelf product?

If you have a commercial off the shelf product, did it require customization and if so did the state complete the customization or did the vendor complete the customization?

What is the payment structure for your system (i.e. Fee for service by the hour, subscription based, etc.)?

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