Due: Friday, August 29, 2025
3:00 PM EST

Response to

CRFI 0201 SEC2600000001 Request for Information

One-Stop-Shop Permitting Program

Prepared By :

SEP TECHNOLOGY CONSULTING
Strategy . Execution . Personnel

245 W 99th Street
Suite 14B
New York, NY 10025

Submittal Letter

August 29, 2025

State of West Virginia
Department of Administration – Purchasing Division
2019 Washington St. E
Charleston, WV 23505
Attn: Tara Lyle
Tara.L.Lyle@wv.gov

To Whom it May Concern,

SEP Technology Consulting L.L.C. (SEPTech) has carefully reviewed CRFI 0201 SEC2600000001 Request for Information One-Stop-Shop Permitting Program and prepared the following response.

SEP Technology or SEPTech, is proposing the Accela Civic Platform in response to this request for information. SEPTech has been providing Accela Systems Integrations Services to public sector clients for more than 12 years. We have worked and continue to work with cities, counties and state departments in configuring and deploying the Accela platform and have the qualifications and certified staff to complete the work. SEPTech currently has numerous clients across the United States for whom we are implementing or have implemented this exact solution and we have unprecedented experience in environmental health and quality processes, as well as migrating customer data from legacy platforms.

We would welcome the opportunity to speak with you further about this project and how we can assist you and your organization in successfully implementing a modern application for this program. Should you have any questions or concerns, please do not hesitate to reach out to me directly at 212-634-9221.

Sincerely,

Keyur Majmudar
Owner and Managing Partner
SEP Technology Consulting, L.L.C.

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1. Vendor Profile

CONSULTANT'S LEGAL NAME & CONTACT INFORMATION		
Organization	Company Name	SEP Technology Consulting L.L.C.
	Company Address	245 W. 99th Street, Suite 14B New York, NY 10025
	Website	www.septechconsulting.com
	Federal Tax ID Number	26-3086311
Authorized Representative	Name	Keyur Majmudar
	Title	Managing Partner and CEO
	Email Address	keyur@septechconsulting.com
	Phone Number	212-634-9221
Other Point of Contact (if required)	Name	Danielle Balmelle
	Title	Sales Lead
	Email Address	dbalmelle@septechconsulting.com
	Phone Number	212-634-9221, ext. 711
Type of Enterprise		☐ Non-Profit
		☐ Sole Proprietorship
		☐ General Partnership
		☐ Corporation
		☒ Limited Liability Company
		☐ Other ____________
Statement of credentials to perform services specified in this RFP		SEP Technology Consulting has been in the business of providing systems integration and information technology consulting services since its inception in 2008. SEPTech has worked closely with dozens of cities and counties on implementing Accela solutions and providing project support. SEPTech has sufficient financial capability and stability to foster a long-term relationship with the city.
Vendor Signature		**August 28, 2025**

Executive Summary

The State of West Virginia, herein known as The State, under the direction of the Department of Administration or DOA, is embarking on a challenging project with goals that will transform how the State approaches municipal service delivery for constituents and for those who wish to do business with The State. SEP Technology Consulting concurs with the State Legislature in that the creation of the One Stop Shop Permitting Program in West Virginia including the provision of a Permitting Dashboard to operate as a "one-stop-shop" for obtaining and renewing qualifying permits is in the interest of the public. SEP Technology Consulting understands that The State is seeking a solution that provides a common platform for permitting operations 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. The Accela Civic Platform implemented by SEP Technology Consulting, or SEPTech, will provide a proven system for The State that can meet these objectives and deliver the latest technology for processing permits and other related activities for internal staff, provide a self-service portal for residents and the business community to process these same requests, as well as provide public users a solution that is easily accessible, searchable, and informative. For internal users, the solution provides tools that greatly enhance coordination between offices, departments, divisions, and agencies of the state to more efficiently process and issue permits, licenses, and business registrations.

While there are several choices for solutions and implementation partners, the Accela Civic Platform implemented by SEP Technology Consulting ensures The State of a successful implementation to replace the current and disparate systems, meet to-be defined, out-of-box functionality and requirements for back office and online public portal users, and enhance processes for permitting and licensing across State of West Virginia agencies. The Accela Civic Platform, implemented by SEPTech, an Accela certified implementation partner, will exceed The State's expectations for an experienced implementation firm to deliver a fully integrated, state-of-the- art solution One-Stop-Shop Permitting solution tailored to automate most if not all permitting and licensing activities across State agencies. Accela is the leading Permitting and Licensing solution with over 600 customers worldwide using their solutions for these very functions.

With almost 40 years of experience in providing public sector software solutions, Accela is 100% focused on enterprise solutions that enable each agency to meet its unique needs while making an investment that can be expanded to other agencies in your organization. Drawing upon over a decade of expertise, SEPTech has been at the forefront of delivering Accela Systems Integration Services to a diverse array of public sector clients. Our extensive track record includes successful collaborations with cities, counties, and state departments, where we have adeptly configured and deployed the Accela platform. Backed by a team of certified professionals, we possess the qualifications and proficiency required to execute the task at hand. SEPTech is presently engaged with numerous clients across the United States, actively implementing or supporting this precise solution. Our unparalleled experience in successfully deploying the Accela solution for clients with similar requirements sets us apart, showcasing our unwavering commitment to excellence in every project we undertake. The proposed technical solution for The State leverages the Accela solution and its underlying, industry-tested system architecture and infrastructure to deliver proven performance for internal staff and the public. The productivity and citizen engagement offerings include planning, building, licensing, service requests, environmental health, and more. The State can take advantage of common services like GIS, mobile tools, dashboards, online payments, and web portals to further extend Accela's capabilities. Core components of the Accela purpose-built platform include:

- Powerful and flexible process automation engine
- Data management
- Built-in GIS visualization
- Specialized mobile worker solutions
- Branded and responsive citizen access portal
- Electronic Document Review
- Communications management
- Dynamic reports, dashboards, and analytics
- Robust APIs for integrations with other systems and services

Accela's Civic Platform makes it easier for the public to manage permit and license registrations, simplify the process for staff and management to process permits, collect fees, manage time-sensitive and complex workflows, and work seamlessly with other integrated State systems. The SEPTech and Accela vision for project success includes The State realizing sustainable economic development, smart growth, and becoming a recognized leader in permitting management practices. We know from our years of experience that projects with such transformational potential require budgeting that balances achieving project objectives in a timely and effective manner, while efficiently managing costs.

SEPTech and Accela Experience

SEP Technology Consulting is a limited liability company with headquarters in New York, NY. We have actively been in the business of providing systems integration and information technology consulting services since inception in 2008. SEP Technology Consulting SEPTech, is a Gold Certified Professional Services Partner™ for the Accela Platform; a partner who not only brings respected expertise in Accela implementations, but also one who has extensive experience in agency processes across agencies with specific responsibilities in permitting and licensing. SEPTech has worked closely with dozens of state and local governments to implement Accela solutions and provide application support. SEPTech has sufficient financial capability and stability to foster a long-term relationship with the State of West Virginia and we have more than two dozen employees focused exclusively on Accela engagements.

Since 2012, SEPTech has been dedicated to delivering a range of Accela platform solutions, including end-to-end systems integration, significant enhancement projects, long-term support and engagement, program management, and evaluation services. While other Accela partners have shifted their focus to permitting and licensing solutions outside of Accela, SEPTech has worked exclusively to support Accela customers with new implementations as well as support beyond implementation.

With over 600 customers across the public sector, Accela, a trailblazer in cloud-based software solutions, is committed to fostering modernization within local and state governments. At its core lies two main facets: first, the Accela Civic Platform, a unified, robust system that consolidates all functionalities onto one platform, thereby simplifying IT architecture and enhancing interdepartmental connectivity. Second, Accela provides a suite of ready-to-deploy and highly configurable civic applications that expedite the implementation of various licensing, permitting, and code enforcement functions.

SEPTech, leveraging the power of the Accela solutions, has successfully engaged with customers across the US such as Mecklenburg County in North Carolina, Maricopa County in Arizona, and Butte County in California, New York City as well as others, showcasing our proven track record in the industry.

Key Tenets:

- Iterate through deliverables, while leveraging frequent product demos, to ensure a high level of client satisfaction and precision of the solution.
- Provide alternatives with innovative ideas and efficient practices to enhance quality of the desired solution.
- Maintain a practical bias towards easy to scale/enhance solutions rather than quick to implement ones wherever feasible.
- Identify project risks & issues proactively and continuously to raise awareness immediately - act quickly to achieve resolution. Minimize surprises.
- Test solutions thoroughly to ensure a positive end-user experience.

Our experienced Accela team members combine the mindset and outlook provided by their singular expertise as consultants with their long-term experience as employees to deliver sustainable solutions to our clients. SEPTech team members always possess specialized skills for their assignments and a focus on providing long-term, easy to maintain/enhance implementations.

SEPTech is a highly regarded services partner and Value-Added-Reseller for Accela. Both SEP Technology Consulting, LLC and Accela are strongly aligned with the goal of continuing to build a strong partnership between the firms and SEPTech as a go-to partner for all levels of service needs for implementation projects.

The below is a select listing of SEPTech's Accela implementation projects:

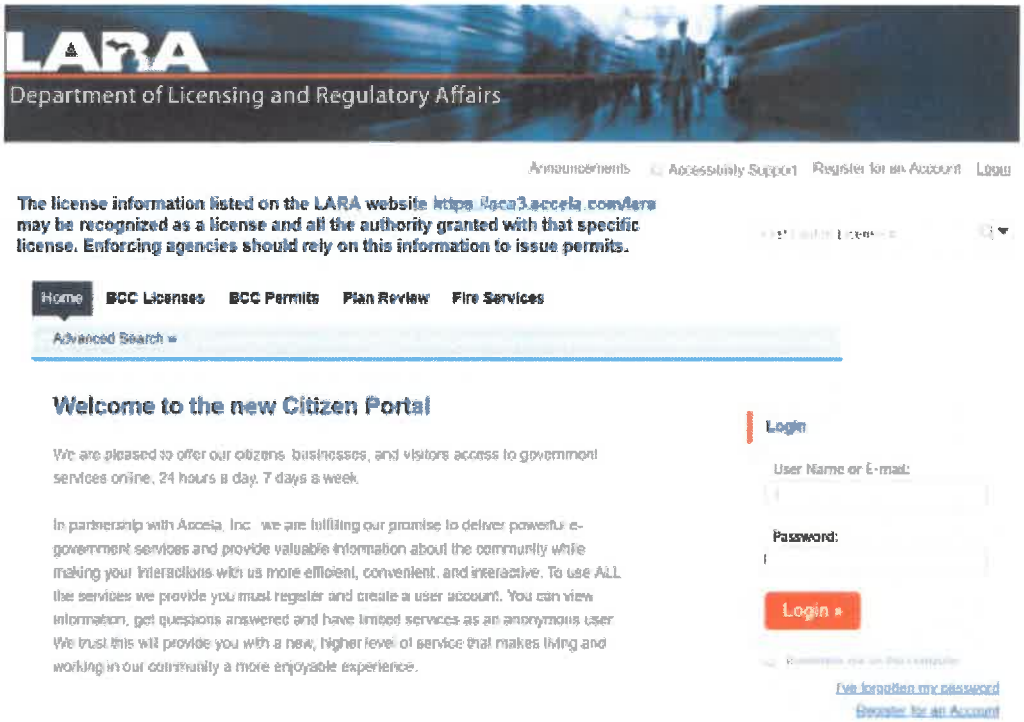
- Butte County, CA: Environmental Health and Community Development
- Mecklenburg County, NC: Buildings, Planning and Land Development
- Santa Barbara County, CA: Environmental Health (all programs)
- Kings County, CA: Environmental Health (all programs)
- Maricopa County, Arizona: Prime for Remediation and Development for Environmental Services, Air Quality and Planning & Development Departments
- Maricopa County, Arizona: QA Automated Testing
- New York City: Delivery of very large multi-agency program including Department of Consumer Affairs and Department of Buildings
- Tampa, Florida: Remediation development and delivery of project: Buildings, Planning, Code Enforcement
- Lexington, Kentucky: Business Analysis, Workflow Process Analysis
- Marion County, Indiana: Environmental Health Implementation (all programs)
- Virginia Alcohol Beverage Commission: Implementation Lead and QA Automated Testing

Accela brings valuable experience working with state, municipal, federal, and international regulatory agencies for the State of West Virginia's consideration. This includes best practices and tools to help create efficiencies in your processes that help back-office processors, investigators in the field, citizens and the business community. We listen and learn from our customers to constantly improve our products and methodologies. We also believe that one of the best resources for our customers is other customers. On the following pages, we provide a few examples of our client's success with Accela's solution

State of Michigan Department of Licensing and Regulatory Affairs (LARA), including Bureau of Construction Codes (BCC), Bureau of Professional Licensing (BPL) and Bureau of Fire Services

The State of Michigan Department of Licensing and Regulation invested in Accela for statewide automation in the regulatory areas of licensing, permitting, inspections, and enforcement. Michigan has doubled the number of permits issued using online services and cut down permit processing time from a week to minutes. "*The main goal is to make government easier to do business within the State of Michigan by streamlining processes across multiple departments and providing a single point of entry, making the experience seamless for our citizens*," said Shelly Edgerton, LARA Deputy Director and Chief Data Systems Officer. Accela has helped to make that possible. *To see the live portal, visit https://aca-prod.accela.com/LARA/Default.aspx*. This real-time electronic submission saves customers time and money, improves accuracy, and allows the bureau to use resources more efficiently. Michigan became the first state nationally to implement the new technology for plan review through Accela's solutions. Customers can now go through one portal to submit construction documents for new projects, additions, or renovations to the Bureau of Construction Codes and other agencies involved in the review.

dbusiness, Detroit's Premier Business Journal, published an article describing the State's success going paperless for plan check. "The *new customer-friendly Accela program launched by (the licensing and regulatory affairs department) makes the electronic processing of plan reviews quicker, more predictable, and less costly and is a major accomplishment toward streamlining the construction process,*" says Lee Schwartz, Executive Vice President for Government Relations at the Home Builders Association of Michigan in Farmington Hills. *"For a builder or developer, time is literally money."*



City and County of Denver, Colorado Alcohol and Marijuana Licensing

In 2010, Denver awarded a contract to Accela to provide the City and County of Denver (CCD) with a multi-department, regulatory system, powered by our solutions. The system streamlines processes for CCD's teams of Licensing, Planning, Enforcement, Right of Way, and Development Services (encompassing Building, Zoning, and Fire Prevention), by enabling seamless sharing of information between function areas, as well as between back-office and mobile workers. The platform tracks permit and license applications and fees, and automatically route applications to appropriate personnel in various departments for follow-up on issues such as compliance with zoning, fire, or occupancy codes.

When CCD's Department of Excise and Licenses (DEL) implemented the City's Medical Marijuana Code in 2010, it was presented with a new, complex challenge: how to organize, access, and manage a new licensure process with significant volumes and tight timelines.

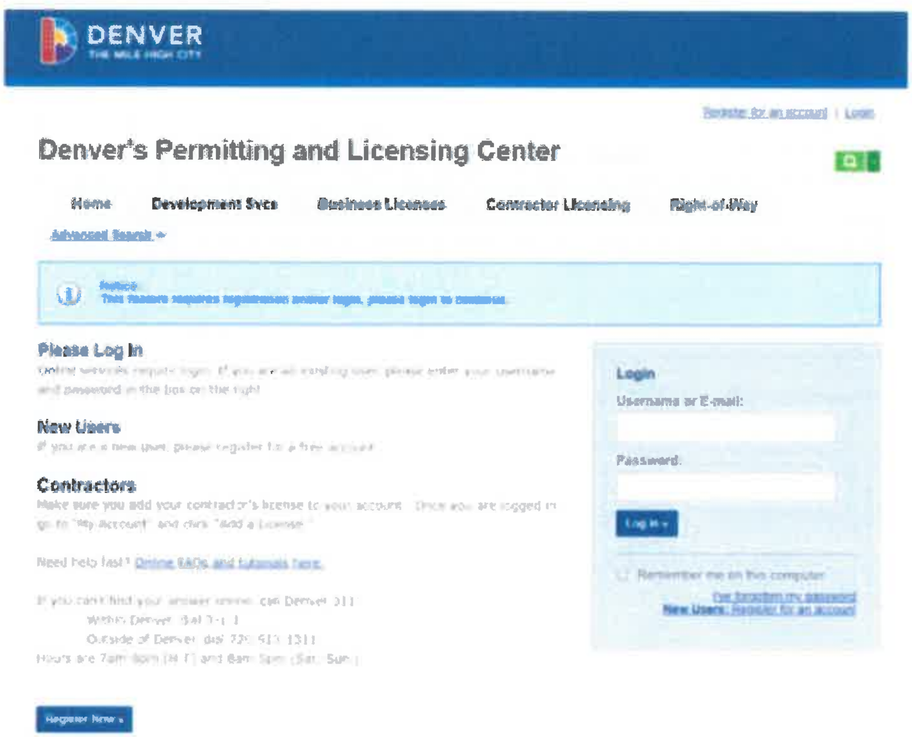
It was not until the legalization of recreational marijuana in 2012 that industry demands CCD, along with other Colorado jurisdictions, to re-examine how it had been managing medical marijuana operations, and how to combat greater challenges with managing recreational marijuana operations.

As an Accela customer since 2009, DEL had already automated licensing processes for alcohol and other regulatory activities within the CCD. It collaborated with Accela again to extend its solution for marijuana licensing. The group modeled much of its marijuana licensing process on liquor licensing, configuring for the nuances of DEL's seven types of marijuana licenses.

Among Accela's key timesaving functionality, email notification has greatly enhanced customer communications about license expiration, renewals, and inspection results. Likewise, the solution streamlines the marijuana licensing process by centralizing all information in a single system — versus separate databases and applications — for faster and more accurate reporting. Also, data sharing has improved transparency and efficiency by allowing the Department to open its records to other departments and agencies.

After initially struggling to coordinate a new licensure process, DEL has implemented a successful cross-agency strategy for managing legalized marijuana permits. By sharing application information online, staff can save time and respond twice as fast to public record requests and new applications, compared to when it first began accepting retail marijuana applications in 2013. Looking ahead, DEL has estimated conservative savings of $3.5 million over five years by using Accela to automate, streamline, and speed up its various licensing processes.

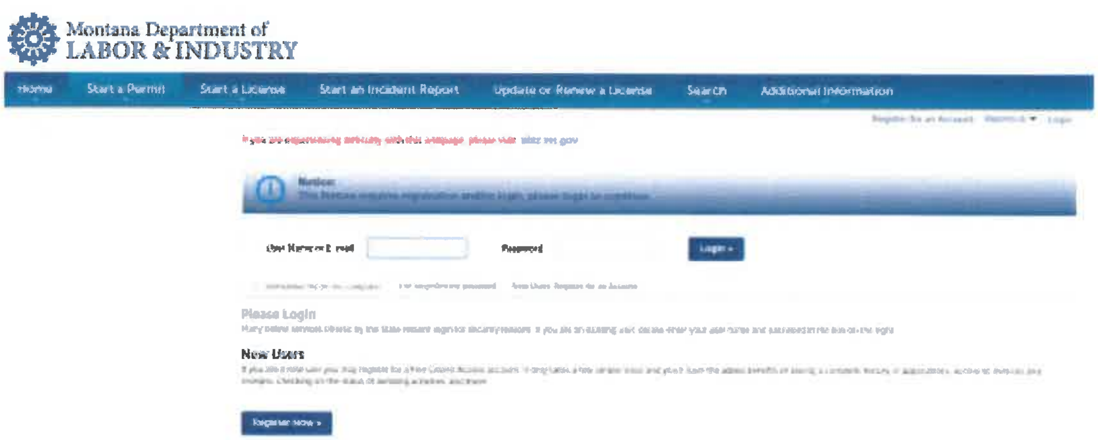
To see the live portal, visit:
https://aca-prod.accela.com/DENVER/Cap/CapHome.aspx?module=Licenses&TabName=Home



State of Montana Department of Labor and Industry

The State of Montana and Accela developed a strong relationship with our solutions implemented at the Business Standards Division, Building Codes Bureau (BCB) as the statewide ePermit System. The ePermit system is a premier online portal that will deliver a standardized e-permitting experience to building professionals operating across the nation's fourth-largest state.

This relationship expanded by providing our licensing solutions to two bureaus within the Montana Department of Labor and Industry — the Business and Occupational Licensing Bureau, and the Health Care Licensing Bureau — which regulates nearly 40 licensing boards and programs, and license close to 100 professions. Faced with a growing Montana population approaching 1 million, both bureaus needed new solutions to help them deliver on their commitment to process 80 percent of all new license applications within 14 days of receipt. *To see the live portal, visit* *https://aca-prod.accela.com/BCB/Default.aspx*



Mecklenburg County, NC Land Use and Environmental Services Agency

- Code Enforcement: Buildings, Planning, Code
- Land Development: Plan Review, Stormwater
- With Accela team 11/2019 – 12/2023 (with Accela team) Direct implementation and support contract 11/2023 – Ongoing

Project Summary

SEPTech was contracted to work with Mecklenburg County for the enhancement of their implementation of the Accela Civic Platform. This was a highly customized implementation for multiple agencies that required extensive business rules automation, complex fees structures, multiple real-time and batch integrations with other County systems. The implementation included:

- Business rules automation scripting that provided:
  - In addition to the automation of renewal and expiration processes within the Accela application, custom integrations were built to update other County systems with this information for other processing needs.
  - Batch processes for financial data reconciliation
  - Utilization of integrated GIS data for proximity alerts, automation of inspector assignments based on GIS districts and other information
- For the automation of highly complex fees, we implemented as a series of a calculation functions to calculate the fee amounts and apply exceptions. JSON is utilized to parameterize the input variables which allows for easier maintainability and updates as fees change.
- A module for processing of payments utilizing an external payment processor
- Complex scripting to apply conditions and holds based on a combination of data selection, workflow step, documents, GIS information and other attributes.
- Integration with other necessary County systems that need access to such information or may provide necessary information such as GIS based location data and Address Parcel Owner (APO) Information utilizing the County's Assessors System information.
- Real-time integration with the County's ERP system.
- Custom integration into the County's legacy inspection scheduling and financial system
- Development of a Custom Accela Citizen Access Portal wrapper to provide a more intuitive and effective entry point for external users. SEPTech has created this for Maricopa County as well.
- SEP Tech has also contracted with the County to provide ongoing maintenance and support for the implementation.

Butte County, CA

- Community Development Services: Buildings, Planning, Code Enforcement
- Environmental Health Department: Consumer Protection, Drinking Water, Hazardous Materials, Land Use & Wastewater, Solid Waste
- EH Implementation 01/22 - 10/22 with ongoing support contract

Project Summary

SEPTech worked with Butte County through two separate implementation phases. The first was to implement their permitting and licensing needs for their Environmental Health Department and the second was the implementation for their Building, Planning and Code Enforcement Departments. These implementations included

- A module that intakes, issues and maintains date-effective permits and licensing for all associated program areas including:
  - the ability to apply online and for the departments to process over 100 distinct permit/license types. This process includes initial intake, plan reviews, electronic document review, payments, inspections, communications and issuance, renewals, and expirations.
- Business rules automation scripting that provided:

  - Automation of the permit/license renewal and expiration processes. This was especially important for many of the programs as the licenses/permits usually had an annual renewal date, which prior to our Accela implementation, would require many weeks of detailed and manually intensive work to prepare renewal notices, invoices, and process payments. With the business rules automation in place the system is automatically sending out batch communication notices for the upcoming expirations, renewal notices which have the functionality within to launch their renewal process including allowing for the payment and issuance of a renewed license/permit.
  - Utilization of integrated GIS data for proximity alerts. These alerts trigger external batch communication/mailings for events such as demolitions, temporary closures, etc. For other clients we have implemented functionality to notify residents within a certain proximity to vector events such as mosquito fogging.
- Automated calculation of fees utilizing configuration and scripting for constant, range, min max, linear and other formulas.
- A module for processing of payments utilizing an external payment processor
- Integration with other necessary County systems that need access to such information or may provide necessary information such as GIS based location data and Address Parcel Owner (APO) Information utilizing the County's Assessors System information.
- Custom integration into the County's Laserfiche System for storage and retrieval of documents linked to Accela records (permits/licenses, inspections, complaints, etc.)
- Conversion of historical data from the County's legacy systems (Envision Connect for Environmental Health and TRAKiT for Community Development Services) utilizing transformation script and tools that SEPTech has developed to load into Accela. This allows for the Departments to continue to process their active records without the need to access and maintain multiple systems.
- Integration, design and confirmation of Open Cities Premium Citizen Experience to provide a better self service experience
- SEP Tech continues to provide ongoing maintenance and support for the implementation.

The Accela solution implemented by SEPTech, is a sound choice for The State of West Virginia. Several customers across the United States and abroad are currently leveraging the power of Accela's solutions to transform permitting and licensing, streamline workflows, and enhance service delivery. SEPTech has delivered successful Accela Implementations to dozens of public sector clients of similar scope as The State and to counties and cities much larger and smaller. Accela and SEPTech also have a history of fostering customer success and delivering excellence in civic processes and functions. Together, we deliver on the promise of a better today, and a better tomorrow for the communities we serve. The rapid shift in technology and regulation is presenting governments with unprecedented challenges. The new normal is that citizens expect 24/7 engagement and 24/7 response. Empowered in their daily lives, citizens now demand better from their government and Accela and SEPTech are responding in kind.

2. System Functionality

SEPTech is proposing the implementation of Accela's Civic Platform solution to meet The State's functional and technical requirements. The Civic Platform is purpose-built which ensures configuration for functionality, record types, automation, and reports and notifications to reduce time to value, minimize maintenance, increase supportability and decrease overall costs. The proposed Accela solution combined with SEPTech's proven methodology ensures the successful implementation of an integrated solution that is flexible and scalable.

Since its initial launch 24 years ago, there have been more than 30 releases of the Accela Civic Platform, excluding minor releases and service packs. Accela is committed to the ongoing development of their software solutions and works continuously to enhance the solutions to remain current with new technologies, changes in legislation, and consistent with best business practices.

2.1 Accela Civic Platform - SaaS

Accela's Civic Platform is deployed via SaaS or cloud delivery model to significantly reduce infrastructure costs and free up your IT staff from the burden of hardware and software maintenance. Agencies can significantly reduce their infrastructure costs with Accela's SaaS delivery model. Accela manages our apps and infrastructures within the industry-leading Microsoft Azure hosting environment. The hosting facilities are in the United States for U.S. customers. The U.S. is primarily in Azure Central with disaster recovery in Azure East. For SaaS customers in the Azure environment, Accela offers a single sign-on service (SSO) that makes it easy to integrate our back-office solutions with third-party identify providers (IDP). Integrating the Civic Platform with an SSO provides the following benefits:

- Use Okta, Azure Active Directory, or another SSO application to control user access to the Civic Platform
- Allow users to automatically sign into the Civic Platform when they sign into an SSO application
- Manage accounts in a single central location

Our cloud model offers an uptime commitment of 99.9 percent each calendar month (subject to scheduled and emergency maintenance and certain other SLA limitations) and complete disaster recovery capability. This means The State's IT staff can eliminate the costs and time of maintaining and upgrading hardware and software.

PROVIDE higher-quality services to your citizens, businesses and employees

INCREASE your agency's effectiveness and speed

UTILIZE your staff more productively

FOCUS on innovative new services vs. status quo

GROW and scale to meet the needs of additional initiatives and users

Because the cloud is elastic and scalable, Accela can expand capacity easily as demand spikes occur. In addition, the cloud has full integration capabilities with Esri and other third-party applications that will allow The State to offer a fully functional web-based, cost-efficient solution on a 24/7/365 basis while still owning the data that can be exported quarterly to our cloud customers (at the customer's request).

As outlined below, the Accela cloud solution provides unparalleled reliability and protection:

- 99.9 percent uptime SLA per calendar month for Accela's solutions, subject to scheduled and emergency maintenance and certain other SLA limitations. *We continually are making investments in our services, infrastructure, and operations to improve this.*
- Meets rigorous security industry standards, including NIST 800-53
- Veteran and dedicated cloud staff with multiple industry certifications
- System administration and support duties for the application and system database
- Advance notice of planned maintenance, performed during off-business hours
- Real-time performance monitoring

With the cloud model, Accela can deploy resources in an orchestrated, secure fashion and position those resources in the regions we select. They gain the benefit of nationwide network peering relationships and scalable host infrastructure and can quickly deploy additional infrastructure resources (such as additional virtual machines) as needed. Our SaaS customers are not restricted by resources in a cage. As such, Accela can focus on providing high quality resources to meet our clients' needs.

Accela is able to scale the environment vertically and horizontally to meet the need and capacity of the SaaS platform. Accela's SaaS model eliminates the need for costly on-site hardware, reducing capital expenditures on servers and IT infrastructure. By removing these hardware needs, agencies no longer face the costs of regular maintenance, updates, or hardware refresh cycles, all of which can lead to unexpected expenses. With Accela, agencies benefit from fixed-cost contracts, allowing them to accurately forecast their technology expenses, thus avoiding unforeseen costs typically associated with on-premise systems. The table below describes Accela's responsibilities to SaaS customers.

Accela's SaaS Responsibilities

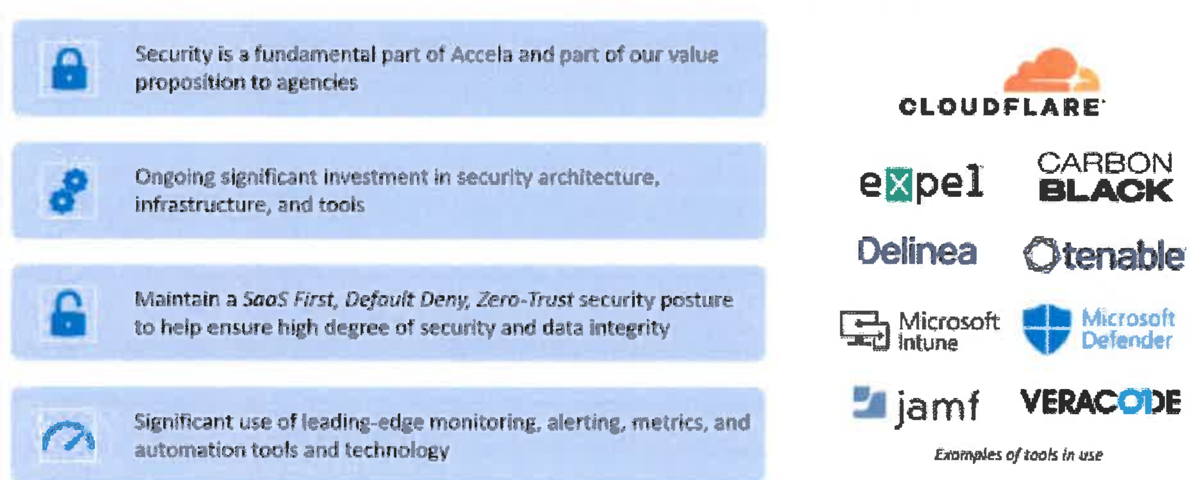
SaaS Component	Accela Responsibilities
Management, Support, and Maintenance of Hardware	Accela's partnership with Microsoft Azure ensures application of any necessary patches or updates and upgrades as necessary. Accela shall provide a mirrored back-up of the system. Accela shall monitor the SaaS environment and manage & maintain the resources within the system infrastructure in constant continuation of service.
Capacity Planning and Monitoring	Accela shall be responsible for monitoring capacity and performing capacity planning to ensure the System environment has sufficient capacity to meet the service level agreements agreed upon in the Contract.
Facilities Services	Provide SaaS service via a PCI compliant facility.
Monitoring Server and OS - detects and responds to up/down availability faults generated by monitored servers.	Provide the operational support processes required for up/down monitoring Document and track all detected problems using the site problem management process Escalate all detected problems to the appropriate support personnel
Operating System Management - proper functionality of SaaS software on servers. Support is provided for operating systems and related software products. Included are all ongoing processes to maintain supplier-supported operating platforms including preventive software maintenance services.	Install and maintain system-level software, such as operating system and other system-level products software requiring user access Monitor system software status and take necessary action to resolve any issues Perform operation system software tuning as required to maintain daily operations for Accela-provided services Install preventive maintenance patches deemed critical by the vendor to support system software products to prevent known problems from impacting the operating environment Install patches per vendor instructions for security exposures deemed critical by the vendor Participate in the identification of connectivity and associated network problems Plan and implement necessary changes for the System Document and track all configuration management changes using the site change management process Provide problem escalation and interact as necessary with third-party suppliers
System/File Backup and Restore - operational and management processes to back up and restore operating system and flat-file data	Design and implement the backup Plan Perform backups Provide for data restores as needed if customer causes the need for a data restoration; customer will be responsible for the actual cost of the data restore at the hourly service rate in the Contract. Monitor backup processes and verification of successful completion Adjust backup and restore plans as new components are added to the System

SaaS Component	Accela Responsibilities
Server Storage Management - support of server direct-attached storage environment	Integrate the storage hardware and software to provide the appropriate level of capacity, scalability, and performance of the server storage hardware and software Manage hardware and software maintenance requirements based on the manufacturer's recommended schedule Implement security practices, such as logical unit masking, preventing unauthorized storage access from an unauthorized server Maintain proper storage configuration(s) (mapping logical volumes, creating file systems, balancing I/O capacity)
Server Management Services	Provide server management services.
Controlled Server Access	Provide the tools and processes to manage access to assets. This includes the management of user logon IDs and their access rights to system-level resources, as well as maintaining server-level security parameters and security product options.
Virus Protection	Provide anti-virus software on each server to provide protection and detection of viruses, worms, and other malicious code. The anti-virus software can be updated with current virus signatures and detection engines automatically or by file distribution software. This service also provides the means to scan the server at the system level to detect malicious code.
Security Event Logging	Detective control that enables the recording of security events on system hosts based on preset parameters. The administrative tool's logging function is enabled and the security events are retained in a record for future review.
Vulnerability Scan and Report	Preventive and detective services to identify vulnerabilities as they emerge; to prevent those vulnerabilities from affecting the in-scope systems; to detect when an in-scope system has been affected; and to cure those affected systems. Vulnerability management includes both Vulnerability Alert management and Vulnerability Scanning processes. Vulnerability Alert management is the preventive process that collects known vulnerabilities and prioritizes vulnerabilities based on associated risk. Vulnerability Scanning is the detective process of identifying potential vulnerabilities on servers for exposures to such vulnerabilities.
Managed Cluster	Processes to deliver server/storage configurations clustered together in the same physical site. This is delivered using hardware configuration and software to meet availability requirements.
Host Based Intrusion Detection	Real-time identification, detection, and notification of suspected unauthorized intrusions on individual servers.
Secondary Mirrored Site Management	Provide skilled staff to support all operational support services. These services include support processes necessary to provide a secondary mirrored site that allows for replication of the primary site in the event of a natural disaster rendering the primary data center inoperable.

SaaS Component	Accela Responsibilities
Data Recovery	Data is replicated intra- and inter-regionally in near-real-time. Switchover/Failover to the DR site in case of a severe primary site outage is not anticipated as, in the event of a complete outage of the primary cluster of the production data, Accela will switch all applications to a replicated local database without the need to activate the DR site. If a full DR switchover is necessary, agencies will be notified via Accela's Customer Support team, Accela's Community site, or via another resource. Accela follows its documented Business Continuity & Disaster Recovery processes to restore service.

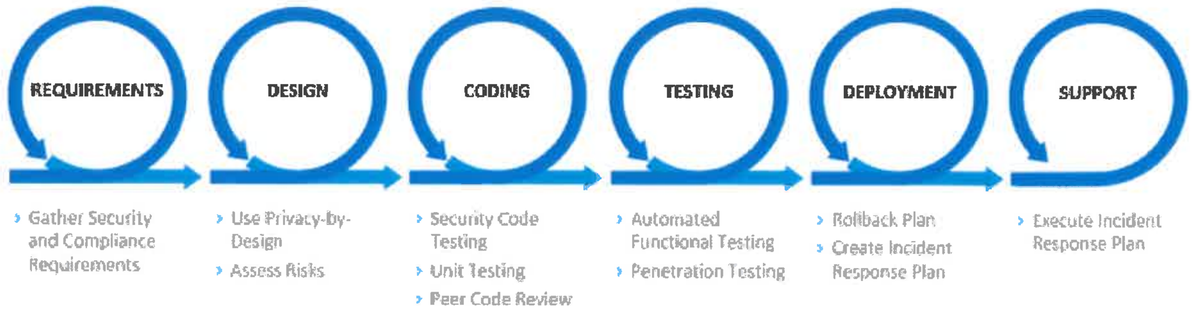
2.2 Security Compliance

As a provider of Software as a Service (SaaS) solutions for government, Accela prides itself on delivering an elevated level of data and cloud security by implementing a variety of measures to protect its customers. Along with in-depth audits for its network, applications, and databases, Accela's use of encryption, user authentication, backup and recovery programs, and real-time network performance monitoring offers governments and the communities they serve the ability to provide innovative, reliable solutions securely.



Security is a fundamental part of Accela's service offerings. Accela maintains a strong focus on security and maintains best practices and utilizes best-in-breed tools to ensure a high degree of data security and privacy.

Accela focuses on security and privacy from the ground up. As shown in Exhibit 2, our software is developed using "Secure SDLC" protocol and security requirements are identified and implemented throughout development process. Additionally, all Accela staff attend annual training covering security awareness, health data integrity, and data privacy.



All major design changes are reviewed according to Secure SDLC requirements.

Accela's security is aligned with the National Institute of Standards and Technology's (NIST) standards, Payment Card Industry Security Standards, and AICPA Trust Services Principles. Partner companies, like Microsoft, ensure their cloud services meet the FBI's Criminal Justice Information Services (CJIS) standards, another high benchmark in cybersecurity. Accela's software development lifecycle and operational processes align with the Open Web Application Security Project (OWASP).

These standards require security controls like identity management, multi-factor authentication, configuration controls, incident response, and change control. For CJIS compliance, there are also the added requirements that grant the FBI physical access to Microsoft's cloud facilities for IT audits, to get detailed quarterly security updates, and for agents to conduct background checks on Microsoft personnel.

Accela maintains a broad set of controls across the areas of people, processes, and technology covering these areas:

- Application security
- Data security and lifecycle management
- Secure software and delivery lifecycle
- Audit and Accountability
- Business Continuity
- Change and Configuration Management
- Datacenter / Infrastructure as a Service Security
- Encryption in transit and at rest
- Threat, Vulnerability, and Risk Management
- Identity and Access Management
- Mobile Security
- Incident Management and Response

As shown below, Accela also maintains a variety of security certifications to demonstrate and provide third-party validation of its commitment to customer security. We are currently working towards obtaining our StateRAMP authority to operate (ATO) and are currently enrolled in the StateRAMP (GovRAMP) Progressing Program.

SSAE18 SOC2 Type II	HIPAA HITECH	PCI-DSS v4.0.1 Attestation of Compliance for Report on Compliance – Service Provider	CCPA
Audited at least annually against the SOC reporting framework by independent third-party auditors. Audit controls for data security, availability, and confidentiality as applicable to in-scope trust principles for each service.	Audited annually against the national standards passed by the Health Insurance Portability and Accountability Act (HIPAA).	Self-assessed annually as an e-commerce merchant for its payment adapter services and integration with the Civic Platform.	The California Consumer Privacy Act (CCPA) creates new consumer rights relating to the access, deletion, and sharing of personal information collected by businesses.

Accela maintains these key security certifications within our products.

Microsoft Azure Compliance

Our partnership with Microsoft Azure and the integrated security tools is very important to the overall security environment. Azure helps us scale according to demand. With the security tools integrated into all services and instances within Azure, we can effectively monitor our entire environment automatically.

Additionally, we leverage Microsoft's extensive compliance program to ensure a secure framework. This provides extensive certifications with software deployment, including multi-layered security that extends to physical data centers, infrastructure, and operations.

Microsoft Azure certifications.

Disaster Recovery

Disaster recovery is an integral part of maintaining business continuity should a catastrophic outage occur. Accela is committed to giving our cloud customers access to their respective data and sites in a timely fashion should such an unlikely outage occur. Accela maintains a third-party audited Business Continuity (BR) and Disaster Recovery (DR) policy which is certified as documented and tested at least annually as part of SOC 2 certification.

The SaaS production database is replicated locally and mirrored to a geographically distinct failover site. Great care, planning, and expense has been taken to ensure that no single points of failure occur within the cloud environment itself. All network and I/O paths are redundant, and all services are available via load-balanced environments. Accela employs virtualization that allows for the dynamic migration of any failed virtual guests to another live host the moment an outage is detected. This ensures the continuity of business services should a single server go offline.

A two-node database cluster provides high availability for the key production databases. This cluster allows for both dynamic and manual relocation of key services insomuch that the associated web and business services can always connect to a live node.

Database backups follow a standard weekly full/nightly incremental schedule. Accela SaaS offers a committed 1-hour Recovery Point Objective (RPO) and a 4-hour Recovery Time Objective (RTO).

In any scenario involving data loss, multiple opportunities are available to recover the data. If a site-wide outage occurs that is projected to be sustained and lasting but the data itself within the data center is retrievable, Accela employees will transfer any outstanding archive logs to the standby site and activate the standby site as the primary cloud facility. External DNS entries will then be updated to reflect the failover site.

2.3 User Security

Accela's solutions provide a multi-level security system where the system administrator has full control over user access. This control on user access is granted based on a single user login ID and grants that user specific rights and privileges to the system.

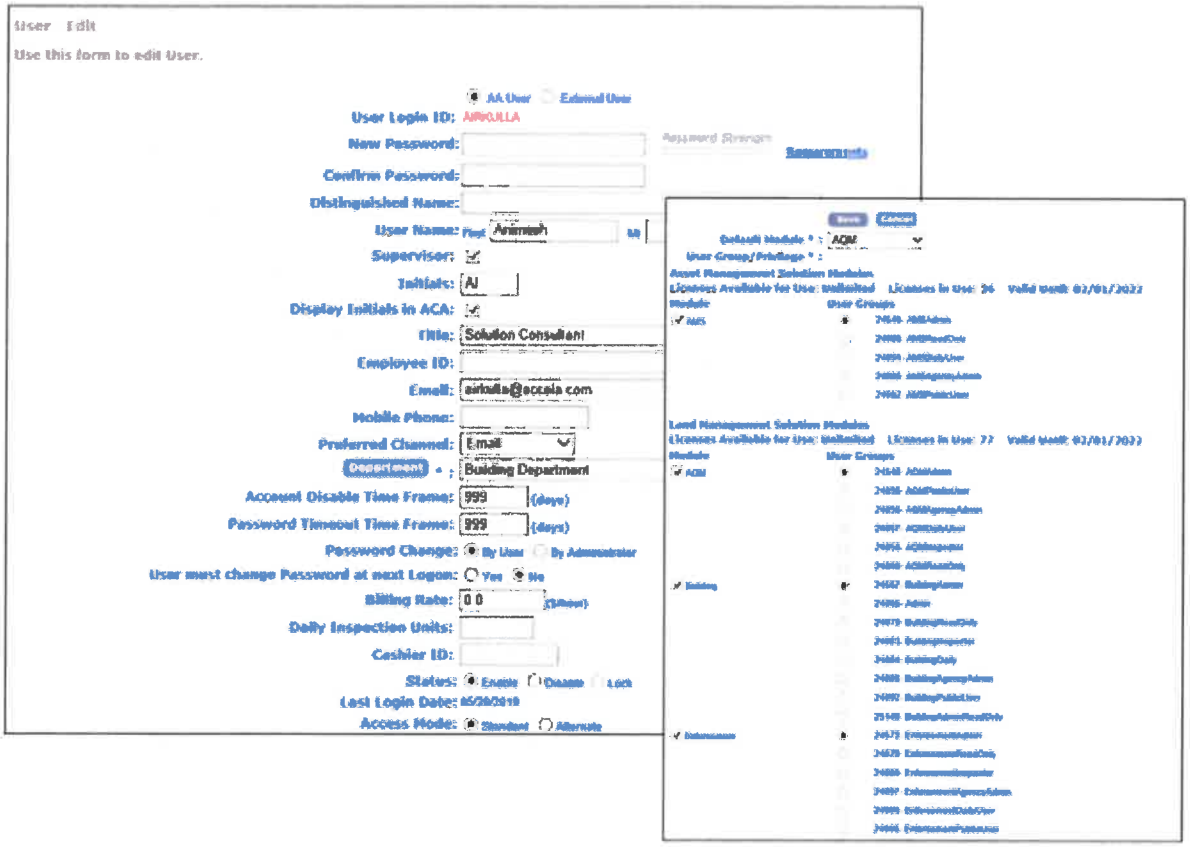
Accela's solutions also allow system administrators to set up groups or roles and set security based on those such as read-only, update, or no access. Our security goes beyond this setup to the functional level, allowing administrators to set security down to a specified function. For example, an Investigator may have read-only access, but no access to "Add Fees".

These rights and privileges can be extended to internal users, other departments, outside agencies, and even public citizens and applicants to safeguard the sanctity of system information. Individuals, as well as groups, can have one or more distinct security rights and system administrators can have universal rights and privileges or assign such rights to other designated and duly authorized users.

Administrators can set up password time-out frames at the individual user level. If the password time-out is blank, the system will set it up to a default of 90 days.

User group security features include:

- Each named user is explicitly part of one or more user groups
  - Each user group has specific, agency-configured access to functionality according to Functional ID (no access, full access, read-only access)
  - There are hundreds of Function IDs that are separately configurable for each user group
  - User groups can be created to be very general and include a large number of people and can also be created to be very specific and include a small number of people (even one person)
- Console display and other user interface elements are configurable so that named users are not presented with data or functionality that they are not entitled to access
- Field-level configurability is available at the agency, department, solution, user, and field level for agency-defined custom fields. Other more subtle areas include:
  - Form Level: The ability to restrict read, write, create, and/or delete access to entire forms/sections of the application such as preventing a user from viewing the Audit Log within the Permit solution or not allowing a user to edit Inspections of any type.
  - Field Level: The ability to restrict read, write, and/or masking at the individual field level of virtually any field in the system such as preventing a user from seeing the Risk Score for a particular Contractor or masking a Social Security Number.
  - Record Type: The ability to restrict read, write, create, and/or delete access to individual Record Types (across all 4 tiers of record type definition) such as the ability to restrict a Gas Customer Service Representative (CSR) from editing an Electrical Permit.
  - Attachment Categories: The ability to restrict read, write, and/or delete rights dependent on the Categorization of an attached document such as restricting the exposure of Transcripts attached to a Contractor License application to only those who need to review them.
  - Report Security: The ability to restrict the visibility and execution of reports such as limiting financial reports to only be run by those in Finance.
  - Workflow Security: The ability to define the management scope for individual Workflow Tasks; including the ability to adjust the access control based on the specific status of the Workflow Tasks.



Accela Administration Interface

2.4 Accela for One-Stop-Shop Permitting

Without automation, the permitting and licensing process is often lengthy and costly for both the agency, the applicant, and citizens. The lack of visibility in the process makes it hard for those involved in the process to manage resources, budgets, and timeframes. Communities who want to encourage development Accela's Civic Application for Business Licensing offers a myriad of benefits including a simplified application process, efficient review and approval, integrated payment processing, streamlined renewals and compliance management, data-driven decision-making, and enhanced collaboration. By providing a seamless and user-friendly experience for businesses, ensuring regulatory compliance, and supporting economic growth, our solution empowers government agencies to thrive in the digital age.

Accela for Licensing and Permitting is an integrated, fast, and responsive solution covering the permitting, licensing, and renewal needs for The State of West Virginia.

Streamlined License Application Process: Our solution simplifies the license application process for businesses by providing an intuitive online portal. This portal allows businesses to effortlessly submit applications, provide necessary information and documents, and conveniently track the progress of their applications, thus reducing paperwork and eliminating the need for in-person visits.

Efficient License Review and Approval: By automating the review and approval processes, our solution ensures a streamlined workflow for business licenses and permits. Agencies can define rules and regulations, automatically verify applications for compliance, and seamlessly route them to the appropriate departments for review. This automation minimizes manual effort, accelerates application approvals, and enhances operational efficiency.

Integrated Payment Processing: Seamlessly integrated with payment processing systems, our solution facilitates online payment of license fees and associated costs. This integration eliminates manual payment processing, reduces errors, ensures secure transactions, and generates payment receipts for businesses, thereby enhancing transparency and efficiency.

License Renewal Management: Our solution offers comprehensive features for managing license renewals and compliance. Automated notifications and reminders keep businesses informed about upcoming renewals, simplifying the renewal process and ensuring timely compliance with licensing requirements. Agencies can maintain accurate and up-to-date records of licensed businesses, thereby fostering regulatory compliance.

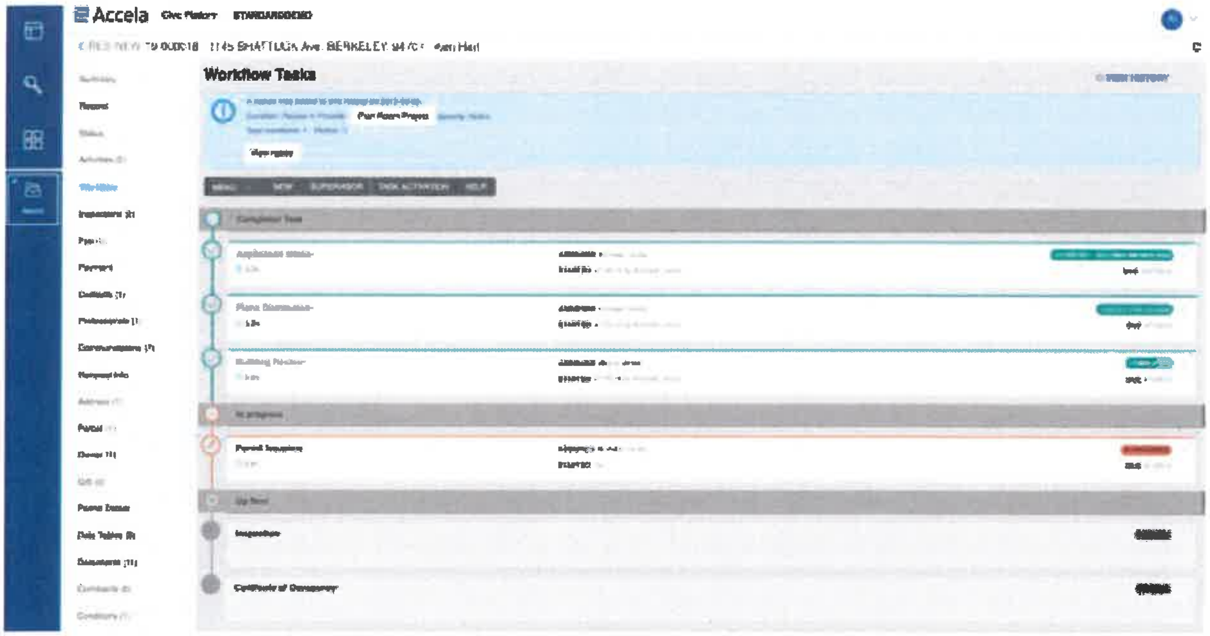
Reporting and Analytics: With robust reporting and analytics capabilities, our solution provides agencies with actionable insights into licensing activities. It generates insightful reports on license applications, approvals, and revenue, enabling agencies to identify trends, monitor performance metrics, and make data-driven decisions. This facilitates continuous improvement and effective resource allocation.

Open Data Integration: Our solution seamlessly integrates with other systems such as GIS and CRM software, providing agencies with a holistic view of licensing activities. This fosters collaboration among different departments involved in business licensing, streamlines workflows, and ensures consistent information sharing, thereby enhancing operational synergy.

2.5 Workflow Designer

One of the most attractive aspects of Accela's solutions to our clients is its potential to inherit the complex business rules and operations our clients have in place and desire to maintain. The application was designed and developed to allow for maximum configuration at all levels of the solution (for case types, workflow, fees, fields, automation, business rules, etc.) to be performed by trained end users, eliminating the need to customize the solution or to seek outside help to modify the solution whether by Accela or by other third parties. The inherent solution Admin Tools allow our clients to tailor the solution to meet their needs and should those needs or requirements change, the solution is able to offer the framework for accepting those changes and modifications without custom programming.

The flexible configuration of our solutions lets customers define and manage the sequence and requirements of the hundreds of steps involved in a workflow, including initial applications, plan reviews, code enforcement, fee calculation/collection, inspections, notices, and approvals. The solution manages all types of regulatory activities — one-time processes such as residential construction permitting and pesticide application permitting, or annually renewable activities such as elevator permits and air quality permitting. Permits or other case types The State requires may be configured at any time in the future by System Administrators to meet these yet unforeseen needs.



Clean lines color-coded and icon-based status indicators, and an HTML5 responsive design allow your agency to quickly move applications through the unique business processes to take them from intake to approval.

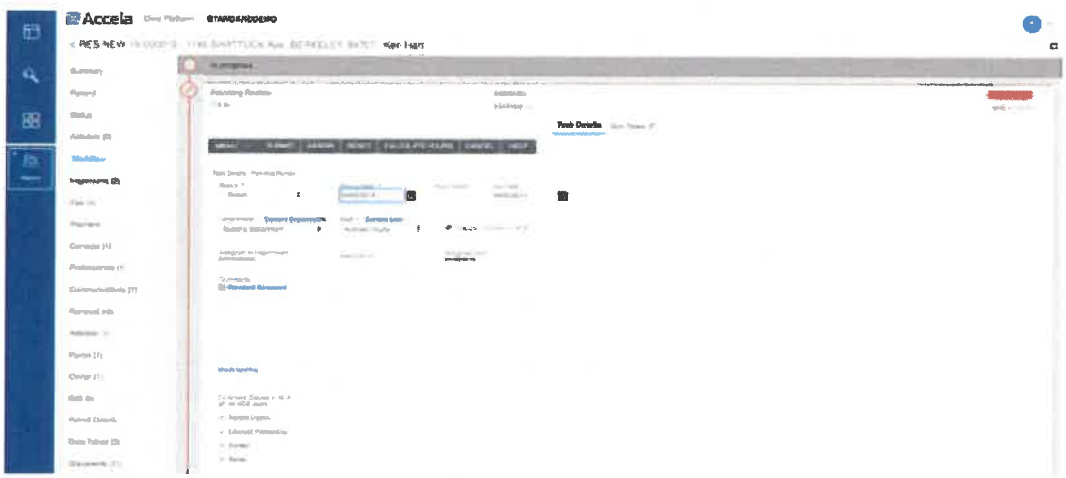
Accela's Workflow Designer can mimic The State's simple or complex workflows across business areas and allows every aspect of each key business process to be configured in our solutions. This tool efficiently guides each process from task to task, from initialization to completion, but it also

- Facilitates key task assignments
- Allows the definition of duration for each of the tasks
- Automatically sets due dates based on task durations
- Task tracking: Who is assigned to handle the task, task status, and location of pertinent data about the completion of the task?

This workflow engine is the universal element in the Accela client space, acting as the eyes and ears to a myriad of public processes in city, county, and state governments. Accela's Workflow Designer has expanded this graphic design tool for workflow configuration to include the following major features:

- **Support administrators to drag and drop widgets onto the canvas to visually build or edit a workflow process.** The widgets may be process start and end points, forks, joins, flow lines, and tasks (including sub-processes).
- **Support administrators to design workflow and processes**, and define tasks in processes, including setting task basics, associating task-specific information groups, setting task status, proximity alert, and e-mail notification.

Each workflow task is represented as a milestone to be done sequentially, concurrently, or ad hoc based on the business requirements of your agency. This includes task-specific status dispositions, custom data collection, time tracking, and workflow metrics management that help ensure you capture the right information at the right time. Workflow automation including generating internal and external communication via email, SMS, and alerts, generating applicable documents/forms, routing work tasks to other stakeholders, and automatically creating related records such as trade permits, licenses, etc. are all managed "under the hood" through Accela's workflow design tool, thus keeping the end-user experience streamlined and efficient.



The Detail Card View allows users to see the detailed step information that is pertinent to a specific workflow task so they can track, update, and move an application forward.

Each set of workflow tasks (*Completed*, *In Progress*, and *Up Next*), can be collapsed to help the user focus on a specific task or set of tasks. The *Completed* and *Up Next* tasks are collapsed by default. Users can quickly expand collapsed task sets and then expand the individual tasks that are most pertinent to their jobs. This puts important information at the user's fingertips without presenting an overly detailed and distracting view of the entire workflow process. Ad Hoc tasks are displayed in the same manner, with *Completed* and *In Progress* tasks grouped so they can be collapsed or expanded.

The key components of the Workflow Designer feature include:

- **Workflow Tasks:** Each workflow process consists of a series of logically ordered, user-defined tasks that comprise a specific business process. The Workflow Designer allows these tasks to be handled one at a time or concurrently. It can change based on each task's status, for example, skipping certain tasks as appropriate, branching and/or looping to other tasks as needed, or repeating tasks when necessary.
- **Task Statuses:** Each task may have a series of Task Statuses that update and direct the task within the Workflow Designer process. These statuses are user-defined and control the various paths the workflow process takes using flow controls. However, because a task is just one component of an application, the task status may be different from its application's status. For example, if there are six tasks required for one application, all six tasks need to be completed before the application status can be "complete." Therefore, it is possible to have the status of one task be "complete" while the application status is still "in process".

- **Application Status:** Task Statuses can drive an overall application status; providing a high-level view of the progress of the workflow process. This is particularly useful in managing process timelines and high-level management reporting.

- **Task-Specific Information:** Task-Specific Information is key data entered during the Workflow Task update process. This component also drives task-specific checklists that are often critical components of workflows. Task-specific information fields can be marked as searchable for easy searches.

Accela's Workflow Designer is a powerful feature that is integrated with an agency's organizational structure. This lets administrators assign each task to an individual that works for the agency. Administrators can add sub-tasks, also known as activities, to each task. Sub-tasks help create a more detailed workflow process or outline the steps involved in each main-level task. Administrators can also associate any type of document with a sub-task. Documents can give further instructions about a sub-task or record the results of the sub-task: for example, users can attach a report of the results of the plan review or upload the actual plans. A workflow process represents all the tasks that an agency is responsible for concerning a certain application type. Users can determine the view, assignment, and search settings for workflow tasks for the My Tasks user screen.

For each task in a workflow process, users can set up a series of appropriate and user-defined task statuses, such as "Active," "In Progress," or "Complete." Task statuses allow users to describe the current situation of a workflow task accurately. As users update workflow tasks, our solutions know which tasks to activate next, depending on how users set up the statuses. In this way, the process moves forward or where needed following user input. When users update a certain task, our solutions will update the task in the workflow for the record. However, because a task is just one component of an application, the task status may be different from its application's status. For example, if there are six tasks required for one application, all six tasks need to be completed before the application status can be "complete." Therefore, it is possible to have the status of one task be "complete" while the application status is still "in process".

Every step in the Workflow Process is recorded in Workflow History so that any user with assigned rights can view the history and assess the progression of the Workflow for any given work order. Task assignments and due dates are automatically viewed through the system's My Task feature. Individual users view their specific assignments and due dates through a Task portal; and supervisors can view assignments and due dates across the entire department.

2.5 API Enabled Integrations with Other State of West Virginia Business Systems

Virtually every Accela implementation has mandated the establishment of interfaces to third party systems. Our teams have implemented numerous custom and standard interfaces with GIS/XAPO integrations, various payment processors, interfaces with 3rd party systems for real-time or scheduled exchange of data and building custom apps for enhancing the user experience. The Accela integration framework allows data to be brought into the system from virtually any external source. While each source/channel may differ in how the data is brought in, the configuration layer of the application allows for the sharing of rules to support using the same process for multiple channels, if desired. Data brought into our solutions will conform to Accela's data model setup.

Accela's APIs support integrations with third-party products. Accela's partner ecosystem provides a variety of standard and custom integrations to common third-party products like Esri, Microsoft, EDMS systems such as Hyland, financial systems such as Oracle, as well as payment processing solutions such as Elavon. Accela API is a REST-based API that empowers agencies, partners, and developers to build civic engagement apps that extend and customize Civic Platform solutions. Using the Accela API, developers can build innovative apps that bring core government functions such as permit applications, licensing, land, and asset management within the citizens' easy reach. These apps create efficiencies for agency staff and increase engagement between citizens and government.

Accela API is a REST-based API that empowers agencies, partners, and developers to build civic engagement apps that extend and customize the Civic Platform. Using the Accela API, developers can build innovative apps that bring core government functions such as permit applications, licensing, land, and asset management within the citizens' easy reach. These apps create efficiencies for agency staff and increase engagement between citizens and their government.

The Construct API enables developers to get data in and out of our solutions via custom websites, web services, or mobile apps without rewriting the data model or business rules. The Construct API standardizes how developers interact with our solutions while providing protection and security. To help developers build their apps, Accela provides Software Development Kits for popular mobile operating systems such as iOS, Android, .NET, Windows, PHP, node.js, and Ruby.

The Accela Civic Platform is an ecosystem whose framework consists of Civic Platform application components and Accela Construct.

We use this interface protocol to support Accela's added capabilities: mobile applications, GIS, and third-party-developed extension applications.

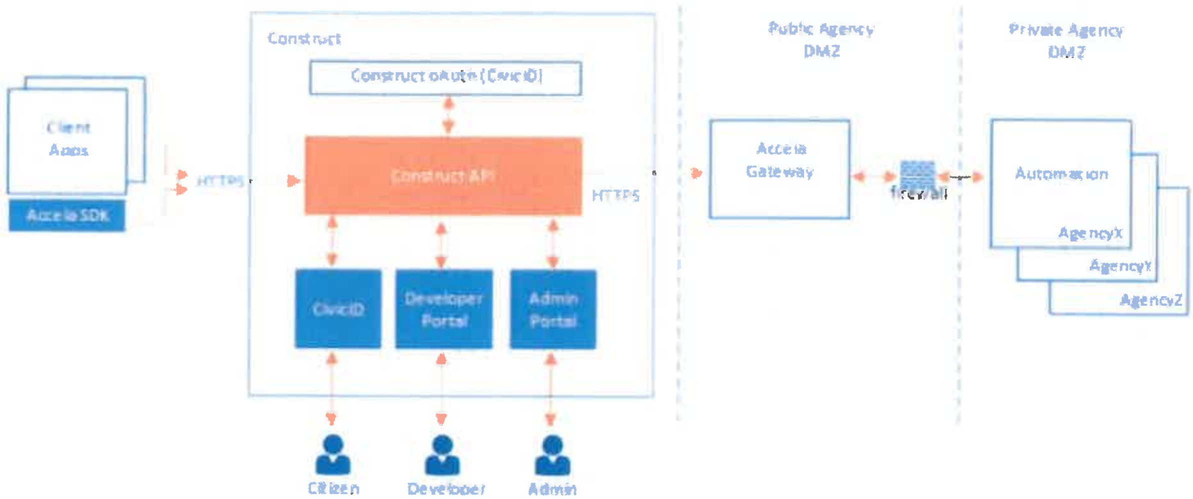
Service	Interface
Development Platform	▪ J2EE ▪ .NET

Service	Interface
Architectural Framework(s)	▪ J2EE
Architectural Pattern(s)	▪ MVC ▪ Factory ▪ Controller ▪ Data Access
Application Communication Technologies	▪ Web Services (e.g., XML, SOAP, WSDL, UDDI, and HTTP) ▪ Public Facing ▪ Internal Facing
System Integration Technologies	▪ XML ▪ JSON ▪ Adaptors ▪ Secure FTP

Our Construct API provides the capability to manage identities for authentication. The Construct API's authentication mechanism ensures that the customer's identity is secure and the customer's data is protected. Developers do not have to build their authentication.

Our solutions allow clients such as mobile and web applications to access Accela data and extend solutions via the Construct API. Clients can directly call the Construct API via HTTP requests or use Accela SDKs to interact with the Construct API in their native environment.

The Construct API authenticates user identity using an OAuth2 process, which is used to generate API access tokens. Our solutions manage secure API traffic between the Construct API and Accela and our solutions through the Accela Gateway. The Gateway receives requests from Construct API calls and asynchronously sends the requests to the appropriate agency and Accela instance, whether the Accela system is SaaS (Accela-hosted) or On-Premise (customer-hosted). The Gateway sends Accela data back to Construct API via HTTPS, and back to the client in an HTTP response body.



The interactions and communication paths between clients and the Construct API and across our solutions.

User portals enable citizens, developers, and administrators to manage their activities with our solutions. A Developer Portal allows civic developers to register new apps and administer existing apps that use the Construct API. The Administrator Portal is used for OpenData administration and management of developers and apps registered on the Developer Portal.

In addition to our Construct API, Accela also provides the following other APIs:

- **Financial web service** –web service providing financial services
- **Asset web service** –web service providing asset services
- **Report web service** –web service allowing a user to run a report in our solutions
- **Generic Query web service** –web service allowing a user to query data from our solutions

Furthermore, our solutions use the following web services to integrate with third-party systems, making use of data or services from third-party systems:

- **E-Payments gateway web service** – perform server-side gateway e-Payments from a third-party payment provider*
- **External APO (XAPO) web service** – retrieve APO data from a third-party system
- **EDMS web service** – upload/retrieve the document to/from a third-party document system

2.6 GIS Integration

Esri GIS integration is critical for agencies to visualize specifics for planning and permitting utilizing maps. It enables agencies to gather, manage, and analyze data, helping users make smarter decisions. Through GIS data, users can gain insight into specific land parcels, kick off the permitting process, see zoning and land use entitlements, and more.

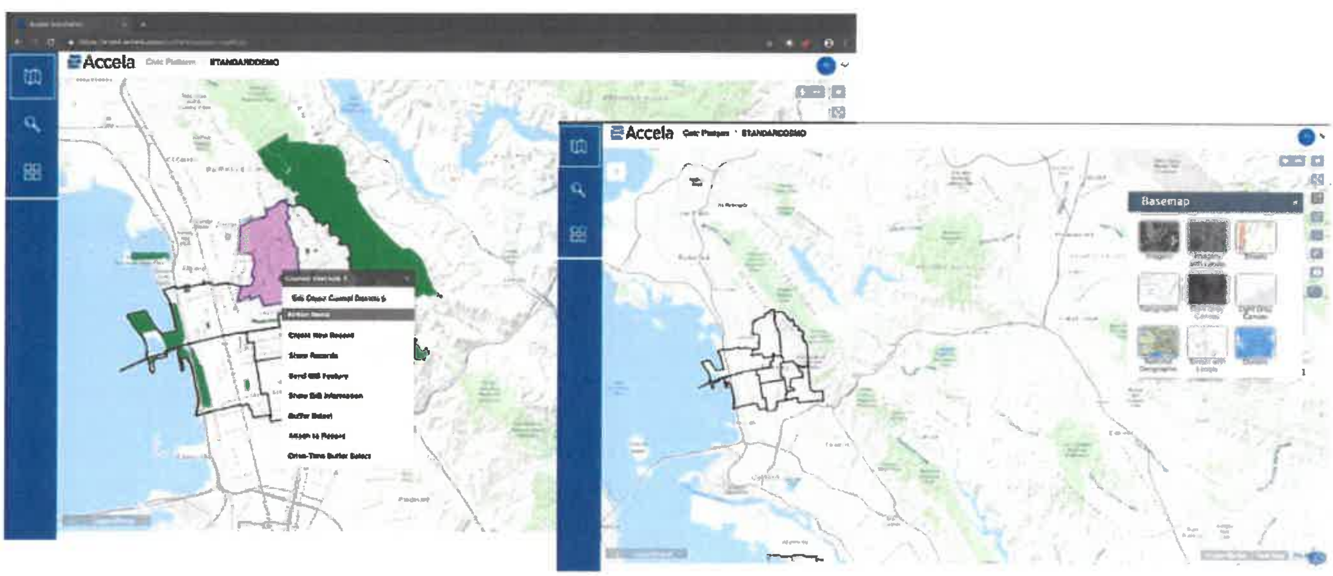
Accela integrates with GIS technology to help users visualize specifics for planning and permitting. *Accela offers GIS mapping in the field via mobile devices and can link back to Esri's back office to supply them with system updates.* The technology integration offers governments a geographic view of all land-use, zoning, and infrastructure information associated with parcels, permits, inspections, and service requests, and works seamlessly with Esri maps, layering the information for increased visibility.

Accela has been an Esri partner since 1992. This has given Accela access to Esri staff and valuable information for creating tight integration with the GIS industry-leading technology. The Accela map component is built using the Esri JavaScript map control and consumes GIS services published from the agency's ArcGIS Server or ArcGIS Online, as well as can consume Open Geospatial Consortium Web Mapping and Web Feature Service map services.

GIS also provides visualization of an agency's government data geographically by plotting locations of activities captured in our solutions on the map. GIS provides an enhanced user experience with:

- Optimal server response times
- Smooth panning
- Context-sensitive commands and menu items
- Drag and drop functionality
- Client-side graphic rendering

Accela's GIS gives users the option to initiate and manage all building and planning activities from a map interface. GIS is a bi-directional interface enabling viewing, interaction, and presentation of both tabular and spatial information. It leverages an agency's GIS database and map services published by one or more ArcGIS Servers. Base maps published by one agency can be combined with map data from another agency to provide a comprehensive view of geographic information.



Share the data in Esri ArcGIS Online

Optional map editing tools empower end users to draw new features using points, lines, or polygons to represent actual geographic elements or assets. Once these new features are created, they can be associated with transactions in the Accela database. GIS supports efficient fieldwork through its routing features. Inspection schedules can be automatically routed or users can choose to optimize inspection schedules based on shortest distance or travel time.

Customers may enhance user views by adding the agency's ArcGIS map layers to the map viewer. Together, these data sources united with Accela transaction data, offer the most comprehensive visual representation of government and location data available. Users can manage, edit, and update data from the map viewer. The map viewer presents reference data and context-based action items for a selected parcel(s) (i.e., create record, show record, create inspection, etc.).

When deployed with Mobile, routing capabilities are available whether connected or disconnected from the network. Routes and driving directions can be saved and printed as needed. Optimized routing can be done one of two ways:

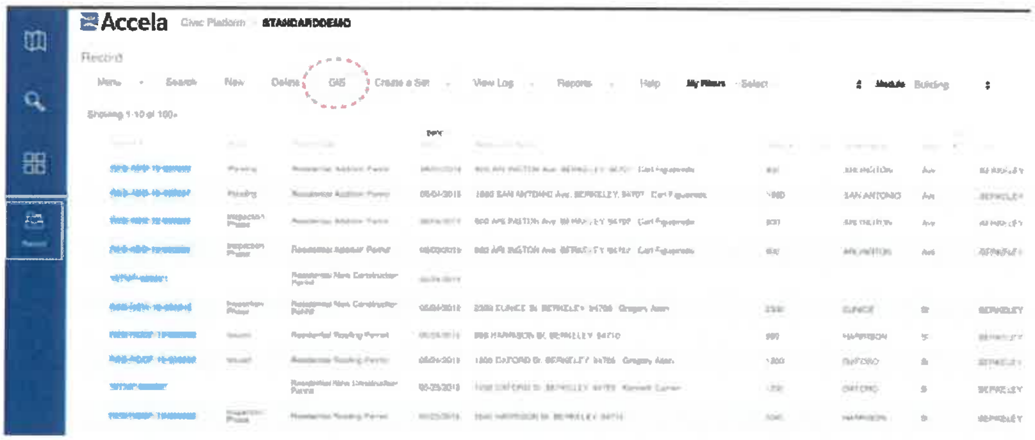
- To use an agency's street file, that agency needs ArcGIS Server Network Extension and a published routing service. The agency typically creates the network via ArcGIS Desktop and the Network Analyst extension.
- The agency may not have a quality street file in an Esri GIS format or does not have the additional Esri software list noted in #1 above.

The following is a list of features/functions that are available out of the box in Accela's GIS solution:

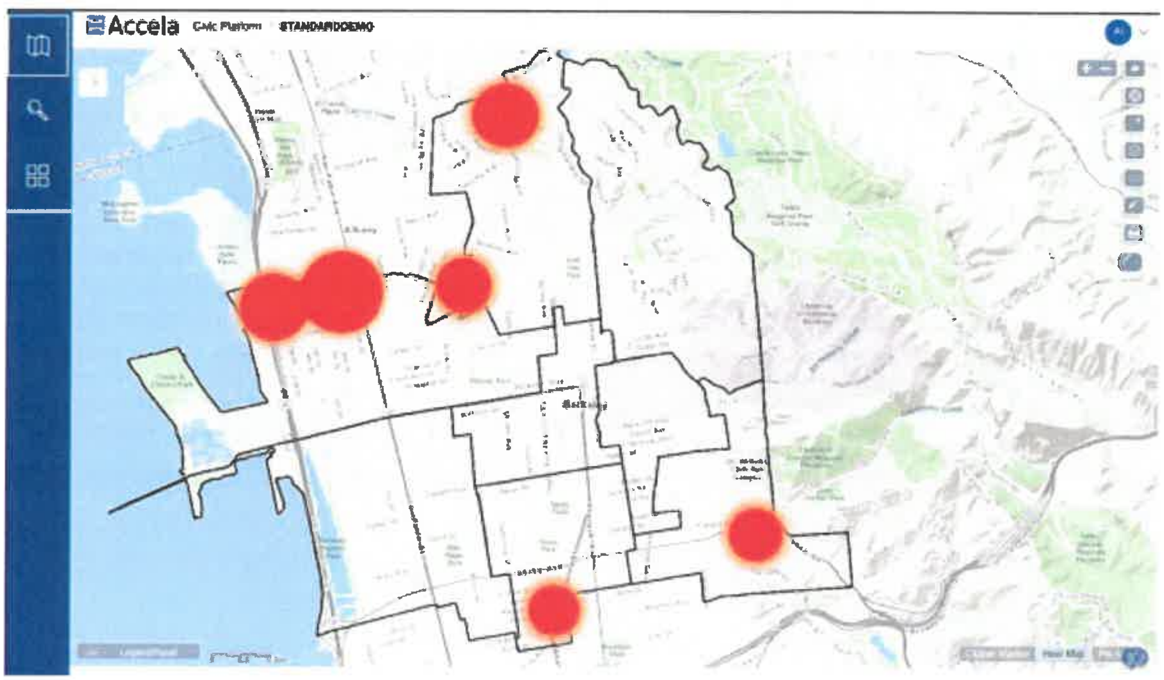
- Plotting event locations (address, parcel, or asset matching)
- Start a new application/transaction from the selected map feature
- Navigation (pan, zoom in/out, zoom to scale/selected/full extent)
- Select (by line, polygon, rectangle)
- Buffer selection
- Attach/associate feature to the transaction record
- Add selected features to a Set in Accela
- Redlining (point, line, polygon, and text box)
- Identify (click on the map and see attributes of features)
- Reverse geocoding for mobile mapping

Heat Maps

An additional GIS analytics tool that is available out-of-the-box within our solutions is the Heat Map view within the JavaScript map viewer. As shown below, results from virtually any search screen in Accela can be plotted out to GIS and then toggled to a Heat Map view that provides a graphical representation of the highest densities of the search results around The State.



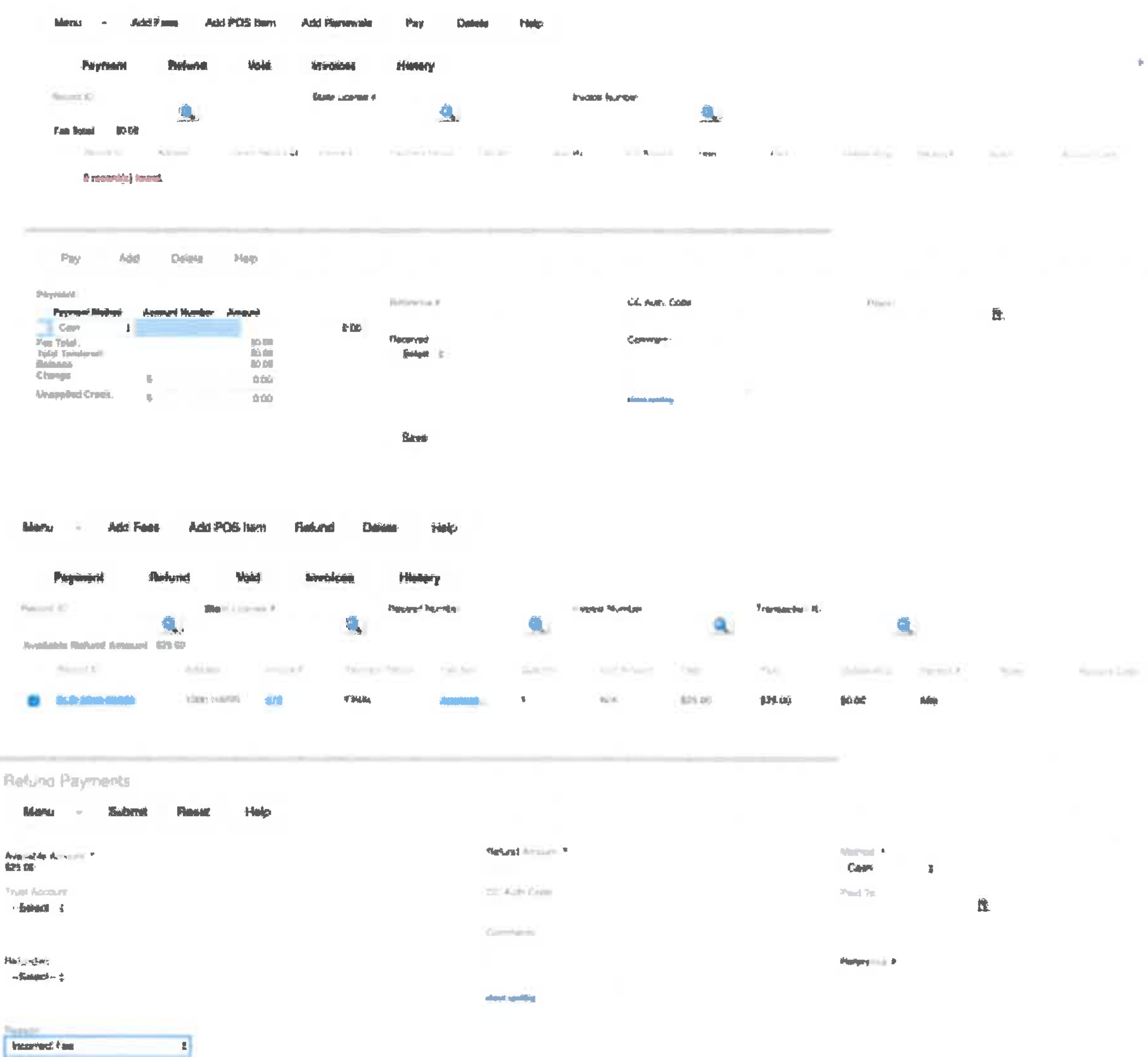
A search results list with the *GIS* button highlighted in red. Clicking this will plot the search results to the GIS map where the user can toggle to the *Heat Map* view as shown below



A Heat Map view displays when the search results are plotted to the map and the user toggles from the default "Pin Map" to the *Heat Map* view (toggles located in the bottom right corner of the map).

2.6 Fee and Cashiering Management

The Accela solution has cashiering tools that allow for easy intake of payments across multiple records and point of sale items. When an applicant is ready to pay for invoiced items in the back office, the cashier can consolidate payments for fee items from different records. For example, a contractor wants to pay the fees for the electrical applications on three different records. This feature allows individuals to pay for fee items using multiple tenders. The solution stores the payment as a transaction in the payment history on each permit record and within the global accounting audit log. In addition, the solution provides refund and void functionality, as seen below.



The Accela solution has cashiering tools that allow for easy intake of payments across multiple records and point of sale items.

Step 2: Payment information

Please select a payment method and then fill in all required information.
The available payment methods are:

- Credit Card
- Bank Account
- Trust Account

Use the dropdown menu to change the payment type.

Payment Options

Amount to be charged: $861.18

- (●) Pay with Credit Card
- ( ) Pay with Trust Account
- ( ) Pay with Bank Account

Credit Card Information:

*Card Type: *Card Number: *Security Code:

--Select--

*Name on Card: * Exp. Date:

01 2018

Credit Card Holder Information:

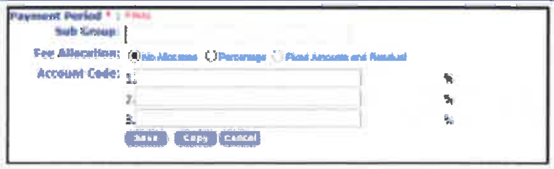
☐ Auto-fill with Dwayne Patterson

Citizen Access provides cashiering functionality, allowing the applicant to pay their fees online via credit/debit card, eCheck/ACH, trust account, or bank account.

Accela's solutions include a robust set of finance and cashiering capabilities the offer a wide range of configurability and flexibility to adapt to the unique needs of The State. The information on the next page describes these elements.

Accela's Cashiering Capabilities

Cashiering Capability	Description
Fee Schedules	▪ Fee schedules are comprised of one-or-more Fee Items and are configured directly within the system's administrative toolset. Fee schedules are versioned and possess effective dates that can define when a schedule goes into and out of effective use within the solution. ▪ New Fee Schedules can be created from existing ones and simply copy down the fees to the new version where they can be modified as needed thus saving time and effort around their initial configuration.
Fee Items	• Each fee item has numerous options of which some include calculation formulas, General Ledger account assignments, and auto-invoicing settings. • Individual fee items can be changed by users with appropriate permissions. • The solution offers the ability to group Fee Items logically within the application for an additional reporting tier. • From an accounting and reporting standpoint, Accela can write to and/or from The State's financial system of record as Fee Items are assessed, invoiced and paid as well as the full range of performed functions including NSF, Void, Refund and Credit. • Users with appropriate permissions can easily configure new fee types.  
Account Codes	The solution supports the ability to define account codes for the purposes of Accounts Receivable, Accounts Payable and General Ledger at the individual Fee Item level (i.e. all assessment of financial obligations) including the ability to define multiple account codes for each if The State is interested in distributing the obligations by percentage or fixed amounts plus residuals. The following is a screen grab of the Fee Item administration screen illustrating the Account Code section.

Cashiering Capability	Description
	
Security Access Roles	• The solution's security matrix is defined using User Roles and supports the association of multiple roles per named user. The following screenshot highlights the security rights capable of being granted at the User Role level in either No Access, Read Only Access or Full Access modes. • In addition to the User Role rights outlined above, the solution also allows for definition of Business Rules that may enforce situation-specific behavior related to fee assessment, invoicing and payment processing through the application.

Cashiering Capability	Description
Payment Methods	• Payment methods may be defined by module and there are no limitations to the number of payment methods configurable within the solution. • Specific payment methods such as eCheck/ACH, Trust Account, Bank Account, and Credit/Debit Card may trigger additional behavior within the solution to capture supporting information such as check number or CVV code.

Cashiering Capability	Description
	• Write-Offs for overpayment and underpayments within a State defined threshold are also supported within the solution where applicable
Generally Accepted Accounting Principles	• All transactions within the solution are PCI-DSS compliant from a software perspective; assuming the State's infrastructure also adheres to PCI-DSS compliance standards. • All cashiering and financial elements of the solution are designed to adhere to the generally accepted accounting principles (GAAP), the standard framework of guidelines for financial accounting.
Cashier and Account Reconciliation	• The solution can track transactions individually by one or more cashiers/cashiering stations. • Cash transactions, as well as those related to other monetary instruments, can be tracked exactly by the solution. • End of day reports can be configured using any one of the supported and seamlessly integrated reporting engines (Crystal Reports, MS Reporting Services) to provide transaction summaries, including those related to type of currency and cashier. • For cash, actual cash collected can be compared to cash transactions completed within the solution for reconciliation and reporting purposes.
Payment Processing	• Partial or complete payments are first, allowed to be completed by only authorized users, and second, subject to the System Audit Trail, tracking exactly who completed the payment, when it was completed, and providing information regarding the payment amount itself. • As with all other types of transactions completed in the system, bond/trust accounting is accommodated and includes information tracking the payee and all cash bond refunds. • Nearly every client who has implemented Accela solutions is conducting financial transactions using credit and debit cards as well as account transfers. Using an agency's merchant account or employing Accela's merchant services, the solution can conduct all financial transactions safely, securely, and in accordance with PCI standards. • The system can accept one form of payment for one record, multiple forms of payment for one record, or multiple forms of payment for multiple records. • Receipts can be configured to be automatically printed or made available for printing with any and all information the State desires to include on the receipt itself.
Refunds, Voids and NSF	• Users with the appropriate User Role rights may be able to processes refunds, voids and NSF transactions through the back-office solution. • Voids: Can be restricted to limited to only occur within the same calendar or financial day that the original transaction took place thus allowing for the payment to be reversed prior to its entry into the General Ledger and/or The State's system of record for the first time.

Cashiering Capability	Description
	• Refunds: Are typically permitted after the original transaction has already been written to the State's financial system (i.e. a subsequent calendar or financial day since the original transaction) and writes a reversing GL Debit and Credit Entry to off-set the original payment. If The State is employing an Accounts Receivable model as well, then the applicable AR Debit and Credit entries will also be produced. • Insufficient Funds (NSFs): These are treated almost identically to the Refunds process but can include penalties and interest surround the bounced check. • Management approval refunds, voids and NSF processes can be setup (configured) in the solution to enable specific management staff to approve all checks and voids of financial information. All modifications to saved transactional information will be subject to the system audit trail provisions.
Fee Waivers and Exemptions	If permitted by The State' business rules, configuration can account for allowing and recording fee waivers in lieu of paying for a given fee. The solution also allows for the definition of fee variables and business rules that can factor in discounts, fee waivers, etc. related to data attributes associated to any given application.

Invoicing and Accounts Receivable

Governed by business rules, invoices represent report outputs and may be generated by authorized users from the reporting engines based on fees, staff time expended on workflow tasks, and other factors from data within the system. Invoices can also include logos, seals and other information to fulfill an agency's needs.

Accela's solutions support the ability to define account codes for the purposes of Accounts Receivable, Accounts Payable and General Ledger at the individual Fee Item level (i.e. all assessment of financial obligations) including the ability to define multiple account codes for each in the event that The State is interested in distributing the obligations by percentage or fixed amounts plus residuals.

Fee Item administration screen illustrating the Account Code section

Furthermore, our solutions offer the ability to group Fee Items logically within the application for an additional reporting tier. From an accounting and reporting standpoint, Accela can write to and/or from The State's financial system of record as Fee Items are assessed, invoiced and paid as well as the full range of performed functions including NSF, Void, Refund and Credit. The above screenshot also illustrates the Payment Period and Sub Group classifications.

Accela's solutions also offer State of West Virginia personnel and its customers the ability to create and maintain Trust/Deposit Accounts that allow money to be held for future use in paying down financial obligations and housing Credit, Refund and Fund Transfer monies for future allocation to financial obligations or reimbursement to the account holder. Similar accounting principles as described above are applied to these transactions. Trust/Deposit Accounts can be defined at the Customer (i.e. Owner, Applicant, etc.), Business (i.e. Contractor) and Record (i.e. Permit, Project, etc.) levels and controlled with applicable, State of West Virginia defined business rules.

Point-of-Sale Transactions

Payment Processing

Accela has hundreds of client sites, virtually everyone where our solutions have been implemented, that is conducting financial transactions using credit and debit cards as well as account transfers. Using an agency's merchant account or employing Accela's merchant services, the solution can conduct all financial transactions safely, securely, and in accordance with PCI standards.

Partial or complete payments are first, allowed to be completed by only authorized users, and second, subject to the System Audit Trail, tracking exactly who completed the payment, when it was completed, and providing information regarding the payment amount itself.

As with all other types of transactions completed in the system, bond/trust accounting is accommodated and includes information tracking the payee and all cash bond refunds. The system can accept one form of payment for one record, multiple forms of payment for one record, or multiple forms of payment for multiple records. Receipts can be configured to be automatically printed or made available for printing with any and all information The State of West Virginia desires to include on the receipt itself.

Refunds, Voids and NSF

Those users with the appropriate User Role rights may be able to processes refunds, voids and NSF transactions through the back-office solution.

- **Voids:** Can be restricted to limited to only occur within the same calendar or financial day that the original transaction took place thus allowing for the payment to be reversed prior to its entry into the General Ledger and/or The State's financial system of record for the first time.
- **Refunds:** Are typically permitted after the original transaction has already been written to The State's financial system of record (i.e. a subsequent calendar or financial day since the original transaction) and writes a reversing GL Debit and Credit Entry to off-set the original payment. If The

State is employing an Accounts Receivable model as well, then the applicable AR Debit and Credit entries will also be produced.

- **Insufficient Funds (NSFs):** These are treated almost identically to the Refunds process but can include penalties and interest surround the bounced check.

Management approval refunds, voids and NSF processes can be setup (configured) in the solution to enable specific management staff to approve all checks and voids of financial information. All modifications to saved transactional information will be subject to the system audit trail provisions.

Financial Reporting

Since the system provides complete functionality to configure, calculate and assess fees and other charges applicable to permits and other case type, data from transactions, deposits, fees due, trust accounts, and other elements of this component of our solutions may be compiled into reports of any type by authorized users. Reports of this type are best generated by employing a supported, seamlessly integrated reporting engine – Crystal Reports, MS Reporting Services and Oracle Reports[A2]. For reports of a simpler nature, the native Ad Hoc Report Writer may be used. All reports may be saved for later reuse by its author or others, or may be retuned to meet more specific needs in the future. Should there exist an interface to an agency financial system, reports would likewise be able to be generated using data from this interfaced third party system.

Accela includes over a dozen financial-specific reports out of the box including:

- Balance Due Report
- Outstanding Balances
- Outstanding Fees by Module
- Payments By Cashier and Payment Method
- Payments by Module
- Payments Made By Date Range
- Revenue By Account Code
- Revenue By Account Code w Project Name
- Revenue By Record Type

Financial Security Controls to ensure GAAP Compliance

All transactions within the solution are PCI-DSS compliant from a software perspective; assuming The State's infrastructure also adheres to PCI-DSS compliance standards. All cashiering and financial elements of our solutions are designed to adhere to the generally accepted accounting principles (GAAP), the standard framework of guidelines for financial accounting.

Management approval refunds, voids and NSF processes can be setup (configured) in the solution to enable specific management staff to approve all checks and voids of financial information. All modifications to saved transactional information will be subject to the system audit trail provisions.

Accela's solutions include out-of-the-box financial reports as well as the tools necessary for The State to create and deploy more specific financial reports as needed. Partial or complete payments are first, allowed to be completed by only authorized users, and second, subject to the System Audit Trail, tracking exactly who completed the payment, when it was completed, and providing information regarding the payment amount itself.

Accela's solutions support an incredibly granular level of role-based user rights blended with configurable business rules that can adapt to The State's ever-changing demands.

Manage and Track Impact Fees, Credits, and Payments

Impact Fee management is a common user case found within many Accela implementations and is typically managed with a combination of GIS-based business rules for assessing impact fees, property-level (parcel, address or GIS feature) data fields that house information related to impact fee credits and record-level impact fee assessment and payment information; all of which can be configured in such a way that reporting and referencing these three elements is a seamless process.

- **Impact Fee Assessment & Payment:** This is typically handled through the configuration of GIS, Property and Condition-based business rules that determine the scope of work for a given project, the property(ies) involved with it and the surrounding attributes (i.e. infrastructure, schools, parks, etc.) to calculate and assess all applicable Impact Fees for development. These Fees can be assessed every time in full, up to an assessment cap, based on the scope of the project and much more. The fees can be required for payment at applicable project milestones and can be paid through all the standard payment methods supported through the solution.
- **Impact Credits:** These can be tracked against people, properties and projects and applied only towards Impact Fees automatically. The calculation of Impact Fee Credits (for example the demolition of an existing two bedroom SFR home) can be automated and tracked at any or all the levels mentioned earlier. Impact Fee Credits can also be distributed (i.e. when a parcel is split) if The State's business rules so dictate.

Tracking Impact Fee Data Spatially

It is common that GIS plays a large role in determining applicable Impact Fee(s) within a given spatial area. This can be managed as an attribute of a point, line or polygon feature within The State's GIS (i.e. a Traffic Impact layer) that can be passed into an application within Accela and used as an input parameter for Impact Fee calculation. Furthermore, Accela can store and manage Impact Fee Credits, Payment History and much more and use that information in the determination of applicable Impact Fee calculation for peoples, properties and projects throughout the solution.

Examples of Impact Fee Implementations

Accela has over 38 years' experience in deploying software solutions designed to meet the needs and requirements of municipal governments around permitting for Planning and Building departments. It is very common that our customers leverage Impact Fee's on projects and permits, and our product is designed to handle this efficiently and easy. A recent example of an Accela project with impact fees are the City and County of San Francisco, CA.

- For San Francisco, the City imposes development impact fees on development projects to mitigate the impacts caused by new development on public services, infrastructure and facilities. These may apply to certain neighborhoods or geographic areas as well as to specific development projects. The City leverages Accela's solutions integration with GIS to determine if the project's location requires an impact fee. In addition, they have the ability to flag large development projects in our solutions for impact fees thereby auto associated a percentage fee to the project.

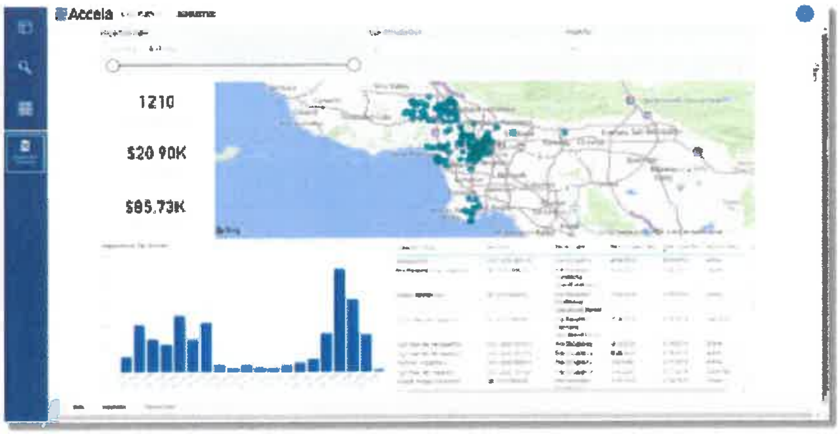
2.7 Fee and Cashiering Management

Accela understands reporting can be one of the most difficult, time-consuming functions, while critical and necessary for measuring, scheduling, and determining business decisions. For this reason, Accela prides itself on bringing you modern, intuitive tools to make sense of your data and empower stakeholders to make more informed, timely, and strategic business decisions. Accela's solutions include 100+ standard out-of-the-box reports across our solutions. The reports are created in a fashion that is dynamic and adjusts to the data that is being fed to the report.

Leveraging Power BI technology, included in your seat license cost, Accela provides an embedded data visualization tool known as Accela Insights. Accela Insights allows end-users to create modern and interactive dashboards. This tool provides multiple views into your Accela data through visualizations representing different information and insights. It does this with an interface simple enough for end-users to create their dashboards while accessing their data through business terms they are familiar with and understand.

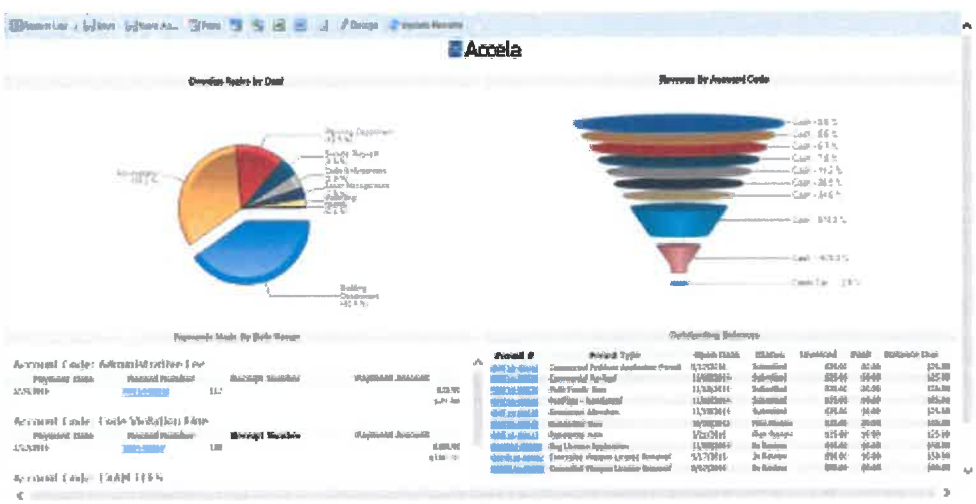
Accela Insights allows stakeholders to consume the information that matters the most, while also having the chance to interact and drill into more information in a self-sufficient experience. It empowers agencies to:

- Provide operational dashboards to track daily operations and provide a comprehensive snapshot of performance, analytical and strategic dashboards.
- Provide analytical dashboards to use data from the past to identify trends that can influence future decision-making.
- Provide strategic dashboards to track performance concerning your key performance indicators to better align actions with strategy.
- Provide a single source of truth for tracking department and organization-wide metrics.
- Empower inspection managers to understand team performance and key metrics with more ease.
- Enable inspectors to see and track their inspection activities and optimize routes for upcoming tasks.



Example dashboard leveraging Accela Insights

Accela's reporting and analytics offerings even go beyond dashboarding with our Ad hoc Report Writer, which provides an easy point-and-click user interface and user-friendly views of our solutions data, offering State of West Virginia staff the ability to design, deploy and manage its reports and documents (i.e., form letters) **without requiring any third-party reporting tools**. Due to its ease of use, report writers do not need specialized report-writing skills or in-depth knowledge of our solution's data schema. A basic tabular report can be written in less than 15 minutes.



Accela's Ad-Hoc Reporting Tool

Reports may be immediately published in our solutions without the assistance of the IT team or administrative staff. Tabular reports automatically provide hyperlinks that allow users to launch and view related Record data in our solutions from within a report. In addition to creating tabular reports, users may also create formatted forms and documents such as contracts, permits, rental agreements, etc. Comprehensive administrative functions are available for these reports, forms, and documents, such as controlling access to creating/running reports, controlling access to data views, managing report menu visibility, automated generation of reports, automated emailing of reports, automated saving of reports to a document management system, etc.

Reports can be generated in multiple formats depending on the need including Hypertext Markup Language (.html), Adobe Acrobat Portable Document Format (.pdf), Microsoft Word (.doc), Rich Text Format (.rtf), delimited text by tab or comma, Microsoft Excel Spreadsheet format (.xls), and XML. Reporting tools provide services to format, spell check, and design documents from simple to detailed designs.

In addition to Accela's built-in Ad Hoc Report Writer tool, our solutions also support reports developed in the major report authoring tools on the market including MS SQL Server Reporting Services and Crystal Reports. Accela centralizes your reporting experience for all your reporting needs within the Civic Platform's Report Manager. By using this single-source platform, users with access to configure and deploy reports can secure reports to only the intended user groups, attach them to workflows, deploy them to citizen access, and many other features.

Users can create, save, organize, and maintain an unlimited number of reports from the Report Manager. Report parameters can be established, permissions assigned, and reports can be attached to screens and associated with workflow tasks (for example, "print permit" for a specific record). Report Manager manages the configuration and printing of all reports, including permits, documents, statistics, analytics, and form letters. Hard copy permits may be printed manually, as part of a workflow task, or as part of a batch process. In addition to Accela's robust reporting offerings, built-in functionality allows the following:

- **CSV Export** – End users can export the contents of any List screen directly to an Excel™ spreadsheet for reporting and analysis activities.

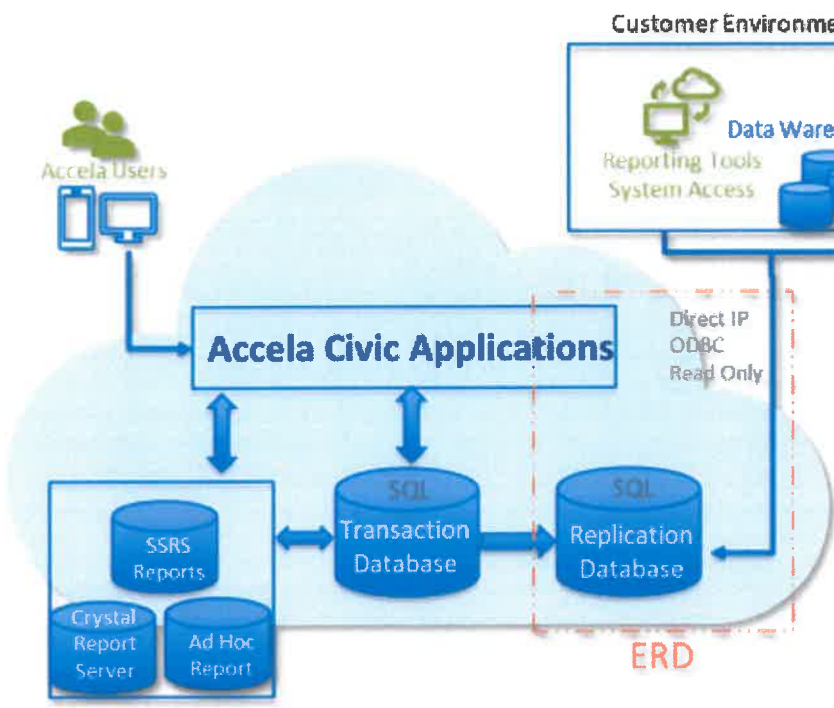
- **Filters and Global Searches** – Filters and Global Searches let end users see data they need to see, in the way they want to see it. This allows end-users to do their jobs more effectively. Administrators configure role-based Filters, thus allowing end-users to see only authorized data. Global Searches are dynamic queries that either administrators or end users can configure and save. For example, a call center agent may set up a Global Search for an Electrical Plan Check due within the next ten days.

Additionally, our Report Manager deploys Microsoft Word documents for mail-merge reporting against data within Accela. These reports can be deployed throughout the application seamlessly. They do not require the deployment of any additional software or services onto client/end-user machines to run the reports from within the system.

Accela's reporting and analytics solutions also offer the ability to deploy reports virtually anywhere within the system, and make them available for execution manually, automatically, or only when specific milestones have been met. The State is also able to restrict who can execute reports based on role level security and/or application status.

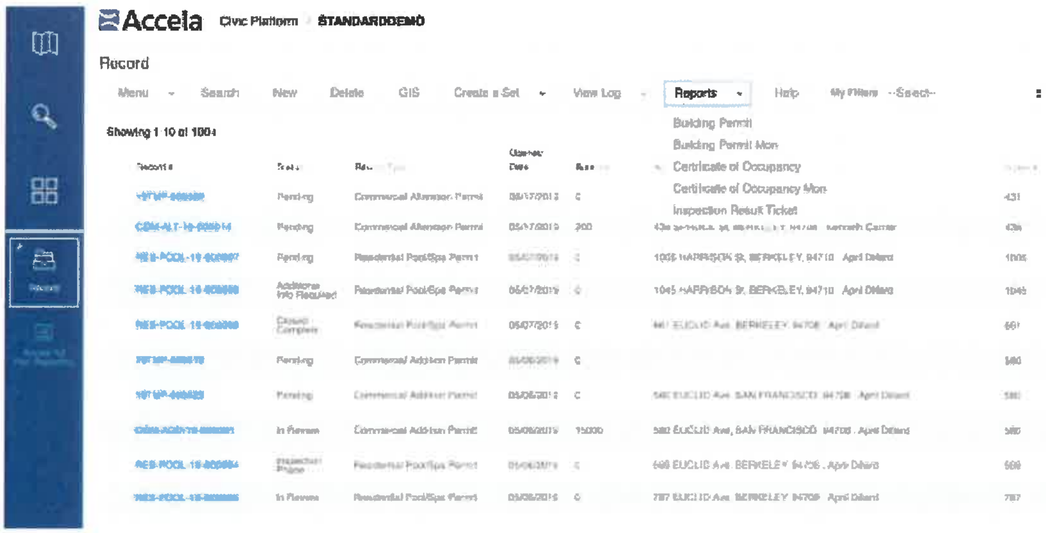
Empower End Users to Improve Financial, Operational, and Strategic Outcomes

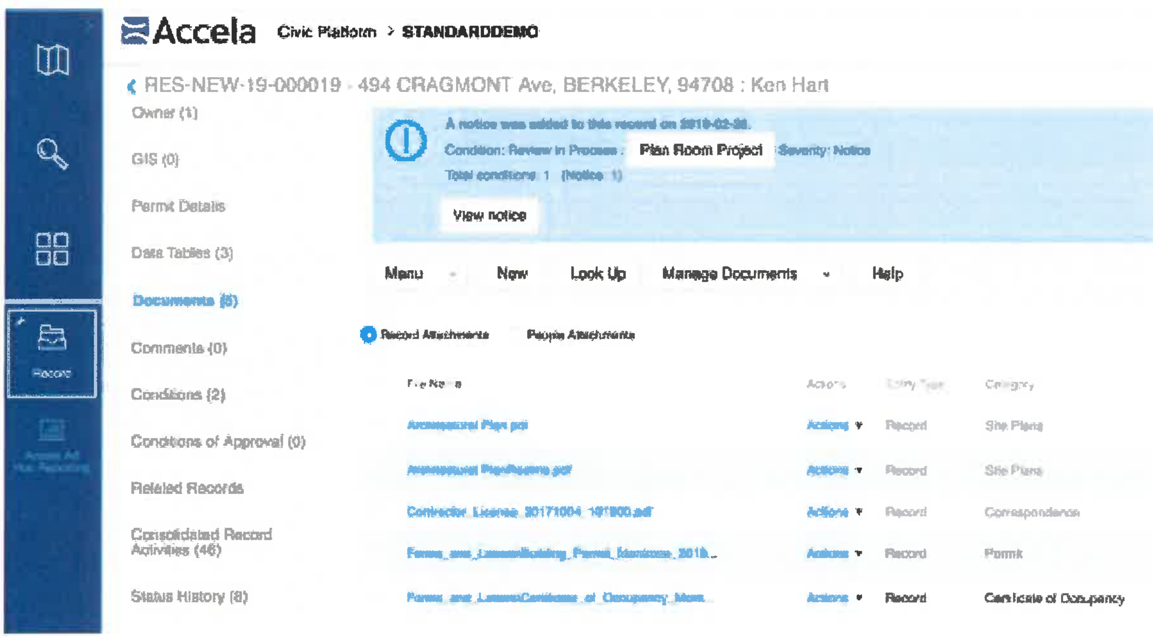
Accela is aware of our SaaS customers' desire to have direct access to their raw Accela data to write live SQL queries, connect to third-party reporting tools or simply stand up the data locally. For this reason, we provide you with direct, secure cloud access to your Accela data as if it were a local resource. With Accela's Enhanced Reporting Database (ERD), you can connect your raw Accela data directly to tools such as Azure Data Studio, SQL Server Management Studio, Visual Studio, Microsoft Report Builder, Power BI, Tableau, Cognos, ESRI, and many more. ERD access also empowers you to merge your Accela data with other departmental or organization-wide data such as a data warehouse. This optional service replicates the Accela transaction database while offering near real-time syncing and direct access for agencies through an ODBC connector, database authentication, and a whitelisted IP address.



Agencies can leverage ERD to build Power BI reports and bring those reports back into the Accela solution

Agencies that already have an existing Power BI Premium license can leverage our Power BI Premium connector that is included with ERD. The Power BI connector allows you to render Power BI reports inside the Accela solution to empower end-users with data visualizations at their fingertips or even deploy dashboards directly to citizens to enhance building trust and transparency between your data. End users can also use Accela permissions and the existing Report Manager framework to centralize the report experience. This capability allows agencies to combine external data with Accela such as financial or other departments that do not integrate with Accela.





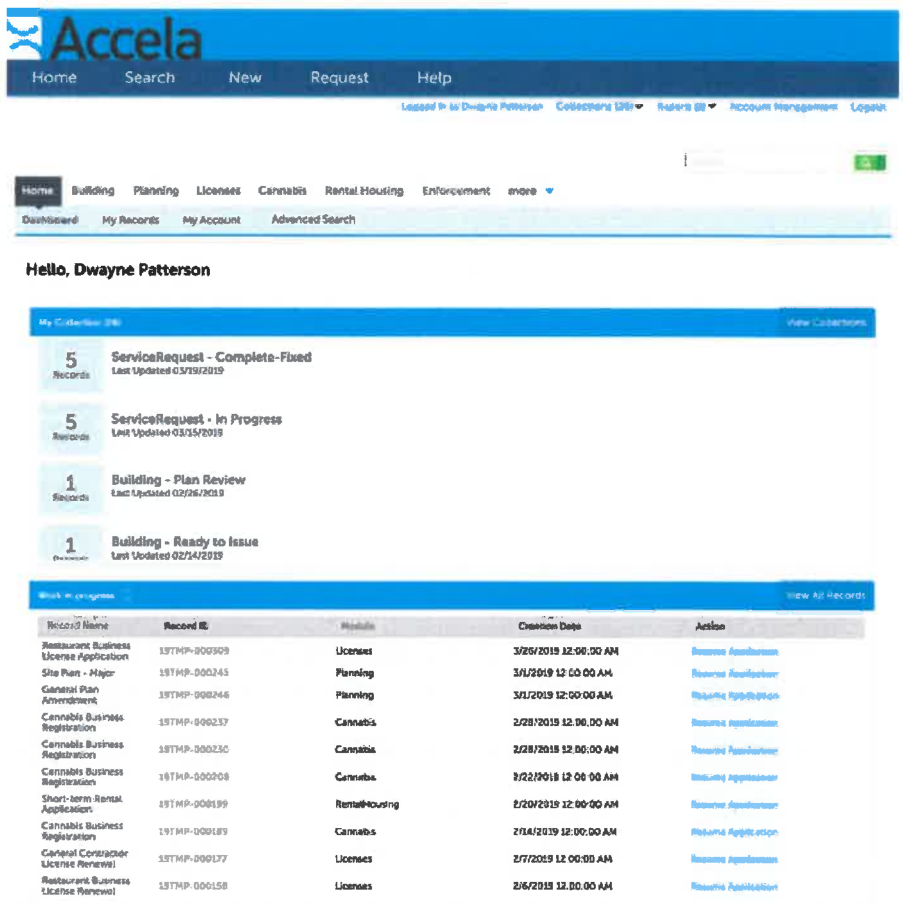
Examples of Reports deployed within a Record List, Permit Form and Permit Documents List

To foster sharing of best practices across to all its customers, Accela also provides a site for sharing ideas, configurations, and suggestions for enhancements, reports, and much more in Accela's Success Community. This site provides a benefit to our customers to share reports as a library of documents using best practices across the country.

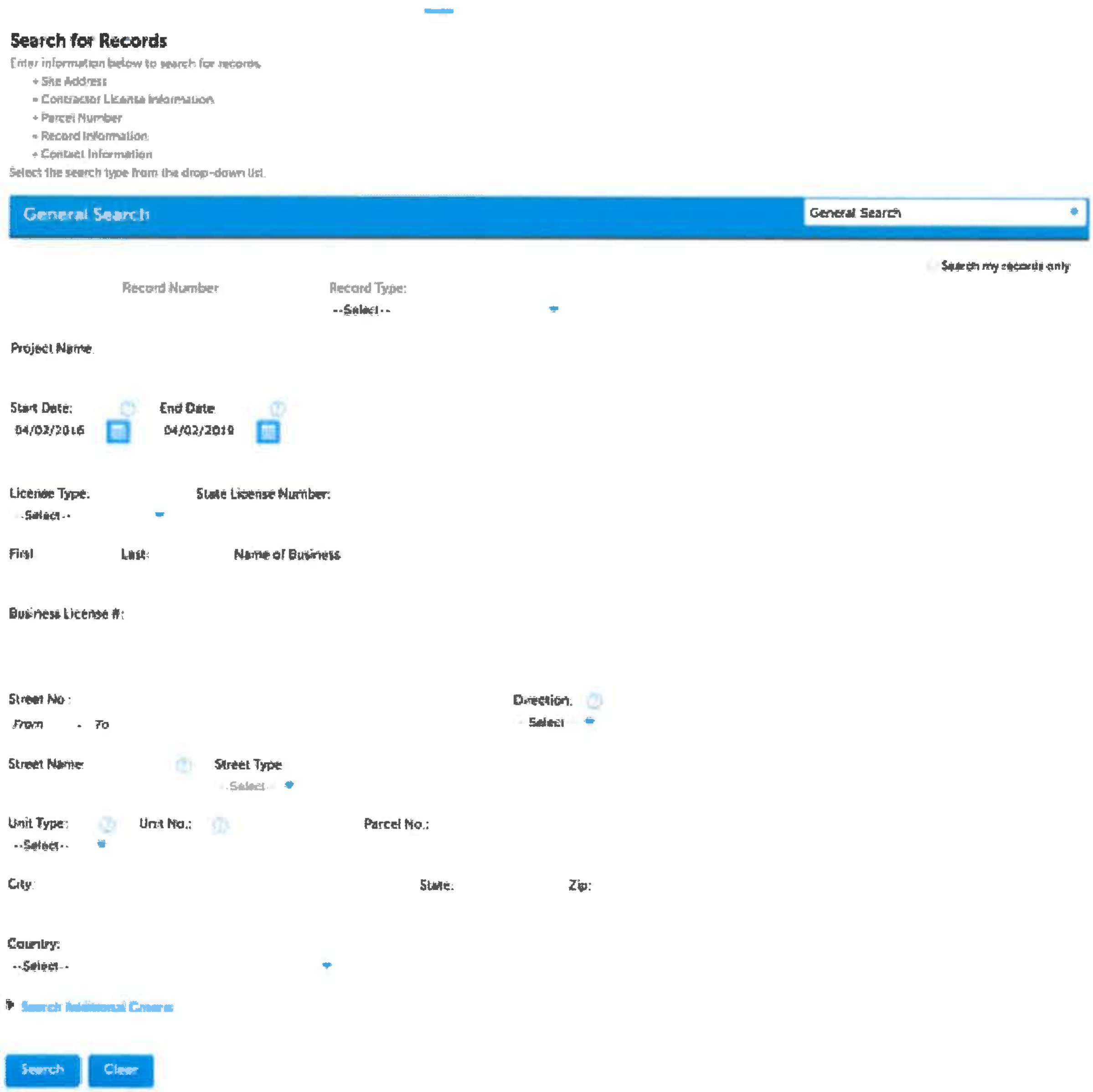
2.8 Web Portal for Application Submissions and Inquiries

Citizen engagement and meeting public expectations is a challenge state and local government face today. Providing online services and allowing the public to self-service reduces walk-ins and phone calls, increases agency staff productivity, and saves the overall cost of service delivery.

Elevating citizen service delivery through a self-service web portal, Citizen Access extends government services to the public 24 hours a day from the convenience of their home, office, or job site on any device they prefer. This allows agencies to engage and connect with the public in the way the public expects and needs. It provides all services online, including initial application, fee calculations, renewals, and real-time status updates, to reduce the need for citizens to call or travel into offices and wait in queues to submit paperwork or check progress.



Citizen Access Dashboard



License Records in Citizen Access

Providing quick turnarounds for applications, proposals, plan reviews, approvals, and building inspections can help foster economic growth and development within a community. However, government is often viewed as a bottleneck in permitting and plan review. Paper-based processes and 1st-gen technology drain agencies of valuable time and resources. Fortunately, Accela's solutions include tools to cut planning and building processes by at least 50 percent. These solutions address critical government challenges.

- **Improved Developer Productivity** — Getting permits faster means project owners accomplish more while saving time and money in the process. They can schedule jobs more effectively and do a better job keeping projects on schedule and budget.

- **Increased Transparency** – Accela's solutions provide total visibility throughout the planning and permitting processes for agency staff and project owners alike. Those requesting services can easily see status updates and office staff can quickly identify where a request is to ensure they move through the process quickly and efficiently.
- **Improved Resident Satisfaction** — Accela makes it easier for developers and builders to do business with the government, which improves customer satisfaction. The public appreciates the convenience of 24/7 access. With the Accela online portal, applicants can initiate an application, check the status of an existing application, renew a license, make a service request or upload supplementary documentation during the review process.
- **Greater Economic Growth** — Accela reduces much of the manual and labor-intensive work of enforcing and regulating local codes and ordinances. The solutions speed processing times for faster development of growing communities.

Public users can take advantage of the following capabilities:

- **Online Public Portal**– Easily upload permit applications and documentation, make payments, check for status updates, and schedule inspections from a desktop or mobile device 24/7 for better project management. Enable citizens to conduct zoning research, submit proposals, verify status updates and pay fees from the convenience of a home, office, or job site to reduce in-person visits and phone inquiries.
- **Electronic Plan Review** - Digitally engage with builders on plan reviews. Agencies can easily upload documents, comment and markup plans for revisions and submit approvals. Builders can then submit changes electronically. Mark up, comment, review, and approve plans simultaneously leveraging systems like Digital Plan Room, Adobe Acrobat, e-PlanReview, DigiPlan, ProjectDox, BlueBeam, and more to perform parallel plan reviews with version control.
- **Application Status Review** – Applicants can search for any current or pending permits and determine the status of any submitted permits, complaints, or other case types 24/7, eliminating calls to the office; the solution automatically e-mails applicants of deficiencies or failures so that action can be taken.
- **Conditional Documentation Request.** - Agencies can require documentation during the application process based on the application type or response.
- **Trade License Verification** – The public has access to an online lookup tool to verify a business, or individual holds an active license.
- **Complaint Submittal** – Concerned residents can file an online complaint for nuisance or potentially illegal activity like underage sales, working without a license, or other concerns.
- **Public search** – allows search of public data that can be downloaded as a CSV, Excel, or PDF file.
- **System Notifications** - Pre-defined email notifications can be sent to an applicant (and other recipients) to communicate missing information, application status, and other critical updates.
- **GIS Queries with Map Viewer** – GIS integration provides intuitive visualizations to access land parcel permits, code, and zoning details.
- **Search for Public Documents for Geographic Location** – allows the public to view public documents by selecting a location on a map.

- **Collections –** allows users to organize their licenses and permits by project or business making it easy to track status, fees owed, upcoming inspection, etc. For example, a business owner with multiple locations can organize licenses/permits by location. Hospitals can track the license status of physicians, nurses, etc.
- **Provider Searches** – finds approved providers for continuing education or education requirement fulfillment.
- **Continuing Education searches and submittal** – requirements for continuing education throughout the year for any license requirement.
- **Inspection Request/scheduling** – developers can request, or schedule required inspections online. Options include Request Only, Request Same Day/Next Day, and Request for a specific date/time or time window.
- **Reports & Public Records requests**– provides online reports, documentation, written instructions, agendas, etc. for registered users. Public records can be available for self-service or requested individually.
- **Online Payments & Shopping Cart –** allows users to pay for 1 or many licenses and permits with a single payment by placing in a "Shopping Cart". Payment methods accepted: credit card, e-check, bank account, and **trust account. Full or *Partial payments or deferred payments are allowed based on the agency's rules.

**Paying partial fees allows multiple citizens the ability to make online payments to a single invoice by choosing which fee items to pay. This also allows a citizen to pay some fees of an invoice immediately to avoid fines if s/he cannot physically go to the agency or mail a physical check.*

**An individual or business may establish a financial account with the Agency where they can debit funds for use when applying for licenses/permits applications, inspections, etc. An individual or business may periodically add funds to this account online, over the phone, or in the agency office.

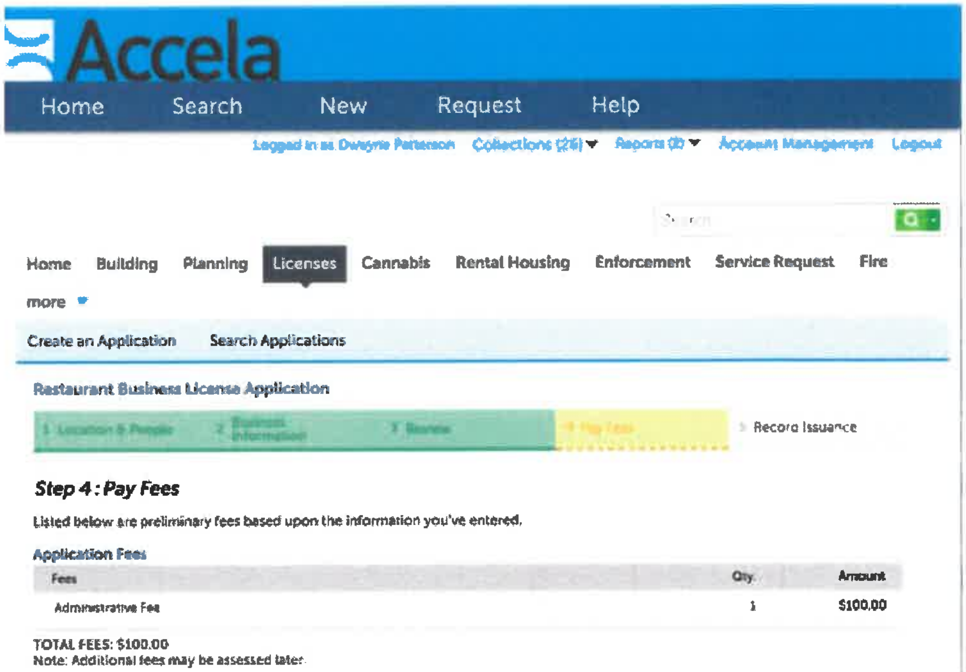
Fee Estimates – allows the public to estimate the cost of a permit or license before applying.

Third-Party Wizard – support integration to third party wizard, chatbots, and virtual assistant products

Branding - customizable header/footer, navigation, home/welcome page, and branding such as logo, fonts, and colors

Announcements – Generate timely announcements for the public.

Applicants can start, save and return, cancel or print their applications at any time using Citizen Access. The agency can designate what information is required for each license type – addresses, associated contacts to the application, education, work history, exam information, or any other data specific to the license type.



License Application Process in Citizen Access

Documents can be uploaded throughout the application process to support the application. This promotes a "paperless" office and electronic flow of information for the approving agency.

Citizen Access is available in English (U.S. and Australia), Spanish, French, Arabic, Chinese, Portuguese, and Vietnamese language packs. Additionally, we developed the solution so that all financial transactions are PCI DSS compliant when using Accela's standard payment adapter and preferred payment processors.

Citizen Access is mobile responsive and can be used on any device of their choice. It is Section 508c and WCAG 2.1 AA compliant. VPAT/Conformance guide can be provided by request.

Citizen Access allows unlimited public users. Agencies decide what roles are applicable to turn on, from Read Only, Anonymous, to Registered User types all have unlimited access to an agency's portal and to the data the agency defines for each role.

Citizen Access integrates with an agency's IDP providing Single Sign On (SSO) for residents.

Citizen Access comes with pre-configured permit types to reduce the time to implement and get your system up and running.

2.9 Accela Mobile

Accela offers mobile capabilities for iOS, Windows, and Android-based mobile devices to bring processing to the field through our cloud-based solutions. With Accela Mobile, The State field personnel perform inspections and investigations using their mobile device. This includes:

- Resulting inspections
- Capturing evidence by attaching photos and videos

- Inserting comments using comment controls that allow ad hoc, as well as standard, favorite, and recent comments
- Using extensive checklist functionality to add comments or documents, fill out custom fields or tables, and score and result inspections
- Creating, rescheduling, and reassigning inspections
- Creating records to log new violations and other violations
- Viewing and updating record and inspection conditions
- Viewing jobs on a map and navigating to a job location
- Communicating with record contacts via email, phone, and text and the ability to edit contact information or add new contacts

Job List

The job list displays inspections and records based on data filters that can be customized to show the user what is most relevant based on the needs of their role. Users can drill into specific items from the job list to view details and make updates. Items in the job list can be ordered based on various parameters or manually set in the desired order by the user.

- Job lists can be configurable for the solution, department, user group, or user.
- Allow users to quickly filter jobs by many different types of criteria, including inspections for the week, annual inspections coming up, today's complaints, or by status or severity.
- Users can switch between filters throughout the day as their needs change. For instance, if one inspector finishes assigned work for the day, he or she can switch filters and help other team members finish their inspections.

Inspections

Accela Mobile lets you complete inspections on your device. Building, fire, health, and code enforcement inspections can be scheduled, and rescheduled, resulted from Accela Mobile. Checklists can be used to allow the user to perform a step-by-step assessment of the codes and regulations established by government agencies. Inspections can be accessed from the Job List, as well as from search results or from the record or permit with which the inspection is associated.

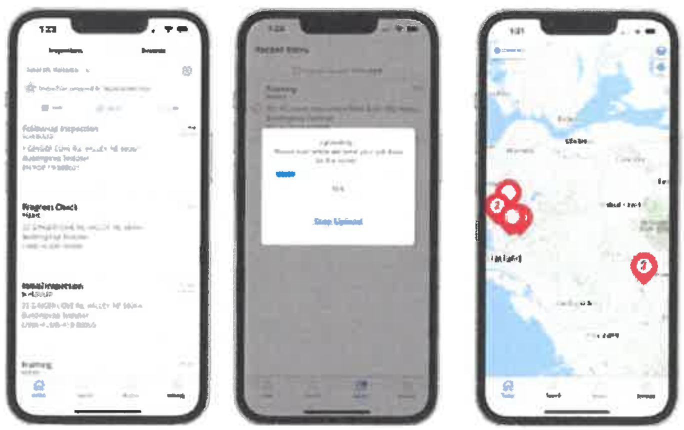
Work Offline

Accela Mobile lets you work with records and inspections in offline mode, allowing you to download job lists, records, documents, contacts, forms, tables, and workflows to your device for use offline in the field. If a data connection is not available when updating an inspection, the app will queue updates to be sent later when you initiate a sync.

GIS

Accela Mobile lets field staff use Accela GIS to search for records on a specific property within a community or neighborhood. Users can also take advantage of the following capabilities:

- Select which map layers are displayed to show zoning, parcel, and other information relevant to a specific task
- Navigate from one inspection or record location to the next using the current location and driving directions
- View proposed locations on a property for specific applications, such as code enforcement violations and inspections



Accela Mobile's job list, offline mode, and GIS features

2.10 Technical and Customer Support

Accela's Standard Support provides live technical support between 4 am and 6 pm Pacific time, Monday through Friday, excluding Accela-observed holidays.

As per the standard agreement, Accela's yearly subscription comprises the following services:

- **Telephone Support** – Accela's Customer Support Department, a live technical support facility, is available in English to identified Authorized Customer Contacts from 4 a.m. until 6 p.m. Pacific Standard Time Monday through Friday, excluding Accela's observed holidays.
- **Online Support** – Accela provides a 24x7 online support portal. To submit cases, log in to https://success.accela.com, navigate to "Submit a case," and click "Submit."
- **Email Support** – Accela provides one or more email addresses to which a customer may submit routine or non-critical support requests 24 hours a day, which Accela will address during our regular business hours.
- **Community Support** – Accela's online, searchable knowledge base is available 24/7 and provides information on our supported products and solutions. We likewise host a robust online community that is supported by our customers, partners, and Accela personnel.

- **Remote Support** – Accela provides remote assistance via a mutually acceptable remote communication method when required to resolve a maintenance request properly.
- **Accela Chatbot** – Get the answers you need 24x7 from Accela Knowledge resources using AI technology.
- **On-Site Support** – On-site assistance can be requested at SEPTech's current time and materials rates. Additional charges for airfare, lodging, transportation, meals, and incidental expenses will be billed as accrued.

Incident and Escalation

The Customer Support team receives incident reports and tracks them until they are resolved. A Customer Support representative is assigned to each incident and communicates its progress at critical milestones using our incident tracking system. We use a standardized incident handling process for all customer incident reports. The incident handling process includes the following:

- A customer's Authorized Support Contacts report incidents to Accela Customer Support by phone, email, or Accela's online Customer Success portal.
- All reported incidents are recorded in Accela's incident tracking system.
- Customers receive an email notifying them of the associated case number.
- Incident severity is assigned to the case based on the definitions in the table in Exhibit 2.

The incident handling and escalation process follows this path:

- **Initiation:** Information provided to Accela Customer Support is entered into Accela's tracking system. The incident is given an identification number and assigned to a Customer Support Representative.
- **For Requests for Information:** The Customer Support representative provides the requested information and closes the incident.
- **For Usage Questions:** The Customer Support representative explains to the customer how to accomplish the task in question. The incident is then closed.
- **For Software Issues:** After confirming that the issue is not related to usage, the Customer Support representative will perform an issue analysis to determine the cause of the incident.
- **For Enhancements**: The Customer Support representative gathers information about the requested enhancement. If the issue is confirmed as an enhancement, the customer is advised to create an IDEA on Accela's Customer Success Community. The incident is then closed.
- **For Service Requests:** The Customer Support representative communicates and escalates the request to the appropriate Accela Account Executive.

- **Analysis:** Once a software issue is reported, the Customer Support representative attempts to replicate, analyze, research, and diagnose the cause of the issue. The customer may be asked to provide additional information, screenshots, or files to demonstrate the issue.

- **Escalation:** If the Customer Support representative cannot resolve the issue, it is escalated, and additional resources are engaged to help resolve the issue.

- **Escalation to Sales:** Incidents are escalated to our Sales team when custom services are requested. The Sales representative coordinates with the relevant team to determine feasibility and prepare a cost estimate for the requested service. These teams may include Accela's Services team or Accela's Partners. Upon customer approval, a purchase order is generated, and the appropriate team provides the requested enhancement or service.

- **Escalation to Product and Engineering:** Escalation to Accela's Product and Engineering teams occurs when a modification to the existing ecosystem is required. After an initial evaluation, the Product and Engineering Teams provide an estimated completion date. Our Quality Assurance staff evaluates each service pack or workaround before it is deployed to the Customer.

- **Resolution:** Once a solution is identified, and before closing the incident, the customer is asked to review and test the proposed solution. Resolved incidents are then closed.

The Customer Support team receives incident reports and tracks them until they are resolved. A Customer Support representative is assigned to each incident and communicates its progress at critical milestones using our incident tracking system. We use a standardized incident handling process for all customer incident reports. The incident handling process includes the following:

- A customer's Authorized Support Contacts report incidents to Accela Customer Support by phone, email, or Accela's online Customer Success portal.
- All reported incidents are recorded in Accela's incident tracking system.
- Customers receive an email notifying them of the associated case number.
- Incident severity is assigned to the case based on the incident severity and with defined SLAs.

Support and Enhancement Services

To assist The State with post-production support of the implemented One-Stop-Shop Permitting solution, SEPTech can perform the remediation of reported issues and proposed enhancements. SEPTech provides an issue reporting mechanism, Jira Service Desk, in order to report and track production support cases. This allows our customers to assign severity/urgency levels for each of the reported issues and to track the status of each.

- As needed, SEPTech will participate in analysis sessions with State of West Virginia Agency Subject Matter Experts to obtain additional information to develop a resolution.

- SEPTech provides daily updates for all Critical defects. Updates for all other defect and enhancement categories are provided during 1x weekly scheduled status meetings. *Note: that this is a proposed meeting cycle and can be adjusted as needed by the customer*

- Defect resolution and Enhancements configuration/scripting are developed, and unit tested and, upon completion of testing, migrated to the customer's environment for final testing and subsequent migration to Production.

In addition to the Accela platform, SEPTech has developed and delivered automated testing solutions for Accela implementations using the Logitech TestArchitect tool. This tool is either sold to the client, as an optional service, directly for their configuration for SEPTech to configure or provided as Testing as a Service (TaaS) annual subscription, depending on the client's needs.

Managed Accela Application Support

Managed Application Support Services offer our customers maintenance and enhancements for their Accela configuration on a fixed price basis. Our services are designed to keep your Accela instances running smoothly, across all Tiers of Support to provide helpdesk functionality, troubleshooting, bug fixes, maintenance updates and on-demand or strategic enhancements. We ensure that your Accela applications are always up to date, secure, and optimized for peak performance. With a dedicated team of professionals overseeing your software needs, you can focus on your core business while enjoying the peace of mind that comes from knowing your applications are in capable hands. Managed Application Support Services streamline operations, reduce downtime, and enhance overall productivity.

It is important to note that Accela Support covers product operational issues and enhancements/upgrades. In addition to Accela Customer Support, SEPTech has a robust Accela Support & Enhancement practice which is honed to provide support specific to The State's implementation, with a combination of on-demand rapid SLA based defect resolution, access to specialists for impromptu questions, and planned enhancements leveraging a team of technical and functional experts familiar with the client's Accela setup. These services are provided through a service/issues management platform that is designed to maximize transparency, eliminate miscommunications, and increase accountability while maintaining a high level of ease of use.

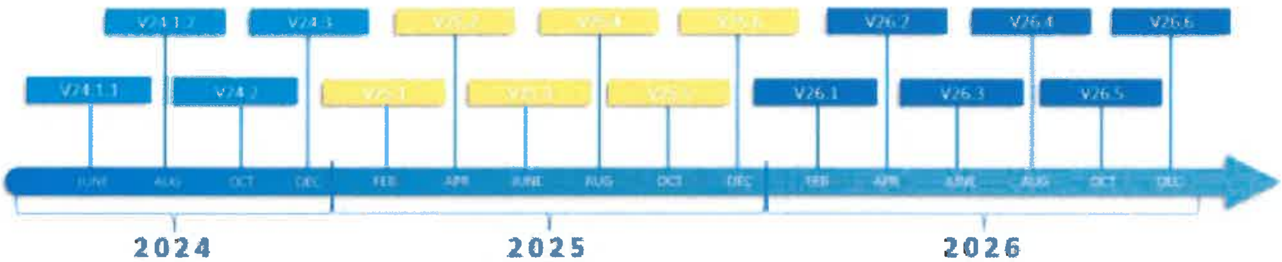
2.11 System Management

Accela is committed to the ongoing development of our products and works continuously to enhance the solutions to remain current with new technologies, changes in legislation, and consistent with best business practices. We spend millions of dollars each year on research and development activities to enhance the effectiveness of our technology for our clients. Every single release aligns with and exploits technology improvements in underlying technologies, and other strategic initiatives that broaden Accela's supported industry technologies and domains.

For each new release, the requirements for new enhancements and features originate from several sources, including customer requests, market demand, strategic investment, and technology advances.

Frequency

Accela provides a major software release twice per year. We apply service packs each month with usability enhancements and new capabilities, as well as to correct identified problems with a software program or maintenance on operating systems that require immediate action or updates. For simplicity, we use seasonal terminology with the calendar year for our releases (e.g., Spring 24.1, Fall 24.2). These major releases include enhancements to Accela's solutions, Civic Platform, Citizen Access, GIS, Mobile, and our pre-configured Civic Applications.



Provision of release notes

All version releases and service packs are provided with corresponding instructions to enable a complete understanding of the reasons and outcomes by The State's System Administrators. Detailed product release notes accompany all product releases, and are alternatively available on Accela's Success Community website for customers to review before installation. In addition, the following technical documentation is provided with each major release:

- Administrator Guide
- User Guide
- Installation and Configuration Guide
- Online Help
- Interface Software Development Kit

Steps to perform an upgrade

For SaaS customers, Accela manages the upgrade process. We recommend The State review the corresponding release notes and third-party software versions to ensure compatibility with the upcoming Accela release (browsers, local ArcGIS Server, ePayment providers, etc.). Release windows are typically four to six hours on Tuesdays or Thursday nights once a month, with minimal downtime.

Improving the Quality of Patch/Upgrade Support

Accela's Product Management team is constantly monitoring and analyzing both the product and processes used to support that product. As we find any inefficiencies or areas for improvement in the processes we leverage, we fold those improvements into our process improvement sprints. Process improvement sprints run in parallel to our product development sprints and as we roll out improvements, we can leverage those in the next available cycle.

Release to SaaS Clients

For major versions, Accela upgrades our SaaS Staging environment four to six weeks before the customer SaaS Production and non-production environments are upgraded to the same release version. (For minor releases, we upgrade the SaaS Staging environment one week ahead of the Production and non-production environments update.) This gives our clients time to certify, train, perform integration testing, and elect any new features that will require specific configurations before the release is installed into the

Production environment. Accela completes upgrades for our clients. Our customers perform all testing and verification of the new release against their specific configuration and setup in the Staging environment.

3. SEPTech Implementation Approach

The SEPTech team will apply the following standard methodology throughout the life of the State's project to meet the implementation goals and deadline for any resulting RFP for a phased or all at once implementation. This is a proven methodology that provides an Agency with an understanding of their solution on day one of the project by leveraging the standard package solutions. What distinguishes SEPTech from other Accela partners is the expectation of excellence in our Accela implementation methodology. To better support our portfolio of Accela projects, SEPTech maintains libraries of scripts, reports, and interfaces, from its extensive experience, and the development of best practice standards and artifacts, which will be leveraged for the benefit of The State of West Virginia's Accela project.

Scripting

SEPTech has extensive experience fixing, troubleshooting, and maintaining/deploying EMSE scripting. We have an intricate comprehension of the EMSE API, and the various methods used to develop scripts and meet the needs of our customers. We maintain a vast list of unique and complex scripts through our Scripting Libraries in GitHub. Furthermore, an inventory document is maintained and catalogs each script and its intended use for a particular business process. The Scripting Library includes the following distinct script types.

An example of a recent solution we released to our clients in the Environmental Health and Land Management space is a configurable mechanism for automating fees. This allows agency users to adjust the assessment of various fees through a configuration file and also identify the event where a particular fee is assessed (i.e. the initial application submittal or after a workflow task is updated)

Workflows

SEPTech has extensive experience in configuring, fixing, updating, and maintaining business process workflows. Our team also possess extensive functional knowledge of the business processes for Buildings, Planning, Public Works, Environmental Health, and others, acquired through 10+ years of working in and with these teams. This knowledge allows us to provide recommendations on potential workflow process improvements and standardization we have developed with your peers throughout California and the U.S.

Reports

Our goal is to utilize the Enhanced Reporting Database to design informative and interactive advanced reports/dashboards that can provide powerful insights into the business to find opportunities for improvement, deliver better services in a timely manner, identify, and eliminate bottlenecks to drive revenue growth, reduce costs and improve services.

We bring extensive experience in designing crystal reports, SSRS reports, and ad hoc reports. Various types of custom reports including tablix, matrix, charts, drilldown, etc. with complex parameterized queries have been developed and deployed as per client requirements. We maintain detailed guidelines for designing and implementing Accela reports, and libraries of SQL and report templates correspondingly.

Interfaces

Our teams have implemented numerous custom and standard interfaces with GIS/XAPO integrations, various payment processors, interfaces with 3rd party systems for real-time or scheduled exchange of data and building custom apps for enhancing the user experience.

As the project progresses through the four stages, there are key checkpoints where the Agency will gain a better understanding of their solution at a point in time. The key component of the methodology is having the Agency see their solution come together. This approach will allow for some iterative steps that will assist the Agency in understanding impacts to their decisions. This methodology is based on existing or pre-configuration solutions for an off-the-shelf product that will allow the Agency to maintain the solution post go-live. It's important for the Agency not only to adopt the new solution and have your staff become familiar with how the system will work for your business process, but also to understand that over time the solution can evolve as the Agency implements standard practices or business changes.

Day one begins the knowledge transfer and the importance of following the four key stages of the methodology.

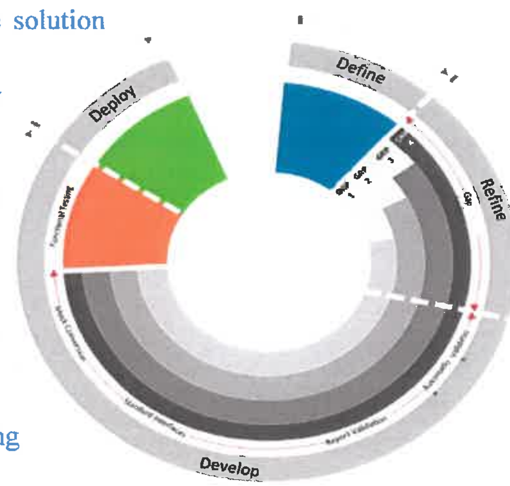
Implementation Stages

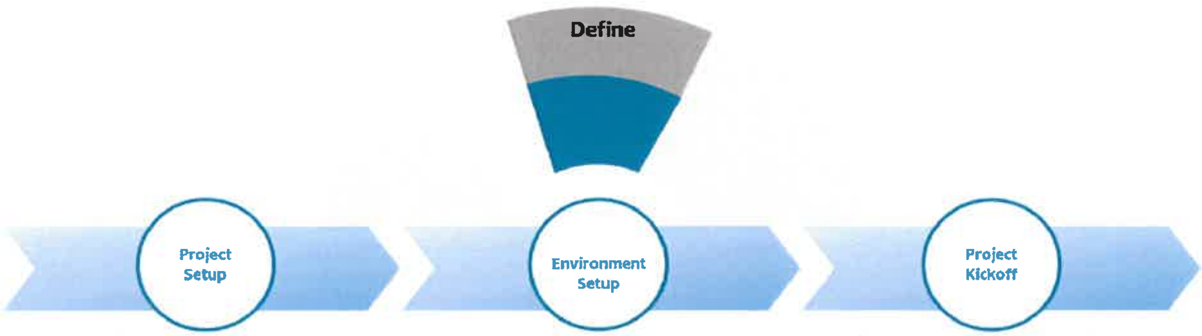
This rapid iterative approach provides an end product earlier in the lifecycle as Develop iterations are completed on a subset of record types.

The first (Define) and last (Deploy) stages of project delivery flow in a linear direction, then the second (Refine) and third (Develop) stages have a more iterative approach to deployment. The SEPTech delivery team will determine record groupings based on similar processes, each group will start with Gap Analysis and move through the Refine and Develop Stage of the methodology. This allows for smaller datasets to be developed, enterprise interfaces developed in the first iteration, and conversion to start early. Each stage has pre-defined objectives, tasks and deliverables.

This approach benefits The State by providing better knowledge transfer, enablement, and less risk in several ways:

- Reduce the Agency's requirement to conceptualize the solution through documentation
- Break down the solution with "bite size goals" by defining "Grouping" as record types based on similar business processes
- The defined "Grouping" moves through the methodology between Refine and Develop stages.
- Demonstrate during the Gap Analysis any add-on components (may not be fully configured in initial "Grouping", but will be complete in final "Grouping")
- Improvements capture bus0iness rules in a more configurable way. Also reduces unit and UAT testing issues. documentation





Project Setup

- Refine the Project artifacts based on th Statement of Work. This includes:
  - ✓ Conducting a Pre-Kickoff meeting w Agency
  - ✓ Project Management Plan (to incluc ricks and issues; communication, gc
  - ✓ Project Schedule
  - ✓ Resource Management
  - ✓ Setting up a project repository

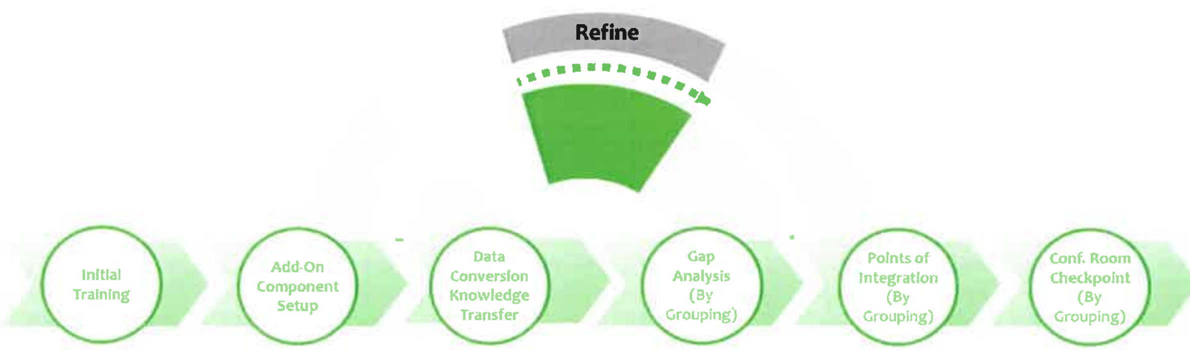
Environment Setup

- Work with the Agency in setting up the Accela environment(s)
- Installing the Accela Civic Solutions in the environments (based on products included in the Statement of Work)
- Installing any add-on components such as Accela Citizen Access, Accela GIS, Accela Mobile, etc.

Project Kickoff

- Refine the Project Kickoff template with the Agency to capture the primary objectives of the project
  - ✓ Who will be involved in the project
  - ✓ Setting expectations for the project
  - ✓ What the key stakeholders expect to achieve from the project
- Conduct a formal presentation with the stakeholders and participants who will be involved in the project to set expectations

The Define Stage of Accela's Delivery Model sets the stage for how the project is managed throughout the project life cycle.



Initial Training

- Conduct Core Team Training – establishes the baseline for how the Accela Civic Solutions work and terminology
- Initial User Experience – Begins to set expectations for the project and the solution

Add-On Component Setup

- Setup of any add-on components such as Accela Citizen Access, Accela GIS, Accela Mobile, etc.

Data Conversion Knowledge Transfer

- Conduct the Data Conversion Kickoff meeting to set expectations for the Agency
- Provide Accela with a copy of the source data

Gap Analysis (By Grouping)

- Gap Analysis Kickoff meeting is a one time event to set expectations during the Gap Analysis sessions and to agree upon the process, "Solution Groupings" and schedule
- Walk the Agency through the pre-configured processes to include the data provided by the Agency to identify any gaps such as required fields, internal vs. external fields to be completed, fees, required documents

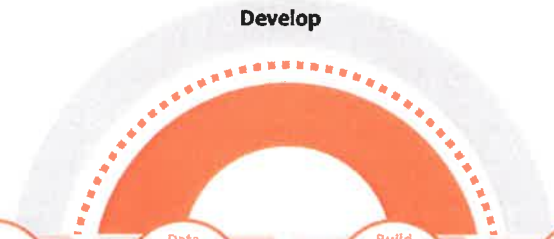
Points of Integration (By Grouping)

- Identify the integrations by "Solutions Grouping"
- Establish or refine the requirements (based on Accela's SDKs or APIs) to support the integration requirements and design

Conf. Room Checkpoint (By Grouping)

- The Agency Responsible Expert will demonstrate a process with the "Solution Grouping" to end-users
- If needed, conduct one final gap analysis session to incorporate the agreed upon changes

The Refine Stage begins the knowledge transfer and the adoption of the new system. Within this stage the foundation of the system will be configured.



Automation & Validation (By Grouping)

- Verify and validate existing configurable automation for the "solution grouping" based on business process or user stories with the Agency
- Configure automation for the "solution grouping" and perform spot testing to ensure configurable script is working as expected
- If scope includes custom scripting hours, establish the user stories, develop script and unit test scripts

Report Verification (By Grouping)

- Configure the report parameters based on the validation sessions and perform spot testing to ensure the report is executing as expected
- If scope includes custom reporting hours, establish the report specification, develop the report and unit test report

Data Conversion Iterative Mocks (By Grouping)

- Conduct mini-mocks based on a small dataset for the "solution grouping" where the conversion activities build upon each mini-mock with new data features; starting with basic record structure and may end with fees or inspections

Build Points of Integration (By Grouping)

- Develop the code based on the interface design specifications and perform unit testing for the interfaces built within the "solution grouping"
- If needed, amend configuration of the code for additional "solution groupings" based on original requirements

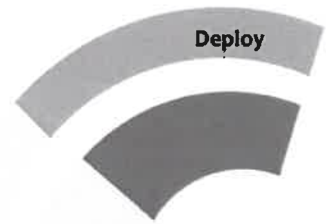
Conf. Room Checkpoint (By Grouping)

- The Agency Responsible Expert will re-demonstrate the process from Refine Stage within the "solution grouping" to end-users
- If needed, conduct one final session to incorporate the agreed upon changes

Data Conversion Functional Mock

- Conduct 2 dry-run data conversion mocks, these mock runs should mirror the activities to support go-live
- Validate the converted data, apply adjustments between mocks if needed prior
- The second mock conversion run will support User Acceptance Testing activities

The Develop Stage will build or configure the remaining system components for the "solution grouping", to include integrations, reports, automation, and data conversion. At the end of this stage's conference room checkpoint, the Agency will have a working system for "solution grouping".



Prepare Test Plan

- Conduct a Test Plan kickoff with the Agency to set expectations
- Refine the User Acceptance Test Plan with the Agency to support testing activities; the plan will include how testing should take place; who will support the testing activities, the test schedule, who should report issues and define the severity of the issue

Execute User Acceptance Testing

- The Agency will be responsible for coordinating, creating test case scenarios, and conducting testing activities based on the schedule established in the plan
- Accela will monitor UAT Issue Tracker for clear description of the defect, accurate reporting of severity levels and based on scope will address the issue in a timely manner to complete UAT within the allotted duration

Conduct End User Training

- Based on the Statement of Work, Accela will provide a level of training either train-the-trainer or a duration of time for end user training
- The Agency will be responsible for any training documentation, providing a location/ facility for the training and ensure their staff participates in the training

Execute Cutover Plan

- The Cutover Plan will begin to take form during the Develop Stage during the Data Conversion Functional Testing activities
- The Plan will outline the activities for go-live from when to communicate to end users to suspend activities in the legacy system to when the Accela Civic Solutions are ready for end users to begin entering information
- Completion of the go-live milestone

Post Production Support

- Accela will support the Agency's production environment for a period of time defined in the Statement of Work
- Accela's role will be primarily addressing any issues that are identified during this specified duration and severity level to be addressed and promoted to the production environment

Transition to Customer Support

- Accela will begin to coordinate with the Accela Customer Support team prior to the execution of cutover or go-live
- At the conclusion of the Post Production Support Period, the Accela Professional Services team will officially transition the Agency to the Accela Customer Support team for on-going support

The Deploy Stage prepare end users for go-live and using the new system

Project Management

SEPTech ensures exceptional solution delivery with strong Project Management discipline and enables end-to-end accountability for delivering services. Their Project Management methodologies are grounded in thorough planning combined with continuous proactive monitoring through small milestones. This allows them to set goals based on required assumptions, while continuously tuning to increase ability to meet them. SEPTech achieves this through their mature methodologies that create transparency of all tasks and by proactively identifying risks and challenges, aggressively identifying relevant resolutions, and holding the assigned individuals accountable. They focus on delivering the expected results while meeting schedule, scope, cost and quality targets.

SEPTech will provide an integrated and standard governance structure to the program. Having an effective project management and reporting methodology is critical to the success factors for delivering a valuable system.

Project Scope Document

On any project, SEPTech first creates a Project Scope document. This document articulates their understanding of all of the key project deliverables, softer nuances and significant constraints. By keeping a Project Scope document to a short 1-2 pages, they can obtain rapid feedback, and easily engage many SMEs to help assess the project.

The scope document allows one to first assess the project without getting into every nuance; it always remains as the guiding document for all teams for project goals. The scope document further allows them to engage their technology specialists, to devise a high-level solution creating a proposed solutions document. The combination of the scope document and the high-level project plan, then allow them to determine the correct phasing structure most relevant to a particular project. All of these tasks are done in close collaboration with their clients, as they believe that collaboration is one of the key ingredients to achieving project success.

Project Plan

SEPTech's project plan will detail tasks at the level where individual members of various teams are allocated, hence allowing them to hold individuals responsible for their commitments. The plan is a detailed list of tasks and milestones that will be performed on the project. It will indicate the dependencies and resource assignments and will be updated to ensure the status of the project is accurate.

SEPTech believes in creating milestones that allow them and their clients to observe actual progress, so as to get an extremely accurate pulse on the project and its challenges. This enables them to identify and resolve issues that in most cases would be detected too late, affecting project timelines and quality.

In managing project deliverables, they also favor minimizing the number of tasks on the critical path, so as to provide some room for adjustments wherever possible. However, as part of the project monitoring methodology, they focus on both the critical path as well as buffers created, once again creating a high level of proactivity and agility in managing the project.

Communications

SEPTech's communications methodologies are geared towards broadcasting the right level of info to the right audience at the right time, triggering desired actions when required. They do this through an approach that has proven successful across varied environments and with projects of varying sizes and criticality.

Considering a combination of client preference, project criticality and cost/risk parameters, they devise a governance and communications program that ensures that the right participants have the needed information at any given time.

Their project plan works with our base governance and project management program, which would be adjusted as described above, comprises of:

- Stakeholder Meetings (Monthly) - A formal meeting and report to review the broader aspects of the project/ program progress including current and trending status; this forum further ensures strategic alignment of all stakeholders.
- Project Status Meetings (Weekly) - A formal meeting and report to review progress, address delays, identify and manage risks, track and address outstanding issues.

Furthermore, their teams follow certain principles in all meetings that include:

- All outstanding tasks must have one person responsible and an expected close date (which is closely monitored)
- All risks must have mitigation actions, and a Red/Amber/Green (RAG) status to indicate its stability
- All meetings must have minutes published by a designated person, listing all decisions and assigned tasks (once again with dates & responsibilities identified)
- All templates for our governance, communications and project management are reflective of the transparency and accountability to which they hold their processes.

Go Live Support/Post Go Live Stabilization

The steps to be taken to ensure that users will be ready to use the Accela system once it is transitioned:

- Recommended adjustments to the strategy for implementing the Accela solutions (for example, phased by participating agency, specific license type(s), license function or other);
- The steps that should be taken to ensure that the appropriate individuals are ready to support the Accela system once it has been implemented and is in use;
- Identification of the point during implementation at which the Agency takes responsibility for production problems, "help" or trouble calls, and for resolving the problems;
- Identification of user and technical documentation to be delivered as part of the transition; and
- Knowledge transfer approach describing how the Agency staff members will administer, maintain and support the Community Development system without SEPTech Project Team intervention.

After Go-Live, a formal meeting will be scheduled with the Agency and SEPTech for transitioning support to the Agency. (If desired the Agency may contract with SEPTech for long term system support and enhancements).

The management of systems training will be done to ensure that the Agency team have the knowledge and skills needed to achieve program objectives using their new Accela solutions. Approaches for acquiring knowledge and skills are identified and evaluated. Training plans will be developed that directly address the acquisition of required skills and knowledge. Training materials will be developed for each training course or instruction.

Additionally, Accela also has a vibrant community where customers, partners and employees have continual access to computer-based training topics, training documents and product documentation. There are also forums available to discuss and resolve questions as they come up any time.

Knowledge Transfer

Knowledge transfer is an ongoing process throughout the implementation, finalized after the deployment of the application. This deliverable comprises the post-Go-Live support assistance that SEPTech will provide to address issues and provide consultative advice immediately following Go-Live. SEPTech will work with the Agency to address issues identified during this period using a Postproduction Issues List. This list will comprise issues related to the defined deliverables listed in the final SOW. Examples of issues the Agency is responsible for include training issues, functional changes beyond the scope of the SOW, cosmetic changes, and procedures related to using the Accela solutions.

SEPTech's proposed project team will spend time explaining how the system application and architecture works and will review the project deliverables so the Agency will understand how the solution was built and where the documentation exists. SEPTech will be available during preparation for Go-Live, taking the lead to resolve issues and then turning that role over to the Agency in an orderly Post-Go Live process.

SEPTech's Project Manager will work with the Agency to refine and deliver knowledge transfer, including:

- Opportunity for the support team to assist "hands on" during the implementation upgrades and installs;
- A description of what needs to be done to ensure the Agency stakeholders will be ready to receive the Accela solutions;
- An early assessment of the Agency readiness to allow mitigation of significant risks exposed by the assessment;
- A description of how and when SEPTech recommends that the Agency stakeholders will test and accept the Accela solutions and confirm and authorize its implementation

Ongoing Services

In addition to Accela's standard product support and maintenance. SEPTech can provide and does provide to numerous of its customers, ongoing development Support and Enhancement services to support the Agency's future needs to expand the utilization of the system through additional record types, business process automations, reports, interfaces, etc. This can be contracted for an additional cost on a time and materials basis. Rates and duration can be discussed during the contracting process.

Training

Consistent and thorough training ensures that Agency end users have the knowledge required to use Accela's solutions to its greatest potential. Training plans are developed as part of the project's Statement of Work and address the Agency's specific operational and administrative needs.

During project initiation, a draft training plan will be created based on the products purchased, the numbers and types of end users, and the specific Agency requirements relative to training and development.

Training for Each Phase

Training Title	Description
Course - Civic Platform and Digital Plan Room Core Team	The Core Team class is designed to prepare the Agency to effectively participate in the Gap Analysis / Tailoring sessions: Product familiarization – Participants will learn the major design/build concepts of the Civic Platform Digital Plan Room. This course will give clients the knowledge they need about the solution prior to going into analysis and configuration. It will familiarize them with the terminology, basic to advanced concepts, possibilities of automation and all things Accela including Digital Plan Room integration.
Course - Civic Platform Admin Usage	The Administration for Clients class is designed to prepare clients who use Civic Platform in two areas: • Design/Build Concepts – Participants will learn the major design/build concepts of Civic Platform. The skill sets learned are essential for any Administrative level role played by the client. Clients will become fully familiar with these concepts so they may either completely build out the CDH - Participants will learn how to manage the day to day operation of Civic Platform and perform minor on-going system enhancements and changes.
Course - Civic Platform Citizen Access Administration	The Citizen Access class is designed to prepare clients who use Civic Platform and will be implementing web strategies for citizen access and usage. • Standard Choice Setup– Participants will learn the Standard Choice concept and which of those are used in the Citizen Access setup • ACA Design - Participants will learn how to configure each of the pages of Citizen Access, turn on and off functionality and implement appropriate security settings
Course - Civic Platform Mobile Office	The Accela Mobile class is designed to prepare clients who use Civic Platform and will be implementing Mobile Office • Daily Usage – Participants will learn the processes of Inspections in the Wireless environment - including navigating thru inspection data entry and other processes within Mobile Office.
Course - Civic Platform Ad Hoc Reporting	The Ad-Hoc Reporting class is designed to prepare clients who use the Civic Platform in: • Tool – Participants will learn the tool details and what it does • Use Cases – Participants will learn practical real-use report setup using the Ad-Hoc Reporting tool
Course – Civic Platform Train-the- Trainer	This Civic Platform Train the Trainer course is intended to prepare identified customer trainers to train their end users. • Tool –Participants will first be taught the basic end user course around the customer daily Automation processes. • Use Cases – Participants will engage in workshop practice sessions where the students teach each other and the Accela instructor sections of the end user course. Feedback will be given to help the customer trainers obtain the skills needed to effectively train their end users.

Train-the-Trainer Classes

SEPTech provides a variety of user and administrator training courses that are designed to orient, educate, and reinforce the core concepts behind operating and managing the Accela and Digital Plan Room solution.

They also provide "train the trainer" classes. This approach allows customers to use existing team members to conduct user training classes during and after the project implementation. SEPTech and the Agency team will work together to identify the end user sessions needed. This will be done by identifying the daily processes and functional groups. Also, before scheduling the train-the-trainer sessions, the configuration of the processes should be in a near-final state to avoid any retraining needs.

The methods used for train-the-trainer delivery include first teaching the customized course to the designated instructors. Upon completion of that step, the students are given assignments of sections of that course to study and teach to other students within a specified timeframe. The potential instructors teach the others and the SEPTech instructor in the classroom.

If this training format is selected, SEPTech can train these power users in all aspects of the process and how that process is followed using the application from the perspective of a common user, a technical/administrative user, and a trainer. This approach is often used by large agencies that have the staff and resources to conduct training sessions at its convenience.

Once the Civic Platform and Digital Plan Room are in active use, there are some recommendations as to how to continue training for Agency staff. The following is a list of the sessions/classes that may be helpful. All the sessions below would fit most solutions:

- **Detailed Process Training** – Although process training was received as part of the pre-Go-Live training, now that your users have been processing applications, they will have questions and need more detailed process training to improve efficiencies.
- **New Hire Training** – As new Agency staff come aboard, you will need to give them the training the other staff members received. In some cases, it may be best to start with a basics class – navigation, searching, basic terminology and process. Follow this up with role-based process training covering what they do in Accela's solutions and how they do it.

Accela's Learning Management System

Accela SaaS customers have access to a library of training videos and materials in a Learning Management System.

- **Refresher Training –** No matter how much training was completed prior to Go-Live the users will need some help remembering some of the basics and process. This can be done with documentation and/or a short session to take them through the Accela solutions. This can also be combined with the Detailed Process Training above.
- **Super User Training –** This session is for those who may decide that instead of burdening the IT staff with all configuration or administrative changes, a small group of "super users" can be trained to make some of those for their departments or groups. This would include form design changes, field text changes, adding or taking away drop-down values etc.
- **Administrative Training –** This session would be by request of the administrators who wish to learn more advanced topics – business rules writing, report writing and management, etc. This could also be a request for refresher training from the IT perspective as well.

Over and above the standard training provided for each Accela implementation, comprehensive product training is also provided via Zoom. Custom classroom style training designed specifically for Agency may also be provided at an additional cost.

The management of systems training will be done to ensure that the Agency team have the knowledge and skills needed to achieve program objectives using their new Accela solutions. Approaches for acquiring knowledge and skills are identified and evaluated. Training plans will be developed that directly address the acquisition of required skills and knowledge. Training materials will be developed for each training course or instruction.

Accela also has a vibrant community where customers, partners and employees have continual access to computer-based training topics, training documents and product documentation. There are also forums available to discuss and resolve questions as they come up any time.

Data Conversion Plan

The objective of the Data Conversion Strategy is to develop an approach and plan for transferring historical data from The State's ystems to the Accela Civic Platform. This document will provide an overview of Accela's Data Conversion process and includes who is responsible for specific tasks during the conversion.

Data Conversion Responsibilities

The sections below outline the responsibilities of The State and SEPTech in the Data Conversion work stream. The table below contains the name, role, skillset and responsibilities of the resources from the SEPTech and The State teams who are responsible for the data conversion activities.

Conversion Roles and Responsibilities

Role	Skills/Responsibilities
SEPTech Data Conversion Functional Lead	• Provide overall guidance on the conversion approach. • Lead the conversion strategy with The State. • Provide training on the Accela Conversion Tools and methods. • Coordinate the conversion runs and assist with the resolution of identified issues. • Support during conversion testing and validation.
State of WV Subject Matter Experts	• Complete Data Mapping process. • Resolve issues that have been identified by SEPTech during the conversion process, including data cleansing, questions or clarifications. • Test and validate data after each mock.

SEPTech's Responsibilities

- Provide guidance on the overall conversion and lead sessions with The State on the conversion strategy.
- Conduct training on Accela Data Conversion process.
- Provide data mapping template and provide guidance to The State in mapping source to target data.

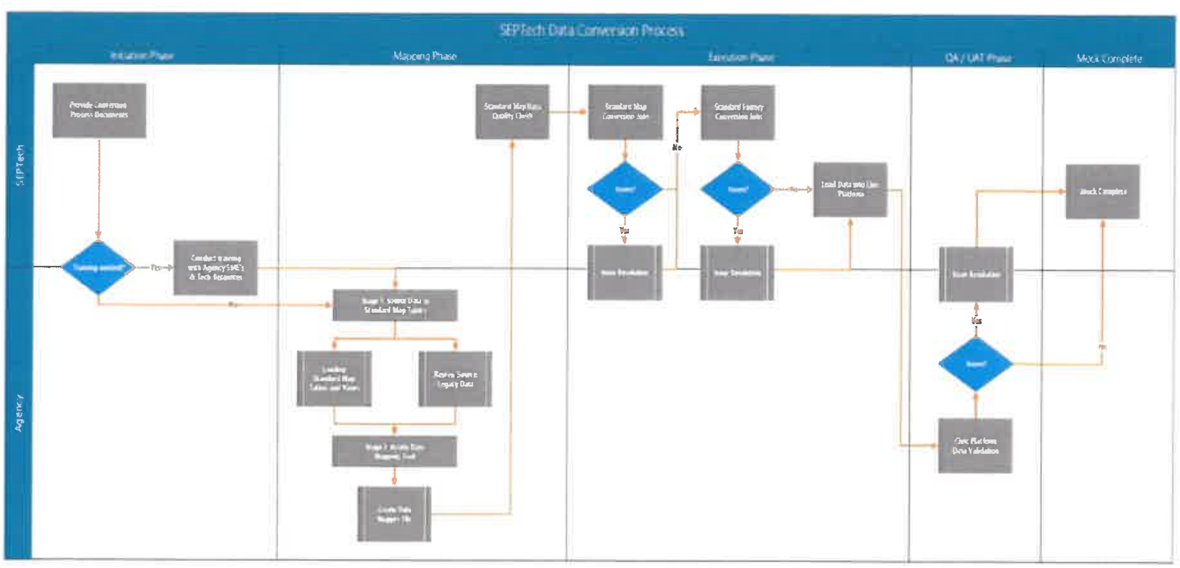
- Make recommendations about data that is needed in Accela Civic Platform based on the proposed solution. These recommendations will help to inform The State decisions on what data should be moved to Accela as well as data that should not be moved.
- Execute the conversion jobs for each stage, identify any issues encountered, and relay to The State for remediation.
- Review converted data after each stage of the conversion to confirm row counts for potential data issues.
- Assist in validating data loads into Accela Civic Platform.

State of WV Responsibilities

- Fill out SEPTech's Data Conversion questionnaire.
- Complete the data mapping process:
- Create target set of standard map tables "AATABLE_" using the scripts provided by SEPTech.
  - Extract historical data and load into standard map tables such that it complies to Accela's constraints and formats. Cleanse data prior to loading into standard map tables wherever required. A high number of data integrity errors during this step will result in unanticipated and unplanned effort.
  - Create an Oracle database backup of all standard map tables.
  - Complete the data mapping templates provided by SEPTech.
  - The State will provide subject matter experts on the legacy data source to aid SEPTech in understanding key components of the historical data. For example, Custom Fields, Inspections, Workflows.
  - Fix data issues as identified by SEPTech during the conversion process.
  - Review and approve converted data in Accela Civic Platform.

Data Conversion Process

The below high-level diagram explains the data movement from various legacy systems to Accela Civic Platform.



Stage 1 [The State]: Source Data to Standard Map Tables

The first stage is getting the source data into the Accela Standard Map tables prefixed with "AATABLE_". This step of the conversion process is crucial because it is the first conversion and/or translation that happens. The Accela Standard Map tables are predefined; therefore, the source data needs to be extracted, transformed, and loaded into the correct columns with the appropriate data types, values, and translations. If there is bad data at this stage, this could affect any of the next 3 stages in the conversion process. SEPTech will provide guidance and training during this stage, and the State will be responsible for converting the source data into the Standard Map tables.

Stage 2A [The State]: Complete Data Mapping Templates

The second stage is mapping the Standard Map tables to the Accela Civic Platform configuration including record types, status, workflow, inspections etc. During this step, The State will be responsible for completing and providing accurate data mapping from legacy source to Accela configuration.

Stage 2B [SEPTech]: Complete Data Mapping Templates

Based on the data mapping provided in Stage 2A, SEPTech will utilize the Accela Data Mapping tool (ADM2) to map the source data to the existing Accela Civic Platform configuration. This will generate a Data Mapper file in an Access database format which will be used during the next stage. This is meant for the select set of objects below.

Objects that can be mapped using ADM2:

Record Types	Workflow	Custom Fields	Custom Lists
Record Status	Task Spec Info	Inspections	Inspection Status
Fee Codes	Contacts	Licensed Professionals	

The remaining objects such as Checklists, APO or Contact Custom Fields, etc. will be mapped manually.

Stage 3 [SEPTech]: Standard Map Conversion

This stage is the second "cleansing" of the data. Common challenges we see in similar projects are around data cleansing efforts. The same data field may take on different meanings or purposes during the lifetime of the legacy product depending on need or department. The simplest example is a field labeled address. In one department, the field could be used as the physical address and in another department, defined as the mailing address. There are many other cases that could potentially be in your system. It requires The State to understand how the fields were used, and come up with an approach of cleansing the data to improve data integrity for the new system.

In this step, the most common issues are with empty "required" fields, unacceptable duplicate rows, non-conforming data per the needs of Accela conversion, and mapping issues. SEPTech will identify the issues and The State will be responsible for resolving identified issues.

Stage 4 [SEPTech]: Standard History Conversion

The fourth stage is executing the Standard History conversion jobs. This stage will utilize the converted data from Stage 3 and convert it into the Accela Civic Platform tables. Typically, the common issues would have been resolved in previous stages. The remaining issues are likely to be related to the conversion jobs or infrastructure/network related issues.

Stage 5 [The State]: Accela Civic Platform Data Validation

The final stage is for The State to review the accuracy of their mappings provided. Any corrections required at this stage, should be fixed and addressed in the Stage 1 mock.

Sample Data Conversion Questionnaire

Data Conversion Questionnaire

This questionnaire is to help SEPTech prepare properly for the start of the data conversion. One questionnaire should be filled out for each data conversion source that will be converted into Accela Civic Platform.

Data Conversion Summary Information

Question	Answer
Data Source Name	
Database Type and Version	<ex. Oracle 11gR2.>
Agency Subject Matter Expert	
ERD Available?	<Yes/No>
Data Dictionary Available?	<Yes/No>
Database Size	<Disk size of database backup of flat file in MB>

Data Retention

The time and complexity of the data conversion process is dependent on the number of fields being converted, the cleanliness of the data, and City personnel's knowledge of the systems that the data is currently stored in. There is no standard number of years on how far back your data should go for conversion. However, SEPTech finds that the

Agency Data Overview

Requirements	Questions	Agency's Response
Record Statuses	Does the legacy system support Record Statuses?	
Record Contacts	Does the legacy system contain Contact/Application/Owner/Licensed professional information?	
Record Professionals	Does the legacy system contain Licensed professional information?	
Record Addresses	Does the legacy system record site/complaint/parcel addresses?	
APO Data	Does the legacy system store Address, Parcel, and Owner data when a record is created?	
Project Information	Is there Project hierarchy data stored in the legacy system? If so how many levels are required	
Comments	Are there general comments recorded in the legacy system?	
Workflow	Is the Legacy system Workflow based or Milestone based, and will that data need to be retained for in processes Records that are converted, and is this data reliable?	
Inspections	Are inspections being processed	

Implementation Pricing Strategy

There are a variety of phasing options for implementing Accela's solutions. SEPTech has experience deploying a phased solution for many of our customers, however there are common themes we have seen. The most common options chosen are as follows, and it is not unusual that several of these options are combined to reach an overall phasing approach:

- **Legacy System end of life**: It is common with an enterprise deployment of Accela's solutions, the customer requests that certain business processes, or functionality, be phased in earlier so that they can retire a legacy system that is either out of warranty, no longer functional, or difficult for IT to maintain.

- **Department Specific:** This option occurs for customers who have certain departments that are ready for an upgrade and others that may be skeptical, in the process of deploying other systems, or otherwise not ready for the implementation effort. In this case, certain departments go-live with the new system first with the others following.

- **Quick Win**: This scenario often involves either immediate customer needs, or city council/mayor goals and objectives. Immediate needs would be a scenario whereby a customer has lost current functionality for some reason, such as the ability to complete inspections in the field. Accela will implement a base system so that inspections can be completed in the field only as a single phase, and then proceed to implement all of the back office and online processes that comprise the total solution. The other scenario typically involves a mandate or goal at an executive level at The State to complete, or show value with specific functionality. An example of this would be allowing customers to apply for permits online. In this case, we would deploy just the online application functionality and then proceed to implement all of the back office, data conversion, integration functionality, etc. that comprise the total solution.

- **Big Bang**: Although this is only a one phase approach, the most common approach our customers choose is big bang. Where the system deployment occurs for all desired processes and functionality all at once.

In terms of how changes in phasing affects the project budget, there are two primary components that affect the budget:

- **Timeline:** Typically, multi-phased implementation projects span over a broader timeline than a big bang. There is overhead to run a project over a longer timeline which generally translates to both internal and external cost increases for an agency as it relates to the implementation budget.

- **Go-Lives:** The planning and execution of a go-live event is a significant cost to an agency. For a multi phased implementation project, there are additional go-live events and even additional complexities in terms of going live with additional functionality in an existing production environment. It should be expected that a phased approach will increase both the internal and external cost for the agency.

In any event, The State can scale the purchase of user licenses appropriate to the project implementation option. If the approach is phased, SEPTecc recommends purchasing the appropriate quantity of user licenses required for implementation and the subsequent go-live. Additional users can always be added when and if needed.

Please note: In terms of the work streams to ultimately deploy a complete solution that meets the goals and requirements of an agency, the level of effort/cost to phase in a solution generally does not change outside of the items mentioned above.

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.

SEP Technology Consulting, LLC

(Company)

Ken- Ma Managing Director

(Representative Name, Title)

212-634-9221, ext. 7OO/ 646-569-9100

(Contact Phone/Fax Number)

08/28/2025

(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)

[X] Addendum No. 1	[ ] Addendum No. 6
[X] Addendum No. 2	[ ] Addendum No. 7
[X] Addendum No. 3	[ ] Addendum No. 8
[X] Addendum No. 4	[ ] Addendum No. 9
[X] Addendum No. 5	[ ] 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.

SEP Technology Consulting, LLC
Company

Ken - Mar...
Authorized Signature

08/28/2025
Date

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