

Request for Proposal

PDF Mail Workflow Processing System

Legal Aid Society of San Diego (LASSD)

RFP Project Overview

LASSD requests a unified, production-grade PDF mail workflow platform that converts employee-scanned correspondence or emailed into LASSD with PDF attachments into correctly routed, summarized, searchable, and governed digital records. The finished system must receive scanned mail as PDFs, use a secure document-intelligence or workflow automation approach to read and classify documents, determine the nature and function of each item, file or link correspondence in the appropriate approved location by user, subject, client, or matter, notify recipients with a secure clickable link, and support upload or linking of relevant case documentation to the correct location in Sharepoint. Leverage JusticeServer(Salesforce) CMS in naming, assigning, and assisting in necessary steps of an appropriate workflow. Some restructuring of document repositories, folders, metadata, or permissions may be required so all relevant workflow locations can be used reliably.

LASSD does not require a specific artificial-intelligence or automation product. Bidders may propose any secure, reliable, and supportable solution that satisfies the functional, confidentiality, access-control, audit, integration, and data-handling requirements in this RFP. Any AI-assisted features must preserve human oversight for ambiguous or exceptional cases.

The completed product is intended to replace fragmented PDF mail handling with a controlled workflow in which each scanned item has one authoritative location and is surfaced to the right people through role-aware access, secure links, metadata, summaries, notifications, and audit history. This is not a simple file-moving utility. It is a coordinated PDF mail workflow and document-intelligence system that must reconcile identity, matter context, permissions, legal confidentiality, routing logic, exception handling, auditability, and staff usability across multiple enterprise platforms.

THE PRODUCT VISION

Every scanned item is intelligently managed and distributed.

Organization Background

LASSD provides civil legal services to clients whose matters often involve confidential personal, medical, financial, and case information. LASSD receives physical mail that is scanned and distributed to advocates, supervisors, administrative staff, and client or matter records, or is emailed PDFs. Accuracy, confidentiality, timely delivery, and clear records of document handling are essential.

Project Need

The current process requires staff to review scanned PDF mail, identify the correct client or matter and assigned advocate, place documents or links in the proper locations, and notify staff that mail has arrived. This creates repeated manual work, increases the risk of duplicate or inconsistent files, and makes the status of each PDF mail item harder to track.

LASSD is seeking an automated PDF mail workflow that creates a reliable digital intake point, uses secure document intelligence or automation to assist with classification and routing, maintains one authoritative document, provides appropriate access for advocates, supervisors, mail administrators, and client files, sends required notifications, gives mail administrators a clear process for reviewing exceptions, and tracks each document from receipt through final disposition. As well as, summarization of important dates, names, and other relevant information from the PDFs for staff and supervisor review.

Current Tools and Process

- LASSD currently uses Microsoft 365 tools, including SharePoint, Teams, and Power Automate. Bidders may propose any secure solution that integrates appropriately with LASSD's required systems and workflows.
- Any artificial intelligence, optical character recognition, automation, or document-intelligence technology used must be secure, auditable, supportable, and appropriate for confidential legal-services records.
- JusticeServer (Salesforce) is the authoritative case-management system.
- New physical mail is distributed as PDFs to case-relevant staff and may rely on automated or manual steps across email, document repositories, JusticeServer-linked folders, and related workflow locations. Documents may contain poor-quality text, handwriting, multiple pieces of mail in one scan, or information relating to more than one client or matter.
- Records are also emailed with PDFs and require the same workflow solution.

Emails and incoming physical mail is sorted by assigned staff, scanned to PDF, and routed to appropriate staff for review. Staff currently review each scanned PDF, verify the assigned advocate or responsible staff person in JusticeServer as necessary, and either complete manual filing steps or use available workflow tools to place or link scanned documents in appropriate locations for the advocate, assigned supervisor, and client or matter record. Notifications are then sent to appropriate users. Advocates and assigned supervisors are responsible for confirming that newly routed documents have been reviewed and handled. Supervisory assignments may change and must be reflected reliably in the workflow.

Functional Requirements

The proposed solution must operate as a cohesive PDF mail workflow environment rather than a collection of disconnected steps and automations. From the user perspective, incoming scanned mail should enter a single digital intake location and emerge as a governed client or matter record with verified context, a concise system-generated or staff-reviewed summary where appropriate, secure visibility through one authoritative document, notifications, and a complete audit trail. The technical complexity should be contained within the platform so the staff experience remains direct and dependable.

"Incoming scanned mail enters a single digital intake location and emerges as a governed client or matter record with verified context, a useful summary, appropriate visibility through one authoritative document, secure notifications, and a complete audit trail."

Vendors must clearly identify whether each requirement is included in the base proposal, requires additional licensing, requires a paid add-on or third-party service, depends on JusticeServer capabilities, or is not available. Bidders must also identify material assumptions, limitations, and dependencies.

1. Document Reading and Information Identification — Highest Priority

- Read text from scanned PDF documents, including image-based PDFs that do not already contain searchable text.
- Identify available client, matter, sender, document type, document date, recipient, and other useful routing information.
- Produce a concise document summary, when appropriate, and clearly identify whether the summary was system-generated, AI-assisted, or staff-reviewed. Any summary must not replace manual review of the original document.
- Extract and store key data for identifying case/client and routing documents and communications.
- Preserve the original document without changing its contents.
- Identify documents that cannot be read, classified, or matched with sufficient confidence and place them into a clear manual review process.

2. Complex and Exception Documents

- Process legible handwriting in scanned PDFs and clearly flag uncertain handwriting for review.
- Recognize when a document or scan batch contains information for more than one client, matter, or subject, and separate the documents or place them into a clear manual review process.
- Recognize when one scanned PDF contains multiple separate documents and support appropriate separation or treatment of those documents.
- Allow authorized staff to correct a match, classification, summary, routing decision, or document split without losing the original record.
- Support refinement based on reviewed examples during the first 90 days of operation so recurring edge cases can be handled consistently. Documents that still cannot be processed with sufficient confidence must remain visible for human review.

3. Client, Matter, and Advocate Matching

- Compare available document information with authoritative JusticeServer records using an approved integration method.
- Identify the most likely client, matter, assigned advocate, and supervisor when enough information is available.
- Avoid silently routing a document when more than one plausible match exists or when authoritative information is unavailable.
- Record the information used to support a match and make that result reviewable by authorized mail administrators.
- Bidders must describe JusticeServer integration requirements, API dependencies, professional services assumptions, and any limits imposed by JusticeServer.

4. Document Management and Access

- Maintain one authoritative digital copy of each processed document in a LASSD-approved secure document repository or system location.
- Make the authoritative document available from the appropriate client, advocate, supervisor, and JS views without creating unmanaged duplicate copies.
- Apply existing or approved role-based permissions, identity controls, and access rules so users only see documents they are authorized to access.
- Prevent broken references or lost access when advocate assignments or supervisory relationships change.

5. Notifications and Summaries

- Notify the appropriate advocate, specifically assigned supervisor, and mail administrators when new documents are ready for review.
- Include a secure direct link to the authoritative document and a concise summary when appropriate.
- Clearly identify any system-generated or AI-assisted summaries and preserve review controls for ambiguous or sensitive documents.
- Prevent notification content, summaries, client names, matter details, and document links from being exposed to users who are not authorized to access the original document.
- Allow notification timing, recipients, and content to be adjusted by authorized administrators.

6. Audit History and Administrative Review

- Maintain an end-to-end history for each document, including receipt, analysis, extracted information, confidence or exception status, matching, staff corrections, final location, access references, and notifications.
- Allow mail administrators to see the current status of each document and identify items that need attention.

- Record who made manual corrections and when those corrections occurred.
- Provide searchable or exportable logs suitable for troubleshooting, operational review, and audit needs.
- Bidders must state how long logs are retained and whether any additional products or licenses are required for reporting or long-term log storage.

7. Security, Data Handling, Governance, and Error Handling

- Bidders must identify the proposed technology stack and explain how each component is used, including any AI, OCR, workflow automation, document-management, notification, reporting, integration, or hosting services.
- Use LASSD-approved identities, authentication, permissions, and administrative controls for access and administration.
- Protect confidential client and matter information while documents are stored, analyzed, routed, logged, and displayed in notifications.
- Records are subject to LASSD's HIPAA requirements for security purposes.
- Disclose where original documents, extracted text, AI prompts and responses if applicable, summaries, temporary files, logs, and integration data are stored, and how long each item is retained.
- Identify whether any LASSD information leaves LASSD-approved systems or environments and describe the purpose, safeguards, encryption, access controls, subcontractors, data residency, and retention associated with that transfer.
- LASSD data must not be used to train public, shared, or vendor-general models, systems, or datasets.
- Build in error checking and handling for all potential failure points, including poor scan quality, integration or API degradation, document copying or writing errors, notification failures, and any condition that could cause the process to be incorrectly marked successful or complete.

Licensing and Scope Summary

- The solution must provide secure document reading, extraction, matching assistance, routing support, and summary generation where appropriate.
- The solution must integrate with LASSD's required document repositories, notification tools, workflow systems, and JusticeServer environment as needed to produce the required result.
- Identify all required products, licenses, premium connectors, AI capacity or consumption charges if applicable, JusticeServer services, third-party products, hosting services, and professional services.
- Identify recurring costs separately from one-time design, configuration, onboarding, and training costs.
- Bidders must state any expected document-volume, page-count, file-size, storage, API, or AI-usage limits that could affect cost or performance.

Implementation and Training Requirements

- The selected vendor must deliver a complete, production-ready system that meets the functional, security, integration, notification, and audit requirements in this RFP.
- Proposals must describe the vendor's project management, testing, acceptance, and risk-management approach without requiring LASSD to adopt a particular internal implementation sequence.
- The selected vendor must provide live training for mail administrators, affected program staff, system administrators, and other users identified by LASSD.
- The selected vendor must provide written user guides, administrator documentation, troubleshooting guidance, and reusable onboarding materials for future staff.
- The selected vendor must provide at least 24 months of post-implementation support or suggestions on dealing with any workflow disruption.
- Bidders must distinguish warranty correction, incident support, routine maintenance, compatibility work with LASSD-approved systems, and separately priced enhancements.

- Bidders must state support hours, severity levels, response targets, escalation procedures, included service limits, and pricing for optional support beyond the initial term.

Submission Requirements

Responses should be concise, well-organized, and demonstrate how the proposed system meets or exceeds LASSD's requirements. Bidders should use the headings in this RFP where practical so that proposals can be compared consistently. Marketing materials may be included as attachments, but they should not replace direct answers to the requirements.

- Describe the proposed finished system and the user experience for mail administrators, advocates, supervisors, and system administrators.
- Identify required products, licenses, third-party services, hosting, storage, workflow, document-intelligence, OCR, integration, or AI-related costs if applicable.
- Identify client and vendor responsibilities.
- State assumptions, exclusions, known limitations, and unresolved dependencies.
- Describe experience delivering comparable secure document workflow, document-intelligence, records-management, notification, and case-management integrations.
- Provide proposed acceptance measures and explain how successful operation will be demonstrated.
- Describe the support model and all related pricing.
- Identify material risks or dependencies that could affect scope, schedule, security, cost, or ongoing operation.

Vendor Information

- Vendor's full name, address, telephone number, email address, and website.
- Primary contact for the proposal, including title, phone number, and email address.
- Brief company history, number of employees, years in operation, and relevant technical, security, workflow, document-management, or integration qualifications.
- Experience with nonprofit legal services, confidential client records, secure document workflows, document repositories, AI or OCR tools if proposed, JS, or comparable case-management platforms.
- Three recent references for work of similar complexity, including a description of services and contact information.
- Names and roles of proposed key personnel and any subcontractors or third-party providers.

Pricing and Pricing Methodology

Pricing must be itemized and must include all one-time and recurring costs needed to deliver and operate the proposed system. Proposals that omit required licensing, AI or OCR usage charges if applicable, connectors, JusticeServer work, third-party services, hosting, storage, logging, support, or other required components may be considered incomplete.

- One-time labor and materials for the complete production system.
- Software licenses, platform subscriptions, premium connectors, hosting, storage, AI/OCR capacity purchases, and estimated ongoing usage or consumption costs.
- JusticeServer integration costs, including any vendor, API, connector, configuration, or professional services charges.
- Third-party products or services, including setup and recurring charges.
- Training, onboarding, documentation, and knowledge-transfer costs.

- At least 24 months of support, with optional pricing for additional years or other suggestions to handle workflow disruptions.
- Assumed document volumes, usage levels, storage, and other factors used to calculate pricing.
- Rates and approval process for enhancements or work outside the included scope.
- Contract term, renewal options, price-change rules, taxes, travel, and any other fees.
- Budget is projected to be up to \$20,000.

Project Timeline

- RFP posted: 9/7/2026
- Questions due by email: 9/14/2026
- Proposals due: 9/21/2026, 5:00 pm PST
- Vendor selection notification: 10/07/2026

Evaluation

The contract is expected to be awarded to the bidder providing the best overall value to LASSD. Evaluation will consider the completeness, practicality, security, cost, and long-term supportability of the proposed system, not price alone.