SOC Report Request Self-Service Guide for Tyler Clients, their External Auditors, and Prospective Clients.

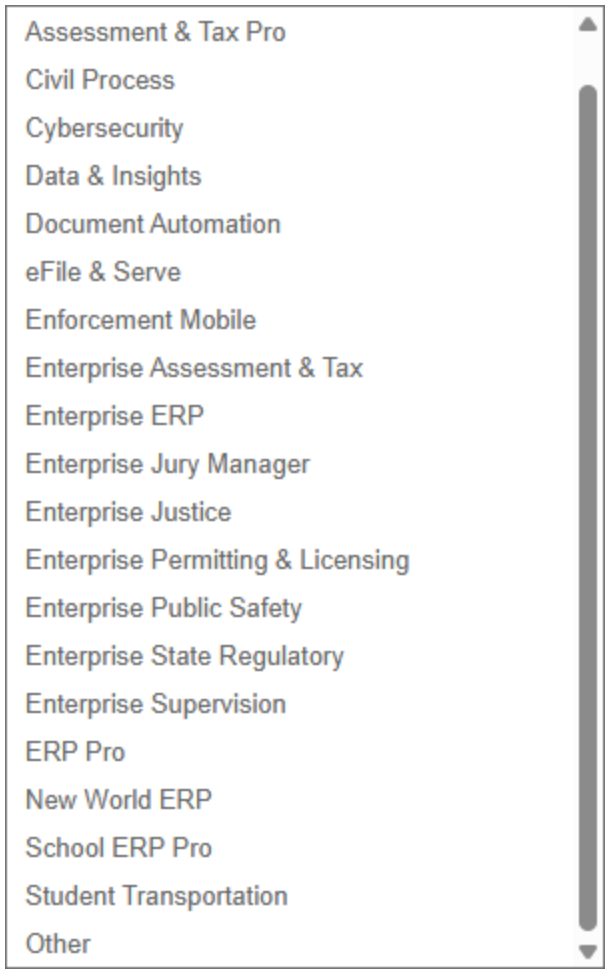
Tyler Clients

(PLEASE NOTE: Tyler Clients will need to be registered to log into tylertech.com to download the reports. If you are already registered at tylertech.com, you will use your current credentials to complete the SOC Report Request Process every year to obtain new reports. If you have not yet registered, you can submit your registration request as part of the SOC Report Request Process. It may take 1-2 business days to approve your registration)

Requesting a New SOC Report

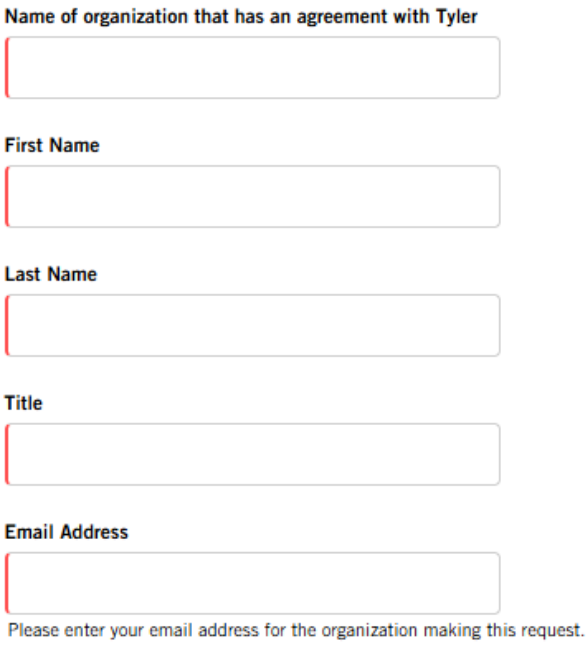
1. Select '**Are you a Tyler Client?'** to generate the client request form.

2. Select your Tyler product from the drop-down list.

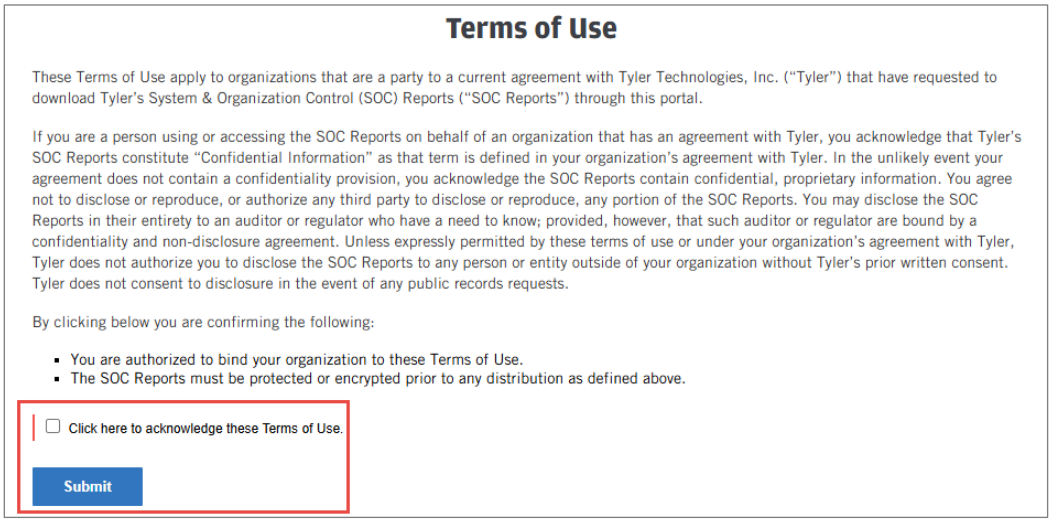


3. Enter the following information:
    a. The name of your organization (the organization making the request)
    b. Your first and last name, title, and email address.

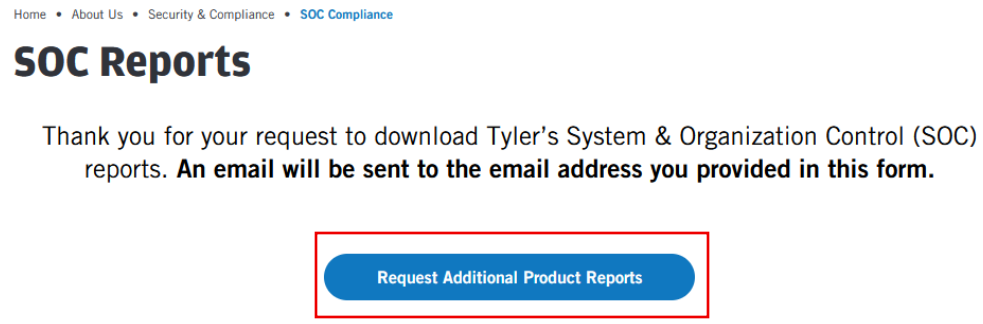
    Note: The email address must be the email address associated with the organization making the request. No requests from external email addresses (Gmail, Yahoo, Hotmail, etc.) will be accepted.



4. Click **Next**
5. **Read through and accept the Terms of Use**.



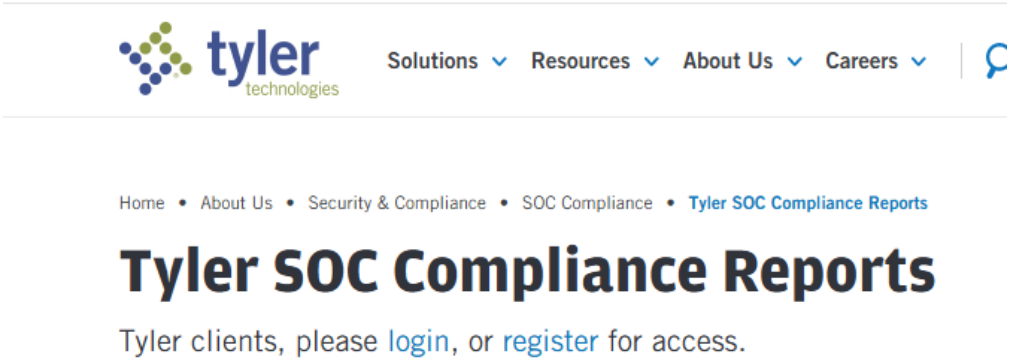
6. Click **Submit**
7. After submitting your request, you have the option to request additional product reports, which will take you back to the form:



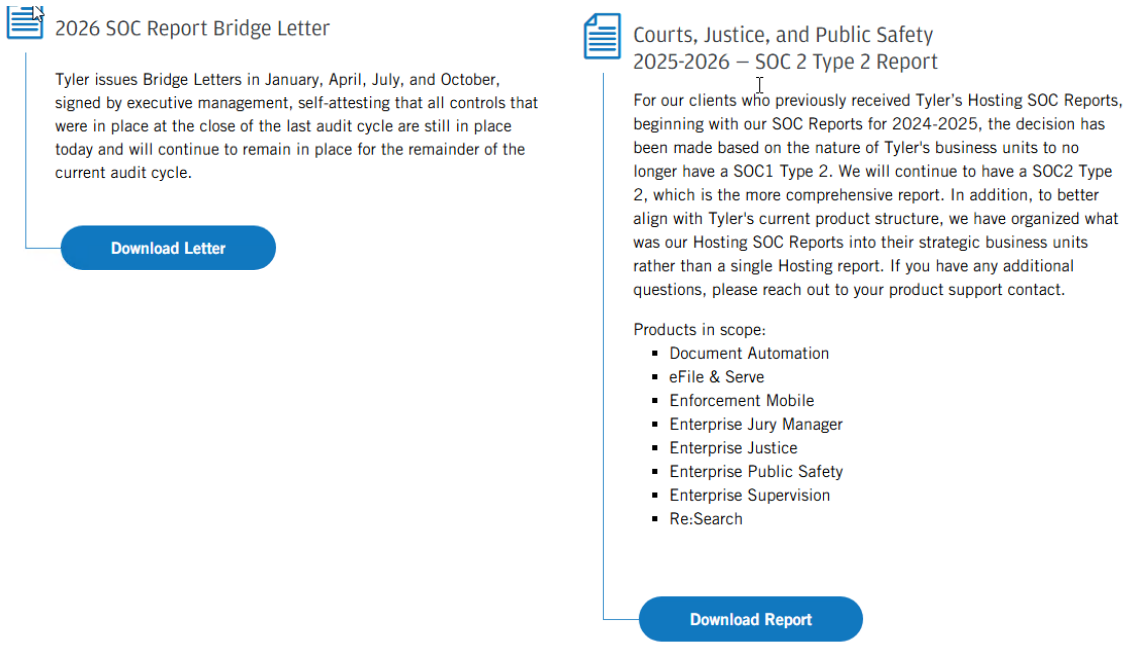
8. You will receive an email from Infosec-compliance@tylertech.com to the address provided in the form including a receipt of the terms of use and the link to download the requested reports.

Downloading a New SOC Report

9. Click the link in the email to go to the login page for tylertech.com to download the reports. You will need to be a registered user on tylertech.com to be able to download SOC reports. If you do not have an account, select **Register** when prompted to log in. (Registration may take up to two business days to process.)



10. After logging in, you will see the report(s) for the product(s) you are registered for and Tyler's Bridge Letter.



11. To download the SOC report, click **Download Reports**.
12. To download the SOC bridge letter, click **Download Letter**.

Note: If instead of the login page you receive the message below, it means that you are not registered at tylertech.com for the product you have requested. Please follow the steps to complete the request:

If you are seeing this message, you are not currently registered on TylerTech.com for the product you requested.

To access the reports, please follow the steps below:

1. On tylertech.com, click the Client Support button in the upper right corner.
2. Select the product you are needing the report for.
3. Under the Notice section, enter your email address to request support access to the product and click Submit.
4. You will receive an email once your account has been updated.
5. Now you can click on the link in the email you originally received to access the reports.

Prospective Clients

To obtain a copy of the Tyler Technologies SOC Reports, please complete the following steps:

1. Download a copy of the Tyler Technologies Confidentiality & Non-Disclosure Agreement (NDA) for Prospective Clients

2. Have a person authorized by your organization to sign legal agreements on the organization's behalf complete and sign the bottom-right section of the NDA. The "Recipient" line in the signature section is for the name of your organization as the agreement is between Tyler and that organization, not with an individual.

3. Send the signed and completed NDA to NDAVerification@tylertech.com. Please include the Tyler product(s) that your organization is considering purchasing to ensure that the properly scoped reports are provided.

4. Once it has been verified that the NDA has been correctly completed and signed, an email with a link to download the SOC Reports will be sent by our Security Team to the email address of the person requesting the reports, unless an alternate recipient and their email address are provided.

5. Click the **Download** link in the email which will bring you to the login page for Tyler's Secure File Transfer Utility.
    - If you are a registered Kiteworks user, log in using your existing credentials.
    - If you do not have an account, enter your email address and follow the instructions to create an account.
        i. **Note:** To create an account, you must use the same email address as the one the link to download the SOC reports was sent.
    - After logging in, click **Download report** and save the .ZIP folder to your desired location.
    - To open the report, extract the PDF file from the .ZIP folder.

External Auditors for Tyler Clients

1. Select '**Are you an auditor for a Tyler client'** to generate step-by-step instructions to request a SOC report. See the same instructions copied below for reference.
2. Download a copy of the Tyler Technologies Confidentiality & Non-Disclosure Agreement (NDA) for Auditors.
3. The bottom-right rection of the NDA must be completed by a representative authorized to sign legal agreements on your organization's behalf.
    a. **Note:** The "Recipient" line in the signature section is for the name of your firm (as the agreement is between Tyler and that organization, not with an individual).
4. Send the **signed and completed NDA** to NDAVerification@tylertech.com for countersignature. Please include the Tyler products that your client is using to ensure that the properly scoped reports are provided.
5. Have your client send an email to NDAVerification@tylertech.com authorizing your firm to receive the SOC reports on their behalf. **The link to download the reports will not be sent until we have received the client's authorization**.
6. After the NDA has been verified and countersigned and the client's authorization is received, Tyler's security team will send an email including the link to download the SOC reports to the email address of the person requesting the reports, unless provided with an alternate recipient and their email address.
7. Click the **download link** in the email to download the report, which will transfer you to Tyler's Secure File Transfer Utility.
    a. If you are a registered Kiteworks user, log in using your existing credentials.
    b. If you do not have an account, enter your email address and follow the instructions to create an account.
        i. **Note:** To create an account, you must use the same email address as the one the link to download the SOC reports was sent.
    c. After logging in, click **Download report** and save the .ZIP folder to your desired location.
    d. To open the report, extract the PDF file from the .ZIP folder.