STATEMENT OF WORK

CITY OF CHULA VISTA®

Prepared for:

Tiffany Allen

Director of Development

City of Chula Vista, CA
276 4th Ave,
Chula Vista, CA 91910

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(619) 691-5179   tallen@chulavistaca.gov

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PRODUCT OVERVIEW

E-PLANREVIEW

e-PlanREVIEW (**EPR**) is an industry-leading, cloud based collaborative platform for team-based design review, permitting. The platform is designed by industry experts for architectural, engineering, and construction (AEC) companies, as well as state, county, and municipal agencies tasked with code compliance and enforcement. EPR improves results and lowers the cost of doing business in both the private and public sectors by replacing printing, shipping and storage expenses of paper plans with convenient online document uploads and concurrent, collaborative web-based electronic plan reviews. Our mission is simple: *To fundamentally change and improve how the construction industry and permitting agencies work*.

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This Scope of Work describes our cloud-hosted deployment of e-PlanREVIEW (EPR) in partnership with *Velosimo* to implement bi-directional integration between the Accela Civic Platform (**Accela**) and EPR. The *Velosimo* integration platform as a service has been purchased via a separate contract and will be utilized in this project to connect EPR and Accela.

Following best practices, Accela will remain the 'source of truth' for permitting project information, document management and document versioning as well as plan review assignments.

This streamlined connectivity between Accela and EPR provides the City of Chula Vista, CA and its constituents a *best of breed* solution to improve staff efficiency and plan review turnaround time.

After completion of this project, EPR will provide the following functionality:

1. Accept *permit* data, plan review *documents* and plan review *assignments* from Accela.
    a. Incoming plan review documents are evaluated in Accela *and* Accela Citizen Access Portal (ACA) by our *Scout PDF* Inspector. Documents not approved by Scout will not be accepted for electronic plan review.
2. Receive *updates* from Accela to the permit data record. (For example, when the project is closed in Accela.)
3. Receive updates to plan review assignments from Accela. For example, the assignment due date is changed in Accela.
4. Conduct web-based, simultaneous plan reviews.
5. Complete each plan review assignments in EPR by choosing either 'acceptance' or 'resubmit' status.
    a. Return the assignment status to Accela in real time so that associated workflows are notified as appropriate.
6. Generate custom Correction Reports.
7. Check in 'reviewed plans', correction reports and any supporting document to the Accela back office, for return to the applicant in ACA, as appropriate.
8. Check in approved plans to the Accela back office for long-term retention.
9. Receive 'corrected plan sets' from Accela for back check.
    a. Carry forward existing markups and comments to the most recent document version.
    b. Reset existing assignments to a 'Not Started' status.
    c. Accept new assignments from Accela, as necessary.
10. Apply electronic 'stamps' to the reviewed plans, as appropriate.
11. Manage EPR permissions, pre-configured for best practices for each user role, as desired.
12. Design/Modify Correction Report templates, as desired.
13. Modify/Manage Email alert notifications to EPR users, as desired.
14. Import/Manage standard comments and checklists into the EPR Comment Library for use by the plan review staff.
15. Utilize EPR for paper plan reviews to leverage the tools and processes across all reviews.

VELOSIMO CONNECT

Velosimo, Inc. is revolutionizing the approach to government software integration with the Velosimo Connect integration platform. Velosimo Connect is a complete *integration platform as a service* (iPaaS) solution designed specifically for the software endpoints in government software. With the Velosimo integration platform typical integration challenges are solvable and sustainable. Velosimo specializes in providing integration to Accela, e-PlanSoft, and many other government software systems.

As our integration partner, Velosimo will provide and maintain the ongoing application programming interface (**API**) connectivity between Accela and EPR.

CHANGES TO ACCELA CITIZEN ACCESS PORTAL

It is anticipated that changes may be required in *Accela Citizen Access** (**ACA**) user interface and or/workflows to facilitate the ability for your constituents to:

1. **Upload** their plan review documents and supporting attachments.
2. **Download** the reviewed plans that require corrections and correction reports themselves.
3. **Resubmit** corrected plans as the 'next submittal', when appropriate.
    a. *ACA must provide the ability to associate an incoming document as the next submittal*.
4. **Download** the approved plans, if appropriate.

The Client should consider engaging an *Accela Service Implementor* to conduct a gap analysis aimed at identifying changes needed on any currently configured workflows or scripts. If no such resource is available, please request assistance.

*Velosimo will ensure that the *Scout PDF inspector* is deployed in ACA and the Accela back office to evaluate whether incoming plans can be accepted.

PROJECT SUMMARY

This Statement of Work (SOW) sets forth the scope and definition of the consulting/professional services, work and/or project (collectively, the "Services") to be provided by e-PlanSoft™ ("e-Plan") to the City of Chula Vista, CA ("**Client**"), for a cloud hosted deployment of e-PlanREVIEW (**EPR**) with integration to Velosimo Connect.

At the core of that plan is a detailed *Project Schedule Timeline* that includes the activities for the project, the resources required to perform those activities, and the schedule for completing them including critical dependencies. The *Project Schedule Timeline* will be provided to the Client following the project kickoff meeting.

We have provided this *preliminary* statement of work based on current understanding of the activities necessary to produce the required deliverables; we will refine our plan with the Client to ensure activities are clearly defined, to review timeframes, and to ensure each activity reflects an appropriate level of detail. Each activity will be owned by person(s) who are responsible for ensuring it is completed successfully. The project plan will be updated regularly throughout the course of the project and communicated to all participants and stakeholders via email.

It is important to identify the project's critical path after the detailed project plan has been developed and prior to the start of the project. The project's critical path is the longest sequential set of activities that must occur in order, based on identified dependencies. The combined end-to-end duration of activities represents required project duration and the project's critical path. This does not account for activities that may occur in parallel, but do not contribute to the project's critical path.

The project team will schedule weekly conference calls. An updated schedule and an updated progress report that includes the following will be provided:

- Activities completed within the current reporting period.
- Activities planned for the next reporting period.
- Updated schedule including milestones and their statuses (originally scheduled date, current target date, and the number of changes to the date).
- Issues or problems requiring resolution.
- The status of any changes that affect scope, cost, or schedule. Any work affecting cost will be done only with written consent from the Client.

THE E-PLANSOFT PROJECT TEAM

The following e-Plan personnel will be assigned to ensure the successful completion of this project for the Client:

Team Members	Role	Responsibilities
Cathy **Rogers**	Project Manager	Responsible for overseeing the Project Timeline. Responsible for e-Plan project management activities and creating project management deliverables. Primary point of contact with the Client's Project Manager and responsible for providing status and issue reports to the Client.
Kris **Trujillo**	Velosimo CEO	Responsible for Velosimo integration between Accela and EPR including ACA and Accela script/configuration changes as defined in this SOW.
Jason **McDonald**	Velosimo Customer Success Manager	Responsible for Velosimo integration between Accela and EPR including ACA and Accela script/configuration changes as defined in this SOW.
Amber **Anderson**	Implementation Manager	Assists with product configuration of EPR, conducts user training sessions and oversees our customer support team.
Jorge **Raya-Navarro**	Technical Support Manager	Provides expertise on the solution architecture, business analysis and facilitates communication between client support requests and the product engineers.
Sean **Hooper**	Customer Success Manager	Ensures the end result of the project implementation meets Client expectations per this SOW.

THE CLIENT CORE PROJECT TEAM

Dedicated involvement of the following Client personnel will ensure the successful completion of this project for the Client. Some overlap in staff responsibilities in the chart below, is understood.

The core team should be comprised of *subject matter experts* (SME's).

Role	Responsibilities
Project Managers	Individual(s) with extensive knowledge of the Client's permit intake and assignment distribution requirements.
Project Coordinators	Individuals who perform permit intake, counter reviews and may be responsible for distributing plan review assignments. Individuals who prepare deliverable packages with the reviewed plans and correction report(s) for return to the applicant.
Department/Group Manager(s)	Individuals who manage plan review staff and may be responsible for distributing plan review assignments for their staff and may be responsible for generating deliverable packages with the review plans and correction report(s) for return to the applicant.
Plan Reviewers	Individuals who conduct plan review and may be responsible for generating the correction report for return to the applicant.
Contributors	Individuals who will collaborate with the Reviewers to discuss/respond to issues, but who will not conduct plan review.

PROJECT MILESTONES

The milestone solution implementation has become a common practice in the industry to address critical business needs quickly and mitigate the risks associated with what has been termed "big bang" approaches that attempt to do too much too soon.

The milestones included in the schedule of work, and outlined in more detail below are:

1. Contract Acceptance
2. Discovery
3. Configuration
4. Integration
5. User Acceptance Testing
6. User Training
7. Go Live – Client Signoff

DESCRIPTION OF THE INTEGRATION

VELOSIMO WORKFLOW DIAGRAM

The Client uses EPR as a tool for reviewing and marking building plans associated with permits managed within the Accela Civic Platform. The Client uses the Accela Civic Platform to manage permit and plan review related activities.

Applicants applying for building permits requiring plan review interact with Client using *Accela Citizen Access*.

The purpose of this diagram is to integrate EPR with the Accela Civic Platform as it pertains to The Client process configuration within the Accela Civic Platform.

The following is a high-level diagram that describes the integration. See below for a descriptive narrative of each touchpoint in the integration.
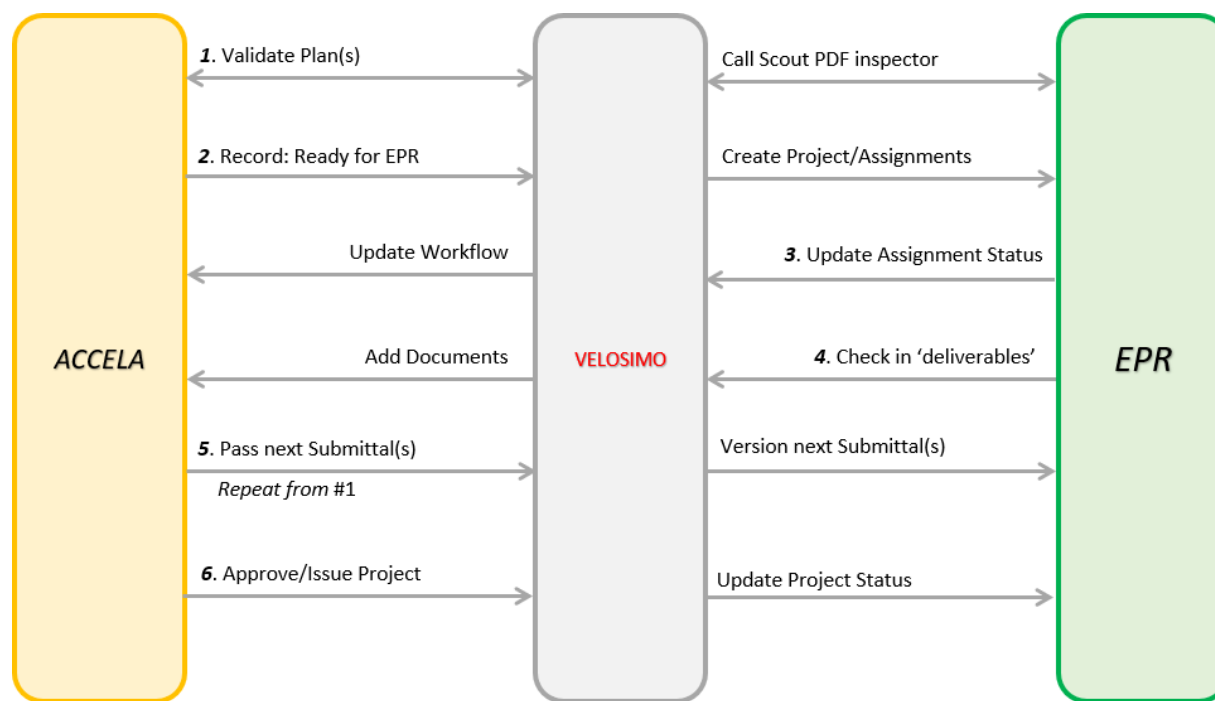
Integration Diagram
Velosimo manages API calls between Accela and EPR

1. VALIDATION OF PLAN REVIEW DOCUMENTS

The Applicant starts the process by creating a new building permit application in ACA. During the building permit creation process the Applicant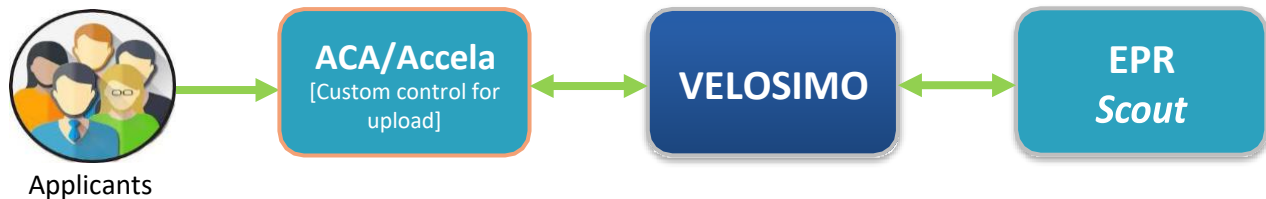 uploads all required plans as part of the application. At the time of upload* the system initiates the **Scout PDF** inspection to analyze incoming plan review documents for known issues. Scout's inspection will return a response to the Applicant, rejecting any plans that do not pass validation. Plan review documents that are validated may be uploaded to the Accela back office.

The Accela system creates the building permit application and assigns the Project Intake workflow task for the new building permit application to the appropriate The Client staff.

*Any plan review documents uploaded to Accela, outside of ACA, will also trigger a call to Scout PDF for validation.

ACCELA INTAKE COMPLETENESS CHECK

Next Intake personnel assigned the Project Intake workflow tasks will see the task in their Accela tasks list.

This user completes the *Intake* task to confirm that **all required data and documents were provided** by the Applicant.

Upon updating this workflow task to a *Ready for Review* process, the Accela system activates the Plan Review workflow tasks for the building permit and sends an EMSE workflow update event to Velosimo Connect letting the platform know a new building permit in Accela is ready for EPR.

2. UPLOAD TO EPR

Velosimo Connect then calls Accela to gather the:

- Permit information
- Contact information
- Plan Review files and Supporting Documents
- Plan Review Assignments

Velosimo then creates the corresponding *project, contact, document,* and *assignment* data records in EPR.

From this point forward, any updates to the *Accela* Project record are captured by Velosimo Connect and passed to EPR so that the EPR project record is up to date.

PERFORMING PLAN REVIEW

At this point each The Client Plan Reviewer has been assigned a workflow task for their respective review in Accela and has a corresponding assignment in EPR.

From the Accela Tasks list, reviewers choose their *assigned plan review* which automatically opens the document in the EPR Review page on a new browser window. Providing EPR login credentials is not required.

3. COMPLETING YOUR ASSIGNMENT IN EPR

In EPR, this user conducts their electronic plan review and when desired, 'completes' their assignment by choosing the appropriate *Assignment Status* in the Review Page. Velosimo Connect intercepts this change and passes to Accela to update the Accela workflow task for this respective task

The Correction Report is then generated in EPR to capture open/unresolved comments that need to be addressed by the Applicant.

4. CHECKING IN 'DELIVERABLES'

When the Client chooses to, the reviewed plans and correction report(s) are checked in to Velosimo from the EPR Deliverables page.

Velosimo adds these reviewed documents to the project record in Accela, setting the appropriate *virtual folders* and information necessary for tracking within Accela.

> Note* Velosimo can be configured to automatically pull the generated correction report and marked up plan set upon a "*cycle compete*" status.

5. REQUESTING RESUBMITTALS FROM THE APPLICANT

If all plan review tasks have been marked as 'approved', the Accela workflow will continue and no further review assignment activity will occur for this permit.

If plan review assignments *require corrections* from the Applicant, then the and the necessary information is sent to the Applicant via Accela to upload another submittal of the plan.

Once the Applicant has the next submittal ready for review the Applicant returns to Accela Citizen Access and uploads the corrected documents as a new submittal to the *original* plan set.

At this point the flow logic described above is repeated.

When Velosimo sends the next 'submittal' to EPR, all markups and comments are carried forward automatically in the Review Page and the previously created assignments are reset to a Not Started status. EPR users conduct there reviews again, marking comment records as closed. When all comments are resolved or marked as conditionally approved, the final plan set can be prepared.

UPDATING ACA – REQUESTING NEXT SUBMITTAL

Assuming corrections are required, the document record in ACA will be flagged with a 'Resubmit' status and the Applicant will be notified.

Corrected plan review documents are then uploaded as the 'next submittal' and the process repeats from *step 1*.

RETURNING THE APPROVED/FINAL PLAN SET

EPR users should apply the appropriate electronic stamps via the EPR Review page for each plan review assignment before approving their assignment.

The final approved plan set should be checked into Accela and placed in the Client's long-term retention location. Velosimo then adds the response documents to the record in Accela setting the appropriate virtual folders and necessary version information for tracking within Accela.

At the Client's discretion, the same deliverable can be returned to the Applicant via ACA for download.

6. CLOSING THE PROJECT IN ACCELA

When the Accela project record is closed, Velosimo will update the matching EPR project record accordingly.

Should the project reopen for revisions after the permit has been issued, the EPR project record will reopen as well.

Documents submitted for Revisions are handled in the same manner as described above.

PROJECT LAUNCH

City Acceptance Criteria:

Upon the provision of Milestone completion signoffs the Client is responsible for either accepting the milestone as complete or providing grounds for non-acceptance within 10 days of delivery. Non-correspondence will result in the de-facto acceptance of the milestone or could result in change orders due to additional project time required which is out of scope for this project.

1: CONTRACT ACCEPTANCE MILESTONE

Following formal acceptance of the Contract/Purchase Order, the e-Plan project manager will schedule the Discovery/Project Kickoff meeting with the Client.

OPEN FORUM PROJECT KICKOFF PRESENTATION

The project kickoff presentation is a formal meeting that includes Client project stakeholders, Client executives, Client staff as well as the e-Plan Sales and project team members.

During this 2-hour presentation, we will review the high-level project plan, discuss the short, and long-term goals and generally describe the Accela to EPR connectivity and functionality.

This open forum is an excellent opportunity for the Client executives to 'rally' the staff and set expectations for the what the finished implementation will deliver.

2: DISCOVERY MILESTONE

Following the project kick off presentation, the *Discovery* milestone is dedicated to collecting information needed for configuring the products to conduct the training and rollout of EPR with connectivity to the Accela back office.

It has several steps and components:

PROJECT LAUNCH MEETING

In the *Project Launch* meeting, the e-Plan project manager and core Client personnel shall meet onsite to discuss the following. (This meeting typically takes 4-6 hours.)

1. Identify the Project Manager who has deep expertise in the Client's internal processes regarding permitting and plan review. This individual will be responsible for ensuring all deliverables are provided to the e-Plan Team on schedule, coordinating time with the Client subject matter experts as well as coordinating user training and product rollout/go live. The desired go/live date will be confirmed in the kickoff meeting.

2. During the meeting, e-Plan will require an in-depth review of the Client's current *standard operating procedures* (SOP) regarding how plan review projects are created in your back-office application(s). Obtaining an updated copy of these SOPs for the kick-off is recommended.

3. Confirm the internal terminology regarding project workflow status, assignment status, document cycles, etc. used in-house is identified to ensure that EPR is configured to use the same terminology.

4. Another item for discussion will be to define how and where electronic documents will be archived for long term retention.

5. Velosimo to consult with Client to prepare the *Functional Specifications Document* (FSD) to confirm the

proposed integration touchpoints and workflow.

6. Identify the Client's subject matter experts (the project team) who will participate in the integration testing, product configuration and user acceptance testing (UAT).

7. Discuss and confirm the Project Timeline schedule for each milestone and all deliverables.

8. Confirm the schedule for remote project management meetings (weekly).

9. Discuss the Discovery Deliverables (see below) that the Client will need to gather.

EPR/Velosimo Responsibilities:
- Provide timely and appropriate responses to Agency's request for information
- Coordinate project planning activities
- Complete Baseline Project Plan, Project Status Report Template, and Project Initiation Presentation deliverables with input from appropriate Agency resources

Agency Responsibilities:
- Identify and set expectations with key resources and subject matter experts for ongoing participation in the project
- Provide timely and appropriate responses to e-PlanSoft and Velosimo requests for project planning input and meeting logistics requests
- Provide meeting facilities for Project Kickoff or Virtual Kickoff and other onsite activities

PROJECT TIMELINE SCHEDULE

Following the kickoff meeting, the e-Plan PM will share the *Project Timeline,* generated in *smartsheets,* with the appropriate project team members. This schedule will be relied on to confirm each milestone event, critical dependencies and to document progress, decisions, and the plan of action.

A secure *ShareFile* site will be deployed via which the team can exchange documents.

DISCOVERY OF DELIVERABLES

The Client shall gather the following deliverables*, listed below, in the format desired by e-PlanSoft. This information will be used to configure EPR and Accela in preparation of integration and user acceptance testing (**UAT**).

- List of all Accela records. As an CSV export with the four-level structure. Group>Type>Sub-Type>Category
  - List of all Workflow Processes associated with the list of records
  - List of Workflow tasks and statuses that will be used to integrate with EPR
- An updated staff organizational chart for the departments/agencies involved in the project.
- User names, user roles, department/agency affiliation, user email and phone number. An XLS document will be provided.
- A sample representative document(s) for the Correction Report letter in Word format.
- A representative sample of electronic stamps (saved in .PNG format) for use by the EPR plan reviewers.
  - PNG images with transparent backgrounds are recommended.
- Standard Comments/Checklists in Word or Excel format to be uploaded into the EPR Standard Comment Library, via an XLS template provided by e-Plan.
- A matrix that describes in any format that contains:
  - A list of EPR users who should automatically be added to new project 'teams' based on the type of project being reviewed.

- o File-naming requirements for incoming documents.
    - A Client email account (for example: donotreply@domainname.com) that EPR can use to send automated emails to Client staff (email notification alerts). Requires opening firewall port 25.

EPR/Velosimo Responsibilities:
- Provide EPR/Accela expertise and answer any questions related to the integration
- Complete EPR/Accela integration analysis

Agency Responsibilities:
- Provide Velosimo an Accela user and all the Accela login details
- Provide Accela records
    - o Workflow processes
    - o Task and Status integration points
- Provide all samples Correction reports
- Provide all Standard Comments

3: EPR CONFIGURATION MILESTONE

Using the Configuration milestone to *conduct hands-on training* for the EPR Administrators has been determined to provide the method for retention.

Once these tasks are complete, EPR training can begin.

- Creation of User **accounts**.
- Confirm the EPR **groups** (departments/agencies).
- Configure the EPR application and project type **lists**.
- Configure one Correction Report **template**.
- Upload standard comments into the EPR Comment **Library**.
- Configure the EPR color scheme '**branding'** and login page landing image.
- Upload Electronic **stamps** (.PNG format) and assign them to the appropriate Reviewers.
- Confirm/configure the EPR **permission** settings.
- Enter the Client **email** account that EPR will use to send automated emails to Client staff. For example: *DoNotReply@Clientdomain.org*
- Create sample projects and upload sample plans for training of Client staff. Plans shall meet electronic submittal requirements.

During the completion of this milestone, the Client will validate that configuration for EPR is complete.

The project schedule will be updated to indicate the completion of the Configuration milestone.

EPR/Velosimo Responsibilities:
- Complete EPR Configuration

Agency Responsibilities:
- Validate EPR Configuration

4: VELOSIMO DESIGN AND DEVELOPMENT

The Velosimo Connect product sits as a 'middle tier' between Accela and EPR and will be responsible for triggering, watching and intercepting calls. This Scope includes connecting five (5) Accela record types and (2) two workflows.

The following process will be required to complete the integration development between Accela and Velosimo:

1. Create an Agency support channel on Slack

    • Invite agency to Velosimo support on its Slack channel.

2. Obtain access to or deploy a copy of the Accela sandbox for development and integration testing.
3. Perform a business analysis & requirements gathering in the Accela and ACA platforms to evaluate scripting, workflow and business processes.
4. Capture requested or out of scope functionality not included in this SOW for implementation.
5. Obtain Client sign off on the proposed integration business plan.
6. Engineer and smoke test the bi-directional integration touchpoints to EPR on the Accela development server, as defined in the FSD.
7. Proceed to User Acceptance Testing (UAT) to confirm the workflow process end to end.

During the Accela integration configuration phase there are time requirements by City staff or contracted staff for the success of the project.

The requirements during this phase of the project are as follows:
1. Subject matter expert (SME) for the City Accela process: 40% of FTE
2. Accela technical staff: 60% of FTE

These time requirements can be fulfilled by one SME or multiple different people.

PROPOSED SOLUTION
This section will cover all the integration connection points between Accela and Velosimo-EPR. The diagram is a high-level illustration of the five connection points in an EPR-Velosimo-Accela project life cycle.

This is a mash up of screenshots form other agencies that are already live with EPR.
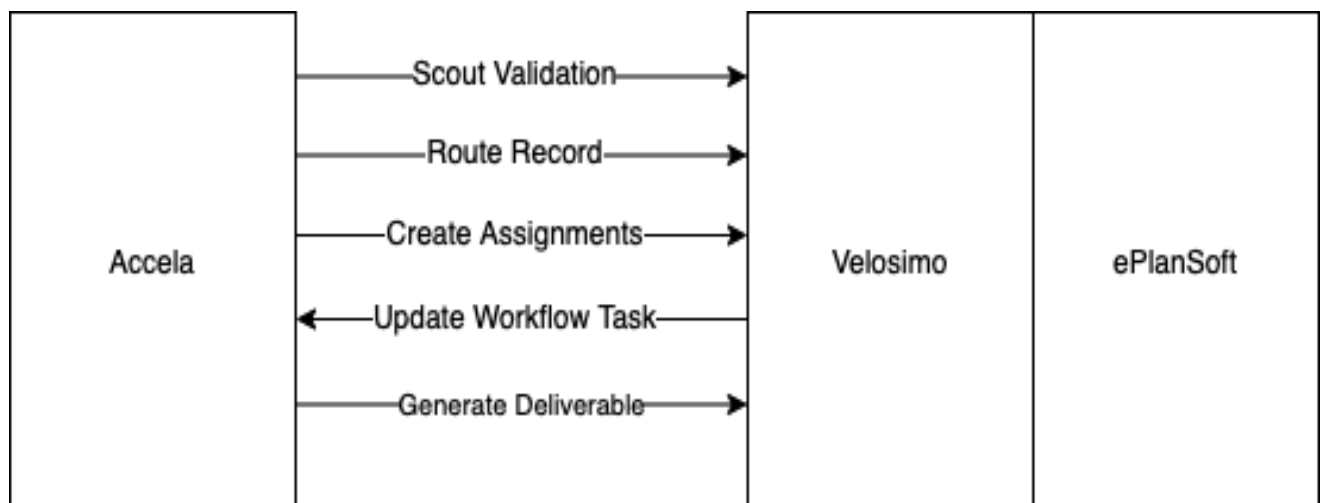
5: USER ACCEPTANCE TESTING (UAT)

In this milestone, the core project team will devote a <u>dedicated period</u> to test the full workflow from end to end between Accela, Velosimo and EPR. Requirements on the City for UAT testing is typically 1-2 of testing per workflow for each record type.

The desired goal is to confirm that configured workflows and ESME script in Accela are working properly and that the data/documents and document versioning passed to EPR are being recorded correctly.

Additionally, EPR calls to return information and documents to Accela are being properly captured.

UAT TRAINING FOR INTAKE STAFF/MANAGERS/REVIEWERS

Testing EPR and Accela includes the following:

- Submitting the project in Accela Citizen Access
- Processing incoming documents from Accela through intake to distribute plans to the appropriate staff.
- Confirming the project is created in EPR with all the correct data
- Confirming *optical character recognition* (OCR) of the sheet numbers on the incoming plans.
- Performing plan review including adding comments, markups, stamps, measurements.
- Completing an assignment task and confirming the corresponding Accela workflow task is updated correctly.
- Generating a Correction Report.
- Preparing a deliverable package for return to Accela.
- Sending back the resubmit deliverable package from EPR to Accela.
- Resubmitting plans in Accela Citizen Access.
- Accepting and routing the next submittal to the plan reviewers.
- Stamping the final approved set of plans.
- Downloading the approved final set for long term retention.
- Sending the Approved deliverable from EPR to Accela
- Closing the project record in Accela.

The Client needs to test every record and workflow process in ACA/Accela to be successful.

Velosimo will provide assistance to help the Agency to see that the configuration meets definitions in all the deliverables. Velosimo will provide eighty (80) hours of during the overall project including consultation during UAT. Velosimo will assist the Agency in the testing and validation of the configuration and its readiness to be migrated to production for active use and will assist in transferring the system configuration and any required data from Dev/Test/Support to Production. The testing effort will require a significant time investment by the Agency, and coordination of resources is critical. At this point in the implementation process, the Agency can further test individual components of functionality of the configuration (i.e., functional and/or unit testing), and can also test to ensure that the interrelated parts of the Accela Automation and e-PlanSoft configuration are operating properly (i.e., integration testing).

Velosimo will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support. Velosimo will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. Velosimo uses Slack for real-time customer support, some issues do not need a ticket and can be resolved in real-time using this method. Velosimo recommends that the Agency develop a test plan and scripts, as well as an issue log to track the progress of testing.

During User Acceptance testing, the Agency should expect to spend 2-4 hours per person, per record for testing all the EPR/ Accela integration points and whole process in Accela

For example, if an Agency has 50 records to test it will take **one person** anywhere from 100 hours (2 ½ weeks) to 200 hours (5 weeks). If during this time the Agency does not dedicate adequate resources to user acceptance testing, Velosimo will be forced to assess the progress and potentially assign resources to other projects until testing is properly executed by the Agency.

EPR/Velosimo Responsibilities:
- Provide timely responses to Agency's UAT bugs and questions related to Accela/Velosimo/EPR
- Fix all go-live critical bugs and log bugs not being fixed and provide a mitigation plan on when bug will be resolved

Agency Responsibilities:
- Identify Test cases for UAT
- Perform UAT and provide signoff

6: CONDUCTING EPR TRAINING

e-PlanSoft will provide comprehensive training for EPR users per the schedule below. These sessions will occur onsite in the mornings and afternoons, over a two-day period.

Training is offered as follows:

Course Description	Intended Audience	Session(s)	Duration
Velosimo training for Administrators: Monitoring the Velosimo dashboard API events.	EPR and Accela Administrators	1	**1 hour**
EPR training for Administrators: User accounts, permissions, configuration.	EPR and Accela Administrators	1	**2 hours**
EPR training for Intake and Deliverables: Scout inspection and OCR. Preparing Correction reports and project deliverables.	Permit Intake staff, Group managers, Permit QA Supervisors	1	**3 hours**
EPR training for Reviewers: Performing plan review. Plan review using *paper-based* plans. Preparing Correction reports and project deliverables.	Reviewers, Group managers, Permit QA Supervisors.	2	**3 hours**

*Additional training is available per the rate indicated on your Purchase Order/Sales Order.

The Client will be requested to sign off on UAT when this milestone completes.

TRAINING MATERIALS

EPR online help can be accessed from within the products by selecting the help icon. Several training videos for users of the EPR Review page are available.

TRAINING ENVIRONMENT

To facilitate the best possible experience, user training should be held in a classroom environment that provides:

1. Workstations/laptop for your staff running the latest version of Chrome.
   a. 27-inch monitors.
2. A large screen TV/projector.
3. A speaker phone.
4. A maximum class size of 15 users is recommended to complete the training in the time allotted.

7: GO-LIVE – CLIENT SIGN OFF

This completes the implementation of the project.

All milestone deliverables are complete.

SOFT LAUNCH FOR TARGETED CLIENTS

We recommend a *soft launch* approach as the Client rolls out to a targeted number of your constituents who have attended the ACA training session. This will provide some time for everyone to settle in and get comfortable with the process changes, after which the Client can expand the offering on more clients in a managed schedule.

COMMUNICATION

Schedule communication event Client wide re: electronic plan review acceptance. Announce a Go-Live date and update the Client website.

Conduct Workshop events for training constituents on using ACA. It has been our experience that Applicants struggle with uploading documents as the 'next submittal'. This is a critical function that can be resolved in Accela back office by your staff, but ongoing training for Applicants will be the most effective means of reducing this from occurring.

KEY ASSUMPTIONS

- The Client has contracted Directly with Velosimo to subscribe to the Velosimo Integration Platform as a Service to be connected as part of this project integrating e-PlanREVIEW and Accela Civic Platform.
- The Client shall provide the required documentation for configuring the product as specified in this SOW.
- The e-Plan Project Manager and Client POC will schedule weekly conference calls throughout the life cycle of this project.
- The Client **commits the necessary staff and dedicated resources** be available for the agreed upon project schedule Timeline.
- Delays to the project caused by staff unavailability will negatively impact the project schedule.

PLAN REVIEW WORKSTATIONS

EPR is supported on the *Chrome* and *EDGE* browsers although Chrome is the preferred browser.

EPR requires popups to be enabled for the specific domain to which EPR is deployed. (Any Client policy to disable browser popups must be allowed for your EPR URL.)

We recommend that *Adobe Reader* be installed on workstations.

EPR Reviewers should have at minimum, two 27"+ inch monitors running in high definition (1920x1080p).

A graphics card capable of supporting two 27-inch+ monitors is recommended.

PERMIT INTAKE WORKSTATIONS

EPR is supported on the Chrome and *EDGE* browsers although Chrome is the preferred browser.

EPR requires popups to be enabled for the specific domain to which EPR is deployed. (Any Client policy to disable browser popups must be allowed for your EPR URL.)

We recommend that *Adobe Pro* be installed on the Permit Intake workstations.

PROJECT CHANGE MANAGEMENT

The purpose of Project Change Management is to define the process that will be utilized by the project to manage and account for changes to project scope, cost, and schedule. All project tasks must be approached with an understanding of the project scope and critically examined within the context of project scope, cost, and schedule management.

The purpose of Project Change Management is not to eliminate change, but rather to define a process allowing the proposed changes to be properly identified, evaluated, and escalated as necessary. The Change Order Process is defined anything that changes the Statement of Work, duration of the project or contract values. The Change Order Processes will follow the steps outlined below.

A Change Order Request Form must be completed for all changes requested by either e-PlanSoft or the Client that further clarify impact or deviate from the approved SOW or MSA. The e-PlanSoft Project Manager will be responsible for managing all Change Order requests submitted on the project in accordance with the following process:

- All requests must be submitted in writing to the e-PlanSoft Project Manager either by e-mail or hard copy to be recognized as a formal request. Verbal requests or voice mails will not be considered formal change order requests. The Change Order Request Form, shown in an Appendix of this SOW, should be used to document in detail the change and provide justification for why it is needed. The initial submission must also document the estimated work effort and cost specifically for investigating what it would take to implement the change if approved. Based on the impact analysis and the estimated work effort and cost, representatives from both e-PlanSoft and the Client will jointly determine whether to proceed with the investigation. If the investigation is rejected, then the Change Order request is considered rejected and no further action is required. If it is accepted, then the requester (or its assignees) will then determine the impact of implementing the change on the project. The Client is responsible for completing any additional paperwork required as a result of this change (i.e. internal contract change documents).

- In investigating the impact of the Change Order on the project, the requester (or its assignees) will determine the impact and change on the cost, schedule, and manpower originally estimated for the project. The requester will also determine the impact on the SOW and any revisions to the language that may be required, as well as the estimated work effort and cost to implement the Change Order. Once the investigation has been completed, the requester will complete the Change Order Request Form with the information gathered in this step and resubmit it to the project manager for coordinating the review and approval.

- Based on the estimated work effort and cost, representatives from both e-PlanSoft and the Client will jointly determine whether to proceed with implementing the Change Order. If the implementation is rejected, then the Change Order request is considered rejected, and no further action is required. If the Change Order is accepted, the Change Order request is considered approved. Once all appropriate signatures have been obtained for the Change Order, the approved Change Order will become part of the overall agreement and an amendment to the SOW. The amended SOW will become the new baseline document upon which any new changes will be based.

- Hourly rates defined in your Purchase Order/Sales Order will apply.

CHANGE ORDER FORM

Proposed Change(s) AND Reason/Justification for Change (Indicate Urgency Level)
Urgency Level: ☐ High   ☐ Medium   ☐ Low

Project Name and Control NUMBER:
Requestor:
Organization:
Date of Request:

Description of Change

Impact of Change(s):
Impact on Resources:
Impact on Schedule:
Impact on Requirements:

Impact on Cost:

Assumptions / Risks

Alternatives to Proposed Change(s) (if any)

SUMMARY of Total Impact of Change
Resources:
Schedule:
Requirements:
Cost:

ACCEPTANCE

Please indicate the Client contact responsible for authorizing this SOW:

Name:	
Title:	
Signature:	
Phone Number(s):	
Email:	

PROJECT PRICING

E-PLANREVIEW SUBSCRIPTION QUOTE

QUANTITY	UNIT(s)	DESCRIPTION	COST		EXTENDED COST	
	License	e-PlanREVIEW - Subscription Fee List Price	$	2,000.00	$	-
75	License	e-PlanREVIEW - Subscription Fee Preferred Customer Discount	$	1,000.00	$	75,000.00
		Subscription Fee Sub-total			**$**	**75,000.00**
IMPLEMENTATION, TRAINING						
48	Hours	Project Management	$	200.00	$	9,600.00
40	Hours	EPR Deployment, Set Up and Configuration	$	200.00	$	8,000.00
40	Hours	Accela Integration Platform Configuration Support	$	200.00	$	8,000.00
1	Day(s)	Web Based User Training - Train the Trainer (Onsite Optional)	$	1,600.00	$	1,600.00
1	Day(s)	Virtual GoLive Support (Onsite Optional)	$	1,600.00	$	1,600.00
		Implementation Sub-total			**$**	**28,800.00**
		Subscription and Implementation Fee Total			**$**	**103,800.00**
Recurring Subscription fee						
75	License	e-PlanREVIEW - Subscription Fee Preferred Customer Discount	$	1,000.00	$	75,000.00
		Recurring Subscription Total			**$**	**75,000.00**

This Quote is governed by the e-PlanSoft Master Services Agreement.

*Subscription License fees are charged annually and include cloud hosting, feature releases, product updates, user documentation, telephone, email, and online support.

Discount: 50% discount based on a three (3) year contract agreement. Any reduction of licenses within this period will result in increase in of user license to list price.

*Subscription License Fees are subject to an annual adjustment of 5%.

*Subscription fees are due at time of signing.

*Travel expenses & Per Diem billed at Cost.

***This Quote is valid until for 90 days.

PAYMENT SCHEDULE

Payment Milestone Schedule City of Chula Vista, CA

Contract Signed

e-PlanREVIEW - Subscription Fee Preferred Customer Discount		**$75,000.00**
Total Year 1 Subscription Fee (Due at Signing)		**$75,000.00**

Professional Services - Milestones

Contract Acceptance (Due at Signing)	80%	$23,040.00
Go Live - Client Signoff	20%	$5,760.00
Total Professional Services Fee		**$28,800.00**
Total Year 1 Project Fee		**$103,800.00**

Recurring e-PlanREVIEW SUbscription

Year 2: e-PlanREVIEW - Subscription Fee Preferred Customer Discount	**$78,750.00**
Year 3: e-PlanREVIEW - Subscription Fee Preferred Customer Discount	**$82,687.00**
Year 4: e-PlanREVIEW - Subscription Fee Preferred Customer Discount	**$86,822.00**
Year 5: e-PlanREVIEW - Subscription Fee Preferred Customer Discount	**$91,163.00**

*e-PlanREVIEW License Due on date of contract execution.

*Professional services invoiced upon milestone completion.

*Yearly Subscription Fees due on anniversary of contract signing.

*Travel expenses billed at cost