



# Statement of Work

Prepared For: Visalia, CA

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Statement of Work Regarding the ePermitHub Digital Plan Room  
Project for Accela Cloud Customers

**8/21/2025**

## Table of Contents

<b>Statement of Work</b>	<b>3</b>
<b>Project Objective</b>	<b>3</b>
<b>Implementation Services Overview</b>	<b>3</b>
<b>Phase 1 - Implementation Phase</b>	<b>3</b>
<b>Phase 2 - Training, User Acceptance &amp; Go-Live Phase</b>	<b>4</b>
<b>Project Assumptions</b>	<b>5</b>
<b>Payment Terms &amp; Delivery Schedule</b>	<b>8</b>
<b>Appendix A: Detailed ePermitHub Digital Plan Room Project Plan</b>	<b>11</b>
<b>Project Plan Overview</b>	<b>11</b>
<b>Phase 1: Implementation Phase</b>	<b>11</b>
<b>Phase 1 - Deliverable 1: Project Kick-Off and Initiation</b>	<b>11</b>
<b>Phase 1 - Deliverable 2: Digital Plan Room Provisioning</b>	<b>12</b>
<b>Phase 1 - Deliverable 3: Digital Plan Room Configuration Analysis</b>	<b>13</b>
<b>Phase 1 - Deliverable 4: Digital Plan Room Configuration</b>	<b>14</b>
<b>Phase 2: User Acceptance Testing, Training &amp; Go-Live Phase</b>	<b>15</b>
<b>Phase 2 - Deliverable 1: User Acceptance Testing (UAT)</b>	<b>16</b>
<b>Phase 2 - Deliverable 2: Administrative and Technical Training</b>	<b>17</b>
<b>Phase 2 - Deliverable 3: End User Training</b>	<b>18</b>
<b>Phase 2 - Deliverable 4: Agency Customer Enablement</b>	<b>20</b>
<b>Phase 2 - Deliverable 5: Production Planning &amp; Go-Live Migration</b>	<b>21</b>
<b>Phase 2 - Deliverable 6: Post-Go-Live and Transition to Company Support</b>	<b>22</b>
<b>Risk and Issue Management</b>	<b>23</b>
<b>Appendix B: Accela Record Types with Plan Reviews in Project Scope</b>	<b>25</b>

## Statement of Work

This Statement of Work (“SOW”) dated as of the last date of signature below sets forth the scope and definition of the project-based professional services (collectively, the “Professional Services”) to be provided by Accela, Inc. and City of Visalia, CA (“Agency” or “Customer”).

This SOW is issued pursuant to and governed by the terms and conditions of the Accela Subscription Services Agreement found at [www.accela.com/terms](http://www.accela.com/terms) (“Agreement”).

In the event of a conflict between the SOW and the Agreement, the terms of the SOW shall prevail as to pricing, delivery dates, and description of the applicable Professional Services but will not prevail over, modify, or terminate any surviving provision of the Agreement. This SOW is effective as of the date that the SOW was last signed by the Customer and Accela (“SOW Effective Date”).

Notwithstanding anything to the contrary, Accela is not assigning or licensing any intellectual property to Customer under this SOW and any SaaS products (e.g., Subscription Services) provided under this SOW are not subject to any acceptance.

## *Project Objective*

To complete the ePermitHub Digital Plan Room components implementation into the Accela Civic Platform, including the Accela Citizen Access public portal. Upon completion, Customer staff will access integrated digital review capabilities, including automated digital signature validation, automated document and sheet versioning, collaborative issue management, and 2D electronic markups completely from within the Accela Civic Platform User Interface. In addition, the Customer’s customers can easily submit plans and manage the corrections process, including adding resolution comments and uploading subsequent resubmittals, from within the ePermitHub public portal seamlessly embedded within the Customer’s Accela Citizen Access portal.

## *Implementation Services Overview*

### Phase 1 - Implementation Phase

#### **Phase 1 Deliverables:**

1. Project kick-off and initiation
  - Project kick-off presentation
  - Establish a communication and project tracking plan.
  - Receive access to the customer’s Accela Civic Platform environments

2. Digital Plan Room Cloud Provisioning
  - Verify that all Accela Civic Platform prerequisites are in place
  - Cloud Provisioning of the Digital Plan Room components into Customer's SUPP environment
  - Cloud Provisioning of the Digital Plan Room database
3. Digital Plan Room Configuration Analysis
  - Define configuration for each Plan Review record type
  - Determine all needed document types
  - Plan document upload configuration
  - Plan Digital Signatures validation configuration
  - Plan Accela workflow integration configuration points
  - Design final approved set cloning business logic
  - Determine Accela to Digital Plan Room role mappings
  - Determine Digital Plan Room disciplines configuration
  - Determine required Approval Stamps
4. Digital Plan Room Configuration
  - Configure Accela Civic Platform standard choices as defined in the previous Deliverable
  - Configure new Accela document types and associated business rules
  - Configure Digital Signature validation
  - Configure Digital Plan Room EMSE library and required scripts
  - Implement custom EMSE scripting as determined during Configuration Analysis
  - Design, create and configure Approval Stamps as determined during Configuration Analysis

## Phase 2 - Training, User Acceptance & Go-Live Phase

### Phase 2 Deliverables:

1. User Acceptance Testing (UAT)
  - Assist Customer in the UAT effort and validation of system configuration
  - Resolve issues resulting from Customer User Testing
  - Provide recommendation on testing strategy and best practices
  - Agree on UAT completion date and Go-Live date
2. Administrative and technical training

- Digital Plan Room Administration training
  - Provide Administration Training Documentation
3. End-User Training
    - Digital Plan Room End User training
    - Provide End User training documentation
  4. Agency Customer Enablement
    - Produce contextually relevant public-facing training and help web-based videos for licensed professionals, contractors, owners and the general public submitting plans
    - Produce public-facing User Guide for licensed professionals, contractors, owners, and the general public submitting plans
  5. Go-Live Migration & Production Planning
    - Produce Go-Live Project Migration Plan
    - Produce Production Deployment Plan
    - Conduct web-based Agency customer training sessions
  6. Post-Go-Live Support
    - Post-Go-Live support provided
    - Resolution of all Critical and High defects as defined above in “Phase 2 - Deliverable 1: UAT” discovered during Post Go-Live support period
    - Transfer meeting regarding ongoing support of the Customer to the Company Support program conducted

## *Project Assumptions*

1. Company assumes the Customer will have the proper resources to implement the Digital Plan Room software.
2. Company assumes all Professional Services costs and work have been identified in the SOW. Any additional cost or work required for this project will be identified and requested through a Change Request process.
3. Company assumes the Customer has identified a dedicated Accela user-account to be used for communication between the ePermitHub and Accela software.
4. Company assumes the Customer will provide the appropriate staff to be trained on the software during the training periods outlined in the Project timeline.

5. Company assumes all the Customer's relevant Accela record types and workflows requiring plan review in scope for this project are already configured by Accela staff and then company will add plan review configuration.
6. Company assumes it will provide recommendations to the Customer for plan review related record types regarding record and workflow statuses most appropriate for the Digital Plan Room software.
7. Company assumes all standard choices required to integrate the software into the Customer's Accela configuration and software will be configured by the Company.
8. Company assumes the Customer will collaborate with Company on delivery of scripts required for the Digital Plan Room.
9. Company assumes Customer will verify that all Accela Civic Platform prerequisites are in place.
10. Company assumes that a historical data conversion into the Digital Plan Room will not be needed, and that manual procedures will be documented to import historical and in-flight records into the Digital Plan Room as necessary.
11. Travel & Expenses:
  - a. There is no provision for travel expenses or travel time in this SOW because Agency does not need any onsite resources. Travel to the Agency will not be conducted unless a Change Order, inclusive of travel expense terms and conditions, is signed prior to travel commencing to cover the cost of the travel.
12. Projects Put On Hold: It is understood that sometimes Customer priorities are revised requiring the Customer to place the Company implementation on hold. The Customer must send a formal written request to the Company to put the project on hold. Delays of two (2) weeks or more that have a tangible impact on the Company's resource plan are subject to change order. If either party puts the project on hold for more than 90 days, the other party reserves the right to terminate the contract or negotiate new terms.

When a Project is put on hold, at minimum, the Company will need to draft a Change Order to keep some of the Company project manager's time engaged in monitoring progress and in resourcing the project once it comes off hold. Other Change Order items may be needed because of the delay. When a project goes on hold, project resources will be re-deployed, and

the Company will need a forty-five (45) calendar day notice to re-staff the project. The Company cannot guarantee a Project Start Date until the Company resources are confirmed.

Should either party become non-responsive to the other party's communications for a term of 30 calendar days regarding the continuance of the project work, the other party can choose to cancel the remainder of the Statement of Work. If both parties desire to finish the project, a new Statement of Work may be negotiated at the standard rates.

13. Training Execution parameters are as follows:

- a. At the beginning of the project, the Customer selects and prepares the power-users who will be participating in the training and subsequently training end-users. Any switch in Customer internal resources may require the need for a project change request to account for missing time.
- b. In the event of onsite training, Customer provides suitable onsite facilities and equipment, such as access to network-connected training computers and monitors, to accommodate various training classes.
- c. In the event of offsite training, Customer ensures all remote class attendees have access to suitable equipment, such as access to internet-connected training computers and monitors, to accommodate various training classes.
- d. Ensure that users are proficient in using PCs in a Windows environment as a prerequisite for the course.
- e. Ensure that users are familiar with the use of standard Internet browsers as a prerequisite for the course.
- f. Customer is responsible for printing all training materials developed by the Company for End-User Training.

14. Schedule and delivery are contingent on availability and access to Customer staff resources.

15. Any Professional Services associated with Accela, and other third-party products are not included in this Statement of Work and should be contracted directly through those products or their affiliates. The company will work closely with the Accela Project Manager to align and coordinate on schedule and deliverables per the contract.

## Payment Terms & Delivery Schedule

Accela will perform the Professional Services for a Fixed-Fee price based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. Payment will be invoiced upon SOW signing.

Stage Title	Milestone	Acceptance Criteria (See Appendix A for details)
Phase 1.1	Project Kick-Off & Initiation	<ul style="list-style-type: none"> <li>Completion of the Project Kickoff Meeting</li> <li>The company's access to the Customer's environment is set up</li> </ul>
Phase 1.1	Digital Plan Room Installation/Provisioning	<ul style="list-style-type: none"> <li>All relevant components of the Digital Plan Room software provisioned on Customer's cloud infrastructure and deemed to be working properly</li> <li>Confirmation of ability to log in to Digital Plan Room software</li> <li>Two [2] sandbox environments created</li> </ul>
Phase 1.2	Digital Plan Room Configuration Analysis	<ul style="list-style-type: none"> <li>Completion of To-Be Analysis Sessions</li> </ul>
Phase 1.2	Digital Plan Room Configuration	<ul style="list-style-type: none"> <li>The customer has 15 business days to conduct an initial review of the Digital Plan Room configuration. If no changes or comments are requested within 15 days, the deliverable is considered approved by the Customer. Upon delivery of the Customer's initial feedback from the initial review, Company will complete the necessary changes and updates. The second and final review will have 7 business days for acceptance. Upon delivery of Customer feedback from the second and final review, Company will complete the necessary changes and updates.</li> </ul>
Phase 2	User Acceptance Testing (UAT)	<ul style="list-style-type: none"> <li>Provide customer with UAT test script template for electronic plan review</li> <li>Completion of up to two [2] weeks of UAT support by the Company</li> <li>Completion of up to three [3] weeks UAT by the Customer</li> </ul>



		<ul style="list-style-type: none"> <li>Resolution of all Critical and High defects by Company discovered during UAT by Customer</li> </ul>
Phase 2	Administrative and Technical Training	<ul style="list-style-type: none"> <li>Execution of administrative and technical training courses</li> </ul>
Phase 2	End User Training	<ul style="list-style-type: none"> <li>Execution of End User Training course to the Customer as described in Appendix A</li> </ul>
Phase 2	Agency Customer Enablement	<ul style="list-style-type: none"> <li>Two [2] web-based Agency Customer training sessions of one [1.5] hour each completed covering the following topics: <ul style="list-style-type: none"> <li>Plan Submittal</li> <li>File Validation Overview</li> <li>Response to Customer comments</li> <li>Plan Re-submittal</li> <li></li> </ul> </li> <li>Execution of training for Customer's customers as described above</li> </ul>
Phase 2	Production Planning & Go-Live Migration	<ul style="list-style-type: none"> <li>Go-Live Migration Plan document finalized</li> <li>Production Plan document finalized</li> <li>ePermitHub Digital Plan Room used in the Production environment for daily use</li> </ul>
Phase 2	Post Go-Live Support	<ul style="list-style-type: none"> <li>Six [6] weeks of Post Go-Live support provided</li> <li>Resolution of all Critical and High defects as defined above in "Phase 2 - Deliverable 3: UAT" discovered during Post Go-Live support period</li> <li>Transfer meeting regarding ongoing support of the Customer to the Company Support program conducted</li> </ul>
		<b>Total: \$57,000.00</b>

Estimated level of effort is based on (i) the nature and scope of the Services and associated tasks and artifacts, (ii) the expected staffing levels required to perform the scope, (iii) the Project Schedule, (iv) the Company and Customer's roles and responsibilities, and (v) the other assumptions as set forth in this SOW.

The Company's total Service hours and provided estimate are exclusive of taxes and expenses. This estimate is based on the information available at the time of signing and the assumptions, dependencies and constraints, and roles and responsibilities of the Parties, as stated in this SOW. The Company will not (i) exceed the total estimate amount without the prior approval of Customer and/or (ii) continue to

provide Services, after the total estimate has been reached, without the prior authorization of Customer. Should there be changes to the scope, timeline, or resources that increase the hours or costs needed to complete the Project, a Change Order may be required prior to project continuation. Please see Change Order details in the Assumptions section. Deliverable timelines are contingent upon timely compensation.

ACCEPTED BY: City of Visalia, CA		ACCEPTED BY: Accela, Inc.	
By:		By:	
Name:		Name:	
Title:		Title:	
Date:		Date:	

## Appendix A: Detailed ePermitHub Digital Plan Room Project Plan

### Project Plan Overview

The following section describes the specific activities and tasks that will be executed to meet the customer's business objectives and requirements. In support of the implementation effort as described above, the Company will provide the below-detailed implementation services. For each deliverable, a description and criteria for acceptance are provided.

### Success Criteria

The definition of project success is crucial in setting appropriate expectations from the outset of a project. Success is defined for each phase of the project so the team can measure it as it iterates toward the final goal as follows:

- Phase 1: Analysis and configuration is complete and ready to start acceptance testing
- Phase 2: Acceptance testing and user training completed, go-live completed, post-go-live support completed

### Phase 1: Implementation Phase

This phase aims to create a test Digital Plan Room deployment on the Accela Civic Platform that the Customer staff can use as a testbed for acceptance and feedback. During this phase, the main features of the Digital Plan Room deployment will be implemented into the Customer's Accela test environment. Each Deliverable in this phase defines a set of tasks to complete the implementation.

#### Phase 1 - Deliverable 1: Project Kick-Off and Initiation

Project initiation consists of project planning activities, project management, template creation tracking, establishing project issue tracking and communication methodology, and conducting the kickoff meeting.

As part of the initiation, the following tasks will be conducted:

- Establish a communication plan and create a task management dashboard in an acceptable repository.
- Identify team members who will be responsible for deliverable sign-off and document procedures.

- The customer creates an Accela user for Digital Plan Room Communication with Accela software.
- Review and adjust project scope based on additional findings, if necessary
- Conduct a project kickoff meeting to review project objectives, methodology, timeline, roles, and other key project elements.

The Project Kickoff Meeting includes a formal team presentation to review project objectives, methodology, timeline, roles and responsibilities, risks, and other key project elements with project stakeholders.

Company Responsibilities:

- Provide timely and appropriate responses to Customer's reasonable requests for information.
- Coordinate project planning activities.
- Complete Baseline Project Schedule and Project Kickoff Presentation deliverables with input from appropriate Customer Resources

Customer Responsibilities:

- Identifying and setting expectations with key resources and subject matter experts for ongoing participation in the project.
- Providing timely and appropriate responses to the Company's requests for project planning input and meeting logistics requests.
- Including Executive Project Sponsor in the Project Kickoff Meeting.
- Create an Accela user for Digital Plan Room Communication with Accela software.

Acceptance Criteria:

- Completion of the Project Kickoff Meeting
- The company's access to the Customer's environment is set up

Acceptance Review Period:

- Seven (7) business days

### Phase 1 - Deliverable 2: Digital Plan Room Provisioning

During the cloud provisioning step, the Company team will review the Digital Plan Room cloud provisioning requirements with the Customer's technical team, including infrastructure and software prerequisites. Once the prerequisites are confirmed to be in place in the Customer's DEV environment, the Company will provision the Digital Plan Room software components and verify that they work properly. Documentation on the software setup architecture specific to the Customer will be provided to the Customer's technical team for reference.

Company Responsibilities:

- Providing timely and appropriate responses to Customer's requests for information.
- Consulting with Customer resources to provide technical input and answer technical questions related to the requirements for the Digital Plan Room.
- Company will provision up to two [2] sandbox environments

Customer Responsibilities:

- Providing timely and appropriate responses to Company's requests for information
- Providing Company with Admin contact information to setup Customer's Admin account

Acceptance Criteria:

- All relevant components of the Digital Plan Room software provisioned on Customer's cloud infrastructure and deemed to be working properly
- Confirmation of ability to log in to Digital Plan Room software
- Two [2] sandbox environments created

Acceptance Review Period:

- Seven (7) business days

**Phase 1 - Deliverable 3: Digital Plan Room Configuration Analysis**

Configuration Analysis encompasses the activities necessary to define the optimal configuration of the Digital Plan Room and its integration points with the Accela Civic Platform, specifically to align with the Customer's plan review business processes. During this task, the Company team, with input from the Customer, will identify any details related to plan submittal, review, and approval, and provide appropriate configuration specifications for the following items:

- Determine configuration for each Plan Review record type
- Determine all needed document types
- Determine document upload configuration
- Determine Digital Signatures validation configuration
- Determine Accela workflow integration configuration points
- Determine final approved set cloning business logic
- Determine Accela to Digital Plan Room user role mappings
- Determine Digital Plan Room discipline configuration
- Determine required Approval Stamps

The project dashboard will document and keep track of all the Configuration Analysis tasks and determinations.

Company Responsibilities:

- Providing timely and appropriate responses to Customer's request for information
- Interviewing staff to understand existing business processes
- Conducting to-be analysis sessions to capture the required business processes to be automated within the system
- Conducting meetings via email, web conference, and phone to gather and validate analysis input

Customer Responsibilities:

- Providing timely and appropriate responses to Company's requests for information.
- Making available the appropriate Customer key users and content experts to provide the required information, participate in the configuration analysis, and verify the accuracy of the documented workflows, input/output formats, and data elements
- Providing any existing business process documentation, including process flows; fee schedules; commonly used applications, reports, and forms; and other relevant information
- Scheduling participants and meeting locations for analysis activities

Acceptance Criteria:

- Completion of To-Be Analysis Sessions

Acceptance Review Period:

- Seven (7) business days

**Phase 1 - Deliverable 4: Digital Plan Room Configuration**

The Company will configure the Digital Plan Room and make any modifications to the Accela Civic Platform configuration based on the requirements and determinations agreed upon in Deliverable 3.

The following high-level tasks will be performed:

- Configure Accela Civic Platform standard choices for the Digital Plan Room as defined in the previous Deliverable
- Configure new Accela document types and associated business rules
- Configure Digital Signature validation
- Configure Digital Plan Room EMSE library and required scripts
- Implement custom EMSE scripting as determined during Configuration Analysis
- Design, create and configure Approval Stamps as determined during Configuration

Documentation on the software configuration specific to the Customer will be provided to the Customer's administrative and technical team for reference.

Company Responsibilities:

- Providing timely and appropriate responses to Customer's request for information
- Configuring the solution components as defined in the To-Be Analysis sessions

Customer Responsibilities

- Providing timely and appropriate responses to Company's requests for information
- Making available the appropriate Customer key users and content experts to participate in creating the system to learn about the system (knowledge transfer)
- Working with Company to verify that the system meets the requirements captured in the To-Be Analysis sessions

Acceptance Criteria:

- Configuration documentation provided to Customer
- The customer has 15 business days to conduct an initial review of the Digital Plan Room configuration. If no changes or comments are requested within 15 days, the deliverable is considered approved by the Customer. Upon delivery of the Customer's initial feedback from the initial review, Company will complete the necessary changes and updates. The second and final review will have 7 business days for acceptance. Upon delivery of Customer feedback from the second and final review, Company will complete the necessary changes and updates.

Acceptance Review Period:

- Seven (7) business days

## *Phase 2: User Acceptance Testing, Training & Go-Live Phase*

In this phase, the test deployment will evolve into a fully functioning electronic plan review deployment, guided by feedback and input from Customer staff. The Customer's participants are given full access to the deployment created in the previous phase and will conduct "test" electronic plan review workflows using sample data and plans. During this phase, the team will simulate as many real-life conditions and project types as possible to understand the capabilities of the designed workflow. Customer staff will record any issues to be assessed and corrected as agreed by both parties. Additionally, training sessions are conducted for administrators and end-users, and any additional training documentation is also provided in this phase.

### Phase 2 - Deliverable 1: User Acceptance Testing (UAT)

During UAT, the Company will assist the Customer in testing and validating the configuration and readiness for migration to production. A template test plan that includes general best practices will be provided to the Customer. In cooperation with the Customer, the test plan will be refined to align with the Customer's configuration and business use cases.

After the test plan is completed, the testing effort will commence. This effort will require a significant time commitment from the Customer. The Company will assist the Customer through UAT support and address and resolve issues identified during the UAT process as the Customer's staff carries out the test plan.

Once the entire team reaches a consensus and is confident in the solution, the configuration will be prepared for final migration to production and Go-Live. At this point, a specific Go-live date will be established. UAT will take up to eight [8] weeks, with two [2] to three [3] weeks estimated for UAT script development by the Company, two [2] to three [3] weeks of testing by the Customer, and two [2] weeks of Critical and High issue resolution by the Company. A change order is required to add more support if the Company's UAT support exceeds two [2] weeks.

For issues classified as Critical or High defects, a support ticket is opened with the company's engineering team using the company's Service Desk process for review and resolution. All Critical and High defects must be resolved before completing UAT. The following defines Critical and High defects:

- **Critical** – Major test case(s) are blocked from successful execution without an available workaround. During dry runs and formal test executions, a test critical defect must have an acceptable workaround or fix as soon as possible.
- **High** – Significant degradation in primary operational functions or performance/stability. No workaround is available. During dry-runs and formal test executions, a defect categorized as High requires a fix or acceptable workaround as soon as possible.
- **Medium** – Workaround available for total or partial loss of major operational functions. It has a marginal impact on major operational functions.
- **Low** – A system problem that does not prohibit the successful completion of a test. No significantly noticeable impact on system operations.

#### Company Responsibilities:

- Developing the User Acceptance test scripts
- Providing recommendations on testing strategy and best practices
- Supporting the Customer in up to two [2] weeks of UAT effort and the validation of the system configuration and its readiness for migration to production for active use
- Resolving all Critical and High defects discovered because of UAT activities

#### Customer Responsibilities:

- Providing timely and appropriate responses to the Company's request for information



- Making available the appropriate Customer key users and content experts to participate in UAT as defined and managed by Customer
- Utilizing the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable
- Conducting up to three [3] weeks of UAT following the development of test scripts by Company

Acceptance Criteria:

- Creation of UAT scripts by Company
- Completion of up to two [2] weeks of UAT support by the Company
- Completion of up to three [3] weeks UAT by the Customer
- Resolution of all Critical and High defects by Company discovered during UAT by Customer

Acceptance Review Period:

- Seven (7) business days

**Phase 2 - Deliverable 2: Administrative and Technical Training**

The Company will provide training to the Customer's staff, focusing on the administrative and technical setup, as well as Digital Plan Room administration and configuration. The goal is to educate Customer staff in all aspects of the Digital Plan Room solution and ensure that they are confident before Go-Live.

The Company will provide remote training sessions that span 4 hours. Customer staff are responsible for selecting qualified users for the training, who are critical to project success. The following topics will be covered as part of the training session:

- Accela workflow integration
- Plans and Documents upload
- Digital Plan Room roles and mapping to Accela roles
- Digital Plan Room Standard Choices
- Digital Signatures validation
- Approval Stamps creation and deployment

Company Responsibilities:

- Coordinate with the Customer to define the training schedule and logistics
- Deliver training per the specific requirements listed above

Customer Responsibilities:

- Select and prepare the power-users who participate in the training and subsequently training end-users
- Arrange the time and qualified people for the training who are critical to the project success
- Provide suitable Customer facilities to accommodate various training classes

- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course
- Ensure that users are familiar with the use of standard Internet browsers as a prerequisite for the course
- Ensure that the users install prerequisite software prior to training

Acceptance Criteria:

- Execution of administrative and technical training courses

Acceptance Review Period:

- Seven (7) business days

### Phase 2 - Deliverable 3: End User Training

The Company will undertake all necessary training to operate electronic plan review processes across relevant departments. Training materials and required training sessions will be developed and conducted.

The Company will provide the following onsite or remote training sessions to the Customer End Users (Users with non-administrative roles) within the same week:

- One [1] two-hour session for Intake Specialists/Permit Technicians with the same curriculum for each session
- Two [2] four-hour sessions for Plan Reviewers/Managers with the same curriculum for each session

It is recommended that each training session be recorded for reference.

The course curriculum is as follows:

#### Intake Specialists/Permit Technician Curriculum

	Description
ePermitHub Digital Plan Room embedded into Accela Citizen Access	<ul style="list-style-type: none"> <li>• Plan submittal from the customer perspective               <ul style="list-style-type: none"> <li>○ Understanding the process, a customer will follow to submit an application and submit plans and supporting documents</li> <li>○ Review the types of file validation &amp; digital signature validation occurring during submittal and how to interpret any errors</li> <li>○ Walkthrough file processing and reviewing the automated sheet numbering.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>● Resubmittal process from the customer perspective <ul style="list-style-type: none"> <li>○ Reviewing &amp; answering issues from a rejected plan set</li> <li>○ Completing the resubmittal of plan addressing the answered issues.</li> </ul> </li> </ul>
ePermitHub Digital Plan Room embedded into Accela Civic Platform Back Office	<ul style="list-style-type: none"> <li>● Plan submittal from a staff perspective when done in-house</li> <li>● High-level review of Plan Reviewer activities <ul style="list-style-type: none"> <li>○ Learn at a high-level the steps a plan reviewer will perform and how they affect what the customer will see in Accela Citizen Access</li> </ul> </li> </ul>

### Plan Reviewers/Managers Curriculum

	Description
ePermitHub Digital Plan Room embedded into Accela Civic Platform Back Office	<ul style="list-style-type: none"> <li>● Accela workflow and the digital plan room <ul style="list-style-type: none"> <li>○ Learn how the digital platform interacts with the Accela workflow</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>● Completing a plan review <ul style="list-style-type: none"> <li>○ Navigating the digital plan room</li> <li>○ Overview of the viewer and available tools</li> <li>○ Creating issues &amp; markup</li> <li>○ Reviewing issues and filtering tools</li> <li>○ Sheet versioning</li> <li>○ Comparison tools</li> <li>○ Stamping</li> </ul> </li> <li>● Rejecting plans &amp; requesting revisions</li> <li>● Resubmittals &amp; approving plans</li> <li>● Create print set</li> </ul>
	<ul style="list-style-type: none"> <li>● Overview of Intake Staff usage of the digital plan room <ul style="list-style-type: none"> <li>○ Plan submittal from a staff perspective when done in-house</li> </ul> </li> </ul>
ePermitHub Digital Plan Room embedded into Accela Citizen Access	<ul style="list-style-type: none"> <li>● Overview of customer usage of digital plan room <ul style="list-style-type: none"> <li>○ Plan submittals and file validation &amp; processing</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Reviewing and answering issues contextually from the plan markup</li> </ul>
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Company Responsibilities:

- Coordinating with the Customer to define training schedule and logistics
- Providing End User Training as described above

Customer Responsibilities:

- Selecting and preparing the power-users who will be participating in the training and subsequently training end-users
- Arranging the time and qualified people for the training who are critical to the project success
- Providing suitable Customer onsite facilities to accommodate various training classes
- Ensuring that users are proficient in using PC's in a Windows environment as a prerequisite for the course
- Ensuring that users are familiar with the use of standard Internet browsers as a prerequisite for the course

Acceptance Criteria:

- Execution of End User Training course to the Customer as described above

Acceptance Review Period:

- Seven (7) business days

**Phase 2 - Deliverable 4: Agency Customer Enablement**

In this context, the "Agency" (i.e., County, county, state, etc.) is the Company's customer, and the "Agency Customer" is the Agency's customers, such as the licensed professionals, owners and general public leveraging the ePermitHub Digital Plan Room embedded in Accela Citizen Access to:

- Submit their initial electronic plans and supporting documents
- Respond to Issues related to their plans created by Agency Plan Reviewers
- Resubmit corrected plan sheets (aka, digital slip sheets)
- Access and print approved documents of their plans

During Agency Customer Enablement, the Company co-presents webinar-based training with the Customer. The Customer publishes videos to a dedicated Digital Plan Room information page on the Customer's website.

Company Responsibilities:

- Provide three [2] web-based Agency Customer training sessions of one [1.5] hours each covering the following topics:
  - Plan Submittal
  - File Validation Overview
  - Response to Agency Correction comments
  - Plan Re-submittal

Customer Responsibilities:

- Creating a dedicated public-facing information web page for related Digital Plan Room videos
- Coordination of the external customer webinar scheduling, registration and launching of the training

Acceptance Criteria:

- Two [2] web-based Agency Customer training sessions of one [1.5] hour each completed covering the following topics:
  - Plan Submittal
  - File Validation Overview
  - Response to Customer comments
  - Plan Re-submittal
- Execution of training for Customer's customers as described above

Acceptance Review Period:

- Seven (7) business days

**Phase 2 - Deliverable 5: Production Planning & Go-Live Migration**

During Go-Live Migration & Production Planning the Company and Customer will work together to develop both Go-Live Migration and Production Planning documents. The Production Plan details the pre-installation, Accela back-office installation, and Accela Citizen Access installation activities for the Digital Plan Room. The Go-Live Migration Plan details how migration will take place from the Customer's existing plan review process/solution to the Digital Plan Room solution, including how to handle inflight plan review projects.

Company Responsibilities:

- Creating an initial draft of the Go-Live Migration Plan document
- Finalizing Go-Live Migration Plan document with Customer
- Creating an initial draft of the Production Plan document
- Finalizing Production Plan document with Customer

- Remote support during Go-Live

Customer Responsibilities:

- Providing feedback on the initial draft of the Go-Live Migration Plan document
- Providing feedback on the initial draft of the Production Plan document
- Providing technical and functional user support for pre and post-Go-Live planning, execution, and monitoring
- Providing timely and appropriate responses to Accela's request for information
- Assisting in the development of a Cutover checklist that details the critical tasks that must be accomplished prior to moving to Production
- Making available the appropriate Customer key users and content experts to participate in user acceptance testing as defined and managed by Agency

Acceptance Criteria:

- Go-Live Migration Plan document finalized
- ePermitHub Digital Plan Room used in the Production environment for daily use

Acceptance Review Period:

- Seven (7) business days

## **Phase 2 - Deliverable 6: Post-Go-Live and Transition to Company Support**

Upon Go-Live, the Customer takes ownership of the solution in production and performs the Tier 1 and Tier 2 support functions covering Medium and Low defects as defined above in "Phase 2 - Deliverable 3: UAT". This deliverable consists of the Post Go-Live support assistance the Company provides (Tier 3) to address Critical and High issues, "Phase 2 - Deliverable 3: UAT", and provide consultative advice immediately following the move to Production for daily use.

Additionally, a formal meeting will be scheduled with the Customer, the Company Professional Services Team, and the Company Customer Support to transition support of future issues and questions from the Customer to the Company Customer Support program.

In terms of specific output, the following will be executed for this deliverable:

- 6-weeks of Post-Go-Live Support
- Finalized post-production issues list
- Resolution of all Critical and High defects as defined above in "Phase 2 - Deliverable 3: UAT"
- The transition of support from the Professional Services team to Customer Technical Support for ongoing support

Company Responsibilities:

- Daily 30-minute standing calls for first two [2] weeks following Go-Live
- Two 30-minute standing calls per week for the second two [2] weeks following Go-Live
- One 30-minute standing call per week for the third two weeks [2] following Go-Live
- Transfer ongoing support of the Customer to the Company Support program

Customer Responsibilities:

- Provide technical and functional user support for post-production support and monitoring
- Develop and maintain a Post Production Issues List
- Provide timely and appropriate responses to the Company's request for information
- Following the post-Go-Live support period, the Customer will submit Production technical support issues through the Company Service Desk process for review and resolution

Acceptance Criteria:

- Six [6] weeks of Post Go-Live support provided
- Resolution of all Critical and High defects as defined above in "Phase 2 - Deliverable 3: UAT" discovered during Post Go-Live support period
- Transfer meeting regarding ongoing support of the Customer to the Company Support program conducted

Acceptance Review Period:

- Seven [7] days

*Risk and Issue Management*

Project risks are characteristics, circumstances, or features of the project environment that may have an adverse effect on the project or the quality of its deliverables. Known risks identified with this project have been included below. A plan will be put into place to mitigate the impact of each risk on the project.

1. Current process As-Is documentation details are not enough to understand differences in future software state.
2. The gap analysis may identify additional functionality not represented during the pre-contracting process, causing an increase in scope and/or budget.
3. The integration scope is altered and extended, causing go-live issues.
4. Test plans not detailed enough to handle all business needs.
5. Equipment needed to run the software is not identified or available at the Customer site.
6. Customer staff availability for User Acceptance testing.

7. Customer staff availability for training.
8. Customer organizational change management not thorough enough to gain acceptance of new software.
9. Dependency on the Accela configuration that is required for the ePermitHub solution (i.e., configured base record types including fees, workflows, intake forms, etc.).

To mitigate and resolve project risks, the Company team will:

- Develop and maintain a Risk and Issues Management tracker to maintain collaboration between the Customer project leadership, Accela and Company implementation team.
- Work with the Customer in order to resolve or mitigate risks or issues with the objective of not compromising project deliverables
- Escalate Risks and Issues when necessary to the appropriate Customer team leadership



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## Appendix B: Accela Record Types with Plan Reviews in Project Scope

- Reference Appendix A of the Accela Statement of Work for record types per phase