



HARRIS COUNTY CLERK'S OFFICE

RECORDS ARCHIVE PLAN

FY2025

ARCHIVE PLAN FY2025

Introduction & Background

- The Harris County Clerk's Office (HCCO) is committed to preserving the county's historical records, some dating back to the 1800s, while continually improving technology and services for the future.

As the official recorder of real property, personal, business, and governmental records, HCCO ensures the preservation of documents under its care, including those for the Commissioners Court, County Civil Courts at Law, and Probate Courts. Public documents include any electronic or paper filings authorized by the County Clerk for filing, posting, or maintenance.

The Records Archive Plan manages the lifecycle of public records, reducing costs and improving efficiency through effective storage systems, control schedules, and long-term preservation.

Summary

- The Texas State Legislature provides a way to fund the preservation of current and historical county records through the Records Archive and Management Fee, avoiding raising taxes or using general funds. Approval of this plan will ensure the continued preservation of records for future generations.

According to Local Government Code, Section 118.011, a Records Archive and Management Fee of up to \$10 may be collected per filing. The fee was increased from \$6 to \$10 on January 1, 2024.

For FY 2025, this plan proposes keeping the fee at \$10. The fee will be deposited into a separate account and used for the preservation, restoration, and automation of the HCCO's Records Archives.



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Purpose

- HCCO is committed to preserving current and historical records by utilizing the Archive Fee revenue. This fee funds ongoing preservation projects, including converting older media to electronic formats and integrating enhanced images and data into existing software systems for public access.

Goals and Vision

- HCCO's goal is to continue working towards complete digitization of all records, restoring and preserving them as they have historical value to Harris County. The Records Archive Plan contains HCCO records management, preservation projects, and the County Clerk's overall goals and vision. HCCO aims to fully digitize and preserve records of historical value to Harris County. The Records Archive Plan outlines our records management and preservation goals.
 - Continue to automate and upgrade record systems with new technology.
 - Continue to eliminate or reduce paper document searches by enhancing electronic retention.
 - Continue to make public information easily accessible online.
 - Protect original records by ensuring electronic retention.
 - Continue scanning and indexing all records as they are recorded.
 - Develop a comprehensive electronic records Emergency Management/Disaster Recovery Plan.
 - Continue to seek efficient and cost-effective records management solutions.



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Microfilm to Electronic Image Conversion Project

- The project involves converting 72,000 rolls of microfilm, totaling over 200 million images, into digital format. Awarded to U.S. Imaging in January 2018, the project began with scanning all microfilm and is now in the second and third phases, where images are being enhanced automatically. Real Property records were the first to be processed, with over 16 million images now available online.

Converted images undergo quality control at the County Clerk's office before final production. Any images needing further enhancement will be sent back to U.S. Imaging. We anticipate completing the first two phases and indexing documents from 1836 to 1959 by the end of FY 2025.

This project will provide digital images that align with our electronic records index from the 1930s onward. Commissioners Court backup documents, previously in paper form, are also being digitized. This conversion will free up storage space, eliminate maintenance costs, and improve retrieval efficiency. Upon completion, we will no longer need to maintain multiple microfilm copies but will preserve the master copy in a climate-controlled vault at the Todd Street warehouse.

County Clerk's Records Center

- All historical records maintained by the County Clerk's Office are stored at our climate-controlled warehouse at 11525 Todd Street. This facility features a fire-locked vault for preserving the master copy of our microfilm. The recent completion of digitization of the film media has provided a digital means for long-term preservation. The warehouse includes large-screen computers for public access to view historical records. As part of the digitization project, all pre-1961 record books have been scanned into grayscale TIFFs. These images go through a quality assurance process, by which they are reviewed and enhanced by the vendor. We will seek vendor's assistance to develop an electronic index in-house for records from 1836 to 1955 or seek vendor proposals for software to automate the retrieval of these documents.

Electronic Real Property Index

- The current Real Property index begins in January 1961. Records prior to this are retrieved via microfilm or books. The period from 1955 to 1960 is particularly



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challenging to search due to outdated indexing methods. During these five years, about 950,000 records were filed in Deed, Mortgage, and Contract records. In May 2017, we initiated an in-house project to create an electronic index for these pre-1961 records. So far, approximately 300,000 records have been processed. On January 30, 2024, the court approved the County Clerk's proposal to continue indexing Real Property records from 1836 to 1955, aiming to complete the image repository for these records.

Gen AI Integration

- Implementing Generative AI (Gen AI) in HCCO will significantly streamline operations, reduce manual workloads, improve accuracy, and enhance customer service. Gen AI's capabilities, such as automated content generation, can seamlessly integrate across various applications and third-party solutions, aligning with the County Clerk's operational needs. This strategic move towards AI will drive efficiency and strengthen the office's overall effectiveness.

Document Management System

- Most records filed in HCCO are permanently retained. With our document repository approaching 300 million documents and an additional 1.3 million added annually, we need a centralized electronic document management system. HCCO currently uses multiple systems, which is inefficient and challenging to manage. Given the complexity, the County Clerk is considering purchasing a software application rather than developing one in-house. Preliminary estimates suggest that a suitable system would cost approximately \$3.5 million.



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Redaction of Personal Information

- Once the conversion of microfilm to digital images project is completed and the new document management system is in place, HCCO will redact social security numbers and other sensitive information from public documents. Redaction will involve removing sensitive data without distorting the record's meaning or integrity.

Specifically, the first five digits of social security numbers will be redacted or truncated by removing the text, not just overlaying it. The County Clerk will evaluate the costs and benefits of purchasing OCR/Redaction software versus contracting a vendor for this service. This project will redact sensitive personal information, such as social security and driver's license numbers, from existing records (Backfile Redaction) and future documents (Day Forward) filed in our office. Once completed, previously restricted document types will become accessible to the public. Preliminary estimates for suitable software and services are around \$2.4 million, with an annual maintenance cost of \$30,000.

E-Commerce

- In October 2014, the County Clerk's website began offering public access to images of land, court, and personal records. The public can view and print these images (with a watermark) free of charge, reducing the need for in-office visits. Since August 2020, we have also provided options to purchase certified and non-certified copies (without the watermark).

This achievement marks a significant enhancement in our online and in-person services. In FY 2024 alone, we've processed approximately 58,400 web sales transactions, averaging around 5,000 per month.

The eCommerce feature, developed with input from the legal community, title searchers, and public users, is designed to be intuitive and mobile-ready. This allows users to access documents from various devices. We currently restrict access to records containing sensitive information, such as social security numbers. This technology remains a key focus for the Clerk's Office and will continue to evolve as technology advances.



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Land and Personal Records, Cashiering - eRecording System

- HCCO currently uses a land records product called County Fusion to process the real property and personal records filed in our office. The system provides a flexible and configurable approach to meet constituents' unique needs by automating how we process large volumes (estimated over 700,000 annually) of land and personal records are filed with our office. Over 400,000 of the land records were filed electronically in 2023. The County Fusion application is seamlessly integrated through configurable workflows, allowing the documents to flow through the entire filing, cashiering, scanning, and indexing process. This efficiency ensures that documents are available to the public and the title industry the next day after filing. The solution includes a robust cashiering module that tracks all monies and allows our office to accept and process multiple payment types, including cash, check, and credit card transactions. The system provides customer receipts and monitors all activity through detailed audit trails. Once a document has been filed electronically or converted to an electronic format, the configurable workflows automate the imaging and indexing processes. Electronic documents are automatically imaged, ingested and indexed using optical character recognition (OCR) technology, which enhances data entry and verification.

In December of 2019, Commissioners Court approved a new four-year contract for the County Fusion application. This contract expires in December of 2024 and will be up for rebid. The County Clerk is considering upgrading to a new cloud-based technology for land and personal records, cashiering, and eRecording systems. This upgrade would offer enhanced security, data management, backups, and disaster recovery. The new cloud solution would surpass the current system in scalability, performance, flexibility, and redundancy, better serving the constituents of Harris County.



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Current Commissioners Court Records

- As Clerk of the Commissioners Court, HCCO is responsible for creating the official Minutes and maintaining all documents presented to the court. Since January 2013, we have scanned these documents following each court meeting. In June 2017, we made post-court documents from January 2013 onward available online to other county departments, significantly reducing the need for paper copies. Starting in November 2017, we also began providing audio files of each court meeting. In FY 2021-22, the county implemented a new automated agenda and court minutes software, streamlining the process by recording votes and notes through an interface and automatically generating the official minutes. The Office of Court Administration (OCA) and HCCO are now pursuing a new cloud-based system, offering enhanced security, unlimited training, a unified platform, and other advanced features and customizations.

Historical Vital Records Project

- HCCO is undertaking a project to preserve and restore vital records books for permanent retention. This initiative began in July 2021 with an internal review of the archives and vital records systems, assessing approximately 15,000 volumes and 2.2 million recorded instruments. Many records were severely deteriorated, with damaged bindings and part of an outdated, complex workflow. To address the deterioration of these vital records, HCCO recognizes the need for professional services to carefully preserve, restore, and digitize them. This effort will ensure long-term management and provide digital access for both internal and external users. In addition to preservation, the project will also include indexing the records. On July 15, 2024, the court awarded the project as a turnkey solution with an estimated cost of \$7 million. As a multi-year process, the project will enhance real-time access to records, improve retrieval speed, and maintain historical documents for research purposes, benefiting the community.

Toll Road Adjudication Records

- HCCO serves as the designated custodian for records related to the adjudication of toll road violation cases. In May 2015, we began electronically receiving pre-judgment documents and case index information from the law firm representing the county. Since November 2019, we have expanded to also receive both pre-judgment and



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post-judgment files electronically from the County Attorney's Office and the Harris County Toll Road Authority. HCCO verifies document images and index information, then electronically applies all necessary signatures and stamps. The entire process is now electronic except for printing and mailing post-judgment notices. The project is expanding to include fully automated processes, such as virtual and remote hearings, eliminating the need for time-consuming paperwork and ultimately saving the county resources and costs.

County Archivist Projects

- The mission of the Harris County Archives Department is to preserve, protect, and provide access to permanent county records and records of historic value that document the government and citizens of Harris County. During FY 2019-20, the Archives Department emphasized making more records available through processing and expanding online access to the public through an Information Management System. The public can access the archives finding aids, as well as information about the collections, through our website.

In January 2019, the County Archives were selected to participate in a grant-funded program to have finding aids marked up by a vendor and placed online through TARO (Texas Archives Resources Online). Sixty-nine finding aids of the Harris County Archives are now available through the TARO website. The Archives also provides images online through the Harris County Digital Archives site. An additional 155 images were added in 2019, and as of September 2024, there have been over 1500 images and exhibits added to the online portal.

In 2019, the Harris County Archives began a collaboration with the Harris County Public Library for their 100-year anniversary in 2021. A librarian from HCPL was assigned to the archives to process the HCPL records in addition to digitizing materials for the website they created. As of September 2024, there is currently an effort of collaboration with the Harris County Public Library (HCPL) for the ongoing digitization of the HCPL records, and the co-management of the digital archives.

In April 2019, the Harris County Pollution Control Records were transferred to the Archives. The large and complex collection was comprised of approximately 400 cubic feet of records, 32 scrapbooks (1952 – 2007), books, maps, and audiovisual materials. The collection was completed in 2021. In addition to expanding our online presence, the Archives fielded 465 reference queries, accessing 1,062 materials.

In January 2020, over 300 cubic feet of Justice of the Peace Civil Case files were transferred to the Harris County Archives from the Harris County Records Center.



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These highly fragile records were rehoused and inventoried during this time. During FY 2021-22, the Harris County Archives continued the processing of over 500 cubic feet of records from the Precinct 3 Commissioner's Office and County Attorney files.

During FY 2023-2024, the Harris County Archives had nearly 600 hours of in-person and remote reference. Approximately 450 reference inquiries were received and approximately 650 records were delivered (physically or electronically). HCCO Records Archive received over 400 inquiries serving nearly 300 patrons and provided copies of approximately 700 documents. Over 5,000 users explored the Harris County Digital Archives and received nearly 25,000 page views. During this timeframe, the following collections of records were processed: John D. Bruton Papers; John Peters Papers; and Harris County Flood Control. Additions to Harris County Office of Emergency Management, Social Services, Medical Examiner's Office (1989-1990 autopsy case files), Terence Leo O'Rourke Papers, Public Infrastructure Department, Harris County Judge Records (Jon Lindsay and Robert Eckles), and the Harris County Historical Commission have also been processed and are available for research. Records from the Precinct 3 Road Commission, Precinct 3 Recycling Committee, and Judge Ed Emmett are expected to be processed and available by early 2025.

A future project for the County Archivist will be seeking a collection management/asset manager solution that will also assist in the tracking of records retention schedules.



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Case Management System (CMS)

- This system records, maintains, and preserves all documents filed in the four County Civil Courts at Law and the five Probate Courts of Harris County. In September 2016, our office successfully implemented the Tyler Technology Integrated Odyssey Court Management System (CMS) across all eight courts, and Probate Court Five when it came online in FY 2024. Odyssey CMS automates court operations, including case management, eFiling integrations, scheduling, receipting, reporting, document management, and automated workflow. This system has significantly improved staff productivity, provided auditing capabilities, and streamlined office workflows by facilitating information sharing between the Clerk's and Court's Offices.

The project scope included electronic filing integrations, which reduced data entry workload and enhanced the speed at which the public can search indexes and view images. Odyssey's workflow queues automate electronic tasks between clerks and courts, allowing documents to progress through each processing stage electronically.

To achieve a paperless court environment, specific technologies were implemented to reduce paper influx. New features and tools within Odyssey have been integrated, creating a fully electronic working environment with digital forms and images accessible electronically. The project's success depended on the cooperation of court and clerk staff, who now benefit from these technologies as an alternative to paper case files. The County Clerk's technical department, Office of Court Management, and various experts have worked diligently to implement these electronic methods, including eSignature processes, automated workflows, and tasks.

The "Justice Partners"—comprising the County Clerk's technical department, Office of Court Management, and subject matter experts—will continue to collaborate and develop additional automated processes to benefit the Courts, Clerks, the Legal Community, and Harris County constituents.

Business Continuity and Disaster Recovery

- To protect and preserve the vital records HCCO maintains and ensures rapid recovery from a disaster, we contract with a vendor for off-site electronic storage of our image repository and other critical system components. This off-site storage is updated hourly, providing a complete backup that can be activated if access to our primary data center is temporarily disrupted due to a natural disaster. Currently, all HCCO records are stored off-site at the Fiber Town location.



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Document Image Repository

- HCCO currently digitizes all documents filed with our office, most of which are permanently retained. We continue to maintain our film library as a secondary backup. Our office supports single and multi-page TIFF images and PDF-formatted images. While single-page images were once the standard, we have transitioned to multi-page TIFF images to improve storage and retrieval efficiency within our growing image repository.

To handle the conversion of 72,000 rolls of microfilm to digital format, we have expanded storage capacity by 1.5 petabytes. The entire repository requires backup, with all microfilm now converted to digital images. To ensure redundancy and safeguard this data, we plan to implement an additional Isilon cluster at a secure off-site location and expand the nodes in HCCO's data center. This solution will enable swift data recovery in the event of a catastrophic failure.

Our data center requires an additional 1.6 petabytes of storage based on current storage needs to accommodate future growth, and the increased capabilities of our off-site storage.

Application Development

- HCCO will continue to develop and maintain in-house applications, websites, and databases to automate document workflows. HCCO's Information Technology department is dedicated to enhancing business processes by implementing efficient applications and advanced hardware to process, store, and retrieve filed documents. These custom-built solutions are tailored to the office's specific needs, driving the automation of workflows and routine tasks to improve user efficiency and filing accuracy.



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Records Archives Preservation Project

- HCCO will explore solutions to restore, preserve, digitize, capture index data, and automate the workflow of archived records, making them retrievable through internal systems. The County Clerk is committed to investing in various record series, including Vitals, Surveyor Books, and Commissioners Court records, as part of a larger initiative to preserve and restore historical archives. These collections include approximately 750 pages of Index Books, 7,700 pages of Surveyor Records, and 212 pages of Commissioners Court Records. The project to preserve and restore the 7,700 pages of surveyor records was completed in FY 2024. The archived Vital Records collection encompasses over 15,000 volumes, representing approximately 2.2 million recorded instruments. The court awarded the preservation of these Vital Records in FY 2024 and will begin the process of preserving them in FY 2025.

The preservation project aims to ensure long-term digital management of these records while making them fully accessible upon request. On completion, the County Clerk will have achieved key objectives, including improved accessibility and optimized business processes while preserving Harris County's history and heritage.

APPROVAL

Approved and authorized by:

Name	Title	Date
Jason Knight	Director of Special Projects & Purchasing	9/11/24
Dylan Osborne	Director of Budget & Financial Services	9/11/24
Shane Holman	Chief Deputy of Courts	9/11/24
Esther Cardenas	Chief Deputy of Administration	9/12/24

Approved By: Teneshia Hudspeth,
Harris County Clerk

Date: 9/12/24