



## Title Page

RFI Subject: One-Stop-Shop Permitting

Number: CRFI SEC2600000001

Vendor's Name: Clariti Cloud Inc.

Business Address: 8 The Grn A Ste, Dover, DE 19901-3618

Telephone Number: (732) 492-6408

Fax Number: None

Name of Contact Person: Ron Vukovich

Email Address: [ron.vukovich@claritisoftware.com](mailto:ron.vukovich@claritisoftware.com)

RECEIVED

2025 AUG 29 PM 12:20

WV AUTO & TRNG

DEPT OF

**Ron Vukovich**

August 18, 2025

# Table of Contents

**Title Page..... 1**

**Table of Contents .....2**

**Response Reference.....3**

**Responses.....3**

**3.1. General Information Being Sought.....3**

**3.2. Specific Questions.....4**

**3.3 Information Being Sought..... 14**

## Response Reference

We are pleased to submit our response the State's Request for Information number CRFI SEC2600000001 for a One-Stop-Shop Permitting solution. We've provided the requested information in the following pages and appreciate the opportunity to present our solution to the State.

## Responses

### 3.1. General Information Being Sought

#### Clariti Enterprise: A One-Stop Solution for Streamlined Permitting and Licensing in West Virginia

Clariti is pleased to respond to West Virginia's initiative to modernize its permitting, licensing, and business registration systems. Our Clariti Enterprise platform is a secure, cloud-based Software-as-a-Service (SaaS) solution designed specifically for government agencies to centralize and automate the end-to-end management of permits, licenses, and business-related activities. Built on the Salesforce platform, Clariti offers the scalability, reliability, and configurability required to meet your vision.



Clariti enables a comprehensive one-stop shop experience for businesses, developers, and citizens through an intuitive online portal that supports submission, renewal, payment, communication, and real-time tracking of permits and licenses. Whether it's construction, economic development, infrastructure, or natural resource projects, Clariti provides a unified system that streamlines workflows, eliminates manual processes, and reduces the time and effort required to obtain approvals.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Our platform provides robust capabilities for complex permitting workflows, inter-agency coordination, and application routing—all within a centralized digital dashboard. Configurable forms, drag-and-drop workflow builders, and automated notifications empower agencies to adapt quickly to legislative or procedural changes without the need for code-based customization. The system is accessible 24/7 from any device, ensuring West Virginians can interact with government services on their own schedule.

Clariti's proven implementation methodology ensures high user adoption and rapid deployment, while our support team and product roadmap provide continuous innovation and improvement. With over 150 state and local government customers across North America, including many with similar economic development and environmental oversight requirements, Clariti is a trusted partner for jurisdictions looking to digitize, unify, and simplify the permitting experience.

Clariti is ready to support West Virginia in achieving its goal of creating a transparent, efficient, and user-centric permitting and licensing system—empowering businesses and accelerating project delivery across the state.

## 3.2. Specific Questions

### *3.2.1. Please describe your ability and methodology to establish the One-Stop-Shop Permitting solution.*

Clariti offers a robust and proven methodology to deliver a One-Stop-Shop permitting solution by leveraging over 40 years of domain expertise in public sector permitting and licensing. Built exclusively for government agencies and hosted on the Salesforce platform, Clariti's Enterprise solution supports complex, multi-departmental workflows with an intuitive user experience and 99.9% uptime. Clariti's self-service portal enables citizens to submit applications, schedule inspections, make payments, and track status updates 24/7, reducing the need for staff intervention.

Departments such as Planning, Code Enforcement, Building, and Environmental Health can operate from a unified platform, using role-based consoles, GIS integration, and automated workflows to manage their work efficiently. The flexible configuration tools empower administrators to adapt the system quickly without requiring heavy IT involvement, accelerating response times and improving customer satisfaction.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Our implementation methodology is tailored to the specific permitting needs of each jurisdiction, backed by a collaborative approach between Clariti, implementation partners, and the customer's stakeholders. We emphasize precise system configuration using visual workflow tools, intelligent forms, and dynamic validation to ensure complete and accurate submissions. The platform's integrated capabilities—such as electronic plan review, financials, document automation, mobile inspections, and real-time reporting—create a comprehensive and scalable permitting solution.

Clariti's support model includes standard and add-on services, technical training, and proactive account management to ensure long-term success. From initial intake to final permit issuance and inspection close-out, Clariti transforms traditional processes into a seamless, digital, and citizen-centric experience.

### *3.2.2. Provide examples of previous similar work products.*

At Clariti, we recognize the unique challenges and complexities inherent in public sector implementations, particularly within the community development space. Our approach to implementing our permitting solution is crafted with precision, embodying our deep domain knowledge, technical expertise, and adherence to industry-proven methodologies. This combination ensures we deliver a solution that is not only tailored to your specific needs but also robust, scalable, and capable of evolving with your States aspirations. Please see below for two examples of similar customer implementations.

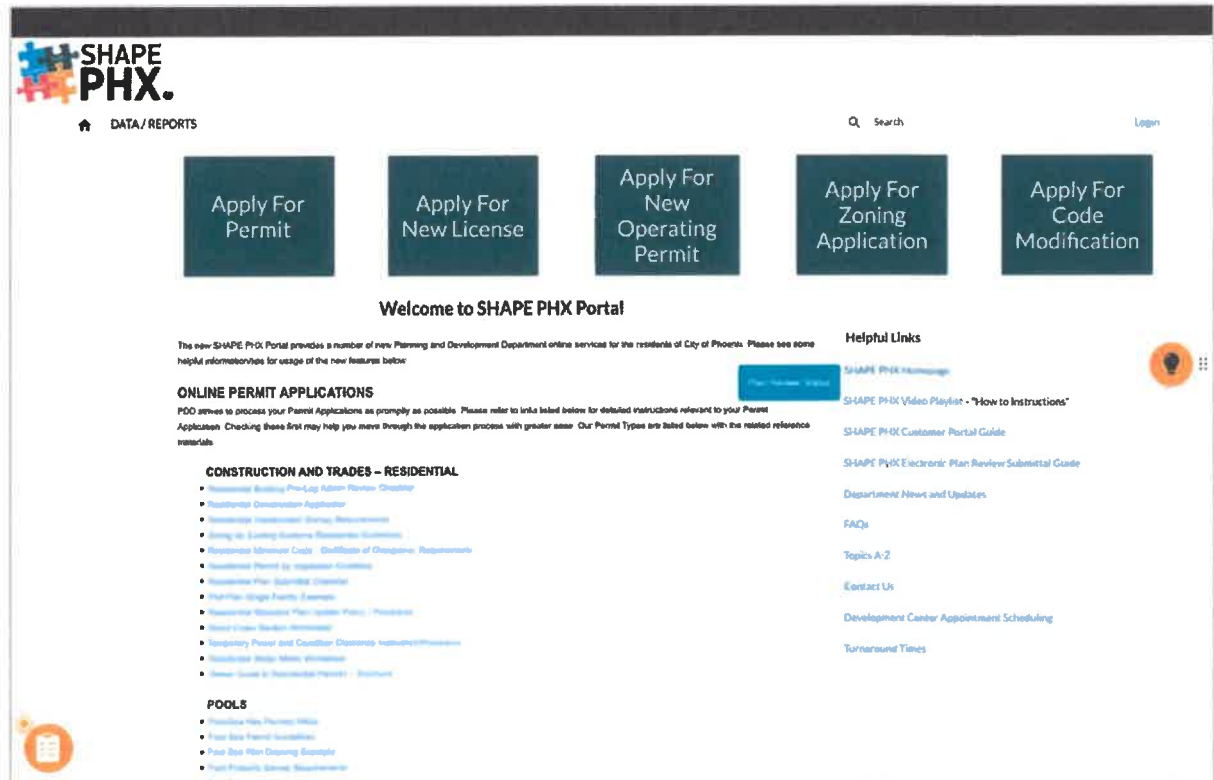
#### **Phoenix, AZ**

The City of Phoenix wanted to replace and consolidate legacy business applications of the Planning & Development Department (PDD). The mission of the multi-year project (SHAPE PHX) is to upgrade these legacy applications for the PDD, specifically the land management/permit tracking software systems, with a modern solution that supports planning, development, and regulation.

The project focus was acquiring a SaaS solution that updates the core permit-managing abilities with integrated, streamlined, and next-generation workflow processes. As community needs change, PDD wanted to keep pace by updating systems to incorporate forward-thinking functionality. The City chose the Clariti solution because it provides a seamless overall experience to PDD internal and external customers, while integrating closely with proven PDD processes and tools used today.



RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001



Since launching Clariti, the SHAPE PHX portal has improved customer experience by simplifying account creation, application submittals, and fee payments, adding self-service options, and making it easier to interact and schedule meetings with employees through the portal. Application workflows and system logic guide customers step by step through the submittal process, while search and drop-down features simplify data entry and improve data quality.

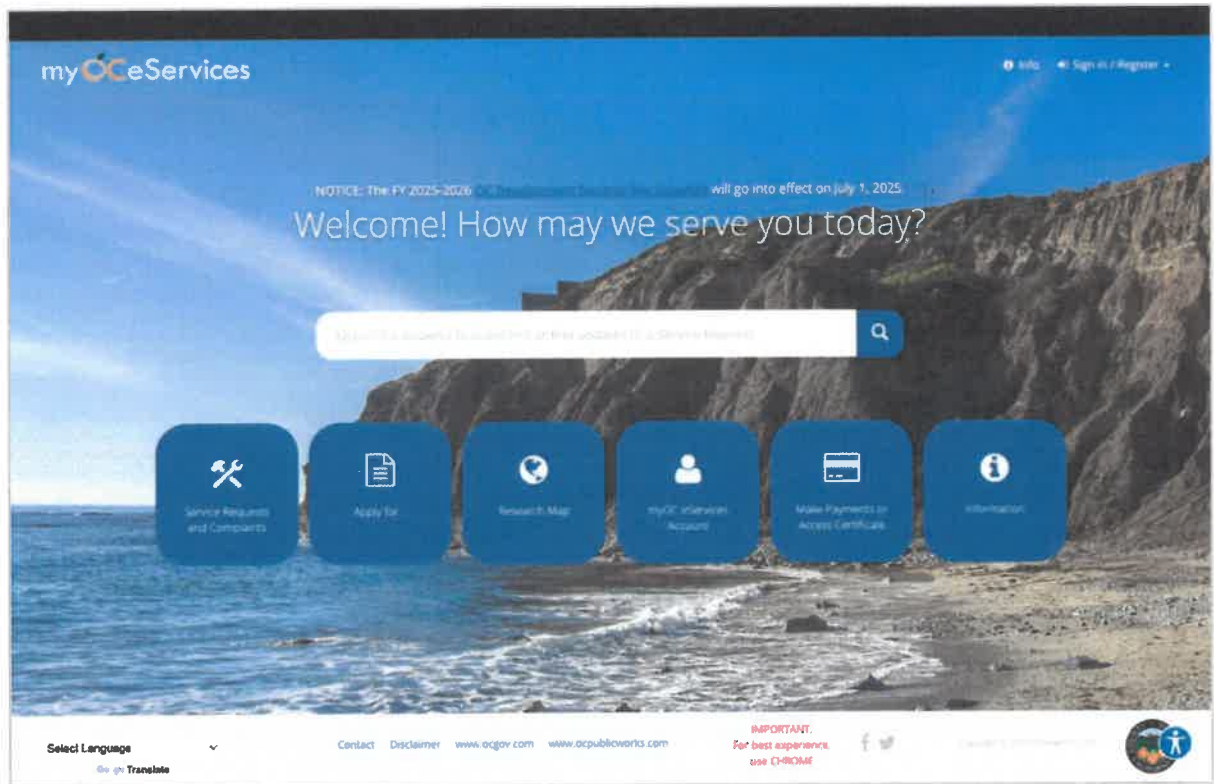
According to the City's five-year operational statistics report, Clariti has helped the PDD reduce the average number of days to complete application reviews by 30% —from 36 to 26. Over 45,000 permits, valued at \$8.9B, were processed through the system in FY 23/24.

### Orange County, CA

Orange County Public Works (OCPW) was looking to modernize how the County did business with its land development community (including the general public, applicants, residents, surveyors, engineers & developers) and general citizen engagement by developing electronic processes to support developers and the public in their interactions for county services.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

OCPW selected Clariti as a comprehensive system that could accept, input, organize, process and track development-related permits, cases and entitlements throughout the entire development process. The flexibility in the solution also addressed non-development-related workflows such as Code Enforcement, Business Registration and Public Works maintenance/repair requests. Additionally, the Public Works Department was able to consolidate ten business functions into one system.



Software users can add new permit types and make changes to their workflows and processes with our flexible solution – saving time, money and resources. With Clariti, Orange County now maintains an average 10-day permit turnaround for three million residents, and all citizen requests are handled online.

3.2.3. *Identify your company name, primary contact person, phone and email.*

Company Name: Clariti Cloud Inc.

Primary Contact Person: Ron Vukovich

Telephone Number: (732) 492-6408

Email Address: [ron.vukovich@claritisoftware.com](mailto:ron.vukovich@claritisoftware.com)

*3.2.4. Describe how your solution would address adding additional permits and licenses for the participating agencies, when necessary, as well as adding additional agencies and their permitting requirements that may come online after the fact.*

Clariti's solution is designed for flexibility and growth, enabling agencies to easily add new permits and license types as needed. Staff can configure new application types—including fees, inspections, and workflows—using intuitive, no-code tools without reliance on IT or vendor support. This allows participating agencies to evolve their processes and services over time, supporting seasonal programs, regulatory changes, or new service offerings. The platform also supports the phased addition of new departments or agencies, each with their own permitting requirements and workflows. Through configurable user roles, modular consoles, and a unified data model, new teams can be onboarded efficiently while maintaining system integrity and cross-departmental collaboration. Clariti's scalability ensures that future agencies can join the solution without disrupting existing operations, promoting long-term adoption and alignment across the organization.

*3.2.5. How would you address permitting portals currently in use by state agencies?*

Clariti is designed to complement or replace existing permitting portals in use by state agencies, offering flexible integration options and a highly configurable self-service portal. Where agencies wish to maintain their current portals, Clariti can integrate with them via open APIs, allowing for seamless data exchange, application submission, and status updates. Alternatively, agencies can adopt the Clariti Portal, which provides a unified user experience across departments, customizable branding, and dynamic guidance to reduce incomplete submissions.

By consolidating disparate systems into a centralized permitting platform or enabling interoperability between systems, Clariti ensures continuity of service while enhancing transparency and staff efficiency. Agencies can choose the approach that best fits their needs—whether phasing out existing portals or maintaining hybrid environments—with full support from Clariti's implementation and integration teams to ensure a smooth transition and minimal disruption to end users.

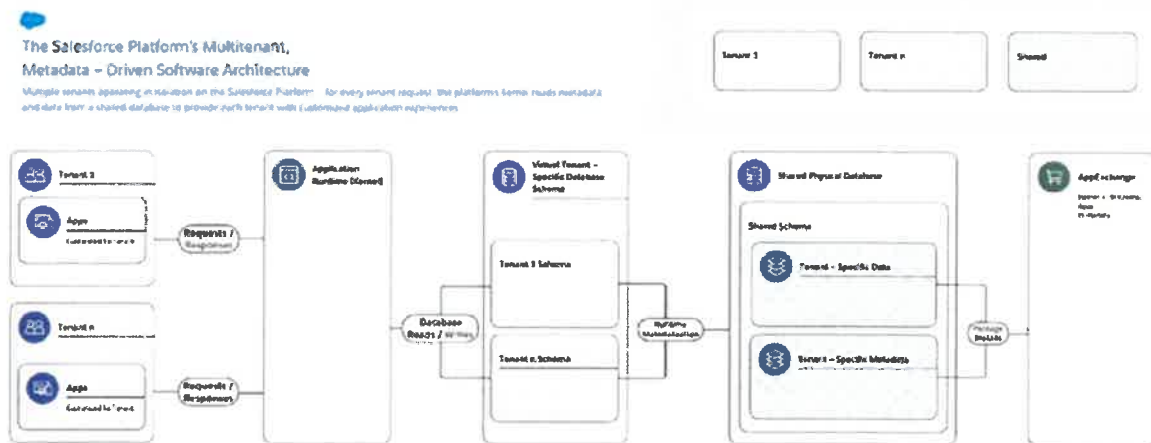


RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

**3.2.6. Describe how you handle security and privacy/cyber security as well as backups and disaster recovery within your solution?**

Clariti's Software-as-a-Service (SaaS) solution is built on the Salesforce platform and is fully hosted, managed, and maintained by Salesforce. To use Clariti, you only need a device with a web browser and an internet connection. No additional software or hardware is required. Clariti is delivered on demand over the internet, so there is no need to purchase additional licensed software or set up and manage expensive hardware systems.

Salesforce is a modern Platform-as-a-Service (PaaS) built for cloud computing. To meet the high demands of its large user population, Force.com's foundation is a metadata-driven software architecture that enables secure multi-tenant applications.



The Salesforce infrastructure is divided into modular architecture based on “pods”. Each pod can support several thousand customers securely and efficiently. Salesforce uses this to continue to scale and meet the demands of customers. There are controls designed to prevent customers’ Force.com instances from being compromised.

Salesforce has 99.9% availability 24/7 and has exceeded this commitment for years. In addition to this availability, the Salesforce platform routinely processes over 6.6 billion service and case interactions per day. Of those transactions, the average response time is around 350 milliseconds. Salesforce provides publicly available data on the status of its service at <https://trust.salesforce.com/en/>.

### **Platform Security**

The comprehensive security features developed by Salesforce are built into Clariti and protect your data's confidentiality, integrity, and availability. Data Centers are architected with redundant systems to ensure no single point of failure and that disruptions have no impact on the availability of applications. From user access to antivirus software to vulnerability scans and more, the security features provided with Clariti ensure your data is secure.

### **Data Storage & Access**

In Clariti, each customer's data is stored separately from every other Salesforce customer, protecting the information from unauthorized access. Salesforce provides contractual assurance to customers that the data hosted in the Salesforce services will be kept confidential. Data will not be accessed except under narrow circumstances for a set amount of time chosen by the customer. In such circumstances, support will access your org only with prior approval and subject to a Non-Disclosure Agreement (NDA). To protect against access throughout the application, Salesforce employees don't have access at the application level unless the customer grants it.

### **Business Continuity & Disaster Recovery**

Salesforce, as the host platform for Clariti, provides disaster recovery and business continuity planning services. These initiatives are overseen by senior management across key functional areas within Salesforce, with support from executive leadership at the highest level. Clariti has developed a strong understanding of these plans. Clariti's support and technical teams are committed to recovering from a localized or widespread catastrophic event as quickly as possible. Salesforce has:

- Developed a Global Business Continuity and Disaster Recovery Program for Salesforce Services;
- Hired Certified Business Continuity Planners; and
- Retained the services of leading consultants to assist in developing Business Continuity and Disaster recovery plans and procedures.

Salesforce has a Crisis Management Team (CMT) comprised of select executives from key departments globally. The CMT is mobilized when a crisis or significant event occurs and is responsible for evaluating the situation and responding accordingly.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Salesforce maintains a Mirror Site, a 100% staged warm site with block-level data replication. The secondary data center is replicated at 100% of the capacity (host, network, and storage) of the production data center. As part of developing a viable disaster recovery plan and program, Salesforce schedules disaster recovery exercises several times per year with and without customer participation.

Additionally, disaster communication processes are exercised using the mass notification system during each exercise, including callouts with response requests to the Salesforce CMT and the production disaster recovery team. Salesforce will test its disaster recovery plan at a minimum annually. It will continue to enhance and develop processes and technology related to disaster recovery to further improve Recovery Point Objectives (RPOs) and Recovery Time Objectives (RTOs).

### **Security Standards**

Salesforce has comprehensive privacy and security assessments and certifications. Third-party auditors test the effectiveness of Salesforce's security controls for each compliance framework. These include:

- ISO 27001;
- SSA 16;
- SOC 1;
- SOC 2;
- SOC 3;
- PCI-DSS; and
- FedRAMP.

Salesforce runs antivirus software on the production systems that store, transmit, or process customer information. The antivirus scans host filesystems – not customer data. The antivirus checks for virus definition updates daily. Other controls are also used to address malware, such as hardening the operating system of servers, firewall configuration to ensure only required ports are open and all others denied, and use of intrusion detection systems. Access to these systems is restricted to authorized personnel, and all these systems and the host platforms are monitored in real-time through a security monitoring system.

Clariti and Salesforce have many customers subject to laws regarding processing personally identifiable information (PII) or personal data. Salesforce offers a broad spectrum of functionalities and customer-controlled security features that may be implemented. This provides customers with the flexibility to comply with laws where stringent privacy and security requirements apply.

### **Shield**

Included in Clariti, Salesforce Shield is a trio of security tools that admins and developers use to build a new level of trust, transparency, compliance, and governance into business-critical apps.

### **Platform Encryption**

Ensure that your most sensitive data is encrypted while at rest across Clariti. This helps protect PII, sensitive, confidential, or proprietary data. Platform encryption enables Clariti to meet external and internal data compliance policies while keeping critical app functionality like search, workflows, and validation rules. You will have full control over encryption keys and can set permissions to protect sensitive data from unauthorized users.

### **Event Monitoring**

Gain access to detailed performance, security, and usage data in Clariti. With event monitoring, administrators can:

- See who is accessing critical business data, from where and when;
- Understand user adoption; and
- Troubleshoot and optimize performance to improve end-user experience.

Event monitoring data is tracked with APIs and can be imported into any third-party data visualization or application monitoring tool.

### **Field Audit Trail**

Know the state and value of data for any date at any time. Use the field audit trail for regulatory compliance, internal governance, auditing, or customer service. Built on a big data backend for massive scalability, this tool helps companies create a forensic data-level audit trail with up to 10 years of history and set triggers for when data is deleted.

*3.2.7. How would you ensure that the solution will be operational by the deadline indicated in the statute and legislative rule?*

To successfully achieve a go-live by January 1, 2027, several critical resources, assumptions, and enabling conditions must be in place from the outset. Given the aggressive timeline, coordinated efforts between the State and the implementation team will be essential to avoid delays and reduce rework.

**Resources Required**

- A dedicated State project lead empowered to make timely decisions and coordinate internally and with external stakeholders
- Engaged subject matter experts (SMEs) for intake processes, fee structures, and permit types
- Technical resources from the State to support in-scope integrations and any required data exchange
- Implementation team availability from the vendor, including but not limited to implementation consultants, configuration specialists, developers, and QA/test support
- State training and change management support for both internal users and public-facing communications

**Key Assumptions**

- Business requirements are well understood and finalized by summer 2025, with minimal changes after sign-off
- No major changes to policy or business rules during the configuration window
- Availability of State SMEs for workshops, reviews, and testing, especially during requirements and UAT phases
- Integrations and any State-side dependencies can be completed in parallel without blocking configuration
- Decision-making cadence is weekly or faster, with a clear governance model to resolve questions quickly

**Conditions for Success**

- A joint, realistic contract vehicle, statement of work, and project plan developed and agreed upon by both the State and vendor teams by September 2025
- Frequent checkpoints and demos to validate progress and align expectations early and often
- Strong executive sponsorship to remove internal blockers and keep departments aligned with project priorities
- Change management and public engagement prepared in advance of go-live to support adoption and reduce confusion



RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Meeting a January 2027 go-live date is achievable with focused collaboration, tight scope control, and shared accountability for key decisions and deliverables. Early alignment and clear ownership across all fronts will be essential.

### 3.3 Information Being Sought

#### 3.3.1. *Examples of previous solutions of similar size and scope.*

Clariti has provided comprehensive project oversight, professional and development services, and ongoing support to state jurisdictions – including the West Virginia State Fire Marshal's Office - within North America. The following table below provides examples of some of Clariti's State customers reaping the benefits of our permitting solutions.

Clariti Launch and Enterprise Customers

Delaware	Division of Professional Regulation (DPR)
West Virginia	State Fire Marshal's Office
Iowa	Professional Licensing Bureau (PLB)
Los Angeles	Department of Building and Safety
Minnesota	IT Services (MNIT)
Colorado	Department of Labor & Employment
Wisconsin	Department of Administration (DOA)
Massachusetts	Division of Professional Licensure
Washington	Department of Licensing (DOL)
Michigan	Liquor Control Commission (MLCC)
Georgia	Department of Natural Resources (DNR EPD)
Ohio	Department of Administrative Services (DAS)

*3.3.2. Please describe pricing strategy options available to address the cost of buildout and maintenance of the program, including user fee options.*

There are two main factors to determine the strategy of pricing the first one being the software licenses which require a specific number of users identified in order to determine a price. Being that at this time that specific user count has not been provided we are unable to offer pricing when it comes to software. Pricing for licenses is structured on a case by case basis. The licenses are invoiced annually based on the number of years on the executed contract The State would enter into.

The second factor in determining a pricing strategy would be the cost of implementation or "build". This is a one time cost, which requires a number of specifications The State would need to provide in order to determine what the implementation cost would be. Some examples of the specs needed would be the number of integrations, data migration, configurations.

Please note the amount of work involved with the implementation has no impact on the pricing structure for the licenses.

*3.3.3. Any marketing materials, technical data or other relevant information to the solution.*

The Clariti Enterprise software solution is a cloud-based platform designed to automate all functions related to permitting, licensing processes, and code enforcement required by the State. This Software as a Service (SaaS) solution is built on the Salesforce platform, providing industry-leading availability, easy drag-and-drop configurability, and an intuitive user interface.

**Simplified Work**

Using Clariti is straightforward. It guides users with step-by-step instructions throughout the submission process. The self-service Portal provides instant access. Citizens can submit applications, make payments, communicate with staff, and view information online. Your team will find Clariti powerful and convenient. It provides the necessary information to streamline work and automation to keep applications moving.

**For Applicants:**

- Modern web Portal
- Accessible from all devices
- 24/7 availability
- Automatic notifications
- Online Payments

**For Staff:**

- Automation
- Dashboards
- Reports
- Notifications
- Interconnected Data

Clariti keeps citizens updated on their application progress, reducing the number of calls to your staff.

**Automated Processes**

Automation works to give time back to your staff. Clariti moves responsive applicants forward by automatically providing the next steps. With our solution, you can automate these customer interactions:

- Status updates
- Fee calculations
- Approvals
- Inspection Scheduling
- Updated application requirements
- And more

**Access from Anywhere**

You can access Clariti from any device, anywhere, at any time, so staff can work when needed. The 24/7 portal allows applications to be submitted according to your community's schedule.

**Faster Issuance Times**

"Issue Permits Faster" is the never-ending request from communities, contractors, council members, and your building and permitting team. Clariti gives you tools to accomplish this with:

- Business process automation
- Transparent progress updates
- Automated alerts
- Always online system
- All applications in one system










**Effortless Reporting**




Analyze your data quickly and easily with Clariti's powerful reporting tools. Trained staff can create and update reports in just minutes as your needs change. The intuitive interface allows your team to generate new reports and modify existing ones independently, so you won't need to rely on a systems integrator or IT support.

**99.9% Uptime**

Clariti is built and hosted on the Salesforce platform. With their proven 99.9% uptime record, your staff and community will have access to your One-Stop-Shop Permitting solution 24/7, every day of the year. Clariti processes over 6.6 billion service and case interactions daily, with an average response time of approximately 250 milliseconds for each transaction. Staff and applicants will never wait for a screen to load, and the easy online applications will reduce in person applications.

Cross-functional Tools of Your Complete One-Stop-Shop Permitting Solution

<b>Portal</b> Self-service community portal where customers can get real-time secure service. Allows self-registration and online payments. 	<b>Over the Counter Service</b> Work with the community in person. View the entire account history and all related records from a single screen. 	<b>Inspections</b> The mobile experience gives your inspectors the power of Clariti in their pocket, plus powerful back-office management. 
 <b>Payments</b> A pre-configured payment processor can accept credit cards, debit cards, and ACH/EFT payments, issue refunds and voids, and report on processed transactions.	 <b>Financials</b> Manage everyday financial workflows and transactions. Includes cashiering, fund accounting, invoicing, accounts payable, accounts receivable, and sub-ledger accounting.	 <b>Reviews</b> Review tool leveraging EPR, GIS, land, permit, inspections, and code enforcement records. Reviewers approve or deny a permit application using a browser-based interface.
<b>Hearing Management</b> Manage scheduling, agendas, and outcomes directly from your solution. 	<b>GIS Integration</b> Connects real-time GIS data with Clariti's land management solution. 	<b>Parcel &amp; Address Management</b> Provides visibility into land parcels and addresses synced from external GIS. 

 <b>Document Service</b> Generate permits, notices, and certificates with system data. Includes document management and storage.	 <b>Reporting and Data Analysis</b> View and analyze data in real-time and on a dashboard, with a scheduled. or ad hoc report.	 <b>Integrations</b> Integrates with third-party software APIs - preconfigured integrations for GIS, payment processing, and electronic plan review.
--	--	--

### Clariti Enterprise Solution Overview

Clariti is a comprehensive and flexible One-Stop-Shop Permitting solution designed to meet industry standards and the specific needs of the State, enabling the State to digitize the permitting process from submission to issuance. Clariti helps your citizens, staff, and inspection teams save time by streamlining workflows and providing real-time visibility into the status of applications. You can customize the platform to match your specific permitting and licensing processes, ensuring it adapts and grows with your needs.

This integrated solution facilitates collaboration between the permitting, planning, code compliance enforcement, and business licensing departments. It includes essential functions such as electronic plan review, inspections, fees, and payments, and a user portal built on a unified data model using the Salesforce platform.

Community development is essential for all local governments, driving economic growth, attracting investment, and enhancing property value. Clariti supports your Community Development efforts in four essential areas:



The solution has all the tools you need to digitize and streamline your One-Stop-Shop Permitting. A modern Portal, integrated tools like GIS and plan review, a powerful mobile experience, and easy-to-use reporting and workflow tools put everything in one system.



## Permitting

Clariti streamlines the application process with its easy-to-use web portal. Users are guided through each step, ensuring all necessary information is collected before submission. This approach reduces errors and ensures complete submissions. Users can save their progress at any stage and complete applications at their own pace. The portal's design is mobile-friendly, allowing users to submit requests from any device at any time.

Clariti gives you the flexibility to optimize the platform for your unique permitting workflows and to continually grow with your needs. With Clariti, you can:

- Apply online, upload documents, and view review progress;
- Automate fee calculations and allow citizens to pay online;
- Request and schedule inspections; and
- Securely access applications from any desktop, laptop, or mobile device.

Clariti improves each step in the application process.

### Applications

- Easy to complete
- Clear and dynamic instructions
- Multiple application workflows
- Automatic next steps
- Online payments

### Inspections

- Schedule or request inspections online
- Daily list of inspections with GIS
- Mobile inspection app
- Permit data linked to inspections
- Easy to complete checklists

### Reviews

- Automated workflows
- Synchronous plan review
- Integrated electronic plan review software
- Real-time document comments
- Automatic progress updates

### Finalization

- Report on outstanding items
- Accountable notifications
- Conditionally issue Occupancy Certificate
- Save applications permanently with the parcel record

From application to certificate of occupancy, Clariti helps you process permits faster. Your staff will have the tools to efficiently receive and review applications, schedule and manage inspections, collect fees, and close out applications.



Complex permit application processes increase the chances of mistakes. Clariti simplifies the process and makes it easier for everyone involved.

## Planning

Planning and development applications can be complex and time-consuming, requiring extensive participation from staff across multiple departments. Clariti shortens this process by minimizing unnecessary waits, simplifying communication, and automating tasks.

Clariti will:

- Improve applicant accountability and application quality;
- Reduce manual input from staff;
- Include GIS context without changing systems;
- Automatically prompt the applicant for fees, documents, and next steps; and
- Create a strong reference record.

Applicants and planners will save time with Clariti as automation streamlines work and validation reduces mistakes. In some jurisdictions, >50% of applications received are invalid. Clariti's robust validation, automatic fee calculation, and detailed document requirements help you receive complete and correct applications.

### In the Office

- View applications with tailored information
- Time and date-stamped actions, including when applicants view communication
- Retain past iterations of reviewed plans, including markups, comments, and redlines
- Schedule hearings, manage agendas, and record and publicize outcomes
- Automatically calculate or set manual fees
- Two-way information sharing with Esri-GIS

### When Applying

- Instructions based on the application type
- Document lists
- Administrative requirements
- Fee schedules
- Automatically set dates and notifications for waiting periods

Community Development is a complex process. Your team should be free to focus on what matters: making decisions that help your community grow as planned.



In some jurisdictions, >50% of applications received are invalid. Clariti's robust validation, automatic fee calculation, and detailed document requirements help you receive complete and correct applications.

## Code Enforcement

Clariti provides digital management and tracking for all code enforcement activities. This approach improves response times, reduces manual steps, and ensures your officers have all the supporting information in the field. Clariti provides comprehensive tools for managing code enforcement activities, streamlining the entire lifecycle from case initiation to resolution. Staff can create code enforcement cases directly within the system or receive them through public submissions via the public portal.

With Clariti code enforcement, you can:

- Register a complaint online at any time;
- Track violations against a person or place;
- Dynamically generate notices and letters; and
- Easily review, triage, and support resolutions.

Clariti's inspections-based code enforcement solution creates efficiencies for your staff and transparency for your community.

### Complaints

- Register a complaint online 24/7
- Add complaints made in person or by phone
- Upload supporting documentation
- Dashboard views of all complaints
- Permanently record complaints

### Inspections

- Schedule inspections
- Request inspections online
- Record violations
- Note resolutions
- Link inspections to complaints, permits, and business records

### Ordinances and Violations

- Upload statutes, laws, and regional or statewide ordinances
- Apply violations to complaints and inspections
- Save case notes and inspection details
- Incorporate saved information into dynamic notices
- Automatically generate fines, additional inspections, citations, and next-step instructions

Clariti empowers your community to engage with their government. Reporting a problem in your community is simple, and your staff can efficiently respond. Enabling your team to act accurately increases your community's confidence that their government works for them.



Code enforcement is a cornerstone of public safety. Clariti empowers your officers in the field with the knowledge and tools they need to enforce compliance with your laws.

## Licensing

With Clariti, you can accept applications online, anytime, and improve your response times. The system makes it easy for staff to prioritize, review, and approve applications. Automatic notices keep professionals and businesses informed and ensure accurate licensing revenues are collected with automated fee generation. Clariti leverages workflow automation to streamline the licensing process from start to finish.

Clariti lets you:

- Easily register and complete applications with clear instructions;
- Efficiently review and process applications;
- Automate license issuance, expiry, and renewal notices; and
- Consolidate requirements for improved applications.

Clariti guides applicants through licensing to provide your team with applications you can process immediately.

### Applications

- Easy to complete
- Dynamic instructions for each license
- Check status online
- Automatic fee generation
- Pay online

### Reviews

- Automated workflows
- Prioritize applications
- Automatic notifications
- Issue digital licenses

### Licenses

- Printable digital licenses
- Automate renewal and expiry notices
- Schedule inspections based on license type
- Connect with third-party systems to validate licenses

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Clariti streamlines the licensing application process, saving staff and the community time. From dog licenses to local business permits, Clariti makes applying easy.



Licensing volume flexes throughout the year. Clariti provides insight into your workload to help you better allocate resources and provide accurate processing times.

### Enterprise Solution Capabilities

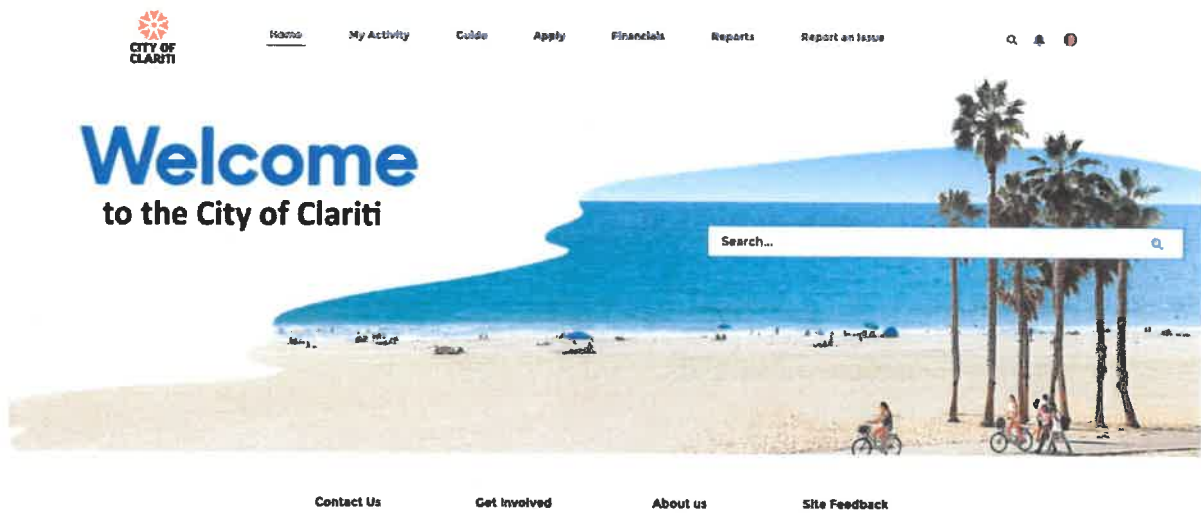
Public sector technology must adapt to changing needs and regulations. The Clariti approach encourages public participation and supports back-office automation to increase staff productivity. We focus on regulatory requirements and understand that customers need flexible, transparent, and user-friendly solutions.

#### Clariti Portal

The Portal is the front door to all your One-Stop-Shop Permitting services. Clariti's Portal provides 24/7 access to your services from any internet-enabled device and is easily configurable to match your agency's desired look and feel. Making it easy for your citizens to engage with you online increases transparency and improves your ability to respond. Residents and businesses utilize the Clariti Portal to request information, submit permit and planning documentation, and submit zoning and planning requests.

The portal offers step-by-step guidance and information on the status of requests in the system, ensuring all required information is captured before submission. This configurable design helps to minimize errors and incomplete submissions. Users can save their progress at any stage, allowing them to complete applications at their own pace.





Clariti Portal - For Illustrative Purposes Only

Clariti's intuitive Portal provides:

- Public searches for community development information;
- Self-registration to access the Permitting and Licensing functions;
- Automated applications with clear instructions;
- Powerful GIS integration for location context; and
- Secure online payments.

The Portal will provide your community with powerful self-service abilities. Applicants can act with minimal staff involvement, saving your team time to focus on community development. Clariti makes it easy to work with you online, improving community buy-in for your new investment. An excellent online experience reduces the number of face-to-face meetings and phone calls interrupting your team.

The Portal is the central web-based online system that provides the following:

#### Accounts

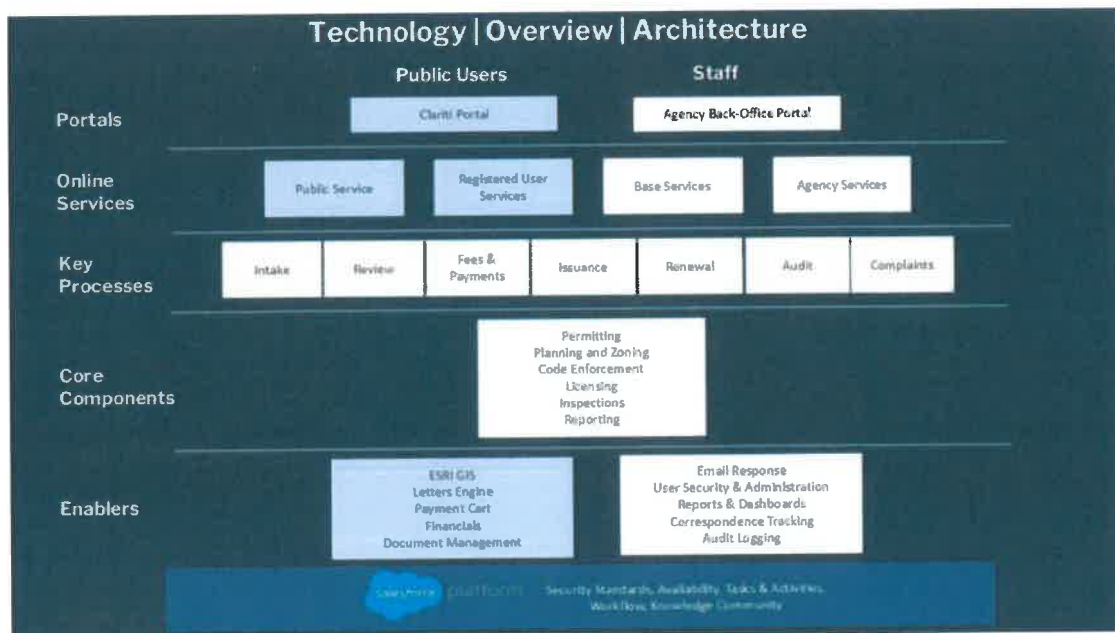
- Self-register for an account linking all activity in the Portal
- Create projects to link activity for development applications
- View comprehensive account history
- Manage account information and link organization accounts
- View and respond to correspondence for all activity

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

- |                      |   |
|----------------------|---|
| Applications & Forms | <ul style="list-style-type: none"><li>● Create, save drafts, and submit applications</li><li>● Upload documents</li><li>● Securely pay fees and submit deposits</li><li>● Request and schedule inspections</li><li>● View detailed status and progress updates</li><li>● Request an extension or renewal</li><li>● View outstanding tasks</li></ul> |
| Public Transparency  | <ul style="list-style-type: none"><li>● Search for publicly available community development information</li><li>● View outcomes of public hearings</li></ul>  |

## Public Services

The Portal allows citizens to self-register and create accounts, submit applications, make payments, file complaints, view correspondence, and access project and account information. Some features may be available to non-registered users at the County's discretion, while others are only accessible to registered users.



The portal lets users save draft applications, request inspections, upload documents for review, manage account information, and assign administrative privileges to other users. Additionally, users can view their account history, streamlining their experience and promoting transparency.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Non-Registered Users: Access to functions defined by you.

Feature	Description
Permits	Search by project name, county, city, permit type, or number to get code amendments, GIS maps, zoning maps, and project-specific information.
Approved Permits	View details, including project scope and status.
Public Notices	Access public notices for community development activities and events.
Compliant Submission	Submit complaints, identifying the permit type and complaint parties (complainant, respondent, witness, etc.) with a summary.
Account Registration	Get access to more robust self-service capabilities.
Frequently Asked Questions (FAQs)	Responses to FAQs. It can also include "Contact Us" links and structured "Contact Us" request templates for submitting messages.

Registered Users: Access additional services.

Feature	Description
My Account Overview	User Profile, associated permits, scheduled events, and transactions.
Application Status	View the status of applications.
Initial Application	Submit initial applications for permits and business licenses.
Pre-application Requests	Submit pre-application requests for preliminary reviews, consultations, and/or pricing estimates.
Create/Manage Projects	Create new projects and manage existing ones, track all permits, inspections, and fees within a project, update details, and track progress.
Complaint Submission	Submit complaints, identifying the permit type and complaint parties (complainant, respondent, witness, etc.) with a summary.
Duplicate Form Print	Request and print forms and documents (e.g. approved permits or certificates of occupancy).
Upload Files/Drawings	Upload data, including raw AutoCAD files for data automation into GIS.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Inspection	Schedule project inspections.
Scheduling	
Request Hearings	Request hearings related to applications or projects.
Online Payments	Payment of fees and fines.
Track and Pay	Track issued citations and make payments for any fines incurred.
Citations	
Extension Request	Request extensions for project deadlines or permit conditions.
Approval Conditions	Track conditions of approval for their projects.
View Outstanding Tasks	See tasks and actions required for applications and projects.
Deposit/Trust Management	Manage deposits and trust accounts associated with projects.
Transaction History	View the history of completed transactions.
Receipt Generation	Generate receipts for payments made through the portal.

## Intelligent Applications

Clariti's intelligent application system reduces the number of incomplete applications, improving turnaround time. The system dynamically responds to user input to generate the next page of forms. This automation means users only see the fields relevant to their application. Concise applications give your staff all accurate information limited to what is necessary.

**Project Sparkling Hills Subdivision**

Type	Status	Start Date	End Date
Development	In Progress	11/21/2022	11/30/2023

**Progress:** In Progress, On Hold, Completed, Canceled

**Name:** Sparkling Hills Subdivision  
**Type:** Development  
**Primary Contact:** Howard Jones  
**Parcel:** 5149-008-079  
**Address:** 344 N ISABEL ST LOS ANGELES CA 90065  
**Outstanding Conditions:**  
**Description:** Project is a 46 single family unit sub-division  
**> System Information**

**Applications (6\*)**

Number	Type	Phase	Status
SUBD-22-016	Subdivision	Hearing	Pending
ZONE-23-0...	Zoning	Hearing	Pending
PAC-23-002	Pre Applicati...	Completed	Completed

[View All](#)

**Permits (6\*)**

Number	Type	Phase	Status
23016-00057	Building	Application	Pending
23016-00044	Building	Application	Pending
23016-00043	Building	Application	Pending

[View All](#)

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

### Project view in Portal - For Illustrative Purposes Only

Clariti's intelligent applications include:

- Automatic form validation;
- Responsive application fields;
- Status flags for missing information;
- Automatic generation of required documents; and
- Fee generation.

Streamline the permits, licenses, planning, and zoning application process with Clariti. You can improve response times by only requesting essential information for specific application types with fully paid applications.

### New Building Permit Application

The screenshot shows a web form titled "New Building Permit Application". At the top is a green progress bar with four steps, the second of which is active. Below the bar is the section "Contractor Details" with the instruction "Choose a contractor for this project by searching below." There is a search input field labeled "Contractor Name" containing the text "gord". Below the input field is a magnifying glass icon and the text "Show All Results for 'gord'". Two search results are listed: "Gordon N Gordon Construction" and "Jim Gordon". A mouse cursor is pointing at the "Gordon N Gordon Construction" result.

### Application Lookup Field - For Illustrative Purposes Only

#### Post Application Activities

For Applicants:	For Staff:
<ul style="list-style-type: none"><li>• Automatic email notifications with attachments (e.g. reviewed documents, invoices, and map views)</li><li>• Status icons that reflect the staff's view of application progress</li><li>• Print issued documents like permits without waiting for a paper copy</li><li>• Status shows a description of steps to be taken at each stage</li></ul>	<ul style="list-style-type: none"><li>• Control status updates and release updates immediately or after review by senior staff</li><li>• Send emails directly from the application, including attachments</li><li>• Accountable communication with automatic timestamps:<ul style="list-style-type: none"><li>○ When notifications sent</li><li>○ When emails are opened</li><li>○ How long do reviews take</li><li>○ Amount of time between events</li></ul></li></ul>



If a submitted application requires the applicant's attention, Clariti informs them automatically via email. Applicants can check their status online, saving staff time previously spent answering applicant phone calls and emails. When questions come up, Clariti provides your staff with the information they need to help reassure impatient applicants. They can pinpoint the source of delays, direct them to more information, and determine the best action to move forward.



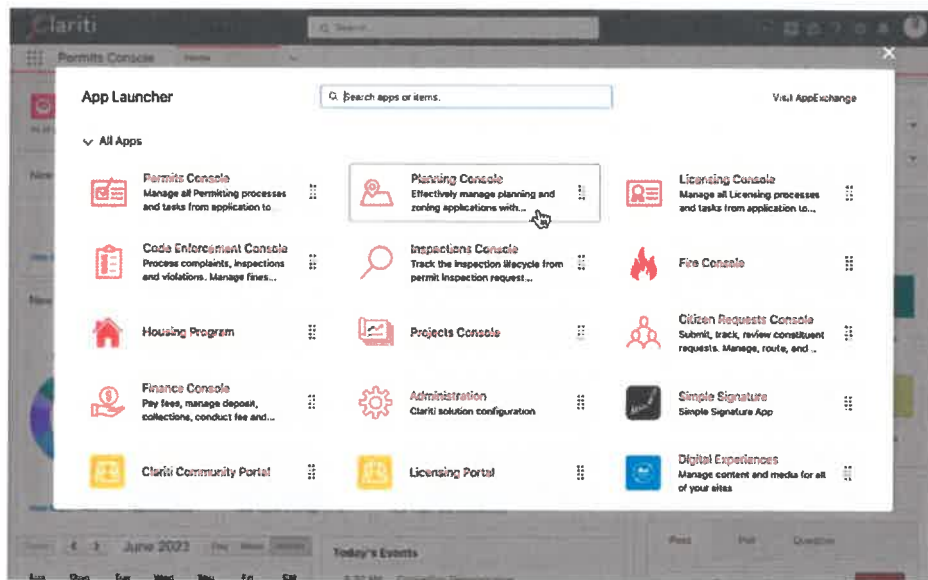
Applicants are often the source of delays in permitting, planning, and zoning applications. With Clariti, you can keep information flowing accountably in your system and improve application turnaround time.

### **Back-Office Experience**

Clariti is fast and intuitive. You can leverage the power of consoles to group common functions while still accessing all data and functionality. For example, the Back-office App Launcher brings up the Permit Console, which gives staff access to highly customizable dashboards that aggregate and display permit requests by priority, status, or assigned personnel. These dashboards integrate advanced filtering and search capabilities, allowing staff to quickly locate specific requests or categories. For example, requests can be organized by type (permit, license, service), applicant, or deadlines, ensuring that high-priority items receive attention promptly.

Consoles are available for other functions such as licensing, or code enforcement services). Requests can be organized by type, applicant, or deadlines, ensuring that high-priority items receive attention promptly.

Clariti provides real-time updates and notifications to ensure that staff stays informed about status changes, deadlines, or updates to the applications they manage. This lets them work more efficiently while maintaining a comprehensive overview of all outstanding tasks.



Clariti Back-office App Launcher - For Illustrative Purposes Only

The system also supports escalations and overrides, enabling managers to intervene to resolve bottlenecks or urgent issues when necessary. Staff can process, approve, or deny requests directly from their dashboards, with each action logged for transparency and audit purposes. Collaboration across departments is also facilitated, as staff can share and comment on requests directly within the platform, ensuring continuity and accountability throughout the workflow.

### Application Management

A common challenge in One-Stop-Shop Permitting software is adding and configuring new application workflows. In Clariti, staff can be trained to create new permits, fees, and inspection types. The system uses templates containing the rules for automated workflows.



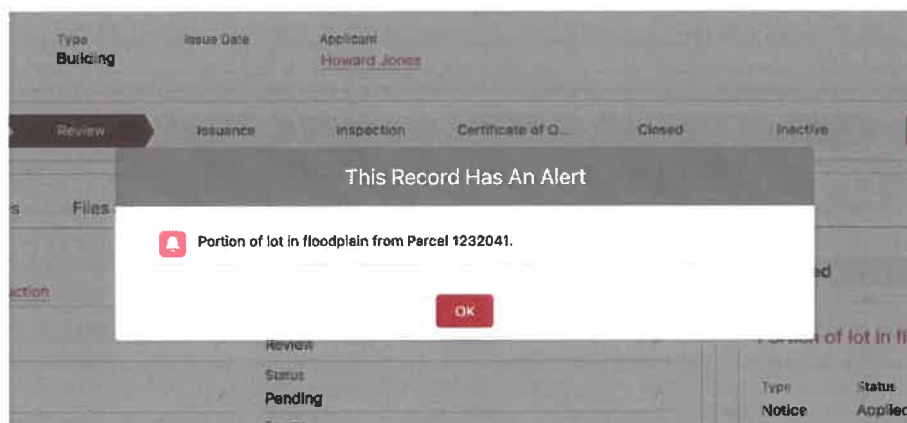
Some systems take weeks or even months to add a permit, with heavy involvement from your IT team and the software provider. With Clariti, a new permit (or any application type) can be added in hours.

## Alerts

In any system, a project can move forward when it should not. Clariti provides alerts to help prevent applications from proceeding at the wrong time. Alerts enable staff to prevent the creation, editing, or deletion of a record. This tool helps your staff securely communicate across teams by applying a notice, hold, or lock on a record. Alerts can be added manually or automatically for the most common situations.

- Notices add a pop-up message to a record for internal communication;
- Holds prevent certain fields from reaching a set value (i.e. preventing approval of an application); and
- Locks freeze records to prevent them from being edited.

Alerts are powerful tools that prevent manual or automatic steps from happening when they should not. Your processes will determine when to apply Alerts, ensuring your data stays complete and accurate.



Example Alert - For Illustrative Purposes Only

## User Roles

Your team has diverse and complex roles. Clariti offers tools to efficiently tailor the experience to the user. Role-based access controls create user roles and groups, giving each member of your team an experience unique to their job.

Tailored user experiences based on functional roles save bandwidth your staff can spend where they need. A permit technician, engineer, inspector, and several others may all need to work with an application, but most roles do not need all the information to do their job. Each user will see the information they need when they need to see it.

Clariti improves the day-to-day staff experience:

- Gated stages automatically assign applications to teams at the appropriate time;
- Reports and dashboards can be configured once and shared across the organization:
  - Automatically filter dashboards and reports based on user, user role, or user group; and
  - Cascade changes to reports across the entire organization, saving time.
- Users only see the information they need.

While information displayed for each role is focused, it is not exclusive. If a team member needs help with an application, it is easy to share it with a colleague and request their input because:









- Every entry in the system has a unique ID, easily shared by link;
- Clariti's powerful global search makes it easy to find information; and
- All entries include a project feed to record internal communication.

## Consoles

Clariti's console feature groups functions and tools tailored to individual roles while maintaining access to all data and capabilities. By managing users, templates, and configuration data within the same user experience, it is easy to learn how to be a super user or administrator. You can keep track of system activity with notifications, dashboards, tabs, and activity logs to manage your workload efficiently.

This approach helps to minimize the amount of information each user must manage. Consoles allow you to configure tools and dashboards specific to the needs of each user group. You can also view multiple related records on tabs inside the console. Consoles enable different functional roles to prioritize what they need for their workload.

The system includes the following consoles:

 Permits	 Planning	 Licensing	 Code Enforcement
 Inspections	 Finance	 Citizen Requests	 Administration

We will work with your team to configure these consoles during implementation. A unified system allows you to provide a tailored experience for each user. One system for all departments involved in your applications makes it easy to collaborate and faster to process applications.



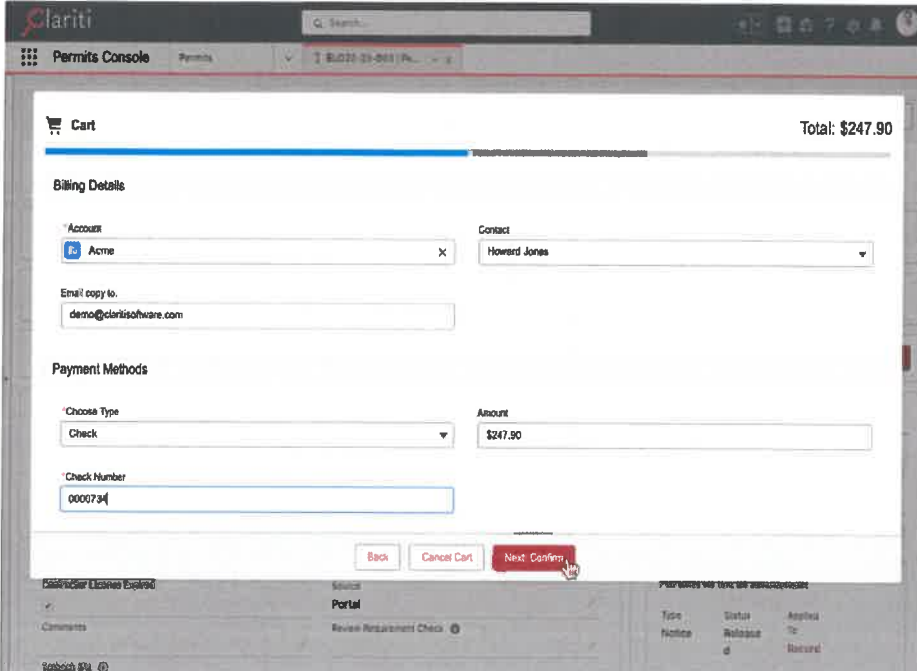
Sifting through irrelevant information and reviewing an incomplete application wastes time. Clariti ensures that each application hits the right desk at the right time.

### **Over-the-Counter Service**

Clariti works for everyone, including people who want to do in-person transactions. With Clariti, you can support the multi-channel delivery of services online and in person. Pulling up a full account history on the Portal for a visitor to your office only takes a moment. From there, you can see every linked record for quick access to make a payment, issue a permit, reprint a document, and more.

Everything a user can accomplish online in Clariti is easy in person; Clariti lets your community choose their preferred way to work with your staff. Whether it's to drop off hard copies of documents, pay with a check, or receive an original document from your office, it's simple for your community and your staff.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

A screenshot of the Clariti Permits Console web application. The interface shows a 'Cart' section with a 'Total: \$247.90'. Below this is a 'Billing Details' section with fields for 'Account' (set to 'Acme'), 'Contact' (set to 'Howard Jones'), and 'Email copy to' (set to 'demo@claritisoftware.com'). The 'Payment Methods' section includes a 'Choose Type' dropdown set to 'Check', an 'Amount' field set to '\$247.90', and a 'Check Number' field set to '0000734'. At the bottom of the form are three buttons: 'Back', 'Cancel Cart', and 'Next: Confirm'. The 'Next: Confirm' button is highlighted with a mouse cursor. The background shows a blurred view of the main application interface with various tabs and data.

Manual Payment Entry - For Illustrative Purposes Only

## Reviews

Application reviews involve multiple documents, people, departments, and iterations. Clariti makes it easy with the following:

- Automated workflows;
- Synchronous plan reviews;
- Real-time document comments; and
- Rich dashboards for progress monitoring.

## Browser-based Review Interface

Clariti's back-office experience centralizes all the relevant information related to an application. Each application links intuitively to documents, GIS data, permits, communications, and fees. As your citizens make applications, review tasks will be generated automatically. Tasks are assigned to the appropriate staff queue to complete. Reviews may be completed in sequence or concurrently, depending on your processes.



RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

The screenshot displays the Clariti Plan Review interface. At the top, there's a search bar and navigation tabs for 'Permits Console' and 'Permits'. Below this, a progress bar indicates the review status, with 'In Progress' highlighted. The interface is divided into several sections: 'Related' (showing 'BLUEBEAM PROJECT FILES FOR PLAN REVIEW'), 'Details' (showing 'FILE NAME' and 'Building Plan Example (Version 1).pdf'), 'Review Manager' (showing a table of reviews), and 'Comments (3+)' (showing a list of comments). The 'Reviews' table has columns for 'Number', 'Type', 'Status', and 'Completed Action'. The 'Comments' section shows three comments with details like 'Description', 'File Name', and 'Page'.

Number	Type	Status	Completed Action
BLD-22-003	Electrical Review	Pending	
PLAN-22-009	Building Review	In Progress	
PLAN-22-107	Engineering Review	Completed	Approved

Review Interface - For Illustrative Purposes Only

Clariti includes powerful tools to automate your processes so you can:

- Create multiple reviews for an application based on the type;
- Set fees based on outcomes;
- Update application status based on review outcome; and
- Send dynamic emails with attachments, comments, and other application data.



The Clariti rules engine can check any field in the system, including fee payment status, account standing, and application contents. Configuring what your review processes require is easy.

## Electronic Plan Review Software

Reviewing documents is a time-consuming part of the application process. Clariti provides a managed integration with electronic plan review software to help streamline the process. A close integration improves review time and adds depth to the application history. Applicants can see comments without leaving the system, facilitating efficient revisions.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

## Integrated Electronic Plan Review Features

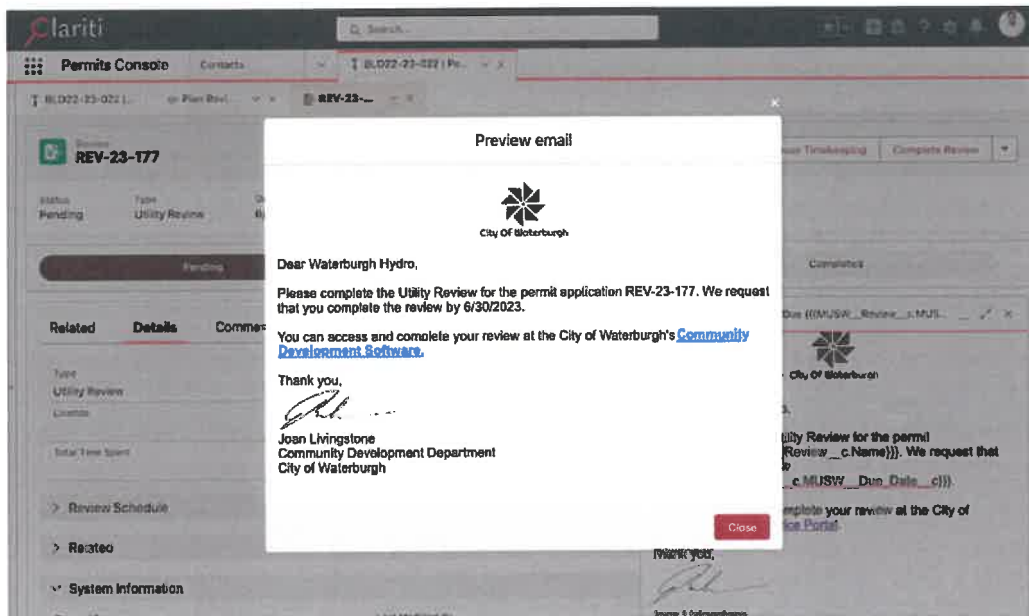
- Access real-time data and documents linked to applications;
- Make comments and markups in real time, with synchronous review across teams;
- Centralize comments into your system; and
- Retain historical data, keeping previous plan iterations read-only for reference.

### Third-Party Approvals

For some applications, your processes may require third-party approval. Clariti allows you to send the necessary information and request a review without switching systems, saving time compared to sending a manual email request.

The system is often configured for two common methods:

- Automated email communication to external parties asking for commentary by email and
- Secure third-party access to your system.



**Example Third-party Approval Email - For Illustrative Purposes Only**

## Inspections

Clariti simplifies the management of inspections in the office or on the road. Your code enforcement team can efficiently schedule routes, record inspection details, and issue permits and fines from any device. Accessing Clariti on a mobile device is effortless using its responsive web interface or mobile application. Inspection staff can access and view data and records related to all system activities, understand the inspector workload, manually assign and reassign inspections, and carry out other inspection-related tasks. With Clariti, staff can optimize their workdays and consolidate real-time data effectively.

### Key Inspections Features

<ul style="list-style-type: none"><li>● Work on any device, online or offline</li><li>● Request or cancel inspections</li><li>● Submit complaints</li><li>● Inspections dashboard including:<ul style="list-style-type: none"><li>○ Daily Schedule</li><li>○ Inspection Queue</li><li>○ Unassigned tasks</li></ul></li><li>● Inspection checklists</li><li>● Issue permits, fines, and certificates on-site</li><li>● GIS-powered schedule routing</li></ul>	<ul style="list-style-type: none"><li>● Mobile application to access Clariti from any device</li><li>● Easy integration with third-party e-signature software API</li><li>● Automation powering:<ul style="list-style-type: none"><li>○ Inspection Scheduling</li><li>○ Violations</li><li>○ Re-inspection dates</li><li>○ Due dates</li><li>○ Fees and Fines</li><li>○ And more</li></ul></li></ul>
--	--

The rich connections in Clariti give an inspector the complete history of an address, helping to make accurate decisions in the moment. Inspection requests and complaints are linked to the appropriate records before your review. With all the information available on their mobile device, including plans and notes, inspectors are always well-informed.

### Visual Workload Management

Clariti enables you to dynamically assign work to your team and easily monitor the workload among inspectors. The list view board offers a visual overview of the assigned tasks, allowing you to reassign, reschedule, and edit items from a single screen.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Inspections can be generated manually as part of the permit process, in response to a complaint, or following a staff observation. Additionally, regular inspections may be created automatically for facilities, assets, buildings, or businesses. Your team can use the list view board and assignment service to effectively schedule and manage this workload.

Inspection Manager				
Inspections - Residential - Team A				
18 Item(s) - Sorted by Rank				
Residential (64)				
Blue Check (4)				
Green Check (4)				
Yellow Check (4)				
White Check (4)				
INSP-23-020	INSP-23-026	INSP-23-032	INSP-23-038	INSP-23-051
2023-09-25	Final Inspection	Final Inspection	Final Inspection	Final Inspection
2023-09-22, 12:00 p.m.	Pending	Pending	Pending	Pending
Final Inspection	3556 Melrose Blvd, Los Angeles, CA 90008	8271 Olympic Dr, Los Angeles, CA 90048	8885 Venice Blvd, Los Angeles, CA 90034	7187 Wilshire Blvd, Los Angeles, CA 90048
Pending	BLD-23-038	BLD-23-006	BLD-23-078	BLD-23-099
	2023-09-25	2023-09-25	2023-09-25	2023-09-25
INSP-23-030	INSP-23-027	INSP-23-038	INSP-23-001	INSP-23-052
2023-09-25	Final Inspection	Final Inspection	Final Inspection	Final Inspection
2023-09-22, 12:00 p.m.	Pending	Pending	Pending	Pending
Final Inspection	6183 Broadway Rd, Los Angeles, CA 90028	4809 Venice Pl, Los Angeles, CA 90034	6301 Hollywood Blvd, Los Angeles, CA 90028	3384 Olympic Rd, Los Angeles, CA 90048
Pending	BLD-23-034	BLD-23-048	BLD-23-030	BLD-23-060
	2023-09-25	2023-09-25	2023-09-25	2023-09-25
INSP-23-031	INSP-23-028	INSP-23-034	INSP-23-039	INSP-23-053
2023-09-25	Final Inspection	Final Inspection	Final Inspection	Final Inspection
2023-09-22, 12:00 p.m.	Pending	Pending	Pending	Pending
Final Inspection	3687 Sepulveda Dr, Los Angeles, CA 91033	1129 Main Blvd, Los Angeles, CA 90001		8814 Melrose Blvd, Los Angeles, CA 90048
Pending				
INSP-23-035				

Inspection List View Board - For Illustrative Purposes Only

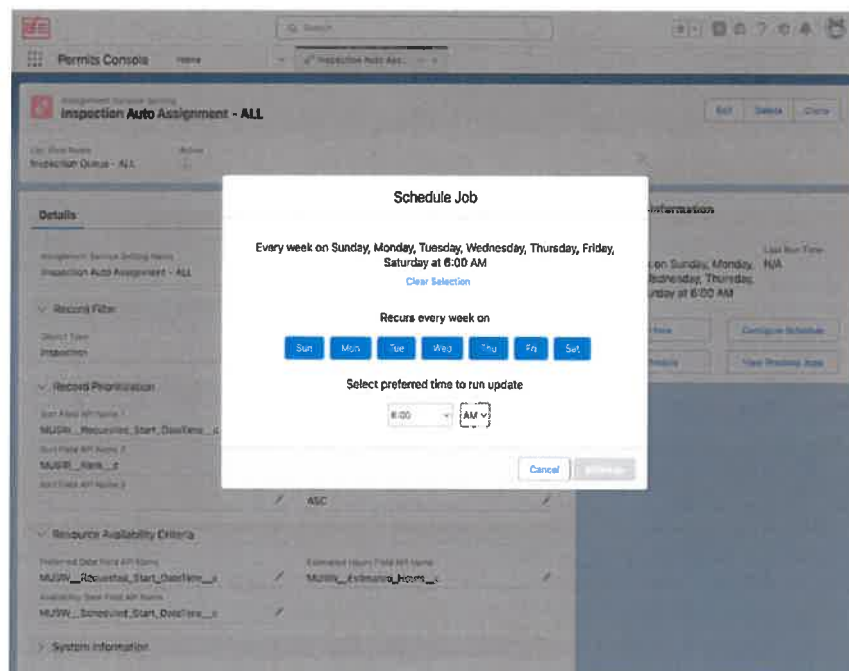
Clariti's List View Board offers features for precise record management, such as:

- Drag-and-Drop Scheduling: Precise record scheduling via drag-and-drop for optimal organization and scheduling;
- Visual Highlighting: Visual icons and help-text tooltips identify record cards that need attention, making it easier to manage a large workload;
- Assignment Service Integration: Optimize inspection assignments by aligning with real-time demands and resource availability; and
- Enhanced Workflow Integration: Select records directly from the interface to trigger workflows for increased efficiency.

### Automatic Scheduling

The assignment service improves efficiency by optimizing team assignments according to each member's availability and skill set. This service allows you to meet diverse organizational needs and effectively assign tasks to your team.

Flexible assignment criteria ensure the service fits your unique needs and is based on multiple factors, such as inspector skill, region, and availability. The assignment service automatically and efficiently distributes records by considering absences, staff workload, and business hours. In addition to inspections, the assignment service can be configured for reviews, complaints, service requests, or any other specified records.

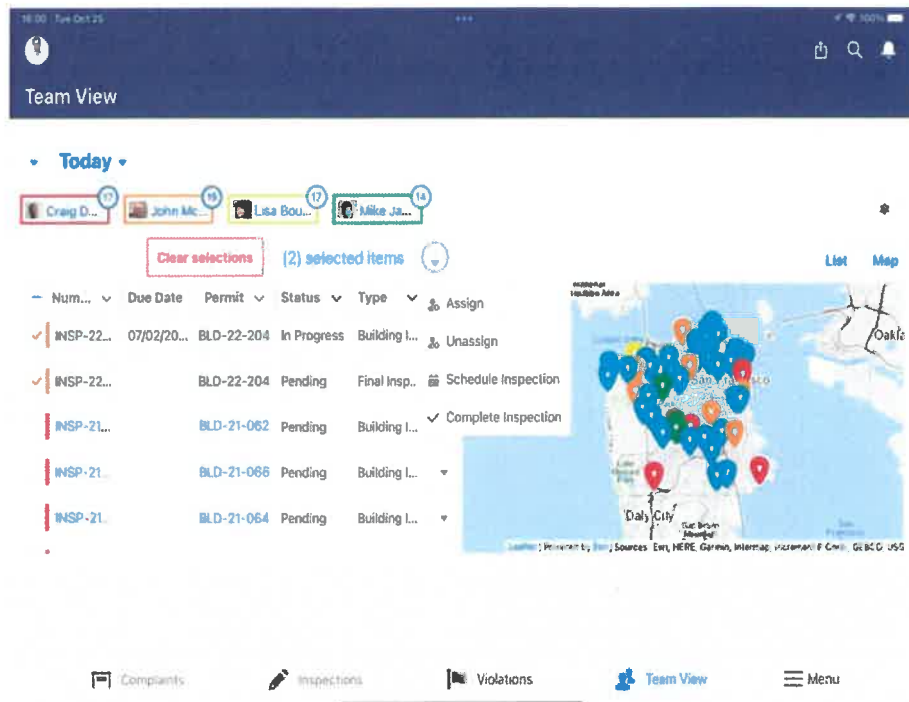


Assignment Service Schedule Tool - For Illustrative Purposes Only

## Routing

Inspectors can organize the day's itinerary based on priority, travel time, traffic, or proximity to the current location. The integrated GIS map viewer lets inspectors visualize inspections based on location or by searching an address without changing systems. Management can use the list view board and dashboard reports to view inspections for the team and reassign jobs to ensure the workload is effectively divided between staff.

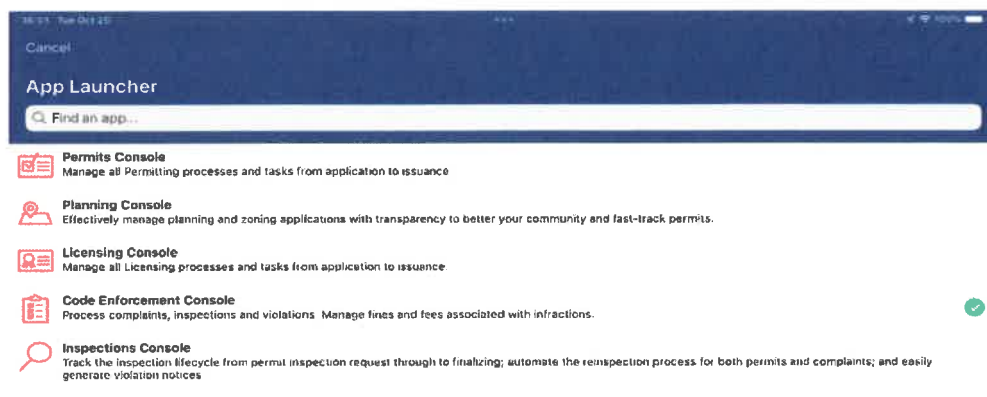
RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001



Routing and Scheduling in Mobile Application - For Illustrative Purposes Only

## Mobile Inspections

Clariti provides a mobile web experience and iOS/Android application that lets officers and inspectors work in your One-Stop-Shop Permitting system from anywhere. Clariti is accessed through the world-class Salesforce mobile application. When inspectors log into the app, they will see an extension of your back office, allowing them to work or download information for offline use.



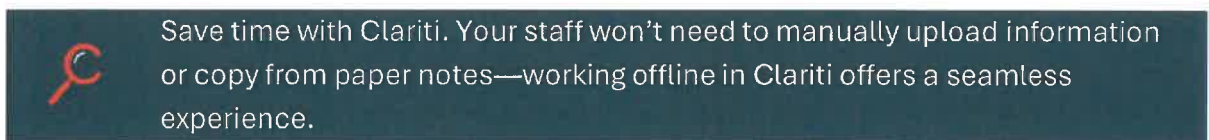
Mobile Application on Tablet - For Illustrative Purposes Only



From a mobile web browser or the app, inspectors and code enforcement officers can:

<ul style="list-style-type: none"><li>● Create inspection records</li><li>● Access editable run sheets</li><li>● Complete inspections</li><li>● Record pass or fail status</li></ul>	<ul style="list-style-type: none"><li>● Capture and upload photos and videos</li><li>● Schedule a follow-up inspection directly from an application</li><li>● Add comments</li></ul>
--	--

Any work recorded offline in the field will be uploaded to the system when a connection to the internet is established.



## Checklists

Clariti's checklists are dynamic forms that inspectors use to ensure code compliance and accuracy. Templates are created and automatically assigned based on the type of permit or inspection. Data can be recorded in the inspection checklist using simple yes-no questions, multiple-choice fields, date fields, and free-form notes. These are highly configurable checklists tailored to meet your specific needs.

Figure 13 - Example Checklist on Mobile - For Illustrative Purposes Only

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

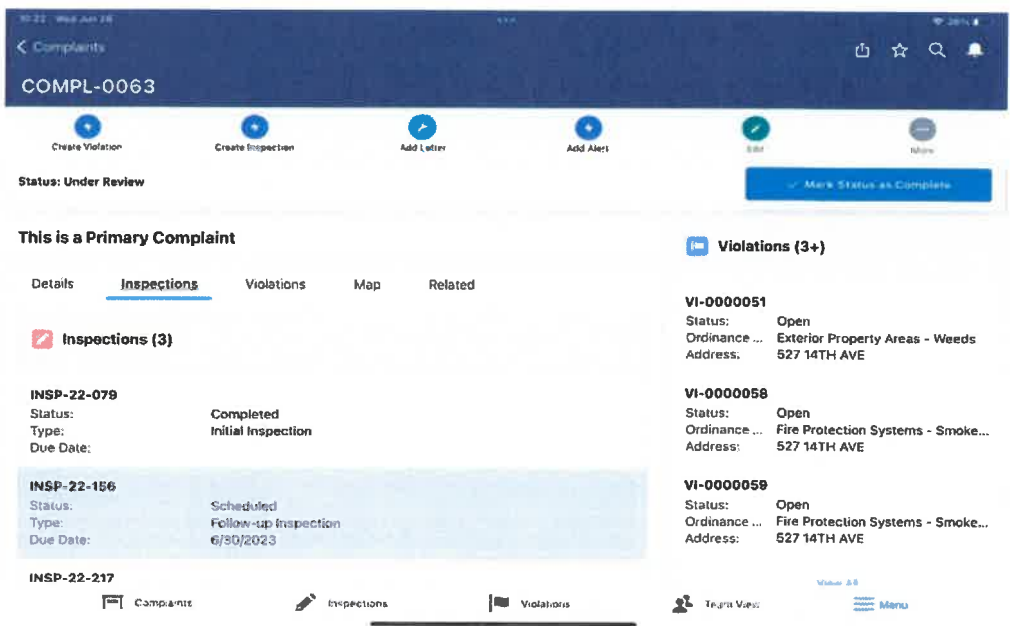
Violations

Inspectors can confidently conduct their work because Clariti enables them to do more on-site. The system helps them reduce omissions and errors so they can focus on the issue.

Clariti uses your ordinance code to provide:

- Automated violation triggers;
- Default standard comments; and
- Reinspection due dates.

Violations are automatically populated with the responsible party's information from the original inspection or complaint. Clariti ensures thorough follow-up; the system automatically adds a violation to the next scheduled inspection or schedules a follow-up inspection.



Inspections and Violations on a Complaint - For Illustrative Purposes Only


RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

## Final Inspections & Issuance

With Clariti, you can perform your final inspection and issue the permit on-site. The permit owner and the inspector can review the inspection notes in the system together and sign off on the result in real-time. Automation allows for the immediate creation of the permit, which is then emailed to the applicant. This enables applicants to begin their work immediately without waiting for a manually issued document. All issued documents are accessible at any time through the Portal.



Preview Issued Permit on Mobile Application - For Illustrative Purposes Only



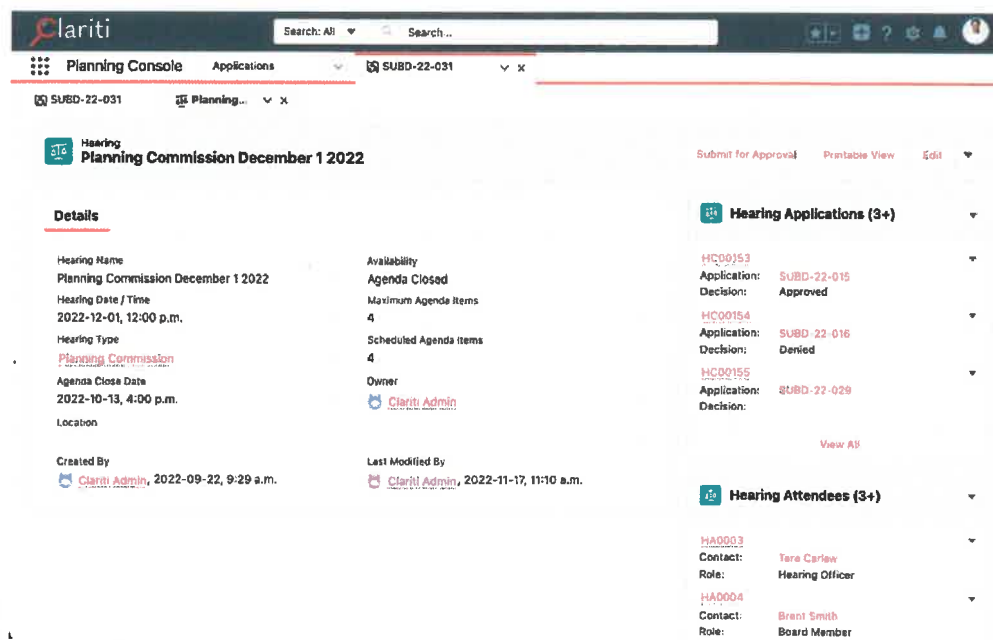
Record the details of an inspection into your system on the spot to increase accuracy and save time. Clariti gives enforcement officers the tools they need to effortlessly run their day from the field.

## Hearing Management

Clariti allows you to schedule, manage, and document the outcomes of public hearings. You can add upcoming hearings to the system to inform applicants about important dates. The system also generates hearing agendas using dynamic document creation tools, saving your staff time managing the detailed agendas required for public hearings. After the hearing, you can record the outcome so applicants are updated on the next steps. Clariti enhances public engagement in the planning process and helps minimize administrative delays.

## Key Hearing Management Features

<b>Scheduling</b> <ul style="list-style-type: none"><li>● Schedule hearings on a recurring, set date, or ad-hoc basis</li><li>● Change hearing dates</li><li>● Notify applicants of hearing eligibility and the next hearing date automatically</li><li>● Accept requests to add an application to a hearing date<ul style="list-style-type: none"><li>- or -</li></ul></li><li>● Allow applicants to add their application to a hearing date</li><li>● Automatically notify the applicant of hearing changes (i.e., a date change)</li><li>● Remove or add applications to hearing as needed</li></ul>	
<b>Agenda Management</b> <ul style="list-style-type: none"><li>● Record staff recommendations</li><li>● Generate agenda reports for public council records, including:<ul style="list-style-type: none"><li>○ Application details</li><li>○ Attached documents</li><li>○ Staff recommendations</li></ul></li></ul>	<b>Outcomes</b> <ul style="list-style-type: none"><li>● Record council decisions</li><li>● Record requirements to move ahead with applications</li><li>● Add multiple outcomes</li></ul>



Clariti Hearing Example - For Illustrative Purposes Only

## After a Hearing

Clariti helps you clearly communicate applicants' responsibilities and the next steps in the planning process.

After a public hearing, the system will:

- Notify applicants of the recorded outcomes;
- Give applicants clear instructions on the next steps;
- Provide public instruction to appeal planning decisions; and
- Automatically calculate the waiting period for successful applications based on type.

After the waiting period, applicants will be prompted to complete payment, and the application will be released. Official notices can be generated using Clariti's document service and automatically sent to applicants, which saves your staff time.



Outcomes in Clariti allow your staff to comprehensively monitor public hearings' approval, appeal, and denial rates, helping management proactively address challenges.

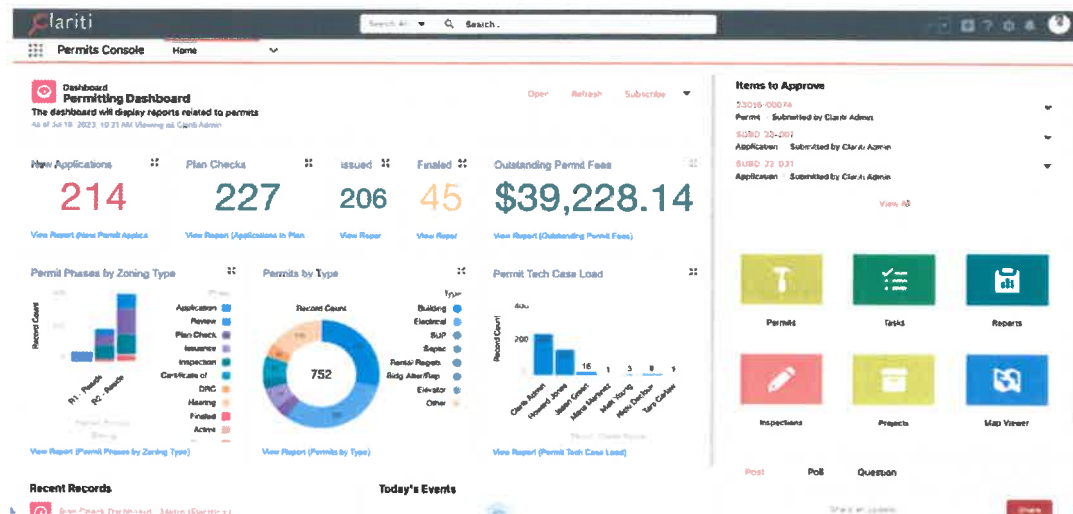
## Reporting

Clariti's reporting engine is powerful and flexible, allowing the generation of reports on any information in the system. Staff can create new reports using the intuitive drag-and-drop user interface without specialized knowledge or advanced training. Reports can be created, saved, and modified to suit changing reporting needs, and they can be scheduled to run and sent to other application users. All data in the solution is real-time and is available in reports immediately.

Clariti makes real-time viewing and analyzing data easy, empowering you to make informed decisions. Reports are designed to be created and used by staff. The out-of-the-box report builder uses a simple drag-and-drop interface to create multi-dimensional reports without leaving Clariti or writing advanced code. With an unlimited number of reports, you can:

- Create Dashboards;
- Run ad-hoc data analysis;
- Set up report subscriptions; and
- Analyze any field in your data.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001



Example Permit Technician's Dashboard - For Illustrative Purposes Only

## Key Reports Features

### User Created Reports

- Create reports using the drag-and-drop report builder
- Add fields, filter data, and format the report
- Share with peers
- Use on dashboards
- Export data as .csv or .xlsx
- Filter existing reports further
- Show information dynamically with tools like "Filter to Current User"

### Dashboards

- Create dashboards using the drag-and-drop dashboard builder
- Visually represent your data with graphs and tables
- Combine multiple related reports onto one screen
- View a single report with different graphs



RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

The screenshot shows the Clariti Report Builder interface. The top navigation bar includes 'Permits Console', 'Reports', and 'Report Builder'. The main area displays a report titled 'Address Activity' with a 'Preview' button. The report is organized into two main sections: 'Permits with Address' and 'Violations with Address'. The 'Permits with Address' section shows a table with columns: Address Name, Permit Number, Type, and Status. The 'Violations with Address' section shows a table with columns: Ordinance Type, Violation Number, Violation Created Date, and Status. The interface also includes a sidebar with filters and a bottom section with 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

Address Name	Permit Number	Type	Status
11 CAYUGA AVE			
Subtotal			
1226 34TH AVE	ELEC-21-008	Electrical	In Progress
Subtotal			
1235 KIRKHAM ST			
Subtotal			
1235 KIRKHAM ST			
Subtotal			

Ordinance Type	Violation Number	Violation Created Date	Status
Fire Safety Requirements - Scope	VI-0000015	1/26/2022	Open
Count: 1			
Unpermitted Accessory Dwelling Unit (ADU)	VI-0000016	6/28/2022	Open
Unpermitted Accessory Dwelling Unit (ADU)	VI-0000017	8/28/2022	Open
Unsafe Structures	VI-0000018	2/2/2022	Open
Rubbish and Garbage - Disposal of rubbish	VI-0000019	7/27/2022	Open
Animal Welfare - Unsafe Conditions	VI-0000020	6/27/2022	Open
Count: 5			
Unpermitted Accessory Dwelling Unit (ADU)	VI-0000021	1/27/2022	Open
Exterior Property Areas - Weeds	VI-0000022	2/18/2022	Corrected
Unsafe Structures	VI-0000023	2/18/2022	Corrected
Fire Safety Requirements - Scope	VI-0000024	1/26/2022	Open

Clariti Report Builder - For Illustrative Purposes Only

Outdated external systems for reports require the valuable time of your IT team for even the most basic data analysis. Reports in Clariti let your staff work in one system, making it easy to review complex data.

## Document Service

Clariti offers comprehensive document management features, allowing users to manage all essential file types, such as PDFs, Word documents, Excel spreadsheets, and image files. Applicants can easily upload required documents such as construction drawings, invoices, and receipts directly to the portal, ensuring all materials are attached to their applications. Once uploaded, these documents can be viewed online or downloaded and printed as needed. Clariti also supports batch uploads for more complex submissions, streamlining the process for larger applications. Built-in validation checks ensure that uploaded files meet format and size requirements, reducing the likelihood of delays.

Clariti provides on-demand and scheduled document generation. Use the powerful dynamic document templates to create permits, letters, licenses, certificates, receipts, and more. Templates are straightforward to create, encouraging super-users to learn how to make their own. The wide variety of documents used by your current processes can be brought into your new system for automated correspondence.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

COMMUNITY DEVELOPMENT

«MUSW\_Permit2\_c.Name»

PROPERTY:  
«MUSW\_Permit2\_c.MUSW\_Parcel\_r.Name»  
ADDRESS:  
«MUSW\_Permit2\_c.MUSW\_Address\_r.name»  
CITY: «MUSW\_Permit2\_c.MUSW\_City\_c»

APPLICANT  
«MUSW\_Permit2\_c.MUSW\_Applicant\_r.Name»  
«MUSW\_Permit2\_c.MUSW\_Applicant\_r.Mail»  
«MUSW\_Permit2\_c.MUSW\_Applicant\_r.Mails»  
«MUSW\_Permit2\_c.MUSW\_Applicant\_r.Mails»

PERMIT TYPE:  
«MUSW\_Permit2\_c.MUSW\_Type\_c»  
ISSUE DATE:  
«MUSW\_Permit2\_c.MUSW\_Issue\_Date\_c»

By my signature below, I acknowledge that I have read, understand, and agree to abide by said terms and conditions. This permit is issued with the terms and conditions described.

City Official

POST IN A CONSPICUOUS PLACE  
COMMUNITY DEVELOPMENT

COMMUNITY DEVELOPMENT

BLD22-23-014

PROPERTY:  
ADDRESS: 123 GENEVERN WAY  
CITY:

APPLICANT  
Howard Jones  
15 West Kellogg Boulevard  
Saint Paul, MN, 55102

PERMIT TYPE: Building  
ISSUE DATE: 2023-03-01

By my signature below, I acknowledge that I have read, understand, and agree to abide by said terms and conditions. This permit is issued with the terms and conditions described.

City Official

POST IN A CONSPICUOUS PLACE  
COMMUNITY DEVELOPMENT

Clariti Document Template and Output - For Illustrative Purposes Only

Workflows use templates to generate documents automatically by reading the template, populating the dynamic fields with system information, and saving or emailing the document to the related user.

Templates power form emails in Clariti. Staff corresponding with applicants can choose to start an email with a template. The template will populate with system data, and staff will complete the email. When needed, creating mass personalized emails is easy as a batch. Documents and emails can be generated daily, weekly, monthly, or ad hoc to create customized letters for your community. You can generate and send letters in bulk based on specific criteria and automate notifications such as expiration dates or overdue notices.

COMMUNITY DEVELOPMENT

BLD22-22-285

PROPERTY:  
ADDRESS: 363 32ND AVE  
CITY:

APPLICANT  
Howard Jones  
30 Main Rd  
Poughkeepsie, NY, 12601

PERMIT TYPE: Building  
ISSUE DATE: 2023-10-11

By my signature below, I acknowledge that I have read, understand, and agree to abide by said terms and conditions. This permit is issued with the terms and conditions described.

City Official

POST IN A CONSPICUOUS PLACE  
COMMUNITY DEVELOPMENT

Clariti Document Preview – For Illustrative Purposes Only

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

Staff can easily view and manage saved documents. Created documents are saved to the related record for viewing or downloading and can be automatically sent to users as an email attachment. Clariti provides versioning, document preview, file engagement statistics, and a permanent home for copies of vital documents. Both staff and users can easily access documents, allowing applicants to reprint documents without staff assistance.



Automating document generation ensures consistent communication with your citizens. The Clariti document service will also save your team time and reduce human error.

### **Geographic Association (GIS)**

Clariti's pre-built integration with Esri-GIS brings rich data visualization into your solution. Real-time GIS data accessed without changing systems lets staff and citizens see applications in context. The integration provides staff with map and data transformation-based tools to manage all land use, zoning, and GIS attributes. Clariti integrates with the ESRI GIS system to graphically display inspections and location-based data on interactive maps. Staff can view inspection locations, parcel details, and zoning information directly in the back office. The embedded map functionality also supports route optimization, helping inspectors plan their day and minimize travel time. This integration ensures that spatial data is fully leveraged to improve operational efficiency and decision-making.

Two key tools make up the GIS integration:

### ArcGIS Map Viewer

Adds visual mapping to your system, showing Clariti and GIS data with tools to make changes.

#### Capabilities:

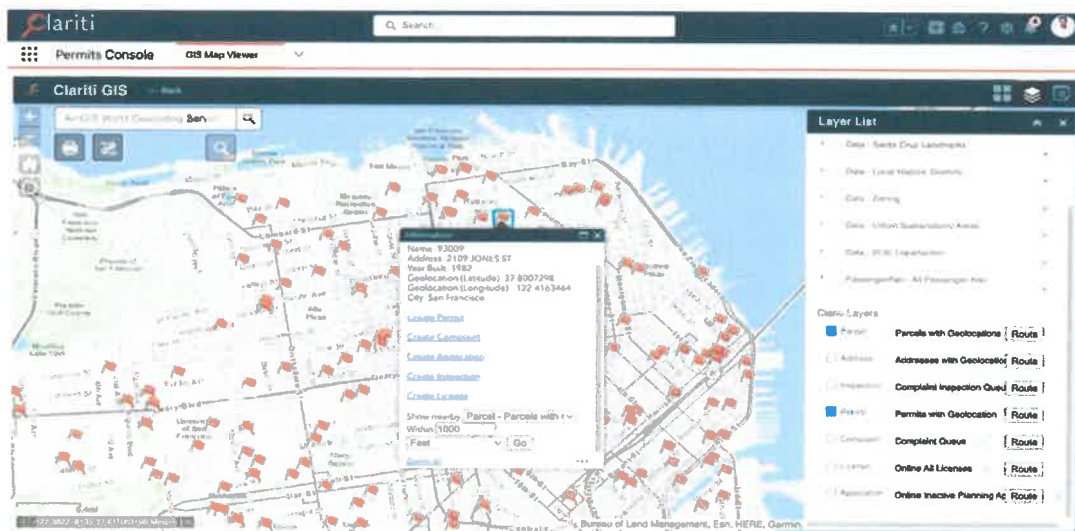
- Go to map location via address search or “use current location”
- Select GIS features by shape, by text, or from the info panel display
- Create list views such as parcels, permits due, or custom views like “My Inspections Today”
- Change the default base map
- Zoom and pan tools
- Access Map Viewer with ArcGIS credentials, adding security
- Control audience for public and restricted information

### GIS Data Sync

Automatically push and pull data from your Esri-GIS linked server, allowing the active flow of live data.

#### Capabilities:

- Two-way data synchronization
- Automatically check changes and additions against existing information
- Batch jobs for hourly, daily, and ad hoc updates
- Robust field mapping to match Clariti data to Esri-GIS data
- Convert Clariti data to Esri-GIS data
- Query filters and data types



Clariti GIS - For Illustrative Purposes Only



Live maps are critical to making informed decisions about planning, zoning, and land use. Clariti makes it easy to view your GIS maps without changing systems.

## Parcel & Address Management

Clariti provides tools for your team to manage and access genealogy, zoning, and land use information for every parcel in the community. A parcel object represents a physical location imported from your GIS data. Applications, inspections, complaints, and other processes must be linked to a property by entering its address. Effective parcel management, which connects every application to a specific parcel, provides your staff with valuable historical information at their fingertips. This empowers your team to make informed land-use decisions without the need to search for relevant information.

## Parcel Genealogy

The history of a parcel in the system is viewed through relationships. When a parcel is split or merged in your GIS system, Clariti creates a new parcel entry to match. The new parcel entry is linked to the historical entry, archived for reference. When an application is made, you can view every linked parcel, allowing you to run through the full history of a parcel. A comprehensive parcel history that's easy to review quickly provides context to your staff.

The screenshot displays the Clariti web application interface. At the top, there is a search bar and navigation tabs for 'Planning Console' and 'Parcels'. The main content area shows details for 'Parcel 5160-005-006-1B'. The address is '5160-005-006-1B', the city is 'LOS ANGELES CA', and the current land use is 'Vacant Land'. The 'Details' tab is selected, showing a table of information including Parcel Number, Current Land Use, Lot Size, Area Planning Commission, Council District, and various zoning and hazard area designations. A 'Parcel Genealogy (1)' section shows a split action from a related parcel. A 'Violations' section shows an open violation for maintenance.

Related	Details	Units	Map
<b>Information</b>			
Parcel Number	5160-005-006-1B	Historic	
Current Land Use	Vacant Land	Legal Start Date	2002-10-16
Lot Size	3,041.00	Legal End Date	
Area Planning Commission	Central	Date Last Sold	
LADBS Branch Office	LA	Energy Zone	9
Council District	14	Hillside Grading Area	Yes
Certified Neighborhood Council	Downtown Los Angeles	Earthquake-Induced Liquefaction Area	Yes
Community Plan Area	Central City	Methane Hazard Site	
		Methane Buffer Zone	
		Methane Zone	

**Parcel Genealogy (1)**

Related Par...	Action	Relationship
5160-005-006	Split	Child

**Violations (1)**

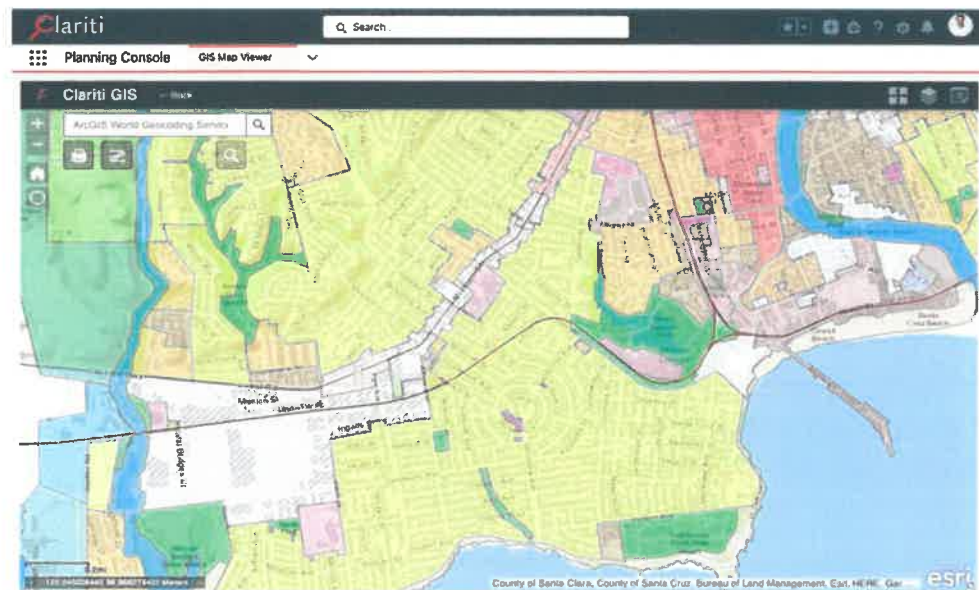
Status	Ordinance...	Address
Open	Maintenance	

Clariti Parcel Genealogy - For Illustrative Purposes Only



## Zoning and Land Use

The zoning and land use designation for a parcel is determined in your GIS system and regularly synced with Clariti. Parcels may have an address linked to a parcel. Variances recorded in your GIS system are imported into the system for permanent future reference. When an application changes a parcel's zoning or land use, you can push the updated information to your GIS system. Up-to-date data on zoning, land use, and addresses in Clariti and GIS empower staff and applicants with information.



Zoning Visibility in Clariti - For Illustrative Purposes Only

## Integrations

Integrating with your existing systems and processes is critical to the success of your One-Stop-Shop Permitting system. Clariti allows comprehensive integrations with third-party applications. The system seamlessly integrates with your software ecosystem, enhancing existing investments and improving communication across departments. Critical integrations for community development software like electronic plan review and payment processing are pre-built as part of Clariti.



## Electronic Plan Review

Electronic plan review software improves review time, adds transparency, and reduces the resources needed for plan review. Clariti provides out-of-the-box managed integrations with three industry-leading electronic plan review software:

- BlueBeam Revu;
- E-PlanSoft; and
- ProjectDox by Avolve.

## Bluebeam

Using Clariti with the managed Bluebeam integration provides the following:

- An easy-to-navigate review process for both reviewers and applicants between your system and Bluebeam;
- Customers report over 50% efficiency gains and overall performance improvements, allowing more time for staff;
- Tools to track and manage review processes, KPIs, and workload trends;
- Applicant access to complete assigned tasks and easily upload drawings and documents, see the status of their application, and check reviewed plans;
- A seamless way to synchronize markups and comments made in Bluebeam back to your system so that they are visible to all users, including applicants; and
- Easily push uploaded drawings and documents provided by the applicant to Bluebeam.

The screenshot displays the Clariti web application interface. At the top, there's a search bar and navigation tabs for 'Permits Console' and 'Reviews'. The main content area shows a 'Plan Review' milestone for 'BLD22-23-035'. A progress bar indicates the review is 'In Progress'. Below this, there's a 'Review Manager' section with a table of reviews. To the right, there's a 'Comments (2)' section showing two comments with descriptions, authors, and statuses. At the bottom, there's a 'Submissions (1)' section showing a submission for 'Building Plan' with a 'Completed' status.

Number	Type	Status	Completed Action	Due
1	REV-23-086	Building Review	In Progress	
2	REV-23-087	Engineering Review	Completed	3/3/2
3	ZONR-23-092	Zoning Review	Completed	3/7/2

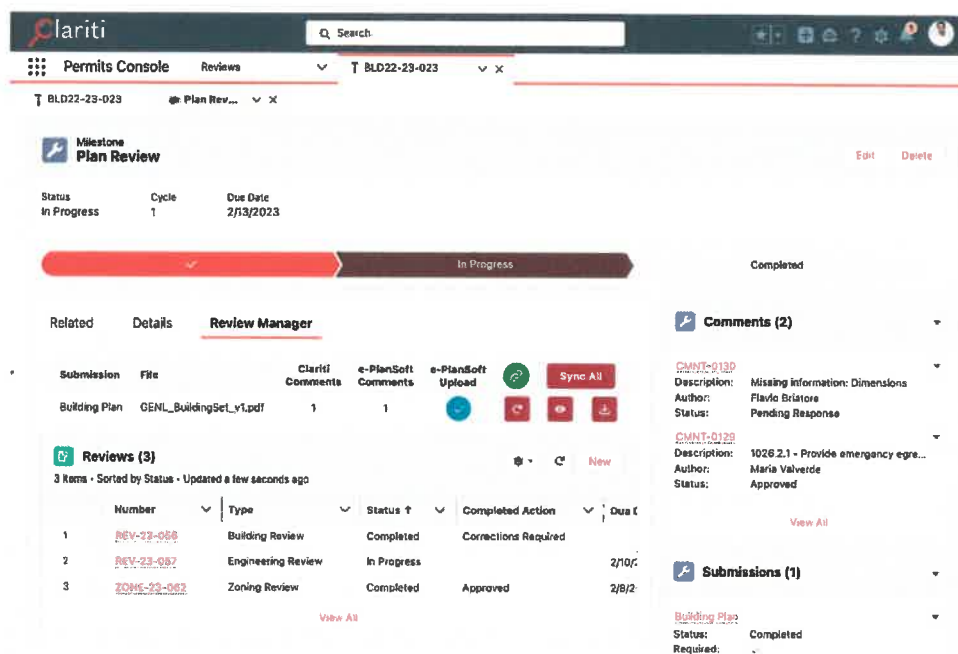
Clariti Bluebeam Integration - For Illustrative Purposes Only

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

## e-PlanSoft

Using Clariti with the managed e-PlanSoft integration provides:

- An easy-to-navigate review process for both reviewers and applicants between your system and e-PlanSoft;
- Customers report over 50% efficiency gains and overall performance improvements, allowing more time for staff;
- Tools to track and manage review processes, KPIs, and workload trends;
- Applicant access to complete assigned tasks and easily upload drawings and documents, see the status of their application, and check reviewed plans;
- A seamless way to synchronize markups and comments made in Bluebeam back to your system so that they are visible to all users, including applicants; and
- Easily push uploaded drawings and documents provided by the applicant to the e-PlanSoft.

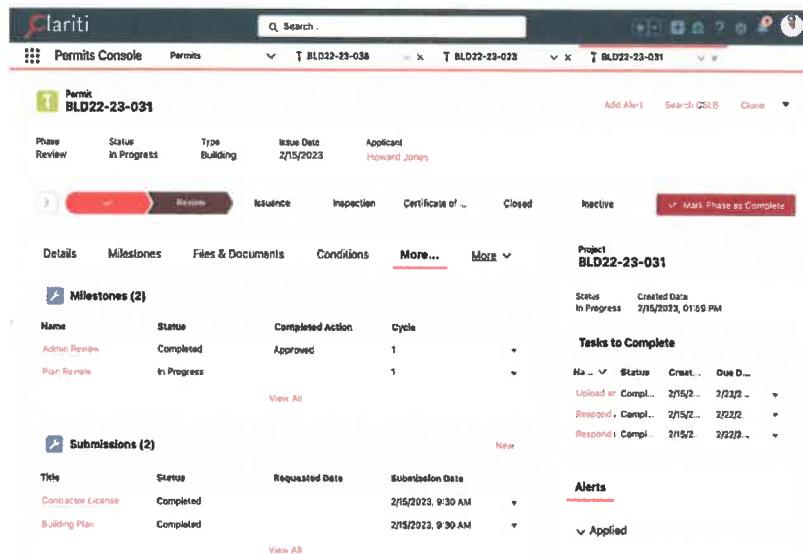


Clariti e-PlanSoft Integration - For Illustrative Purposes Only

## ProjectDox

Using Clariti with the managed Avolve ProjectDox integration provides:

- An easy-to-navigate review process for reviewers and applicants between your system and ProjectDox;
- Customers report over 50% efficiency gains and overall performance improvements, allowing more time for staff;
- Tools to track and manage review processes, KPIs, and workload trends;
- Applicant access to complete assigned tasks and easily upload drawings and documents directly to ProjectDox, see the status of their application, and check reviewed plans; and
- Automatic synchronization of stamped, approved plans from ProjectDox to your system.



Clariti ProjectDox Integration - For Illustrative Purposes Only

## Clariti-Esri Sync Tool

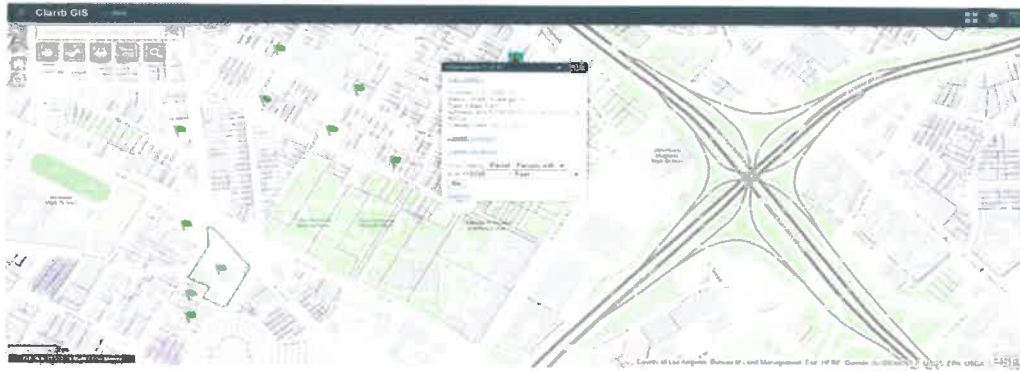
As a certified Esri partner, Clariti provides an out-of-the-box integration with Esri-GIS. The Esri sync tool integrates existing Esri-GIS Server data with the system. This means you can visually analyze and use map-based tools to create and manage land use, zoning, and other information related to a parcel, permit inspection, plan, or code violation.

Clariti's managed GIS integration is made up of two components:

- GIS Sync, which integrates your existing Esri-GIS data with data in the system; and
- ArcGIS Map Viewer, which adds visual mapping to the system.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

The pre-built Esri-GIS integration ensures the most efficient and reliable transfer of existing data into your new system, reducing implementation time.

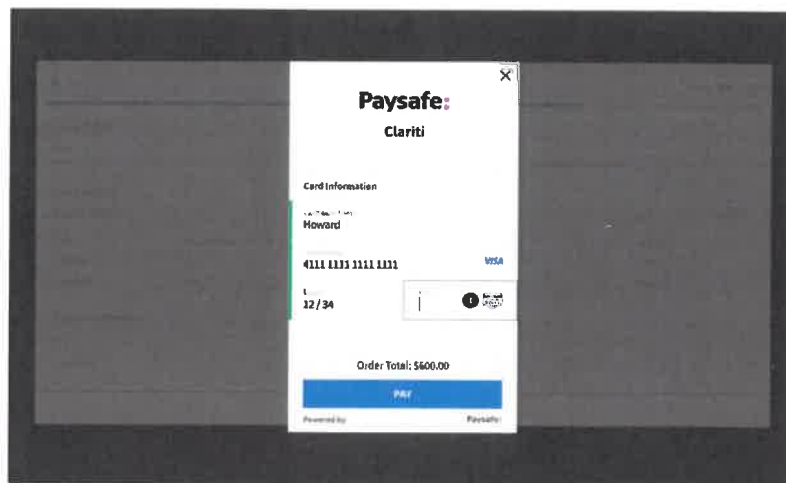


Clariti Esri-GIS Viewer - For Illustrative Purposes Only

## PaySafe

Clariti Payments is a managed integration with PaySafe, providing:

- Secure payment processing accepting credit, debit, and EFT/ACH payments;
- An industry-leading payment processor that handles millions of transactions per day;
- Full PCI compliance; and
- Quick set-up to start accepting payments immediately.



Clariti-Paysafe Integration - For Illustrative Purposes Only

## Email

Clariti connects with Outlook and Google Mail, making it easy to integrate your existing email systems with your new One-Stop-Shop Permitting solution.

## **Identity Access**

Clariti provides multiple ways to securely connect, including:

- Single Sign On;
- Multi-factor Authentication;
- Identity Connect for Microsoft Active Directory user accounts; and
- OAuth.

## **Additional Integrations**

Clariti is designed to be flexible. Through several open APIs, Clariti allows integration with virtually any third-party software. In addition to the pre-built software integrations named above, Clariti integrates seamlessly with customers' existing software ecosystems.

Past integrations include:

- Document Storage/Management;
- 3rd-Party Payment Gateway;
- Analytics and Business Intelligence; and
- Enterprise Resource Planning.

## **Financials**

Clariti offers essential functionality to manage financial transactions and data in your solution. Connecting to your ERP ensures maximum accuracy for your finance team, sharing data in a secure environment and eliminating silos.

Clariti provides:

- Invoice Management;
- Deposit Management;
- Payment Processor Integration;
- Cashiering;
- Cash Tray & Float Management; and
- Subledger accounting.

## **Invoice Management**

Your staff can create, adjust, and pay invoices in Clariti. For most applications, fees are calculated automatically by system workflows and fee templates. Staff can create invoices manually, add specific payables as line items, send invoices, and complete payments. Fee payment can trigger additional workflows or updates, such as application status changes.

RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

The screenshot displays the Clariti Licensing Console interface. At the top, there's a search bar and navigation tabs for 'Licensing Console' and 'Licenses'. The main header shows the invoice ID 'INV-07192022-004'. Below this, the invoice details are listed: 'Billing Account: Acme', 'Due Date: 7/22/2022', and 'Status: Posted'. The 'Items' tab is selected, showing a table of invoice items. The table has columns for 'Invoice Item', 'Item Number', 'Invoice Amount', and 'Type'. There are five items listed, all with an amount of \$0.00 and type 'Fee'. To the right of the table, the total amount is shown as 'Total: \$0.00'. A 'Files (1)' section shows a PDF file named 'Invoice-Acme-07192022 Jul 19, 2022 - 8KB - pdf'.

Invoice Item	Item Number	Invoice Amount	Type
INVITEM-000000	0001465	\$0.00	Fee
INVITEM-000001	0001466	\$0.00	Fee
INVITEM-000002	0001467	\$0.00	Fee
INVITEM-000003	0001468	\$0.00	Fee
INVITEM-000004	0001564	\$0.00	Fee

Invoice Example - For Illustrative Purposes Only

## Deposit Management

Clariti's deposit functionality lets your staff specify, collect, and allocate user deposits. Multiple types of deposits are included:

- Security deposits;
- Trust Accounts;
- Cash Bonds;
- Account Credits; and
- And others as needed by your processes.

Deposit records keep track of money collected which may be held as a trust or fund account. Deposits can be used to pay fees and invoices directly from an account. Clariti makes it easier to account for large projects like planning applications; developers can provide a large deposit in lieu of multiple small transactions to pay for the many fees involved, saving time for both your staff and theirs.

## Payment Processor Integration

Clariti's Portal integrates with your chosen payment processor via API, providing a secure online payment option for your community. Your system will automatically generate fees and provide a payment cart experience integrated with your payment processor. Payments made through the Portal will be automatically recorded against the invoice in Clariti.

The screenshot displays a 'Cart' interface with a total of \$325.00. It includes sections for Billing Details, Cart Details, and Payment Methods.

**Billing Details**

Account	Contact	Email
Account	Howard Jones	demo@claritisoftware.com

**Cart Details**

BLD22-22-288 \$325.00

Name	Payable Type	Outstanding Amount	To Pay
0001903	Fee	\$100.00	\$100.00
0001906	Fee	\$25.00	\$25.00
0001905	Fee	\$200.00	\$200.00

**Payment Methods**

Type	Amount
Credit Card	\$325.00

Buttons: Back, Process

Clariti Payment Cart - For Illustrative Purposes Only

**Cashiering**

Payments made in person will always be a component of your community development solution. Clariti allows you to enter payments in person via the Portal. The system provides a central interface for a cashier to manage payment batches and accept and process payments.

**Cash Tray & Float Management**

Clariti’s enhanced Cash Tray and Float Management capabilities let you easily track physical cash balances, manage floats for over-the-counter cash payments, and report digitally on the physical trays and staff interactions. This helps you reconcile all payments received across the system.

**Sub-ledger Accounting**

Clariti’s accounting system contains a flexible sub-ledger system to manage your financial records that support double-entry accounting and GAAP. Your solution will record every business transaction (Financial Event), creating two journal entry items against two different ledger accounts based on the configuration made in ledger rules and treatments.



RFI Subject: One-Stop-Shop Permitting  
Number: CRFI SEC2600000001

## Payments

Clariti Payments is the out-of-the-box integration with PaySafe, providing a secure payment solution that is ready to use in moments. PaySafe is an industry-leading payment processor in North America, offering a best-in-class and fully PCI-compliant payment solution. Together this integration offers secure transactions, highly competitive transaction rates, and support for multiple payment methods.

## Online Digital Payments

Payments made online with Clariti Payments are secure and effortless for you and your community. The system processes credit cards, debit cards, and ACH/EFT payments. You define the payment methods you accept and provide the flexibility your citizens seek. The seamless integration with the portal makes it easy for citizens to pay online.

## Integrated Refunds and Voids

Clariti Payments uses the financials module to initiate voids or refunds of any transactions processed through Clariti Payments. This integrated functionality removes the need to manually perform the refund/void in each system (Clariti and Paysafe) and eliminates the potential for human error.

The screenshot shows the Clariti Payments interface. The main window displays transaction details for P-06282023-317, including a payment amount of \$247.90. A modal window titled "Refund" is open, showing the available payment amount (\$247.90) and the total refund amount (\$247.90). The modal also displays a table with payment allocation details, including item number 0002439 and allocation amount \$247.90. Buttons for "Cancel" and "Next Refund Method" are visible at the bottom of the modal.

Payment Allocation Name	Item Number	Allocation Amount	Amount To Refund
PA-000842	0002439	\$247.90	\$247.90

Integrated Refund in the Clariti Payments Interface - For Illustrative Purposes Only

### Optional Permit Guide

We understand that the permitting process can be complex, so we offer the Clariti Guide to make the journey easier and help applicants avoid errors. The Guide is an Option that can be added to your portal to organize all the rules, regulations, and instructions in one (1) easy-to-access location. It helps people prepare their applications to obtain permits quickly and easily.

The Guide automatically provides every applicant with a list of required forms, fees, and documents, streamlining the process for everyone involved. Using the Guide, applicants are more likely to submit a correct application on their first attempt, reducing the number of calls, emails, and counter visits for your staff.

#### How it works

##### STEP ONE



Enter details about your project using the smart questionnaire.

##### STEP TWO



Select a location to check zoning and other parcel-based details.

##### STEP THREE



Get a personalized set of instructions explicitly tailored to complete your project.

#### Permit Guide Highlights

- Answer questions like “Which permits do I need?” and “Can I build this at this address?”;
- Quickly provide estimates for fees and approval timelines;
- Automatically perform zoning checks;
- Flag properties in hazard areas, like flood zones, fire hazard areas, or near a coastline;
- Easily import content and rules from other agencies around the Country; and
- Intuitive visual rules engine to configure the guide.



The permit guide takes extensive permitting processes and shows customers step-by-step what to do in your system, providing information up front to avoid surprises or questions later.



Department of Administration  
Purchasing Division  
2019 Washington Street East  
Post Office Box 50130  
Charleston, WV 25305-0130

State of West Virginia  
Centralized Request for Information  
Info Technology

<b>Proc Folder:</b> 1739093			<b>Reason for Modification:</b>
<b>Doc Description:</b> One-Stop-Shop Permitting			
<b>Proc Type:</b> Request for Information			
<b>Date Issued</b>	<b>Solicitation Closes</b>	<b>Solicitation No</b>	<b>Version</b>
2025-07-11	2025-08-11 13:30	CRFI 0201 SEC2600000001	1

**BID RECEIVING LOCATION**

BID CLERK  
DEPARTMENT OF ADMINISTRATION  
PURCHASING DIVISION  
2019 WASHINGTON ST E CHARLESTON WV  
25305  
US

**VENDOR**

**Vendor Customer Code:** VS0000049786  
**Vendor Name :** BasicGov USA, Inc. DBA Clariti  
**Address :** 8 The Green A Ste Dover, DE 19901-3618  
**Street :** The Green  
**City :** Dover  
**State :** DE **Country :** USA **Zip :** 19901-3618  
**Principal Contact :** Ron Vukovich  
**Vendor Contact Phone:** (732) 492-6408 **Extension:** N/A

**FOR INFORMATION CONTACT THE BUYER**

Tara Lyle  
(304) 558-2544  
tara.l.lyle@wv.gov

Vendor *Ron Vukovich*  
Signature X

FEIN# 85-0794862

DATE August 18, 2025

All offers subject to all terms and conditions contained in this solicitation

**ADDITIONAL INFORMATION****REQUEST FOR INFORMATION**

The West Virginia Purchasing Division ("Purchasing Division") is issuing this Request for Information (RFI), on behalf of West Virginia Department of Administration Cabinet Secretary's Office, to all vendors that have a desire to provide information about a One-Stop-Shop permitting program in accordance with West Virginia statute and legislative rule. This RFI is intended to provide the Agency with information necessary to plan and develop specifications for a future procurement.

\*\*\*QUESTIONS REGARDING THE SOLICITATION MUST BE SUBMITTED IN WRITING TO TARA.L.LYLE@WV.GOV PRIOR TO THE QUESTION PERIOD DEADLINE\*\*\*

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	One-Stop-Shop Permitting Program				

Comm Code	Manufacturer	Specification	Model #
43232408			

**Extended Description:**

One-Stop-Shop Permitting Program

**SCHEDULE OF EVENTS**

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Question deadline	2025-07-24

# **Request for Information**

## **CRFI SEC260000001 – One-Stop Shot Permitting Program**

### **TABLE OF CONTENTS**

- A. Table of Contents**
- B. Section 1: General Information and Instructions**
- C. Section 2: Instructions to Vendors Submitting Information**
- D. Section 3: Information Being Sought**
- E. Section 4: Vendor Response**

### **BACKGROUND**

On April 9, 2025, House Bill 2002 was passed to create a One-Stop-Shop permitting program. This program is designed to enhance public awareness, collaboration, accountability, coordination, transparency, and predictability in the State's permitting, licensing, and authorization processes, including for critical infrastructure projects and projects delivering significant economic development to West Virginians. More information about House Bill 2002 and legislative rule, 148CSR25 can be found at [https://www.wvlegislature.gov/Bill\\_Status/bills\\_history.cfm?INPUT=2002&year=2025&sessiontype=RS](https://www.wvlegislature.gov/Bill_Status/bills_history.cfm?INPUT=2002&year=2025&sessiontype=RS) and <https://apps.sos.wv.gov/adlaw/csr/ruleview.aspx?document=18252&KeyWord=>

### **SECTION 1: GENERAL INFORMATION**

#### **1.1. Introduction:**

The West Virginia Purchasing Division ("Purchasing Division") is issuing this Request for Information (RFI), on behalf of the West Virginia Department of Administration ("Agency"), to all vendors that have a desire to provide information about establishing a one-stop shop permitting program and dashboard for several state permitting agencies. This RFI is intended to provide the Agency with information necessary to plan and develop specifications for a future procurement.

#### **1.2. Schedule of Events:**

RFI Released To Public	07/11/2025
Vendor's Written Questions Submission Deadline	07/24/2025
Addendum Issued	TBD
RFI Opening Date	08/11/2025 at 1:30 pm

### **SECTION 2: INSTRUCTIONS TO VENDORS SUBMITTING INFORMATION**

**2.1. REVIEW DOCUMENTS THOROUGHLY:** This form contains a request for information that may lead to a future procurement. Please read these instructions and all documents attached in their entirety.

Revised 1/24/2022

# **Request for Information**

## **CRFI SEC260000001 – One-Stop Shot Permitting Program**

**2.2. NOT A CONTRACT DOCUMENT:** Vendors must understand that this RFI is for information gathering purposes only, and a response to this RFI does not generate a contractual obligation on the part of the State to purchase any commodity or service.

**2.3. VENDOR QUESTION DEADLINE:** Vendors may submit questions relating to this RFI to the Purchasing Division. Questions must be submitted in writing. All questions must be submitted on or before the date listed below and to the address listed below in order to be considered. A written response will be published in an RFI addendum if a response is possible and appropriate. Non-written discussions, conversations, or questions and answers regarding this RFI are preliminary in nature and are nonbinding. Submitted emails should have the RFI number in the subject line.

Submit Questions to:

Tara Lyle, Buyer Supervisor

Email: [Tara.L.Lyle@wv.gov](mailto:Tara.L.Lyle@wv.gov)

Submission Deadline: 07/24/2025

**2.4. YOUR SUBMISSION IS A PUBLIC DOCUMENT:** Vendor's entire response to the RFI and any correspondence relating thereto are public documents. As public documents, they will be disclosed to the public following the RFI opening as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

**PLEASE ENSURE ANY PROPRIETARY, CONFIDENTIAL, OR OTHERWISE NON-DISCLOSABLE INFORMATION IS CLEARLY MARKED, WITH EXPLANATION, TO ENSURE IT IS APPROPRIATELY REDACTED FROM PUBLISHED DOCUMENTS UNDER WEST VIRGINIA CODE § 29B-1-4(a)(1).**

Submission of any document to the State constitutes your explicit consent to the subsequent public disclosure of the document. The Purchasing Division will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.



# **Request for Information**

## **CRFI SEC260000001 – One-Stop Shot Permitting Program**

### **SECTION 3: INFORMATION BEING SOUGHT**

#### **3.1. General Information Being Sought**

- 3.1.1.** We are seeking information for vendors to describe their ability to provide a “one-stop-shop” for obtaining and renewing permits, licenses and business registrations as described WV Code §5A-13-1 et seq. and legislative rule 148CSR25. The intent of this program is to revolutionize and streamline West Virginia’s permitting system by creating an online dashboard for processing and tracking permits for construction, economic development, infrastructure, and natural resource projects.

#### **3.2. Specific Questions**

- 3.2.1.** Please describe your ability and methodology to establish the One-Stop-Shop permitting solution.
- 3.2.2.** Provide examples of previous similar work products.
- 3.2.3.** Identify your company name, primary contact person, phone and email.
- 3.2.4.** Describe how your solution would address adding additional permits and licenses for the participating agencies, when necessary, as well as adding additional agencies and their permitting requirements that may come online after the fact.
- 3.2.5.** How would you address permitting portals currently in use by state agencies?
- 3.2.6.** Describe how you handle security and privacy/cyber security as well as backups and disaster recovery within your solution?
- 3.2.7.** How would you ensure that the solution will be operational by the deadline indicated in the statute and legislative rule?

#### **3.3. Information Being Sought**

- 3.3.1.** Examples of previous solutions of similar size and scope.
- 3.3.2.** Please describe pricing strategy options available to address the cost of buildout and maintenance of the program, including user fee options.
- 3.3.3.** Any marketing materials, technical data or other relevant information to the solution.

### **SECTION 4: VENDOR RESPONSE**

- 4.1. Incurring Cost:** Neither the State nor any of its employees or officers shall be held liable for any expenses incurred by any Vendor responding to this RFI, including but not limited to preparation, delivery, samples, or travel.

# **Request for Information**

## **CRFI SEC260000001 – One-Stop Shot Permitting Program**

**4.2. Proposal Format:** Vendors should provide responses in the format listed below:

- 4.2.1. Title Page:** State the RFI subject, number, Vendor's name, business address, telephone number, fax number, name of contact person, email address, and Vendor signature and date.
- 4.2.2. Table of Contents:** Clearly identify the material by section and page number.
- 4.2.3. Response Reference:** Vendor's response should clearly reference how the information provided applies to the RFI request. For example, listing the RFI number and restating the RFI request as a header in the proposal would be considered a clear reference.
- 4.2.4. Responses:** All responses must be submitted to the Purchasing Division prior to the date and time stipulated in the RFI as the opening date. All submissions must be in accordance with the provisions listed in Section 2: Instructions to Vendors Submitting Information.

By signing below, I certify that I have reviewed this Request for Information in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this information for review and consideration.

BasicGov USA, Inc  
\_\_\_\_\_  
(Company)

*Ron Vukovich, Business Development Executive*  
\_\_\_\_\_  
(Representative Name, Title)

(732) 492-6408  
\_\_\_\_\_  
(Contact Phone/Fax Number)

August 18, 2025  
\_\_\_\_\_  
(Date)

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: CRFI SEC26\*01**

**Instructions:** Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

**Acknowledgment:** I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

**Addendum Numbers Received:**

(Check the box next to each addendum received)

<input checked="" type="checkbox"/> Addendum No. 1	<input type="checkbox"/> Addendum No. 6
<input checked="" type="checkbox"/> Addendum No. 2	<input type="checkbox"/> Addendum No. 7
<input checked="" type="checkbox"/> Addendum No. 3	<input type="checkbox"/> Addendum No. 8
<input checked="" type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input checked="" type="checkbox"/> Addendum No. 5	<input type="checkbox"/> Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

BasicGov USA, Inc. DBA Clariti

\_\_\_\_\_  
Company

*Alison Magrini*

\_\_\_\_\_  
Authorized Signature

August 29, 2025

\_\_\_\_\_  
Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.