

**SAAS SERVICES AGREEMENT  
ORDER FORM**

<b>EFFECTIVE DATE</b> (the "Effective Date")
<b>24 JAN 2022</b>

**CLARITI CLOUD INC.**  
("CLARITI")  
422 Richards Street, #170  
Vancouver, BC V6B 2Z4

<b>CUSTOMER LEGAL NAME</b> (the "Customer")	<b>CUSTOMER ADDRESS</b>	<b>PRIMARY CUSTOMER CONTACT</b> (Phone Number and Email)
<b>Yolo County, CA</b>	<b>292 W Beamer St Woodland, CA</b>	<b>Taro Echiburu.</b> <b>Director of Community Services Department</b> <a href="mailto:echiburu@yolocounty.org">echiburu@yolocounty.org</a> P: (530) 666-8775

**SAAS SERVICES**

CLARITI owns and operates a proprietary, modular, web-based software solution for governments (the "CLARITI Platform"), accessible through the Apex Platform™ online platform (the "Apex Platform") operated by Salesforce.com Inc. ("Salesforce.com"). Subject to the terms and conditions set out in the Agreement (defined below), the Customer wishes to engage CLARITI for access and use of certain modules of the CLARITI Platform (the "SAAS Services"), and the Customer will pay to CLARITI SAAS fees in exchange for such SAAS Services (the "SAAS Fees"), as each is set out in the Pricing Quote in the form attached hereto as **Exhibit "C"** (the "Pricing Quote").

**IMPLEMENTATION SERVICES**

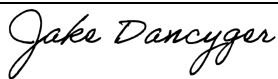
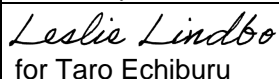
Subject to the terms and conditions of the Agreement, and in addition to the SAAS Services, CLARITI may provide the Customer with implementation services described in a statement of work ("SOW") in the form attached hereto as **Exhibit "B"** (the "Implementation Services"), in exchange for the fees specified in a SOW (the "Implementation Service Fees"). If Implementation Services are ordered as of the Effective Date, the Implementation Service Fees may also be summarized in the Pricing Quote.

**SIGNATURE**

This Order Form is entered into by and between CLARITI and the Customer, as such parties are identified and defined herein, as of the Effective Date first written above. By executing this Order Form, the parties hereby agree to be bound by:

- (1) this Order Form;
- (2) the SAAS Services Agreement attached hereto as **Exhibit "A"**;
- (3) any SOW, in the form attached hereto as **Exhibit "B"**;
- (4) the Pricing Quote attached hereto as **Exhibit "C"**;
- (5) the Service Level Terms attached hereto as **Exhibit "D"**; and
- (6) the Salesforce.com End User Subscription Agreement between the Customer and Salesforce.com attached as **Exhibit "E"**;

(collectively, the "Agreement").

<b>CLARITI:</b>	<b>CLARITI CLOUD INC.</b>	<b>CUSTOMER:</b>	<b>Yolo County, CA</b>
Signature:		Signature:	 for Taro Echiburu
Name:	Jake Dancyger	Name:	Leslie Lindbo
Title:	Co-CEO	Title:	Chief Assistant Director
Date:	December 24, 2021	Date:	December 29, 2021

# CLARITI CLOUD INC.

## Subscription Agreement

Version: 3.20

Release Date: November 2021

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Clariti Cloud Inc.  
1.866.999.1846  
info@claritsoftware.com

## SAAS SERVICES AGREEMENT

This SAAS Services Agreement (the “Agreement” or “Subscription Agreement”) outlines the terms and conditions under which CLARITI CLOUD INC. (“CLARITI”) agrees to provide services to the County of Yolo, a subdivision of the State of California (“Customer”), as further defined in the Order Form referencing this Agreement and executed by such parties (the “Order Form”). This Agreement incorporates the Order Form by reference and is effective as of the effective date specified therein (the “Effective Date”).

WHEREAS, CLARITI is a proprietary, modular, web-based software solution for municipalities, accessible through the Apex Platform™ online platform (the “Apex Platform”) operated by Salesforce.com Inc. (“Salesforce.com”);

WHEREAS, Customer is authorized by Government Code Section 23004 to make contracts as necessary for the exercise of its powers;

Customer wishes to retain the services of CLARITI to develop and manage a permit tracking system for Customer’s Planning, Building, and Code Enforcement Divisions;

WHEREAS, CLARITI has represented and warrants to the County that it has the necessary training, experience, expertise and competency to provide the services, goods and materials that are described in this Agreement.

Now, therefore, for valuable consideration, the receipt and sufficiency of which each of the Parties acknowledges, the Parties hereby covenant and agree as follows:

### 1. Services

1.1. **SAAS Services:** Subject to the terms and conditions of this Agreement, and in exchange for the SAAS Fees, CLARITI will use commercially reasonable efforts to provide the SAAS Services to the Customer during the Term in accordance with the service level terms attached hereto as Exhibit “D” (the “Service Level Terms”).

1.2. **Implementation Services:** Subject to the terms and conditions of this Agreement, CLARITI will use commercially reasonable efforts to provide the Customer with the Implementation Services expressly set out in an executed Order in exchange for the Implementation Service Fees. CLARITI may from time to time engage third parties (each a “Subcontractor”), such as independent contractors, affiliates, service providers, licensees and agents, to perform any part of the Implementation Services. CLARITI will: (a) remain directly responsible to the Customer for the acts or omissions of each Subcontractor; and (b) ensure that each Subcontractor is bound in writing to terms equally as protective of the Customer as the terms and conditions of this Agreement.

1.3. **Use:** The details of Customer’s access to and use of CLARITI, including the number of authorized Users (defined in paragraph 4.1), will be specified in written quotes and purchase orders issued by the Parties. Purchase orders are sent from the Customer to CLARITI, from time to time (each an “Order”), which are governed by and form part of this Agreement.

1.4. **SFDC Agreement:** Customer’s access to and use of CLARITI and the Apex Platform are governed by this Agreement and Exhibit “E” (the “SFDC Agreement”). By signing this Agreement, Customer acknowledges and signifies to CLARITI and Salesforce.com that Customer has understood and agreed to SFDC Agreement. If there is any inconsistency or conflict between this Agreement and the SFDC Agreement, then this Agreement will take priority and govern regarding Customer’s access to and use of CLARITI and the relationship between Customer and CLARITI, and the SFDC Agreement will take priority and govern regarding Customer’s access to and use of the Apex Platform and the relationship between Customer and Salesforce.com if applicable.

## 2. Term and Services

2.1. **Term of Agreement and Orders:** The initial term of this Agreement is for a period of three (3) years commencing on the Effective Date (the “**Initial Term**”), unless terminated earlier by either Party pursuant to this Agreement. Unless expressly stated otherwise in an Order, this Agreement will automatically renew for additional one-year periods (each a “**Renewal Term**”), unless terminated earlier pursuant to this Agreement or unless either Party gives notice of non-renewal to the other Party by no later than ninety (90) days before the end of the Initial Term or the then-current Renewal Term. For purposes of this Agreement, the Initial Term and all Renewal Terms are referred to collectively as the “**Term**”. The term of each Order will commence on the effective date specified on the Order and expire on the expiration date specified in the Order, unless terminated earlier pursuant to this Agreement or the terms of the Order. Any changes to the Order quantity must be submitted 30 days before renewal. Each Order will automatically renew for additional one-year periods at the list price and quantity in effect at the time of renewal unless: (a) the Order is terminated earlier pursuant to this Agreement; (b) either Party gives notice of non-renewal to the other Party by no later than ninety (90) days before the end of the then-current term of the Order; or (c) the Order expressly states that it will not automatically renew.

2.2. **CLARITI Services:** Subject to the provisions of this Subscription Agreement, CLARITI will provide the Customer the Services during the Term to access and use through the Apex Platform: (a) the CLARITI modules specified in valid and subsisting Orders; and (b) online training and technical support materials for those CLARITI modules (collectively, the “**CLARITI Services**”).

2.3. **Optional Services:** CLARITI will provide optional services to or for the benefit of Customer (the “**Optional Services**”), as specified in applicable Orders. Unless otherwise agreed in writing by the Parties, Optional Services will be provided only during the Term and subject to this Agreement and such additional terms and conditions (including payment of additional fees) as agreed in writing by the Parties.

2.4. **Orders:** Each time Customer wishes to request CLARITI Services and Optional Services (collectively, the “**Services**”) from CLARITI, Customer will sign and deliver to CLARITI a completed Order in the form prescribed by CLARITI. An Order submitted by Customer will not be binding on CLARITI unless and until CLARITI accepts the Order in writing.

2.5. **Technical Support.** Customer will ensure that all requests for technical support regarding the services or system warranty and the apex platform are directed to Clariti only, and not to salesforce.com. Any request for technical support made by customer or any users to salesforce.com will be subject to an additional fee payable by customer.

## 3. Customer Data

3.1. **Ownership of Customer Data:** CLARITI will not acquire any right, title to interest in, to or associated with the data provided by Customer or created by Customer using the Services (collectively, the “**Customer Data**”).

3.2. **Storage/Return of Customer Data:** Customer Data is stored by Salesforce.com in the Apex Platform and is subject to the Salesforce.com End User Subscription Agreement. At any time upon request by Customer during the Term and within thirty (30) days after the end of the Term, CLARITI will request that Salesforce.com return all Customer Data in the Apex Platform to Customer in accordance with the Salesforce.com End User Subscription Agreement. CLARITI and Salesforce.com are not responsible for the privacy, security or integrity of Customer Data that is transmitted outside the Apex Platform.

3.3. **Consent and License of Customer Data:** Certain Services may require that CLARITI and Salesforce.com access, use, process and transmit Customer Data, and certain CLARITI modules or additional functionalities (including data integration with Customer’s systems) may result in Customer Data being transmitted from the Apex Platform to other computer systems. Customer authorizes and consents to such use of Customer Data by CLARITI and Salesforce.com, and hereby grants to CLARITI and Salesforce.com a non-exclusive, royalty free, world-wide right and license during the Term to access,

copy, process and otherwise use Customer Data as may be required to provide the Services, perform CLARITI's obligations under this Agreement or to create Anonymized Data. "*Anonymized Data*" means Customer Data which has been stripped of information potentially identifying Customer or which contains any Personal Information, and has been manipulated or combined to provide generalized anonymous information that cannot be reverse-engineered to identify the Customer or identify an individual.

3.4. **Disclaimer:** Use of Customer Data is at Customer's own risk. Customer is solely responsible for, and bears all risks and liabilities associated with, all Customer Data. CLARITI does not have any control over Customer DATA AND is not responsible or liable for Salesforce.com's storage of Customer Data or the deletion, correction, destruction, damage, loss of or failure to store any Customer Data. CLARITI makes no representation, warranty, condition or guarantee of any nature or kind whatsoever, whether express, implied or statutory, or arising from custom or trade usage or by any course of dealing or course of performance, regarding Customer Data, and disclaims any and all responsibility and liability for Customer Data to the fullest extent permitted by law.

#### 4. Authorized Users

4.1. **Users:** Customer will access and use the Services only through Customer's authorized representatives (each a "**User**") with a valid and subsisting account (each an "**Account**") and username and password issued by or on behalf of CLARITI (collectively, "**Codes**"). Customer will appoint and authorize one or more Users (each an "**Administrator**") to appoint other Users and administer Customer's use of the Services. Customer will not authorize more Users than the number of Users specified in valid and subsisting Orders. A User whose employment has been terminated by Customer or who will otherwise no longer use the Service may be replaced with a new User. Customer is fully responsible and liable for, and bears all risks relating to, all use of the Services by Users and all acts or omissions by Users and will ensure that all Users comply with the terms of this Subscription Agreement. In the event CLARITI identifies or suspects that Customer has exceeded the number of authorized Users, CLARITI will inform Customer and give Customer an opportunity to investigate and correct the matter.

4.2. **Registration/Changes:** CLARITI may refuse to register any individual as a User, and may, acting reasonably, restrict, suspend or terminate (in whole or in part) the permission granted to any User to access and use the Services. A User's permission to access or use the Services will automatically be terminated if Salesforce.com suspends or terminates the User's permission to access or use the Apex Platform.

4.3. **Accounts/Codes:** Accounts and Codes are specific to the User for whom they are issued and may not be shared with any other person. Customer will ensure that all Users keep their Codes secure and confidential at all times and not permit any other person to use their Account or Codes, and immediately notify CLARITI if they know or suspect that any Account or Code has become known to or used by any unauthorized person. Customer is fully responsible and liable for the security of all Codes and all use and misuse of Codes and Accounts. If CLARITI, in its discretion, considers a Code to be insecure or to have been used inappropriately, then CLARITI may immediately cancel the Code without any notice to Customer, the affected User, or any other person.

4.4. **Disclaimer:** Codes may not prevent unauthorized access to Customer Data or other information Customer or Users may use in connection with the Services. CLARITI is under no obligation to verify the actual identity or authority of the user of any Codes, Accounts or the Services, and is not responsible or liable for unauthorized access to the Services or any unauthorized or alteration, theft or destruction of Customer Data through accident, fraudulent means or devices, or any other method, unless the direct result of CLARITI's gross negligence.

#### 5. Fees

5.1. **Fees - General:** Customer will pay to CLARITI the applicable fees (the "**Fees**") for the Services as specified in Orders or as otherwise set forth in this Agreement. If the Fees are not specified in an Order or this Agreement, the Parties shall agree on a fee as an amendment or change order to the Agreement

or Order, as applicable. User-based Fees will be based upon the total number of Users specified in applicable Orders, whether or not the corresponding Accounts are actively used during the billing period. All Fees in Orders are at minimum annual, and unless otherwise expressly set forth in an Order, additional Users added during a billing period will be subject to payment of Fees for the pro-rated length of the entire billing period.

5.2. **Fees - Implementation:** The Customer will pay to CLARITI the Implementation Service Fees and Expenses in the amounts, at the times and according to the terms set out in each Order. All Implementation Service Fees payable under this Agreement are exclusive of any and all Taxes, and such Taxes will be invoiced together with the Fees, unless Customer is exempt from such Taxes. Subject to the applicable Order, invoices for Implementation Services are payable, without holdback or setoff, immediately upon delivery, except where such Implementation Service Fees and/or Expenses invoiced are disputed by the Customer in good faith. Invoice disputes will not affect the undisputed portions of the Implementation Service Fees and/or Expenses payable by the Customer.

5.3. **Fees – Data Storage:** The Services include an amount of data storage calculated on a per User basis, as specified in the applicable Order. If the amount of data storage used by Customer during a billing period exceeds those limits, Customer will be charged additional Fees based upon the then current Fee Schedule.

5.4. **Fees – Full Sandbox(s):** The Services require a 1 Full Salesforce sandbox be quoted and purchased for the purposes of receiving ongoing CLARITI updates. The Full Sandbox shall be refreshed to match the Salesforce live production org on a quarterly basis. The Full Sandbox may be used by other parties, (Customer, CLARITI Partners) for other purposes with the understanding that they are aware and responsible for preserving any of their modifications, as the quarterly sandbox refresh will remove those changes to match the production org.

5.5. **Taxes:** Fees are exclusive of all applicable federal, state, provincial, county, municipal and other sales, use, value-added, property, excise, import, foreign, withholding and other governmental taxes, duties, charges, levies, fees, excises, tariffs and assessments, of any nature whatsoever now or hereafter imposed (collectively, “Taxes”). Customer is solely responsible and liable for, and will pay to CLARITI, all Taxes (other than corporate income taxes payable by CLARITI) associated with, based on or due as a result of the Fees, and all related interest, penalties and expenses.

5.6. **Payments:** For each Order, CLARITI will prepare and deliver an invoice to the Customer setting out the applicable Fees and Taxes payable to CLARITI. Each invoice will be due and payable in accordance with the payment terms and method set forth in the Order or otherwise agreed to in writing by the Parties. CLARITI may deliver invoices to Customer by email. If payment is due beyond 45 days in arrears of Term, CLARITI may temporarily suspend Customer licensing.

5.7. **Compliance – User Services:** Customer understands that for the Services identified on the Section 5.6 invoice, there are certain Clariti and Salesforce.com license capabilities and limitations per Customer Org that are contractual in nature (e.g., the limit on the number of custom objects is not limited as a technical matter by the Services) and therefore the Customer agrees to strictly monitor and manage all System Integrators, Technical Staff and Users' use of such subscriptions in the Customer Org and adhere to the capabilities. CLARITI may itself review Customer's use of subscriptions at any time through the Service. In the event CLARITI identifies or suspects that Customer has exceeded the use of subscriptions, CLARITI should inform Customer and give Customer an opportunity to investigate and correct the matter.

5.8. **Compliance – Customer Community, Community Plus Services:** Customer understands that for the Customer Community Services identified on the Section 5.4 invoice, if Customer User logins in the applicable Org exceeds the Permitted Number of Monthly Logins (as described in the Order), CLARITI will inform Customer and give Customer an opportunity to investigate and correct the matter. If the number of Customer User logins continues to exceed the Permitted Number of Monthly Logins in each of four

consecutive calendar months, Customer will be charged the per-Login price (based on the “Monthly/Unit Price” specified in the invoice) for each excess Customer User login in such fourth month and in each consecutive month thereafter in which the aggregate number of Customer User logins in the Org exceeds the Permitted Number of Monthly Logins. Such additional fees will be charged to Customer monthly in arrears in accordance with the billing and payment methods specified above. Unused logins are forfeited at the end of each month and do not roll over to subsequent months. The beginning and end of each calendar month will conform to U.S. Pacific Time.

5.9. **Audit:** CLARITI may audit use of User Services and subscriptions through the CLARITI and Salesforce.com Service. Should any audit reveal any unauthorized use of Services, CLARITI should inform Customer and give Customer an opportunity to investigate and correct the matter. If the unauthorized use continues, Customer agrees to pay to CLARITI, within 45 days of CLARITI's notice of the audit results the difference between the price charged by CLARITI to Customer for the applicable Service and CLARITI's then-current list price for the correct Service in the same Org showing unauthorized use (taken as a group), beginning with the date of the notification through the end of the then current subscription term (the “True Up Payment”). Upon payment of the True Up Payment, all Services showing unauthorized use will be converted into compliant Services and invoiced at CLARITI's accordingly.

## 6. Apex Platform

6.1. **Access to Platform:** Customer's access to and use of the Services will depend upon the access to and use of the Apex Platform (also referred to as an “Org”, “Sandbox”, or “Salesforce Organization”), which is operated and controlled solely by Salesforce.com, and is subject to the Salesforce.com End User Subscription Agreement.

## 7. Restrictions re Services

7.1. **Restrictions:** Customer will use the Services only as expressly authorized by this Agreement and only for Customer's own internal business purposes. Without limiting the generality of the foregoing, Customer will not directly or indirectly: (a) use, disclose, or provide or permit access to or use of, the Services except as expressly authorized by this Agreement or an applicable Order; (b) copy the online training and technical support materials except as necessary for their use as expressly set forth in this Agreement; (c) assign, authorize, license, sublicense, grant, sell, resell, share, lend, lease, loan, transfer, publish, transmit, publicly display or perform, distribute, rent, create any interest in, or otherwise give or make available or permit the use of or commercially exploit the Services or their functionality or performance, by or for the benefit of any other person, with or without charge; (d) modify or create derivative works from or based on the Services; (e) create links to or frame or mirror the Services; (f) alter, attempt to circumvent, destroy, obscure, or remove any notices, proprietary marks or codes, means of identification, or digital rights management tools or information, security or control measures (including license keys), or agreements (including end user agreements) on, in or in relation to the Services; (g) reverse engineer or access the Services or the Apex Platform in order to: (i) create a competitive product or service, or a product or service using similar ideas, features, functions or graphics; or (ii) copy any ideas, features, functions or graphics of the Service; or (h) permit, assist or encourage any other person to do any of the foregoing.

7.2. **Prohibited Users/Uses:** Customer may not access or use the Services or the Apex Platform if Customer is a direct competitor of Salesforce.com or CLARITI, or for the purpose of monitoring availability, performance, or functionality, or for any other benchmarking or competitive purposes. Customer will not, and will ensure that its Users do not, use the Services: (a) for any unlawful or immoral purpose; (b) to send spam or otherwise duplicative or unsolicited messages prohibited by applicable law; (c) to send or store infringing, obscene, threatening, libelous, or otherwise unlawful or tortious material, including material harmful to children or in violation of third party privacy rights; (d) to send or store material containing software viruses, worms, Trojan horses or other harmful computer code, files, scripts, agents or programs; (e) to interfere with or disrupt the integrity or performance of the Services or the Apex

Platform or the data contained therein; or (f) to attempt to gain unauthorized access to the Services or the Apex Platform or related systems or networks. Customer will not, and will ensure that its Users do not, develop applications for internal use with the Apex Platform or the Services without the expressly prior written consent of CLARITI and Salesforce.com. Customer will use commercially reasonable efforts to prevent unauthorized access to or use of the Services or the Apex Platform and will promptly notify CLARITI of any unauthorized access to or use of the Services or the Apex Platform.

7.3. **Changes:** Customer acknowledges and agrees that CLARITI may in its discretion change the Services from time to time, but shall provide notice of Substantive Changes to Customer. If any Substantive Changes to the Services are not approved by Customer, then Customer shall have the option to terminate the Agreement in its sole discretion. “**Substantive Changes**” means any change that fundamentally changes the nature of the Services offered to the Customer

## 8. Proprietary Rights

8.1. **General:** CLARITI and its licensors will at all times own and retain all right, title and interest (including all intellectual property rights) in, to and associated with the Services and all related content, software and technologies. Salesforce.com will at all times own and retain all right, title and interest (including all intellectual property rights) in, to and associated with the Apex Platform and all related content, software and technologies. Except as provided in Section 3.3, Customer will retain all right, title or interest in any Customer Data stored on CLARITI or Salesforce platforms. Customer will not acquire any right, title or interest in, to or associated with the Services or the Apex Platform or any related software or technologies, except for the limited license set forth in Section 2.2.

8.2. **CLARITI Marks:** Clariti™, Clariti Cloud Inc.,™ and related logos and marks are the trademarks of CLARITI (“CLARITI Marks”). Customer will not acquire any license to use, or any right, title or interest in, to or associated with, any of those trademarks.

8.3. **Disclosure of Customer Information to Salesforce.com:** CLARITI will disclose information regarding Customer and Orders (including contact information regarding Customer’s representatives) to Salesforce.com. CLARITI has no control over, or any responsibility or liability for, Salesforce.com’s collection, use, or disclosure of that information.

8.4. **CLARITI Property & Reservation:** CLARITI expressly reserves all rights in CLARITI Property, including all intellectual property rights. All right, title and interest in the CLARITI Property, and any update, modification, adaptation, translation, customization or derivative work thereof, is and remains with Provider (or Provider’s third party suppliers, as applicable). The CLARITI Property is licensed on a subscription basis and not “sold” to Customer. CLARITI and its licensors will at all times own and retain all right, title and interest (including all intellectual property rights) in, to and associated with the CLARITI Property “*CLARITI Property*” means the Services, CLARITI Marks and Anonymized Data, and all materials provided by Provider and not specifically granted to Customer.

## 9. Representations / Disclaimers / Liability Limitations

9.1. **Representations/Warranties of Customer:** Customer represents and warrants to CLARITI that now and at all times during the Term: (a) Customer has the right, power, capacity and authority to enter into and perform its obligations under this Agreement and to grant the licenses, authorizations and permissions set forth in this Agreement (including regarding access to and use of Customer Data); (b) all information provided by Customer to CLARITI in an Order or otherwise is true, accurate, current and complete; and (c) Customer’s use of the Services complies with all applicable local, state, national and foreign laws, treaties and regulations, including those related to data privacy, international communications and the transmission of technical or personal data and (d) the provision of, or transmission of, any Customer Data to CLARITI and the use of such Customer Data for the purposes

described in this Agreement does not and will not violate or infringe the rights of any person and Customer has obtained all appropriate and necessary consents to do so.

**9.2. Representations/Warranties of CLARITI:** CLARITI represents and warrants to Customer that CLARITI has the corporate power, capacity and authority to enter into this Agreement. Functionality that was configured/developed by CLARITI and has unexpectedly stopped working is covered for the Term of the Agreement or Order. (“System Warranty”) Note that warranted items can only be diagnosed by CLARITI. Custom development performed by any non-CLARITI entity and functionality related to payment processing is excluded from System Warranty. In addition, if CLARITI is unable to deploy permit types as outlined in Section 3.2 in the Statement of Work (Exhibit B) within 12 months of the start date of the Sprint Pilot as outlined in Section 3.1.1 then Customer shall give CLARITI notice of any deficiencies and give CLARITI 30 days to correct those deficiencies. If, at the end of the 30-day period the permit types as outlined in Section 3.2 in the Statement of Work are not deployed Customer may terminate the Agreement with 30 days’ notice and all Implementation Service Fees shall be refunded to Customer. All estimates in Exhibit B reflect CLARITI’s good faith estimate of the time necessary to complete such work. During the implementation, both parties will reassess the time estimates on an ongoing basis and mutually agree on an acceptable revision in writing to the schedule if necessary. To the extent the scope or estimates of those sections are greater than the initial estimates in Exhibit B, the additional mutually agreed time to complete the work shall be added to the 12 month period for the purposes of this clause.

**9.3. Salesforce Development Lifecycle Restriction:** Customer agrees to have its technical staff or system integrator staff maintain environments and best practices described in [https://resources.docs.salesforce.com/196/latest/en-us/sfdc/pdf/salesforce\\_development\\_lifecycle.pdf](https://resources.docs.salesforce.com/196/latest/en-us/sfdc/pdf/salesforce_development_lifecycle.pdf) as it existed on the Effective Date of the Agreement, a copy of which will be retained by Customer and CLARITI. System issues that arise due to not following procedures described in sections “Chapter 2: Development Environments”, for single and multiple projects, “CHAPTER 4 Track and Synchronize Development Changes”, “CHAPTER 5 Release Management” are excluded from Section 9.2 System Warranty.

**9.4. No Other Representations/Warranties:** The representations and warranties set forth in paragraph 9.2 are in lieu of all other representations, warranties, conditions and guarantees from CLARITI. The Services are provided “as is and with all faults”, and without any, SUBJECT TO THE SYSTEM WARRANTY, representations, warranties, conditions or guarantees of any nature or kind whatsoever, whether express, implied or statutory, or arising from custom or trade usage or by any course of dealing or course of performance, including any representations, warranties, conditions or guarantees of or relating to: accuracy; capacity; completeness; delays; durability; errors; fitness for a particular purpose; lack of viruses or other harmful component, errors, or interrupted service; merchantability; non-infringement; performance; quality; results; suitability; timeliness; title; or workmanlike effort; all of which are hereby disclaimed by CLARITI to the fullest extent permitted by law. Without limiting the generality of the foregoing, CLARITI does not represent, warrant, or guarantee that: (a) the Services will operate in combination with any other hardware, software, system or data, or be free from errors or uninterrupted service; (b) that the Services are free from errors or defects, provided that any material errors or defects will be corrected in a reasonable period, or (c) the Services and related software and systems are free of viruses or other harmful components, provided that any viruses or other harmful components will be addressed in a reasonable manner.

**9.5. General Disclaimer:** Use of the Services and the Apex Platform is at Customer’s own risk. The Services and the Apex Platform may be affected by numerous factors beyond CLARITI’s control, and may not be continuous or uninterrupted or secure. Security and privacy risks cannot be eliminated. Customer is solely responsible for Customer’s and Users’ use of the Services and the Apex Platform. Customer hereby acknowledges that the Services may be subject to limitations, delays, and other problems inherent in the use of the Internet and electronic communications, and CLARITI is not responsible or liable for any delays, delivery failures, or other damage resulting from such problems.

**9.6. Liability Limitation:** NOTWITHSTANDING ANYTHING IN THIS AGREEMENT, CLARITI'S MAXIMUM LIABILITY TO THE CUSTOMER UNDER THIS AGREEMENT WILL NOT EXCEED THE AGGREGATE AMOUNT OF FEES, COMPENSATION AND OTHER COSTS PAID BY THE CUSTOMER TO CLARITI DURING THE TWENTY-FOUR (24) MONTH PERIOD PRECEDING THE EVENT GIVING RISE TO THE CLAIM. NOTWITHSTANDING ANYTHING IN THIS AGREEMENT, CLARITI WILL NOT BE LIABLE FOR ANY INDIRECT, PUNITIVE, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF THIS AGREEMENT (INCLUDING, WITHOUT LIMITATION, LOSS OF BUSINESS, REVENUE, PROFITS, GOODWILL, USE OR OTHER ECONOMIC ADVANTAGE) HOWEVER THEY ARISE, WHETHER IN BREACH OF CONTRACT, BREACH OF WARRANTY, OR IN TORT, AND EVEN IF CUSTOMER HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, AND THE CUSTOMER HEREBY RELEASES CLARITI OF SAME. IN ANY EVENT, CLARITI'S LIABILITY UNDER THIS AGREEMENT WILL BE LIMITED ONLY TO DIRECT, VERIFIABLE DAMAGES ARISING FROM CLARITI'S MATERIAL NON-FULFILMENT OR BREACH OF ANY WARRANTY OR COVENANT, OR ANY MATERIAL MISREPRESENTATION, EXPRESSLY PROVIDED UNDER THIS AGREEMENT. THIS SECTION WILL APPLY TO THE FULLEST EXTENT PERMITTED BY LAW.

(a) **General/Definition:** this paragraph 9.6 applies regardless of any negligence or other fault or wrongdoing (including fundamental breach or gross negligence) by CLARITI or Salesforce.com, and even if they have been advised of the possibility of the loss or damage being incurred; and in this paragraph 9.6, references to "CLARITI" and "Salesforce.com" includes their respective past, present and future directors, officers, employees, agents, representatives, service providers, subcontractors, suppliers, licensors, licensees, and each of them, jointly and severally. Provided, however, that this paragraph 9.6 shall not apply to fraud or affirmative misrepresentation by CLARITI.

**9.7. Fair Allocation of Liability:** Customer acknowledges and agrees that this Agreement presents a fair allocation of risk and liability, which is reflected in the Fees to be paid by Customer.

**9.8. Cyber Insurance:** CLARITI shall be required to retain Cyber Insurance, with limits not less than \$2,000,000 per occurrence or claim, \$2,000,000 aggregate, during the Term of this Agreement. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by CLARITI in this Agreement and shall include, but not be limited to, claims involving security breach, system failure, data recovery, business interruption, cyber extortion, social engineering, infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, and alteration of electronic information. The policy shall provide coverage for breach response costs, regulatory fines and penalties as well as credit monitoring expenses.

## **10. Indemnity**

**10.1. Indemnity:** Customer will defend, indemnify, and save and hold harmless CLARITI and its personnel and representatives from and against all Claims and Proceedings directly or indirectly arising from, connected with, or relating to Customer's use of the Services and the Apex Platform, or any actual or alleged negligence, misconduct or breach of this Subscription Agreement by Customer or any other person for whom Customer is under this Agreement or in law responsible, or any breach of Customer's warranties under this Agreement. Customer will assist and co-operate as fully as reasonably required by CLARITI in the defence of all third-party Claims and third party Proceedings.

10.2. With the exception that this section shall in no event be construed to require indemnification by CLARITI to a greater extent than permitted by law, CLARITI shall indemnify, defend and hold harmless Customer, its officers, agents, employees and volunteers from and against any and all Claims and Proceedings arising out of or resulting from (a) any negligent act or omission of CLARITI as is expressly contemplated in this Agreement, (b) any material non-fulfilment or breach of any warranty or covenant in this Agreement by CLARITI, or (c) any material misrepresentation in this Agreement by CLARITI. The

defense and indemnification obligations of this agreement are undertaken in addition to, and shall not in any way be limited by, the insurance obligations contained in this agreement.

10.3. In this Agreement: (a) “**Claims**” means claims, counterclaims, complaints, demands, causes of action, liabilities, obligations, damages, losses, legal fees, costs, expenses and disbursements (including reasonable attorneys’ fees and court costs) of any nature or kind, whatsoever and howsoever arising, whether known or unknown, whether in law or in equity or pursuant to contract or statute, and whether in any court of law or equity or before any arbitrator or other body, board or tribunal; and (b) “**Proceedings**” means actions, suits, proceedings and hearings of any nature and kind in any court of law or equity or before any arbitrator or other body, board or tribunal.

10.4 For certainty, and notwithstanding anything to the contrary in this Agreement, this Section 10 and all defense and indemnity obligations herein shall survive the termination or completion of this Agreement for three (3) years.

## 11. Termination and Suspension

11.1. **Termination:** Either Party may in its discretion terminate this Agreement for cause the other Party fails to cure any default upon reasonable notice. This Agreement will automatically and immediately terminate if Customer’s access to and use of the Apex Platform is prohibited by Salesforce.com. If this Agreement is terminated, Customer will promptly pay all undisputed outstanding fees and charges. Each Order will automatically and immediately terminate upon the expiration or termination of this Agreement.

11.2. **Suspension of Services by CLARITI:** Notwithstanding any other provision of this Agreement, if Customer fails to make a required payment under this Agreement, CLARITI may immediately suspend the provision of all or any portion of the Services upon 60 days’ notice to Customer. In addition to other rights and remedies of CLARITI under this Agreement, CLARITI may suspend, terminate or limit (in CLARITI’s sole discretion) Customer’s access to or use of the Services, or any part of it, with reasonable notice in order to: (a) prevent damage to, or degradation of the integrity of, CLARITI’s systems, CLARITI Property or Customer’s systems; or (b) comply with any law, regulation, court order or other governmental request or order. CLARITI will use commercially reasonable efforts to notify Customer of a limitation, suspension or termination action as soon as reasonably practicable. In the event of a limitation or suspension, CLARITI will restore Customer’s access to the Offering when CLARITI determines the event has been resolved. Nothing in this Agreement will limit CLARITI’s right to take any action or invoke remedies or will act as a waiver of CLARITI’s rights in any way with respect to any of the foregoing activities. Unless found to be done in bad faith, no such suspension will be a breach of this Agreement by CLARITI, entitle Customer to a refund or suspension of fees, or give rise to any liability by CLARITI to Customer or any other person.

11.3. **Survival:** Except as otherwise expressly set out in this Agreement, Sections 5, 8, 9, 10, and 12 and paragraphs 6.2, 3.1, 3.2, 3.3, 3.4, 4.4, 7.1, 10.1, 10.2 and 11.3 of this Agreement, and all other provisions necessary to their interpretation or enforcement, will survive indefinitely after the termination of this Agreement and will remain in full force and effect and be binding upon the Parties as applicable.

## 12. General

12.1. **Notices:** CLARITI may deliver Orders and Invoices to Customer by email, facsimile, or delivery to the addresses on record in CLARITI’s Customer file. The Parties will give all notices under this Agreement in writing delivered by courier, e-mail, or by facsimile transmission to the other Party’s current address for delivery specified on the Party’s websites.

12.2. **Publicity.** CLARITI may reference Customer in CLARITI’s advertising and promotional activities and materials (including CLARITI websites) and may list Customer in any listing or directory of CLARITI customers subject to Customer’s prior written consent. Upon request by CLARITI, Customer may provide CLARITI with Customer’s trademark or logos for use in such promotional materials, lists and directories.

12.3. **Solution Feedback - Access to personnel:** For the purposes of improving the CLARITI Product and Services, the Customer shall reasonably make available to CLARITI’s Product Management and

Customer For Life team representatives from the leadership, IT, and user communities on a quarterly basis. Solution feedback in the form of surveys and face to face or virtual meetings will capture product usage, including but not limited to: CLARITI Solution fit, CLARITI Model Utilization, CLARITI and Partner Training Utilization, Certification Attainment of Partner and Customer staff, performance data. This solution feedback may be shared with CLARITI partners in order to improve service levels. The frequency of this access shall be no more than a quarterly basis unless otherwise mutually agreed upon.

**12.4. Solution Feedback - Product Usage:** For the purposes of improving the CLARITI Product and Services, Product usage and performance data may be automatically and periodically transmitted to CLARITI premises for the analysis. Customer Data is not contained in this transmission

**12.5. Solution Integration – Existing Salesforce Apps and Org:** For the purposes of improving the CLARITI Product's integration into a Customer's existing Salesforce Org with existing Applications, within 3 months of issuing an Order, the Customer or CLARITI Partner shall refresh the Full SandBox providing in 5.3 to match production, install the CLARITI software in the refreshed org, test business critical processes, resolve any conflicts, and then move CLARITI assets into the production environment. The CLARITI assets shall be unconfigured.

**12.6. Relationship of Parties:** The Parties are non-exclusive independent contractors, and nothing in this Agreement or done pursuant to this Agreement will create or be construed to create a partnership, joint venture, agency, employment, or other similar relationship between the Parties.

**12.7. Force Majeure:** Notwithstanding any other provision of this Agreement, CLARITI will not be liable to Customer or any other person for any delay in performing or failure to perform any of its obligations under this Agreement to the extent performance is delayed or prevented due to any cause or causes that are beyond CLARITI's reasonable control (an "**Event of Force Majeure**"). Any delay or failure of this kind will not be deemed to be a breach of this Agreement by CLARITI, and the time for CLARITI's performance of the affected obligation will be extended by a period that is reasonable in the circumstances. Customer will not be liable for fees, taxes, or other costs during the period of and relating to CLARITI's non-performance under this section. For the avoidance of doubt, the Customer will continue to be liable for payment obligations with respect to such fees, taxes or other costs incurred for all Services rendered (e.g., Services rendered prior to the Event of Force Majeure), notwithstanding that any Event of Force Majeure is in effect.

**12.8. Miscellaneous:** If any provision of this Agreement is held to be invalid or unenforceable for any reason, then the provision will be deemed to be severed from this Agreement and the remaining provisions will continue in full force and effect without being impaired or invalidated in any way, unless as a result of any such severance this Agreement would fail in its essential purpose. No consent or waiver by a Party to or of any breach by the other Party in its performance of its obligations under this Agreement will be: (a) deemed or construed to be a consent to or waiver of a continuing breach or any other breach of those or any other obligations of that Party; or (b) effective unless in writing and signed by both Parties. Except as expressly set forth in this Agreement, the Parties' respective rights and remedies under this Agreement are cumulative and not exclusive of any other rights or remedies to which the Parties may be lawfully entitled under this Agreement or at law or equity, and the Parties will be entitled to pursue all of their respective rights and remedies concurrently, consecutively and alternatively. In this Agreement: (a) a reference to "this Agreement" and other similar terms refers to this Subscription Agreement and all Orders, each of which is incorporated herein by reference, as a whole and not just to the particular provision in which those words appear; (b) headings in this Agreement are for reference only and do not define, limit or enlarge the scope or meaning of this Agreement or any of its provisions; (c) words importing persons include individuals, partnerships, associations, trusts, unincorporated organizations, societies and corporations; (d) words importing the singular number only include the plural and vice versa; (e) words importing either gender include both genders; (f) "including" means including without limitation; (g) references to a day, month, or year, mean a calendar day, month, or year, unless expressly indicated

otherwise; and (h) references to currency are to the currency of the United States of America, unless expressly indicated otherwise.

**12.9. Enurement and Assignment:** The provisions of this Agreement will enure to the benefit of and be binding upon the Parties and their respective successors and permitted assigns. Customer may not assign this Agreement without CLARITI's prior written consent, which consent may be withheld in CLARITI's discretion. CLARITI may assign or license all or any portion of its rights and interests under the Agreement with Customer's written approval, which shall not be unreasonably withheld. Users are not parties to or beneficiaries of this Agreement. For the avoidance of doubt, and notwithstanding anything in this Agreement, a merger, acquisition, reorganization, change of control, or sale of all or virtually all of the assets of CLARITI will not be considered an assignment of this Agreement, and as such will not require the consent of the Customer.

**12.10. Governing Law:** This Agreement and all related matters will be governed by, and construed in accordance with, the laws of the State of California, excluding the United Nations Convention On Contracts For The International Sale Of Goods and any rules of private international law or the conflict of laws that would lead to the application of any other laws.

**12.11. Dispute Resolution:** All disputes, controversies and claims arising under, out of, in connection with, or in relation to this Agreement, the Services, or any related matters or any legal relationship associated therewith or derived therefrom (collectively "**Disputes**") will be referred to and finally resolved by binding arbitration under California law. The place of arbitration will be in California, but can be held virtually over video-conference, and the language to be used in the arbitration will be the English language. Any awards rendered in any such arbitration are final and binding and judgment thereon may be entered in any court having jurisdiction for its enforcement. The Parties hereby irrevocably submit and attorn to the sole and exclusive jurisdiction of that court in respect of all such matters is the federal District Court for the Eastern District of California.

**12.12. Complete Agreement:** This Agreement, its exhibits, and any applicable Order sets forth the entire agreement of the Parties with respect to the subject matter of this Agreement and supersedes and replaces all previous and contemporaneous communications, representations, negotiations, discussions, agreements or understandings, whether oral or written, between them with respect to the subject matter of this Agreement. Customer's issuance, and CLARITI's acceptance of, a purchase order or other similar document are for administrative convenience only and any terms and conditions contained in a purchase order or other document will be no force or effect and will not in any way amend or supplement this Agreement. This Agreement may be modified only by a written instrument signed by the Parties or their successors or permitted assigns



**IN WITNESS WHEREOF**, the Parties have executed this Agreement as of the day and year first set forth above.

**CLARITI CLOUD INC.**

**COUNTY OF YOLO**

By Jake Dancyger

Jake Dancyger, Co-CEO

\_\_\_\_\_  
Angel Barajas, Chair  
Board of Supervisors

Attest:  
Julie Dachtler, Senior Deputy  
Clerk Board of Supervisors

By \_\_\_\_\_  
(Seal)

Approved as to Form:

By Hope P. Welton for \_\_\_\_\_

Eric May, Senior Deputy County Counsel

**Exhibit "B"**  
**SOW**

## **Yolo County, CA**

# **Statement of Work for Building Permitting Solution Implementation**

**December 17, 2021**

## Statement of Work

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# 1 Introduction

This “Statement of Work” (this “SOW”) is to set-up and configure permits using the Clariti Cloud Inc. (“Clariti”) Building Permitting Solution (the “BPS”) for both the Clariti Console (back-office) and Clariti Community portal (online) and to migrate Yolo County, California (the “County”) permits from their current TrackIT TRAKIT system based on an agreed upon migration approach. The implementation is based on Clariti and the County’s discovery discussions, documentation sharing and the County adopting Clariti’s BPS best practices solution. This SOW encompasses the implementation of Clariti’s BPS solution for the County where the County will adopt the solution to support their go-live activities and Clariti will have a follow-on contract for the Solution Implementation Adoption Support. The follow-on contract will support the County for continuous solution improvements, this may include streamlining process, additional training, and enhancing the solution.

The solution will be implemented by Clariti’s Professional Services team. The Clariti Professional Services team has a breadth of knowledge of the Clariti Building Permitting Solution for both the console and portal to support the Yolo County solution.

This SOW will be conducted pursuant to the terms and conditions entered into between the County and Clariti, specified as the Contract Between Yolo County, California and Clariti Cloud Inc. (the “Agreement”), with the “Effective Date” provided on the “Order Form”. All defined terms in this SOW that are not specifically defined herein remain as defined in the Agreement.

## 2 Objective

### 2.1 Project Objective

This SOW describes the services the Project Team will perform and the roles and responsibilities of each party. The objective of the scope is to leverage Clariti’s BPS functionality to allow Yolo County’s staff, citizens and contractors to register, create a permit, pay fees, upload submissions, request an inspection, monitor permit status, execute inspections and print permit documents. The following sections will capture detailed work to support the objective set-out in this SOW.

The approach for this SOW will be focused on features or outcomes where the County will be able to execute on a component of the objective, for example setup of the console (back-office) to support the permit feature activities, or setup of the portal to allow the County to register a user on the County’s community portal. These features or outcomes will be captured in an iterative approach, where Clariti will capture the feature in a sprint cycle by defining the tasks to achieve the outcome. The County will participate and be responsible for providing Clariti input into the feature so at the end of the sprint the design review will be how the County can access and execute the feature. Once the console and community portal are set up the project will enter into the permit sprint cycles which includes the sprint to develop the group of permits in the console to validate backend processing followed by a sprint to

expose the same group of permits on the community portal. Once the group of permits have completed the community portal, the County will begin testing and data mapping to support conversion activities. If during the sprint design review the County determines gaps within the feature, but the objective of the sprint was met, the gaps or items identified by the County will be captured and tracked in a backlog list to be re-reviewed and prioritized in the last sprint of the feature set. The sprint will be completed and the County will acknowledge the objective of the sprint was achieved.

## 3 Scope

### 3.1 Project Management

To meet the objective of this SOW, the Clariti team will collaborate with Yolo County on tasks where each party may have ownership of the task and will need to provide information or decisions on direction of the sprint feature. To efficiently support the County's objective and deploy the County's console and citizen facing portal in the timeframe outlined in the schedule, the teams will need to work together to achieve the outcome. The approach for this solution is based on agile principles where each feature development will be completed in a one (1) or two (2) week sprint. Each sprint will hold a backlog grooming session to outline what will be covered in the sprint, ownership of the task, due dates which will be quick turnarounds allowing the team to quickly setup or configure the feature to meet the sprint design session at the end of the sprint. During the sprint cycle, a touchpoint will be scheduled to ensure the outcomes identified in the sprint can be achieved and any roadblocks can be managed. These touchpoints will be led by the Clariti team and will need support from the County to ensure follow-up and clarifications are addressed in a timely manner to keep the sprint on track. At the end of each sprint, a design session will take place where the Clariti team will demonstrate the feature outcomes and capture gap items on the backlog list to be addressed during the backlog prioritization sprint. The County will have access to the console at the conclusion of the first sprint where they will be able to execute the outcomes on their own. As the sprints are executed, they build upon the framework of the console and community portal where the County will continue to have access to the environment as a user to support test and training documentation.

Initial proposed schedule for this SOW proposes a 43 week implementation schedule for Yolo County's Clariti Building Permitting Solution Implementation. The schedule has been outlined below to address the sprint approach.

Activities/Tasks	Wk 1	Wk 2	Wk 3	Wk 4	Wk 5	Wk 6	Wk 7	Wk 8	Wk 9
<b>Clariti BPS Console and Community Portal Implementation - Yolo County, CA</b>									
<b>3.1 Project Management</b>									
<b>3.1.1 Sprint Pilot</b>									
Set the client up for success (Organization Change Management Assessment)									
Identify Key Project Team Members									
Conduct Team Charter Workshop									
Conduct Identify Risk Workshop (team)									
Acceptance of Charter/Workbook to support the project									
Weekly Project Status Meeting									
<b>3.1.2 Permit Needs Assessment</b>									
Conduct an expectation session for the needs assessment									
Overview of the Clariti BPS Solution to understand features to support assessment									
Conduct a needs assessment on current permits									
Evaluate schedule impacts and sprint approach based on needs assessment									
Conduct Kick-off meeting (rebaseline plan)									
<b>3.2 Clariti Building Permitting Solution Implementation</b>									
<b>3.2.1 Feature: Setup Clariti Console, Profiles &amp; Permissions</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Execute console setup activities (Setup the Console backend system, initial configuration for console, GIS, etc.)									
Setup Profiles and Permissions (role settings (security), profile and permission configuration)									
Prepare third-party integration activities									
Conduct Sprint Design session - Fridays									
<b>3.2.1a Feature: Setup Clariti Community Portal</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Execute portal setup activities (branding, landing page content, etc.)									
Setup Community Users (permissions, login mechanism, profile assignment, registration controller)									
Identify payment gateway integration activities									
Conduct Sprint Design session - Fridays									
<b>3.2.1b Feature: Setup Account and Contracts</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Collaborate on account and contractor data clean-up									
Account and contact setup for contractors									
User migration from custom portal to Clariti Community portal									
Conduct Sprint Design session - Fridays									

Activities/Tasks	Wk 9	Wk 10	Wk 11	Wk 12	Wk 13	Wk 14	Wk 15	Wk 16	Wk 17
<b>Clariti BPS Console and Community Portal Implementation - Yolo County, CA</b>									
<b>3.2.2 Feature: Setup Permit w/out Review and Inspection (Quick Permits) (3)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									
<b>3.2.2a Feature: Setup permit w/out Review and Inspection (Quick Permits) (3) On Portal</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, setup and permissions, etc.)									
QA test portal permits w/ data collection, fee payments, inspection requests, submissions, etc.)									
Link contractor or citizen to existing permits									
Conduct Sprint Design session - Fridays									
<b>3.2.3 Feature: Setup Permit w/ Review Only (1), Permits w/ Inspection (7), and permits w/ Review OTC and Inspection (5)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									
<b>3.2.3a Feature: Setup Permit w/ Review Only (1), Permits w/ Inspection (7), and permits w/ Review OTC and Inspection (5)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									

Activities/Tasks	Wk 17	Wk 18	Wk 19	Wk 20	Wk 21	Wk 22	Wk 23	Wk 24	Wk 25
<b>Clariti BPS Console and Community Portal Implementation - Yolo County, CA</b>									
<b>3.2.4 Feature: Setup Permit w/ Review and Inspections - Residential (15) &amp; Fire Protection (6)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									
<b>3.2.4a Feature: Setup Permit w/ Review and Inspections - Residential (15) &amp; Fire Protection (6)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									
<b>3.2.5 Feature: Setup Permit w/ Review and Inspections - Electrical (10), Mechanical (7) &amp; Site Improvements (8)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									
<b>3.2.5a Feature: Setup Permit w/ Review and Inspections - Electrical (10), Mechanical (7) &amp; Site Improvements (8)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									

Activities/Tasks	Wk 25	Wk 26	Wk 27	Wk 28	Wk 29	Wk 30	Wk 31	Wk 32	Wk 33
<b>Clariti BPS Console and Community Portal Implementation - Yolo County, CA</b>									
<b>3.2.6 Feature: Setup Permit w/ Review and Inspections - Nonresidential (26)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									
<b>3.2.6a Feature: Setup Permit w/ Review and Inspections - Nonresidential (26)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									
<b>3.2.7 Feature: Setup Code Enforcement (2), Business License (2), Public Works (6)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									
<b>3.2.7a Feature: Setup Code Enforcement (2), Business License (2), Public Works (6)</b>									
Conduct Feature Backlog Grooming Session - Mondays									
Validate input from County has been received									
Permit Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)									
Config permit level security, documents, business rules, etc.)									
QA/Unit test permits w/ data collection, fee calculations, reviews, inspection and checklists, business rules, workflow, etc.)									
Conduct Sprint Design session - Fridays									

Activities/Tasks	Wk 33	Wk 34	Wk 35	Wk 36	Wk 37	Wk 38	Wk 39	Wk 40	Wk 41	Wk 42	Wk 43
<b>Clariti BPS Console and Community Portal Implementation - Yolo County, CA</b>											
<b>3.2.8 Feature: Backlog Prioritization</b>											
Conduct Feature Backlog Grooming Session - Mondays											
Collaborate on backlog items and prioritize for items to be included in sprint											
Setup/configure items in agreed upon list to support design session											
Unit test portal parent permit & land use application w/ data collection, fee payments, inspection requests, etc.)											
Conduct Sprint Design session - Fridays											
<b>3.3 Deployment/Go-Live</b>											
<b>3.3.1 Data Conversion Dress Rehearsal</b>											
Conduct test backlog grooming session - Mondays											
Finalize data mapping to support conversion activities											
Execute conversion activities											
Validate conversion data											
Identify data mapping fixes											
Execute conversion activities											
<b>3.3.2 Test Sprint</b>											
Conduct test backlog grooming session - Mondays											
Collaborate on the level of testing required											
Establish a test schedule to be executed within the sprint schedule											
Train SMEs/Train-the-Trainer											
Execute testing											
Conduct Sprint Design session - Fridays											
<b>3.3.3 Training Sprint</b>											
Conduct training backlog grooming session - Mondays											
Collaborate on the level of training required for both staff and external members											
Establish a training schedule to be executed within the sprint schedule											
Execute training sessions											
Conduct Sprint Design session - Fridays											
<b>3.3.4 Deployment</b>											
Migrate from sandbox to production											
Deployment/go-live activities (smoke testing, validating all permits are exposed on production site, customers have access to the site, etc.)											
Deployment support											

### 3.1.1 Sprint Pilot

The project will start with a Sprint Pilot where the teams will capture what success looks like for Yolo County, identify key project stakeholders, conduct a team charter workshop (identify how the team will work together), conduct a risk workshop (what are the risks associated with the project, owners, and mitigation plans), and establish a weekly project status meeting. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities:

- Setup the Sprint workbook to support the sprint activities
- Establish weekly project status meetings with project stakeholders
- Complete the team charter workshop
- Complete the project risk register to monitor throughout the project

#### Yolo County Responsibilities

- Collaborate on the weekly project status meeting schedule
- Participate and collaborate in identifying the team charter
- Participate and collaborate in the risk workshop in identifying project risks

#### Outcome

- Acceptance of the Sprint Pilot workbook
- Weekly status meetings scheduled

### 3.1.2 Sprint - Permit Needs Assessment

The project team will conduct a needs assessment sprint where the Clariti team will walk the County through the Clariti BPS to gain an understanding of the permit structure, fee calculation approach, review cycles, inspection processing, form letters and/or permit documents, etc. Once the teams have a better understanding of the permit structure the team will evaluate all permits, business licenses, planning applications, and complaints to evaluate current state consolidations into future state permit configuration.

Yolo County will adopt Clariti's BPS permit infrastructure (intake, review, issuance, inspection, close) depending on the different permit types the infrastructure would be adjusted, for example if a permit has no review, this step would be removed. In addition within this infrastructure the steps can be expanded, for example based on the permit type the review may have 1 or 12 different review departments, handling which department is required versus optional would be handled using Clariti's business automation tools.

The needs assessment will include capturing the data conversion requirements, data retention policy, roles and responsibilities to support data conversion activities, and initiate discussion for handling "in-flight" permits, applications, , and complaints to support deployment.

Clariti will lead a session to review the permit types (reference, Appendix D) based on the permit infrastructure of the Building Permit Solution; the team will determine if permit types can be consolidated. In addition, the team will review the planning applications to determine which applicants fall into the Minor Project or Major workflow process to determine if consolidation can take place. The team will evaluate yearly volume processing for each permit type and planning application type. The volume analysis will assist in driving decisions and completing to support the implementation activities. Once the team has agreed on the final list of permit types and planning applications, the team will evaluate the proposed sprint schedule to determine if seven (7) sprint cycles are required and define the grouping of permits for each sprint cycle (console and community portal) for the first release. The team will evaluate the planning applications to determine if the sprint cycles defined in this SOW support the development of these applications (console and community portal) for the second release.

At the conclusion of the needs assessment sprint a kick-off meeting with project stakeholders will take place that will then initiate the Features sprint.

#### **Clariti's Responsibilities**

- Conduct an expectation session for the permit needs assessment activities
- Review Yolo County's permit workflow data (Appendix C)
- Conduct a demonstration of the Clariti's Building Permitting Solution for key project stakeholders to begin knowledge transfer of Clariti's features to support Yolo's permitting processes
- Lead a needs assessment workshop with Yolo's Building and Planning,, Public Works Permits, Licensing, and Code Enforcement to determine permit consolidation
- Lead a needs assessment workshop with Yolo's business and technical teams supporting data conversion expectations throughout each sprint cycle.

- Refine schedule to support the changes
- Conduct kick-off meeting

#### **Yolo County Responsibilities**

- Participate and collaborate in expectation session
- Active participation in Clariti's Building Permitting Solution demonstration
- Participate and collaborate in understanding permit types (appendix D) to determine permit consolidation
- Participate and collaborate in understanding data conversion activities
- Participate and collaborate in refining the sprint schedule and permit groupings for the sprints
- Collaboration in kick-off meeting

#### **Outcome**

- Final Permit List
- Completion of the project kickoff meeting

## **3.2 Clariti Building Permitting Solution Implementation Features**

The feature sprint section will include the configuration and setup of the Yolo County console and community portal. Once the framework has been set up each remaining feature sprint will be based on a grouping of permit types where the project team will build out the permits on the console with the following sprint exposing those permits on the portal. The design review will be a walk through of a permit or two in that grouping to demonstrate how the system will support the Yolo County permitting process. During each permit, licensing, and complaint feature sprint the Clariti team will conduct a walk through with the sprint's SMEs on how the system functions to support the SMEs in testing and creating training materials to support their teams, these sessions will be recorded and provided to the SMEs to review throughout the duration of the project. In addition, the Clariti team will provide the Yolo County team with an extract of fields from the Clariti Building Permitting Solution for the group of permits for the sprint that will allow the Yolo team to begin data mapping to their legacy system, TrakIT. Once the permit group has been configured in the console and on the portal, the Yolo team will have access to the configuration to begin testing and training activities.

### **3.2.1 Feature: Setup Clariti Console**

The Clariti BPS is the framework for how the Yolo County status and the different departments will access the permitting system. The objective of the console is to ensure the staff can access and perform activities on permits, complaints, and business licenses to support the County's processes. In this sprint the following tasks will be completed:

#### **Clariti's Responsibilities**

- Setup the Clariti Building Permitting Solution in the Yolo County org
- Configure the console backend system, configure GIS integration with ESRI
- Setup user profiles and permissions based on the initial user identification
  - Support Staff (6)
  - Building Reviewer (8)
  - Fiscal Reviewer (4)
  - Planning Reviewer (4)

- Public Works Reviewer (4)
- Environmental Health Reviewer (4)
- Integrated Waste Management Reviewer (2)
- Cannabis Unit Reviewer (1)
- Air District (1)
- Plan Reviewer (2)
- Initiate payment gateway integration activities (goal to have the payment gateway integration completed to support the first permit sprint)
- Conduct sprint design review and finalize sprint workbook

#### **Yolo County Responsibilities**

- Provide input to the sprint workbook based on the backlog session
- Provide input to the profiles and permission set-up
- Provide point-of-contact for the payment gateway and a test environment
- Active participation in the sprint design review session

#### **Outcome**

- Yolo County console setup and completion of the design review
- Acceptance of the sprint workbook

### **3.2.1a Feature: Setup Clariti Community Portal**

The Clariti Community portal is the framework for how citizens and contractors will communicate with the County and provide the County transparency to their citizens and contractors. With the public facing portal, the objective is to ensure the citizen or contractor can access and perform activities with the County, such as setting expectations the County has for anyone accessing the community portal. In this sprint the following tasks will be completed:

#### **Clariti's Responsibilities**

- Setup the Clariti Community Portal
- Setup the Yolo County Portal home or landing page, what information the County would want when a citizen or contractor visits the portal
- Setup Community Users (to include login mechanism, profiles assignment, registration controllers)
- Initiate payment gateway integration activities (goal to have the payment gateway integration completed to support the first permit sprint for the portal)
- Conduct sprint design review and finalize sprint workbook

#### **Yolo County Responsibilities**

- Provide Yolo County logo
- Provide language for landing page of the community portal
- Active participation in Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

#### **Outcome**

- The County will be able to access the Yolo County Community portal site
- The County staff member will be able to register a user on the portal

- Acceptance of the sprint workbook

### 3.2.1b Feature: Setup Account and Contacts

The Clariti Community portal may restrict who can register based on the account and/or contact type with the County. During this sprint, the type of accounts and contacts who will be able to register will be defined and configured. In addition, the project team will identify how converted contacts will register in the new Community Portal. The last step in this feature will be migrating contractors from custom portal to new portal. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Account and Contact Setup for Contractors

#### Yolo County Responsibilities

- Provide the type of accounts and contacts who will be able to register on the portal to do business with the County
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

#### Outcome

- The County will be able to access the Yolo County's Community portal site
- The County will be able to login as a contractor on the community portal site

### 3.2.2 Feature Console: Setup Permit w/out Review and Inspection (3)

The Clariti console will be configured to support Yolo County to create permits, pay fees, issue permits, email notification, and creation of the permit document. When a contractor and an applicant submits their permit application, the permit technician will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the console (back-office). If fees are required to be paid at submission of the permit, the applicant will have the ability to pay the County based on the payment gateway integration. Once the permit payment has been received, the permit will be issued where an email notification will be sent to the applicant. The permit document will be created and attached to the permit record. The integration activities will kick-off for Infor and CAMs to understand data, frequency, and approach for handling the integration. Once all permits have been configured, business rules applied, and documents created the Clariti team will pull the data elements from the Clariti console for the County to begin data mapping to the TrakIT data. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Conduct analysis session on data elements and fee calculations for the following permit types:
  - Fire Administrative
  - Fireworks Booth
  - FSA Fees
- Configure data elements, page layouts, and permissions for the permits
- Initiate Infor and CAMs integration activities (capture data, frequency, and approach for the integration)
- Setup business rules to support these permit types that will include

- GIS Validation
- Validation on workflow steps
- email validation with permit document
- Fee generated (calculations)
- Document generation
- Alert triggers
- Configure documents
  - Permit document
- Perform quality assurance testing on permit types in this sprint
- Conduct sprint design session and capture “nice to have” in the backlog
- Provide sprint SME training on solution (to be recorded)
- Create report for data conversion activities

#### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide Clariti with permit type data elements, fees, fee calculations, permit documents, etc.
- Active participation in analysis session
- Participate and collaborate on the Infor and CAMs integration activities
- Address questions Clariti team has related to the permit types in this sprint
- Active participation in the sprint design session understanding the objective of the design
- Participate in training on solution defined in this sprint
- Initiate data mapping activities to support data conversion activities

#### **Outcome**

- The County will be able to access the Yolo County’s Clariti console
- The County will be able to create, pay (test), process permit, and print permit documents from the console
- Acceptance of the Sprint workbook to include approach for Infor and CAMs integration
- Data Mapping document with permit type content

### **3.2.2a Feature Portal: Setup Permit w/out Review and Inspection (3)**

The Clariti Community portal will be configured to support Yolo County to create permits, pay fees, monitor status, and print permit documents. When a contractor or citizen logs into the community portal they will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the back-office that will be exposed to the citizen or contractor. If fees are required to be paid at submission of the permit, the portal will take online payment using the County’s payment provider. If fees are required later in the process, these fees will be available online for payment. In this feature the citizen or contractor will have the ability to create, monitor, pay, and download permit document. In this sprint the following tasks will be completed:

#### **Clariti’s Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Setup the Application Page which will include what permits are accessible on the portal by the County’s citizen and contractors
- Setup the permits, which will include the record type, page layout setup and permissions for the

- following permit types
  - Fire Administrative
  - Fireworks Booth
  - FSA Fees
- Validate the ability for portal users to pay fees
- Expose Work Items to the Clariti Community portal based on current work items configured in the back-office
- Configure business rules based on portal submissions
  - Email notification of the permit issuances
- Provide sprint SME training on solution (to be recorded)

#### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide the description or text for the permit that will assist the user in selecting the correct permit type to begin the permit process
- Confirm the permit types to be available on the community portal
- Provide the data fields exposed online for processing each permit online
- Provide the workflow update when a permit is created online
- Provide attestation language for electronic signature, acknowledgement
- Participate in training on solution defined in this sprint
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

#### **Outcome**

- The County will be able to access the Yolo County's Community portal site
- The County will be able to register as a Contractor or Citizen on the community portal
- The County will be able to login as a contractor and have the ability to see their permits associated to their contract information
- The County will be able to create, pay (test), monitor permit status, and download permit documents from the community portal
- Acceptance of the sprint workbook

### **3.2.3 Feature Console: Setup Permit w/ Review Only (1), Permits w/ Inspection (7) and permits w/ Review OTC Inspection (5)**

The Clariti console will be configured to support Yolo County to create permits, pay fees, issue permits, email notification, department review process, creation of the permit document, and inspections with checklists. When a contractor and an applicant submits their permit application, the permit technician will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the console (back-office). If fees are required to be paid at submission of the permit, the applicant will have the ability to pay the County based on the payment gateway integration. The department review cycle process will be configured to handle department reviews and over-the-counter (OTC) reviews, once the reviews have been approved the permit will be issued generated the permit document. When the applicant or contractor is ready for inspection, the system will be configured to support these inspection requisitions based on inspection types and inspection checklists. The development activities for the Infor and CAMs integration will take place during this sprint. Once all permits have been configured, business rules applied, and documents created the Clariti team will pull the data elements from the Clariti console for the County to begin data mapping to the TrakIT data. In this sprint the following tasks will be completed:

#### **Clariti's Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Conduct analysis session on data elements and fee calculations for the following permit types:
  - Permit Exempt Agricultural Building
  - Energy Storage Batteries
  - EV Charging, Private
  - EV Charging, Public
  - PV, Residential Roof Mount
  - PV, Nonresidential Roof Mount
  - Window Replacement
  - Service Panel 325 Amps or Less
  - HVAC
  - Water Heater - Gas
  - Water Heater - Electric
  - Water Heater - Solar
  - Reroof
  - Siding or Stucco
- Configure data elements, reviews and milestones, inspections and inspection checklists, page layouts, and permissions for the permits
- Setup business rules to support these permit types that will include
  - GIS Validation
  - Validation on workflow steps
  - email validation with permit document
  - Fee generated (calculations)
  - Document generation
  - Alert triggers
  - Creation of inspection types based on status and type
  - Creation of inspection checklist based on inspection type
  - Assignments
  - Failed inspection setup of re-inspection process
  - Corrections Required based on review
  - email and document generation based on corrections and failed inspection
- Configure documents
  - Permit document
  - Corrections Letter
  - Inspection Results
- Design/build Infor and CAMs integration activities
- Perform quality assurance testing on permit types in this sprint
- Conduct sprint design session and capture “nice to have” in the backlog
- Provide sprint SME training on solution (to be recorded)
- Create report for data conversion activities

### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide Clariti with permit type data elements, fees, fee calculations, reviews and departments, inspection types and checklists, permit documents, etc.
- Active participation in analysis session
- Address questions Clariti team has related to the permit types in this sprint
- Active participation in the sprint design session understanding the objective of the design
- Participate in training on solution defined in this sprint
- Initiate data mapping activities to support data conversion activities

### **Outcome**

- The County will be able to access the Yolo County’s Clariti console
- The County will be able to create, pay (test), process permit, and print permit documents from the console
- Acceptance of the Sprint workbook
- Data Mapping document with permit type content

### 3.2.3a Feature Portal: Setup Permit w/ Review Only (1), Permits w/ Inspection (7) and permits w/ Review OTC Inspection (5)

The Clariti Community portal will be configured to support Yolo County to create permits, pay fees, monitor status, and print permit documents. When a contractor or citizen logs into the community portal they will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the back-office that will be exposed to the citizen or contractor. If fees are required to be paid at submission of the permit, the portal will take online payment using the County's payment provider. If fees are required later in the process, these fees will be available online for payment. The applicant or contractor will have the ability to resubmit plans online and request inspections. In this feature the citizen or contractor will have the ability to create, monitor, pay, resubmit plans, download permit documents and/or letters, and request an inspection. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Setup the Application Page which will include what permits are accessible on the portal by the County's citizen and contractors
- Setup the permits, which will include the record type, page layout setup and permissions for the following permit types
  - Permit Exempt Agricultural Building
  - Energy Storage Batteries
  - EV Charging, Private
  - EV Charging, Public
  - PV, Residential Roof Mount
  - PV, Nonresidential Roof Mount
  - Window Replacement
  - Service Panel 325 Amps or Less
  - HVAC
  - Water Heater - Gas
  - Water Heater - Electric
  - Water Heater - Solar
  - Reroof
  - Siding or Stucco
- Validate the ability for portal users to pay fees
- Expose Work Items to the Clariti Community portal based on current work items configured in the back-office
- Expose submissions and requesting inspection on the portal
- Configure business rules based on portal submissions
  - Email notification of the permit issuances
  - Email notification of inspection scheduled
  - Email notification of review status
- Provide sprint SME training on solution (to be recorded)

#### Yolo County Responsibilities

- Active participation in backlog grooming session to understand sprint expectations
- Provide the description or text for the permit that will assist the user in selecting the correct permit type to begin the permit process
- Confirm the permit types to be available on the community portal
- Provide the data fields exposed online for processing each permit online
- Provide the workflow update when a permit is created online
- Provide attestation language for electronic signature, acknowledgement
- Participate in training on solution defined in this sprint
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

**Outcome**

- The County will be able to access the Yolo County's Community portal site
- The County will be able to register as a Contractor or Citizen on the community portal
- The County will be able to login as a contractor and have the ability to see their permits associated to their contract information
- The County will be able to create, pay (test), monitor permit status, resubmit plans, download permit documents and/or letters, and request an inspection from the community portal
- Acceptance of the sprint workbook

### **3.2.4 Feature Console: Setup Permit w/ Review and Inspections - Residential (15) & Fire Protection (6)**

The Clariti console will be configured to support Yolo County to create permits, pay fees, issue permits, email notification, department review process, creation of the permit document, and inspections with checklists. When a contractor and an applicant submits their permit application, the permit technician will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the console (back-office). If fees are required to be paid at submission of the permit, the applicant will have the ability to pay the County based on the payment gateway integration. The department review cycle process will be configured to handle department reviews, once the reviews have been approved the permit will be issued generated the permit document. When the applicant or contractor is ready for inspection, the system will be configured to support these inspection requisitions based on inspection types and inspection checklists. This sprint will include the testing and validation of the Infor and CAMs integrations to ensure the data and frequency are performing based on the design. Once all permits have been configured, business rules applied, and documents created the Clariti team will pull the data elements from the Clariti console for the County to begin data mapping to the TrakIT data. In this sprint the following tasks will be completed:

**Clariti's Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Conduct analysis session on data elements and fee calculations for the following permit types:
  - Addition
  - Alteration: Bath Remodel
  - Alteration: Kitchen Remodel
  - Alteration: Other
  - Deck/Dock
  - Fence
  - Garage/Accessory Structure
  - Move Dwelling
  - New Hotels
  - New Apartments
  - New ADU
  - New Dwelling
  - New Manufactured Home
  - Patio Cover
  - Pool/Spa
  - ANSUL
  - General (Fire Protection)
  - Sprinklers, Residential
  - Sprinklers, Nonresidential
  - Water Pump
  - Water Storage
- Configure data elements, reviews and milestones, inspections and inspection checklists, page layouts, and permissions for the permits
- Setup business rules to support these permit types that will include
  - GIS Validation
  - Validation on workflow steps
  - email validation with permit document
  - Fee generated (calculations)

- Document generation
- Alert triggers
- Creation of inspection types based on status and type
- Creation of inspection checklist based on inspection type
- Assignments
- Failed inspection setup of re-inspection process
- Corrections Required based on review
- email and document generation based on corrections and failed inspection
- Configure documents
  - Permit document
  - Corrections Letter
  - Inspection Results
- Perform quality assurance testing on permit types in this sprint to include the integrations with Infor and CAMs
- Conduct sprint design session and capture “nice to have” in the backlog
- Provide sprint SME training on solution (to be recorded)
- Create report for data conversion activities

#### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide Clariti with permit type data elements, fees, fee calculations, reviews and departments, inspection types and checklists, permit documents, etc.
- Active participation in analysis session
- Address questions Clariti team has related to the permit types in this sprint
- Active participation in the sprint design session understanding the objective of the design
- Participate in training on solution defined in this sprint
- Initiate data mapping activities to support data conversion activities

#### **Outcome**

- The County will be able to access the Yolo County’s Clariti console
- The County will be able to create, pay (test), process permit, and print permit documents from the console
- Acceptance of the Sprint workbook
- Data Mapping document with permit type content

### **3.2.4a Feature Portal: Setup Permit w/ Review and Inspections - Residential (15) & Fire Protection (6)**

The Clariti Community portal will be configured to support Yolo County to create permits, pay fees, monitor status, and print permit documents. When a contractor or citizen logs into the community portal they will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the back-office that will be exposed to the citizen or contractor. If fees are required to be paid at submission of the permit, the portal will take online payment using the County’s payment provider. If fees are required later in the process, these fees will be available online for payment. The applicant or contractor will have the ability to resubmit plans online and request inspections. In this feature the citizen or contractor will have the ability to create, monitor, pay, resubmit plans, download permit documents and/or letters, and request an inspection. In this sprint the following tasks will be completed:

#### **Clariti’s Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Setup the Application Page which will include what permits are accessible on the portal by the County’s citizen and contractors
- Setup the permits, which will include the record type, page layout setup and permissions for the following permit types
  - Addition
  - Alteration: Bath Remodel
  - Alteration: Kitchen Remodel
  - Alteration: Other
  - Deck/Dock
  - Fence
  - Garage/Accessory Structure
  - Move Dwelling
  - New Hotels
  - New Apartments
  - New ADU
  - New Dwelling
  - New Manufactured Home
  - Patio Cover
  - Pool/Spa
  - ANSUL
  - General (Fire Protection)
  - Sprinklers, Residential
  - Sprinklers, Nonresidential
  - Water Pump
  - Water Storage
- Validate the ability for portal users to pay fees
- Expose Work Items to the Clariti Community portal based on current work items configured in the back-office
- Expose submissions and requesting inspection on the portal
- Configure business rules based on portal submissions
  - Email notification of the permit issuances
  - Email notification of inspection scheduled
  - Email notification of review status
- Provide sprint SME training on solution (to be recorded)

**Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide the description or text for the permit that will assist the user in selecting the correct permit type to begin the permit process
- Confirm the permit types to be available on the community portal
- Provide the data fields exposed online for processing each permit online
- Provide the workflow update when a permit is created online
- Provide attestation language for electronic signature, acknowledgement
- Participate in training on solution defined in this sprint
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

**Outcome**

- The County will be able to access the Yolo County’s Community portal site
- The County will be able to register as a Contractor or Citizen on the community portal
- The County will be able to login as a contractor and have the ability to see their permits associated to their contract information
- The County will be able to create, pay (test), monitor permit status, resubmit plans, download permit documents and/or letters, and request an inspection from the community portal
- Acceptance of the sprint workbook

### 3.2.5 Feature Console: Setup Permit w/ Review and Inspections - Electrical (10), Mechanical (7) & Site Improvements (8)

The Clariti console will be configured to support Yolo County to create permits, pay fees, issue permits, email notification, department review process, creation of the permit document, and inspections with checklists. When a contractor and an applicant submits their permit application, the permit technician will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the console (back-office). If fees are required to be paid at submission of the permit, the applicant will have the ability to pay the County based on the payment gateway integration. The department review cycle process will be configured to handle department reviews, once the reviews have been approved the permit will be issued generated the permit document. When the applicant or contractor is ready for inspection, the system will be configured to support these inspection requisitions based on inspection types and inspection checklists. Once all permits have been configured, business rules applied, and documents created the Clariti team will pull the data elements from the Clariti console for the County to begin data mapping to the TrakIT data. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Conduct analysis session on data elements and fee calculations for the following permit types:
  - Fire Detection and Alarms
  - Fuel Dispenser
  - General (Electrical)
  - Generator, Backup
  - Generator, Main Power
  - PV, Residential Ground Mount
  - Service Panel 326-1,000 Amps
  - Service Panel Over 1,000 Amps
  - Temporary Service
  - General (Mechanical)
  - Fireplace
  - Fuel Gas Piping
  - Hood, Type I
  - Propane Tank
  - Water Supply
  - Wastewater
  - Demolition, Nonresidential
  - Demolition, Partial
  - Demolition, Pool
  - Demolition, Residential
  - Flood Hazard Development (Misc.)
  - Foundation Only
  - Grading
  - Site Utilities
- Configure data elements, reviews and milestones, inspections and inspection checklists, page layouts, and permissions for the permits
- Setup business rules to support these permit types that will include
  - GIS Validation
  - Validation on workflow steps
  - email validation with permit document
  - Fee generated (calculations)
  - Document generation
  - Alert triggers
  - Creation of inspection types based on status and type
  - Creation of inspection checklist based on inspection type
  - Assignments
  - Failed inspection setup of re-inspection process
  - Corrections Required based on review
  - email and document generation based on corrections and failed inspection
- Configure documents
  - Permit document

- Corrections Letter
- Inspection Results
- Perform quality assurance testing on permit types in this sprint
- Conduct sprint design session and capture “nice to have” in the backlog
- Provide sprint SME training on solution (to be recorded)
- Create report for data conversion activities

#### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide Clariti with permit type data elements, fees, fee calculations, reviews and departments, inspection types and checklists, permit documents, etc.
- Active participation in analysis session
- Address questions Clariti team has related to the permit types in this sprint
- Active participation in the sprint design session understanding the objective of the design
- Participate in training on solution defined in this sprint
- Initiate data mapping activities to support data conversion activities

#### **Outcome**

- The County will be able to access the Yolo County’s Clariti console
- The County will be able to create, pay (test), process permit, and print permit documents from the console
- Acceptance of the Sprint workbook
- Data Mapping document with permit type content

### **3.2.5a Feature Portal: Setup Permit w/ Review and Inspections - Electrical (10), Mechanical (7) & Site Improvements (8)**

The Clariti Community portal will be configured to support Yolo County to create permits, pay fees, monitor status, and print permit documents. When a contractor or citizen logs into the community portal they will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the back-office that will be exposed to the citizen or contractor. If fees are required to be paid at submission of the permit, the portal will take online payment using the County’s payment provider. If fees are required later in the process, these fees will be available online for payment. The applicant or contractor will have the ability to resubmit plans online and request inspections. In this feature the citizen or contractor will have the ability to create, monitor, pay, resubmit plans, download permit documents and/or letters, and request an inspection. In this sprint the following tasks will be completed:

#### **Clariti’s Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Setup the Application Page which will include what permits are accessible on the portal by the County’s citizen and contractors
- Setup the permits, which will include the record type, page layout setup and permissions for the following permit types
  - Fire Detection and Alarms
  - Fuel Dispenser
  - General (Electrical)
  - Generator, Backup
  - Generator, Main Power
  - Hood, Type I
  - Propane Tank
  - Water Supply
  - Wastewater
  - Demolition, Nonresidential

- PV, Residential Ground Mount
- Service Panel 326-1,000 Amps
- Service Panel Over 1,000 Amps
- Temporary Service
- General (Mechanical)
- Fireplace
- Fuel Gas Piping
- Demolition, Partial
- Demolition, Pool
- Demolition, Residential
- Flood Hazard Development (Misc.)
- Foundation Only
- Grading
- Site Utilities

- Validate the ability for portal users to pay fees
- Expose Work Items to the Clariti Community portal based on current work items configured in the back-office
- Expose submissions and requesting inspection on the portal
- Configure business rules based on portal submissions
  - Email notification of the permit issuances
  - Email notification of inspection scheduled
  - Email notification of review status
- Provide sprint SME training on solution (to be recorded)

### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide the description or text for the permit that will assist the user in selecting the correct permit type to begin the permit process
- Confirm the permit types to be available on the community portal
- Provide the data fields exposed online for processing each permit online
- Provide the workflow update when a permit is created online
- Provide attestation language for electronic signature, acknowledgement
- Participate in training on solution defined in this sprint
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

### **Outcome**

- The County will be able to access the Yolo County's Community portal site
- The County will be able to register as a Contractor or Citizen on the community portal
- The County will be able to login as a contractor and have the ability to see their permits associated to their contract information
- The County will be able to create, pay (test), monitor permit status, resubmit plans, download permit documents and/or letters, and request an inspection from the community portal
- Acceptance of the sprint workbook

### 3.2.6 Feature Console: Setup Permit w/ Review and Inspections - Nonresidential (26)

The Clariti console will be configured to support Yolo County to create permits, pay fees, issue permits, email notification, department review process, creation of the permit document, and inspections with checklists. When a contractor and an applicant submits their permit application, the permit technician will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the console (back-office). If fees are required to be paid at submission of the permit, the applicant will have the ability to pay the County based on the payment gateway integration. The department review cycle process will be configured to handle department reviews, once the reviews have been approved the permit will be issued generated the permit document. When the applicant or contractor is ready for inspection, the system will be configured to support these inspection requisitions based on inspection types and inspection checklists. Once all permits have been configured, business rules applied, and documents created the Clariti team will pull the data elements from the Clariti console for the County to begin data mapping to the TrakIT data. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Conduct analysis session on data elements and fee calculations for the following permit types:
  - Addition
  - Construction Trailer
  - Disabled Accessibility
  - Group A-1, Theater
  - Group A-2, Food or Drink
  - Group A-3, General Assembly
  - Group A-4, Arena
  - Groupe A-5, Stadium
  - Group B, Office, Business
  - Group E, Educational K-12
  - Group F-1, Factory, Combustibles
  - Group F-2, Factory, Noncombustibles
  - Group H, High-Hazard
  - Group I-1, Hospital
  - Group I-2, Jail
  - Group L, Lab
  - Group M, Mercantile, Retail
  - Group S-1, Storage, Combustibles
  - Group S-2, Storage, Noncombustibles
  - Group U, Greenhouse
  - Group U, Other
  - Public Pool
  - Sign
  - Tenant Improvement
  - Trash Enclosure
- Configure data elements, reviews and milestones, inspections and inspection checklists, page layouts, and permissions for the permits
- Setup business rules to support these permit types that will include
  - GIS Validation
  - Validation on workflow steps
  - email validation with permit document
  - Fee generated (calculations)
  - Document generation
  - Alert triggers
  - Creation of inspection types based on status and type
  - Creation of inspection checklist based on inspection type
  - Assignments
  - Failed inspection setup of re-inspection process
  - Corrections Required based on review
  - email and document generation based on corrections and failed inspection
- Configure documents
  - Permit document

- Corrections Letter
- Inspection Results
- Perform quality assurance testing on permit types in this sprint
- Conduct sprint design session and capture “nice to have” in the backlog
- Provide sprint SME training on solution (to be recorded)
- Create report for data conversion activities

#### Yolo County Responsibilities

- Active participation in backlog grooming session to understand sprint expectations
- Provide Clariti with permit type data elements, fees, fee calculations, reviews and departments, inspection types and checklists, permit documents, etc.
- Active participation in analysis session
- Address questions Clariti team has related to the permit types in this sprint
- Active participation in the sprint design session understanding the objective of the design
- Participate in training on solution defined in this sprint
- Initiate data mapping activities to support data conversion activities

#### Outcome

- The County will be able to access the Yolo County’s Clariti console
- The County will be able to create, pay (test), process permit, and print permit documents from the console
- Acceptance of the Sprint workbook
- Data Mapping document with permit type content

### **3.2.6a Feature Portal: Setup Permit w/ Review and Inspections - Nonresidential (26)**

The Clariti Community portal will be configured to support Yolo County to create permits, pay fees, monitor status, and print permit documents. When a contractor or citizen logs into the community portal they will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the back-office that will be exposed to the citizen or contractor. If fees are required to be paid at submission of the permit, the portal will take online payment using the County’s payment provider. If fees are required later in the process, these fees will be available online for payment. The applicant or contractor will have the ability to resubmit plans online and request inspections. In this feature the citizen or contractor will have the ability to create, monitor, pay, resubmit plans, download permit documents and/or letters, and request an inspection. In this sprint the following tasks will be completed:

#### Clariti’s Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Setup the Application Page which will include what permits are accessible on the portal by the County’s citizen and contractors
- Setup the permits, which will include the record type, page layout setup and permissions for the following permit types
  - Addition
  - Construction Trailer
  - Disabled Accessibility
  - Group A-1, Theater
  - Group A-2, Food or Drink
  - Group A-3, General Assembly
  - Group A-4, Arena
  - Group I-1, Hospital
  - Group I-2, Jail
  - Group L, Lab
  - Group M, Mercantile, Retail
  - Group S-1, Storage, Combustibles
  - Group S-2, Storage, Non Combustibles
  - Group U, Greenhouse

- Groupe A-5, Stadium
  - Group B, Office, Business
  - Group E, Educational K-12
  - Group F-1, Factory, Combustibles
  - Group F-2, Factory, Noncombustibles
  - Group H, High-Hazard
  - Group U, Other
  - Public Pool
  - Sign
  - Tenant Improvement
  - Trash Enclosure
- 
- Validate the ability for portal users to pay fees
  - Expose Work Items to the Clariti Community portal based on current work items configured in the back-office
  - Expose submissions and requesting inspection on the portal
  - Configure business rules based on portal submissions
    - Email notification of the permit issuances
    - Email notification of inspection scheduled
    - Email notification of review status
  - Provide sprint SME training on solution (to be recorded)

### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide the description or text for the permit that will assist the user in selecting the correct permit type to begin the permit process
- Confirm the permit types to be available on the community portal
- Provide the data fields exposed online for processing each permit online
- Provide the workflow update when a permit is created online
- Provide attestation language for electronic signature, acknowledgement
- Participate in training on solution defined in this sprint
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

### **Outcome**

- The County will be able to access the Yolo County's Community portal site
- The County will be able to register as a Contractor or Citizen on the community portal
- The County will be able to login as a contractor and have the ability to see their permits associated to their contract information
- The County will be able to create, pay (test), monitor permit status, resubmit plans, download permit documents and/or letters, and request an inspection from the community portal
- Acceptance of the sprint workbook

### 3.2.7 Feature Console: Setup Code Enforcement (2), Business License (2), Public Works (6)

The Clariti console will be configured to support Yolo County to create permits, pay fees, issue permits, email notification, department review process, creation of the permit document, and inspections with checklists. In addition, this sprint will include the configuration of the Complaint and Code Enforcement Cases along with the Business License and Renewal license. When a contractor and an applicant submits their permit application, the permit technician will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the console (back-office). If fees are required to be paid at submission of the permit, the applicant will have the ability to pay the County based on the payment gateway integration. The department review cycle process will be configured to handle department reviews, once the reviews have been approved the permit will be issued generating the permit document. When the applicant or contractor is ready for inspection, the system will be configured to support these inspection requisitions based on inspection types and inspection checklists. The system will be configured to support a business license (with sub-types) where the applicant will provide details of the license where fees will be generated and paid, when the license is issued an expiration date will be set for January 31. Based on Yolo County's business license process the license will enter a period of "about to expire" where the licensee can complete their renewal application, upon approval of the renewal application, the license will be updated with a new expiration date. The Clariti team will configure the complaint and code enforcement case records based on input from the County. The code enforcement process will include notice of violations based on ordinance, investigations, etc. Once all permits, business license, and code enforcement cases have been configured, business rules applied, and documents created the Clariti team will pull the data elements from the Clariti console for the County to begin data mapping to the TrakIT data. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Conduct analysis session on data elements and fee calculations for the following permit types:
  - Complaint
  - Code Enforcement Case
  - Business License
  - Renewal
  - County Surveyor (3)
  - Encroachment Permit (19)
  - Parade-Race-Assemblage Permit (3)
  - Transportation Permit (3)
  - Engineering Review (2)
  - Stormwater Permit (2)
- Configure data elements, reviews and milestones, inspections and inspection checklists, page layouts, and permissions for the permits
- Setup business rules to support these permit types that will include
  - GIS Validation
  - Validation on workflow steps
  - email validation with permit document
  - Fee generated (calculations)
  - Document generation
  - Alert triggers
  - Creation of inspection types based on status and type
  - Creation of inspection checklist based on inspection type

- Assignments
- Failed inspection setup of re-inspection process
- Corrections Required based on review
- email and document generation based on corrections and failed inspection
- License renewal based on license about to expire, update the license status when the renewal has been approved
- email and document generation based on approved business license
- Create the code enforcement case from the complaint
- email and document generation based on code violation
- Configure documents
  - Permit document
  - Corrections Letter
  - Inspection Results
  - Notice of Violation
  - Business License
- Perform quality assurance testing on permit types in this sprint
- Conduct sprint design session and capture “nice to have” in the backlog
- Provide sprint SME training on solution (to be recorded)
- Create report for data conversion activities

### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide Clariti with permit type data elements, fees, fee calculations, reviews and departments, inspection types and checklists, permit documents, etc.
- Active participation in analysis session
- Address questions Clariti team has related to the permit types in this sprint
- Active participation in the sprint design session understanding the objective of the design
- Participate in training on solution defined in this sprint
- Initiate data mapping activities to support data conversion activities

### **Outcome**

- The County will be able to access the Yolo County’s Clariti console
- The County will be able to create, pay (test), process permit, and print permit documents from the console
- The County will be able to create a business license and renewal activities
- The County will be able to create a complaint which may lead to a code enforcement case
- Acceptance of the Sprint workbook
- Data Mapping document with permit type content

### 3.2.7a Feature Portal: Setup Code Enforcement (2), Business License (2), Public Works (6)

The Clariti Community portal will be configured to support Yolo County to create permits, pay fees, monitor status, and print permit documents. When a contractor or citizen logs into the community portal they will have the ability to select a permit type to create, the data collected by the County will be based on field data configured in the back-office that will be exposed to the citizen or contractor. If fees are required to be paid at submission of the permit, the portal will take online payment using the County's payment provider. If fees are required later in the process, these fees will be available online for payment. The applicant or contractor will have the ability to resubmit plans online and request inspections. In this feature the citizen or contractor will have the ability to create, monitor, pay, resubmit plans, download permit documents and/or letters, and request an inspection. The portal will be configured for complaint cases (no fees) for processing and for an applicant to submit a business license where the applicant can pay the license fees online. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Setup the Application Page which will include what permits are accessible on the portal by the County's citizen and contractors
- Setup the permits, which will include the record type, page layout setup and permissions for the following permit types
  - ComplaintBusiness License
  - Renewal
  - County Surveyor (3)
  - Encroachment Permit (19)
  - Parade-Race-Assemblage Permit (3)
  - Transportation Permit(3)
  - Engineering Review (2)
  - Stormwater Permit (2)
- Validate the ability for portal users to pay fees
- Expose Work Items to the Clariti Community portal based on current work items configured in the back-office
- Expose submissions and requesting inspection on the portal
- Configure business rules based on portal submissions
  - Email notification of the permit issuances
  - Email notification of inspection scheduled
  - Email notification of review status
  - Email notification of the Business License Issuance
  - Email notification the complaint was submitted
- Provide sprint SME training on solution (to be recorded)

#### Yolo County Responsibilities

- Active participation in backlog grooming session to understand sprint expectations
- Provide the description or text for the permit that will assist the user in selecting the correct permit type to begin the permit process
- Confirm the permit types to be available on the community portal
- Provide the data fields exposed online for processing each permit online
- Provide the workflow update when a permit is created online
- Provide attestation language for electronic signature, acknowledgement

- Participate in training on solution defined in this sprint
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

#### **Outcome**

- The County will be able to access the Yolo County's Community portal site
- The County will be able to register as a Contractor or Citizen on the community portal
- The County will be able to login as a contractor and have the ability to see their permits associated to their contract information
- The County will be able to create, pay (test), monitor permit status, resubmit plans, download permit documents and/or letters, and request an inspection from the community portal
- The County will be able to create a business license application, pay licensing fees, monitor the status of the license through issuance
- The County will be able to create a complaint application online and monitor status.
- Acceptance of the sprint workbook

### **3.2.8 Feature: Backlog Prioritization**

Once all the features are available in the console and on the community portal for the County to access and test if the County identified gaps or areas of improvement that were captured in the backlog list. The project team will review the backlog list to determine priority of the items and assess which will be included in this final sprint. The team will focus on the core objective with the ability to create a permit, business license, and code enforcement activity in the console and portal based on the building permitting solution. Depending on the backlog items, not all items may be addressed based on time constraints of the sprint. The teams will focus on the capabilities of the objective to ensure these processes can be met on the community portal. If the County determines other backlog items need to be included in this SOW, these items can be added via a Change Request. The County will have the opportunity to include these outstanding backlog items to be addressed during the Solution Implementation Adoption Support periods. In this sprint the following tasks will be completed:

#### **Clariti's Responsibilities**

- Collaborate with the County on backlog prioritization
- Identify backlog items that will be included in the sprint
- Setup/configure these items included in the sprint to support the design review

#### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Active participation in reviewing the data mapping file to support the conversion activities
- Provide Clariti with the data formatted file to support conversion activities
- Lead the data validation activities to ensure the data has been converted based on the mapping defined by the County
- Identify corrections to the data mapping activities to support the second conversion activities
- Continue to validate the data as the County begins the next sprint of training and testing
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

#### **Outcome**

- Clariti will walk through each identified backlog item on how it was addressed
- The County will be able to login to the community portal or console, create a permit or business license or complaint, pay fees, monitor application or permit status, request an inspection (if applicable), and print documents

## 3.3 Deployment / Go-Live Release 1

The Yolo County's community portal has been setup to achieve the objective set out in this SOW, the next steps are to prepare the department who will be responsible for managing the Permits, Business License, Public Works Permits, and Code Enforcement in the console and through the portal process. In preparation, the County will be responsible for testing both the console and the portal to ensure the objectives of the SOW have been met, determine the communication and training required to support the citizens and contractors who will be responsible for creating these permits, business license, code enforcement and public works permits, and the deployment into the production environment where these citizens and contractors can begin or continue to do business with the County in an efficient manner. The activities involved in the deployment will be based on the same approach as the Features, each activity will be a 2 week sprint cycle.

In addition, the deployment will include data conversion activities, where the County will complete the data mapping document provided by Clariti after each Feature sprint with the TrakIT data. Clariti will conduct a dress rehearsal of two data conversion activities where the County will be responsible for validating the converted data in the staging environment.

### 3.3.1 Data Conversion Dress Rehearsal

The project team will work together in executing the data conversion dress rehearsal activities. The County will provide the extract of the TrakIT data in a formatted file supporting the mapping document provided by Clariti after each feature sprint. Clariti will use the formatted file provided by the County to load the data into the Yolo County Clariti Building Permitting Solution environment. The County will review the converted data in the Clariti Building Permitting Solution to ensure data has been converted and supports the County's business processes. If the County identifies an area within the data set requiring corrections based on the mapping fields, the County will be responsible for providing a second file to execute the data conversion actions. After the second data conversion activities, the County will run through a subset of test cases to ensure the Staging environment is ready for go-live activity. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Review the mapping data file to support data conversion activities
- Load the data file provided by the County into the Clariti Building Permitting Solution
- Oversee the data validation activities performed by the County
- Review the updated data file provided by the County to load into Yolo's solutions

#### Yolo County Responsibilities

- Active participation in backlog grooming session to understand sprint expectations
- Active participation in reviewing the mapping data file to support data conversion activities
- Provide Clariti with the formatted data file to support data conversion activities
- Validate the data once converted in the Yolo County Building Permitting Solution
- Identify areas of improvement for the next data conversion activities
- Provide Clariti with the updated formatted data file to support data conversion activities to support the next sprint, testing
- Support Sprint Design meeting on scenarios executed and closed issues

#### Outcome

- Yolo County login to the console and portal to ensure data conversion supports the County process
- Completion of two data conversion activities
- Acceptance of the sprint workbook

### 3.3.2 Testing Sprint

The functionality of Yolo County's console and community portal has been set up and configured to support testing. The Test Sprint will include a backlog grooming session, this session will focus on the functionality of the staff processing permits in the console and online portal that will be tested, for example can an existing user login, can a permit technician create a permit, license, or complaint and walk through the end-to-end process, can an existing user see their permits, license, or complaint on the portal, etc. During each sprint feature the Clariti team provided by the sprint workbook will include a set of test cases, these test cases will be used by the County to support their testing activities in this sprint. The test scenarios will be assigned to County team members where they will dedicate time during the sprint to complete the testing tasks on the portal. The County testers will capture any issues they encounter during this testing cycle, these items will be captured in a backlog list where the Clariti team will monitor. The Clariti team will try to reproduce the issue and determine resolution steps that will be retested by the County. If issues are identified that were not included in the Feature sprint or configuration these items will be placed on the backlog list to be addressed at a future time outside this statement of work. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Establish a test schedule to be executed within the two-week sprint in conjunction with with the County
- Monitor testing issues reported by Testers for resolution
- Conduct sprint design session, by communicating which scenarios were tested and closed issues

#### Yolo County Responsibilities

- Active participation in the backlog grooming session to understand sprint expectations
- Collaborate and agree to the test schedule and execute the test scenarios outlined in the schedule to support the sprint
- Support Sprint Design meeting on scenarios executed and closed issues

#### Outcome

- Yolo County execute test cases
- Clariti address test issues to close out all critical issues identified
- Acceptance of the sprint workbook

### 3.3.3 Training Sprint

The functionality of Yolo County's console and community portal has been set up and configured and tested. The Training sprint will include communication to the staff, citizens and/or contractors working with the County on the new console and community portal, recommendations for training these internal and external users, a schedule for how training will occur in the sprint, and execution of the training schedule. The Training Sprint will include a backlog grooming session, this session will focus the communications to internal and external users, an agreed upon training approach, and a schedule for training that will be executed within the two-week sprint schedule. This sprint will have the Clariti team supporting the SME's conducting training for their teams which may include a SME training dress rehearsal to validate all system functionality. The training may include video recordings or FAQs to assist the internal and/or external users on how to use the console and community portal. Any issues reported during training that impacts the objective of this statement of work will be addressed, and any process improvements or changes to the setup or configuration will be captured on the backlog list to be addressed at a future time outside this statement of work. In this sprint the following tasks will be completed:

### **Clariti's Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Establish a training schedule in collaboration with the County to be executed within the two-week sprint
- Monitor training if issues are reported these will be added to the backlog list
- Provide sessions for Yolo team to ask questions related to the solution in support of training
- Conduct sprint design session, this meeting will be the go/no-go decision for production

### **Yolo County Responsibilities**

- Collaborate with Clariti on the external communication and training approach
- Active participation in the backlog grooming session to better understand the expectations identified for the sprint
- Provide Clariti team with a list of questions to support the sessions in addressing questions
- Contribute to and agree to the training schedule and execute the internal and external communication and training sessions to support the sprint
- Support Sprint Design meeting on decision to go/no-go for production

### **Outcome**

- Yolo County console and community portal is ready for deployment to production
- Acceptance of the sprint workbook

### 3.3.4 Deployment

The functionality of the Yolo County's console and community portal has been set up and configured, tested and external and internal users have been trained on the new building permitting solution. The console and community portal is now ready for production. During the go/no-go decision meeting the project team has determined the date for go-live and users will be directed to the new solution. The Deployment Sprint will include a backlog grooming session to outline all the steps in preparation and execution of deployment or go-live. Once the portal is live the Clariti team will support the production console and community portal for the duration of the sprint, this will include troubleshooting any issues that may be identified in production, the team will investigate the issue to resolution. The issues reported during production that impacts the objective of this statement of work will be addressed, and any process improvements or changes to the setup or configuration will be captured on the backlog list to be addressed at a future time outside this Statement of Work. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Collaborate with the County on backlog grooming activities for deployment (go-live) and support
- Execute the activities/tasks identified in grooming session (migrate from sandbox to production) and smoke test the portal (validate login, permit creation, and payments)
- Support production during the sprint cycle and address any reported these will be added to the backlog list
- Close out project

#### Yolo County Responsibilities

- Collaborate with Clariti on the deployment (go-live) tasks
- Take ownership of the production environment and support external and internal users

#### Outcome

- Yolo County community portal is in production and used by external users
- Acceptance of the Sprint workbook

## 3.4 Planning Applications Solution

The feature sprint section below will include the configuration of the Yolo County planning applications for both the console and community portal. The planning applications will use the framework that had been set up for the building permitting solution. In addition, integrations built in release one (1) will carry over to the planning applications and will be reviewed and updated as needed to support the implementation. The planning applications will continue with the same sprint approach where the project team will build out the applications on the console with the following sprint exposing those applications on the portal. The design review will be a walk through of an application or two in that grouping to demonstrate how the system will support the Yolo County planning process. The planning applications will capture event data, but the process for hearing will be handled outside the system. The complexity of the planning process can be added into the system during the Solution Adoption Implementation Support releases. During each planning application feature sprint, the Clariti team will conduct a walk through with the sprint's SMEs on how the system functions to support the SMEs in testing and creating training materials to support their teams, these sessions will be recorded and provided to the SMEs to review throughout the duration of the project. In addition, the Clariti team will provide the Yolo County team with an extract of fields from the Clariti Planning Application Solution for

the group of applications for the sprint that will allow the Yolo team to begin data mapping to their legacy system, TrakIT. Once the planning application group has been configured in the console and on the portal, the Yolo team will have access to the configuration to begin testing and training activities.

Activities/Tasks	Wk 37	Wk 38	Wk 39	Wk 40	Wk 41	Wk 42	Wk 43	Wk 44	Wk 45	Wk 46	Wk 47	Wk 48
<b>Clariti BPS Console and Community Portal Implementation - Yolo County, CA</b>												
<b>3.4 Planning Application Solution - Release (2)</b>												
<b>3.4.1 Feature: Planning Applications in the Ministerial Workflow (12)</b>												
Conduct Feature Backlog Grooming Session - Mondays												
Validate input from County has been received												
Planning Application Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)												
Config application level security, documents, business rules, etc.)												
QA/Unit test planning applications w/ data collection, fee calculations, reviews, business rules, workflow, etc.)												
Conduct Sprint Design session - Fridays												
<b>3.4.1a Feature: Planning Applications in the Ministerial Workflow (12)</b>												
Conduct Feature Backlog Grooming Session - Mondays												
Validate input from County has been received												
Planning Application Type setup (page layout, w/ review, setup and permissions, etc.)												
Config planning application level security, documents, business rules, etc.												
QA/Unit test planning applications w/ data collection, fee calculations, reviews, business rules, workflow, etc.)												
Conduct Sprint Design session - Fridays												
<b>3.4.2 Feature: Planning Applications in the Discretionary Workflow (12)</b>												
Conduct Feature Backlog Grooming Session - Mondays												
Validate input from County has been received												
Planning application Type setup (page layout, w/ review, setup and permissions, etc.)												
Config planning application level security, documents, business rules, etc.												
QA/Unit test planning application w/ data collection, fee calculations, reviews, business rules, workflow, etc.												
Conduct Sprint Design session - Fridays												

Activities/Tasks	Wk 37	Wk 38	Wk 39	Wk 40	Wk 41	Wk 42	Wk 43	Wk 44	Wk 45	Wk 46	Wk 47	Wk 48	Wk 49	Wk 50	Wk 51	Wk 52	Wk 53	Wk 54	Wk 55	Wk 56	
<b>Clariti BPS Console and Community Portal Implementation - Yolo County, CA</b>																					
<b>3.4.2a Feature: Planning Applications in the Discretionary Workflow (12)</b>																					
Conduct Feature Backlog Grooming Session - Mondays																					
Validate input from County has been received																					
Planning Application Type setup (page layout, w/ review and permit w/ inspection, setup and permissions, etc.)																					
Config Planning Application level security, documents, business rules, etc.																					
QA/Unit test planning application w/ data collection, fee calculations, reviews, business rules, workflow, etc.																					
Conduct Sprint Design session - Fridays																					
<b>3.4.3 Feature: Backlog Prioritization</b>																					
Conduct Feature Backlog Grooming Session - Mondays																					
Collaborate on backlog items and prioritize for items to be included in sprint																					
Setup/configure items in agreed upon list to support design session																					
Unit test portal planning application w/ data collection, fee payments, etc.)																					
Conduct Sprint Design session - Fridays																					
<b>3.5 Deployment/Go-Live Release 2</b>																					
<b>3.5.1 Data Conversion Dress Rehearsal</b>																					
Conduct test backlog grooming session - Mondays																					
Finalize data mapping to support conversion activities																					
Execute conversion activities																					
Validate conversion data																					
Identify data mapping fixes																					
Execute conversion activities																					
<b>3.5.2 Test Sprint</b>																					
Conduct test backlog grooming session - Mondays																					
Collaborate on the level of testing required																					
Regression testing on Building Permitting Solution																					
Establish a test schedule to be executed within the sprint schedule																					
Train SMEs/Train-the-Trainer																					
Execute testing																					
Conduct Sprint Design session - Fridays																					

Activities/Tasks	Wk 37	Wk 38	Wk 39	Wk 40	Wk 41	Wk 42	Wk 43	Wk 44	Wk 45	Wk 46	Wk 47	Wk 48	Wk 49	Wk 50	Wk 51	Wk 52	Wk 53	Wk 54	Wk 55	Wk 56	Wk 57	Wk 58	Wk 59	Wk 60
<b>Clariti BPS Console and Community Portal Implementation - Yolo County, CA</b>																								
<b>3.5.3 Training Sprint</b>																								
Conduct training backlog grooming session - Mondays																								
Collaborate on the level of training required for both staff and external members																								
Establish a training schedule to be executed within the sprint schedule																								
Execute training sessions																								
Conduct Sprint Design session - Fridays																								
<b>3.5.4 Deployment</b>																								
Migrate from sandbox/staging to production																								
Deployment/go-live activities (smoke testing, validating planning application are exposed on production site, customers have access to the site, etc.)																								
Deployment support																								

### 3.4.1 Feature Console: Planning Applications in the Minor Project Workflow (12)

The Clariti console will be configured to support Yolo County to create the planning application, pay fees, conduct department plan reviews and iterations process, creation of a corrections letter (if required), email notification, creation of a decision letter and will capture the conditions of approval in the system. When an architect and/or an applicant submits their planning application, the planner will have the ability to select an application type to create, and the data collected by the County will be based on field data configured in the console (back-office). If fees are required to be paid at submission of the planning application, the applicant will have the ability to pay the County based on the payment gateway integration. The department review cycle process will be configured to handle department reviews, once the reviews have been approved the application will proceed to the decision process for Minor Project workflow (reference Appendix C - Yolo County Workflow Samples), once a decision has been made the system will generate a form letter of the decision. When the applicant or architect is ready for submission of their permits, the system will relate the planning application to these permit(s). Once all planning applications have been configured, business rules applied, and documents created, the Clariti team will pull the data elements from the Clariti console for the County to begin data mapping to the TrakIT data. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Conduct analysis session on data elements and fee calculations for the following application types:
  - Reference Appendix G and the planning applications aligned to the Minor Project workflow determined during the needs assessment sprint
- Configure data elements, reviews and milestones, page layouts, and permissions for the Minor Project workflow applications
- Setup business rules to support these permit types that will include
  - Pre-meeting assignment
  - Application Assignment
  - validation on workflow steps
  - Fee generation
  - Review generation (Conditions of Approval entry)
  - Routing for comments (3rd-party reviewers)
  - Comment due date (in compliance comments/past due comments)
  - Document generation (Correction or Approval Letter)
  - Email generation
  - Review iterations
  - Decision captured (approved/denial/appeal)
  - Alerts triggers
- Configure documents
  - Corrections Letter
  - Decision Letters
- Perform quality assurance testing on planning applications types in this sprint
- Conduct sprint design session and capture “nice to have” in the backlog
- Provide sprint SME training on solution (to be recorded)
- Create report for data conversion activities

#### Yolo County Responsibilities

- Active participation in backlog grooming session to understand sprint expectations
- Provide Clariti with planning application type data elements, fees, fee calculations, reviews and departments, planning documents, etc.

- Active participation in analysis session
- Address questions Clariti team has related to the planning applications types in this sprint
- Active participation in the sprint design session understanding the objective of the design
- Participate in training on solution defined in this sprint
- Initiate data mapping activities to support data conversion activities

#### **Outcome**

- The County will be able to access the Yolo County's Clariti console in a non-production environment
- The County will be able to create, pay (test), process planning applications, and print planning documents from the console
- Acceptance of the Sprint workbook
- Data Mapping document with planning application type content

### **3.4.1a Feature Portal: Planning Applications in the Minor Project Workflow (12)**

The Clariti Community portal will be configured to support Yolo County to create planning applications, pay fees, monitor status, upload submissions, and print documents. When an architect or citizen logs into the community portal they will have the ability to select a planning application type to create, the data collected by the County will be based on field data configured in the back-office that will be exposed to the citizen or architecture. If fees are required to be paid at submission or any time throughout the planning application, the architect or applicant will have the ability to process the payment using the County's payment provider. The applicant or architect will have the ability to submit or resubmit plans online for the County reviewers to conduct their review in the console. In this feature the citizen or architect will have the ability to create, monitor, pay, submit/resubmit plans, and download planning documents and/or letters. In this sprint the following tasks will be completed:

#### **Clariti's Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Setup the Application Page which will include what planning applications are accessible on the portal by the County's citizen and architects
- Conduct analysis session on data elements and fee calculations for the following application types:
  - Reference Appendix G (the same planning applications that were identified in section 3.4.1)
- Validate the ability for portal users to pay fees
- Expose Work Items to the Clariti Community portal based on current work items configured in the back-office
- Expose submissions on the portal
- Configure business rules based on portal submissions
  - Email notification of the application status
  - Email notification of review status
  - Email notification of the application decision
- Provide sprint SME training on solution (to be recorded)

#### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide the description or text for the planning applications that will assist the user in selecting the correct planning application type to begin the application process

- Confirm the planning application types to be available on the community portal
- Provide the data fields exposed online for processing each planning application in this sprint online
- Provide the workflow update when a planning application is created online
- Provide attestation language for electronic signature, acknowledgement (if different from permits)
- Participate in training on solution defined in this sprint
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

#### **Outcome**

- The County will be able to access the Yolo County's Community portal site (non-production environment)
- The County will be able to register as a Architect or Citizen on the community portal
- The County will be able to login as a Architect and have the ability to see their planning applications associated to their contract information
- The County will be able to create, pay (test), monitor planning application status, submit/resubmit plans, and download planning documents and/or letters from the community portal
- Acceptance of the sprint workbook

### **3.4.2 Feature Console: Planning Applications in the Major Project Workflow (12)**

The Clariti console will be configured to support Yolo County to create the planning application, pay fees, conduct department plan reviews and iterations process, creation of a corrections letter (if required), email notification, capture the hearing date and durations, creation of a decision letter and will capture the conditions of approval in the system. When an architect and/or an applicant submits their planning application, the planner will have the ability to select an application type to create, and the data collected by the County will be based on field data configured in the console (back-office). If fees are required to be paid at submission of the planning application, the applicant will have the ability to pay the County based on the payment gateway integration. The department review cycle process will be configured to handle department reviews, once the reviews have been approved the application will proceed to the hearing process where many of the processes will be handled outside the system and the analysis sessions will determine what should be handled in the system. The decision process for Major Project workflow (reference Appendix C - Yolo County Workflow Samples), once a decision has been made the system will generate a form letter of the decision. When the applicant or architect is ready for submission of their permits, the system will relate the planning application to these permit(s). Once all planning applications have been configured, business rules applied, and documents created, the Clariti team will pull the data elements from the Clariti console for the County to begin data mapping to the TrakIT data. In this sprint the following tasks will be completed:

#### **Clariti's Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Conduct analysis session on data elements and fee calculations for the following application types:
  - Reference Appendix G and the planning applications aligned to the Major Project workflow determined during the needs assessment sprint
- Configure data elements, reviews and milestones, page layouts, and permissions for the Minor Project workflow applications

- Setup business rules to support these permit types that will include
  - Pre-meeting assignment
  - Application Assignment
  - Validation on workflow steps
  - Fee generation
  - Generate Task Checklist
  - Review generation (Conditions of Approval entry)
  - Routing for comments (3rd-party reviewers)
  - Comment due date (in compliance comments/past due comments)
  - Document generation (Correction or Approval Letter)
  - Email generation
  - Review iterations
  - Set due date for hearing and/or capture the hearing date
  - Decision captured (approved/denial/appeal)
  - Alerts triggers
- Configure documents
  - Corrections Letter
  - Decision Letters
- Perform quality assurance testing on planning applications types in this sprint
- Conduct sprint design session and capture “nice to have” in the backlog
- Provide sprint SME training on solution (to be recorded)
- Create report for data conversion activities

### **Yolo County Responsibilities**

- Active participation in backlog grooming session to understand sprint expectations
- Provide Clariti with planning application type data elements, fees, fee calculations, reviews and departments, planning documents, etc.
- Active participation in analysis session
- Address questions Clariti team has related to the planning applications types in this sprint
- Active participation in the sprint design session understanding the objective of the design
- Participate in training on solution defined in this sprint
- Initiate data mapping activities to support data conversion activities

### **Outcome**

- The County will be able to access the Yolo County’s Clariti console in a non-production environment
- The County will be able to create, pay (test), process planning applications, and print planning documents from the console
- Acceptance of the Sprint workbook
- Data Mapping document with planning application type content

### 3.4.2a Feature Portal: Planning Applications in the Major Project Workflow (12)

The Clariti Community portal will be configured to support Yolo County to create planning applications, pay fees, monitor status, upload submissions, and print documents. When an architect or citizen logs into the community portal they will have the ability to select a planning application type to create, the data collected by the County will be based on field data configured in the back-office that will be exposed to the citizen or architecture. If fees are required to be paid at submission or any time throughout the planning application, the architect or applicant will have the ability to process the payment using the County's payment provider. The applicant or architect will have the ability to submit or resubmit plans online for the County reviewers to conduct their review in the console. In this feature the citizen or architect will have the ability to create, monitor, pay, submit/resubmit plans, and download planning documents and/or letters. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Setup the Application Page which will include what planning applications are accessible on the portal by the County's citizen and architects
- Conduct analysis session on data elements and fee calculations for the following application types:
  - Reference Appendix G (the same planning applications that were identified in section 3.4.2)
- Validate the ability for portal users to pay fees
- Expose Work Items to the Clariti Community portal based on current work items configured in the back-office
- Expose submissions on the portal
- Configure business rules based on portal submissions
  - Email notification of the application status
  - Email notification of review status
  - Email notification of the application decision
- Provide sprint SME training on solution (to be recorded)

#### Yolo County Responsibilities

- Active participation in backlog grooming session to understand sprint expectations
- Provide the description or text for the planning applications that will assist the user in selecting the correct planning application type to begin the application process
- Confirm the planning application types to be available on the community portal
- Provide the data fields exposed online for processing each planning application in this sprint online
- Provide the workflow update when a planning application is created online
- Provide attestation language for electronic signature, acknowledgement (if different from permits)
- Participate in training on solution defined in this sprint
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

#### Outcome

- The County will be able to access the Yolo County's Community portal site (non-production environment)
- The County will be able to register as a Architect or Citizen on the community portal

- The County will be able to login as a Architect and have the ability to see their planning applications associated to their contract information
- The County will be able to create, pay (test), monitor planning application status, submit/resubmit plans, and download planning documents and/or letters from the community portal
- Acceptance of the sprint workbook

### 3.4.3 Feature: Planning Backlog Prioritization

Once all the features are available in the console and on the community portal for the County to access and test if the County identified gaps or areas of improvement that were captured in the backlog list. The project team will review the backlog list to determine priority of the items and assess which will be included in this final sprint prior to the second release. The team will focus on the core objective with the ability to create a planning application in the console and portal based on the planning application solution. Depending on the backlog items, not all items may be addressed based on time constraints of the sprint. The teams will focus on the capabilities of the objective to ensure these processes can be met in the console and on the community portal. If the County determines other backlog items need to be included in this SOW, these items can be added via a Change Request. The County will have the opportunity to include these outstanding backlog items to be addressed during the Solution Implementation Adoption Support periods. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Collaborate with the County on backlog prioritization
- Identify backlog items that will be included in the sprint
- Setup/configure these items included in the sprint to support the design review

#### Yolo County Responsibilities

- Active participation in backlog grooming session to understand sprint expectations
- Active participation in reviewing the data mapping file to support the conversion activities
- Provide Clariti with the data formatted file to support conversion activities
- Lead the data validation activities to ensure the data has been converted based on the mapping defined by the County
- Identify corrections to the data mapping activities to support the second conversion activities
- Continue to validate the data as the County begins the next sprint of training and testing
- Support Sprint Design meeting, support any follow-up questions, clarification to support the sprint design based on sprint duration, participate in feature review

#### Outcome

- Clariti will walk through each identified backlog item on how it was addressed
- The County will be able to login to the community portal or console, create a planning application, pay fees, monitor application status, and print documents

## 3.5 Deployment / Go-Live Release 2

The Yolo County's console and community portal had been setup in release one (1) to achieve the objective set out in this SOW, the next steps are to prepare the planning department who will be responsible for managing the planning applications in the console and through the portal process. In preparation, the County will be responsible for testing both the console and the portal to ensure the objectives of the SOW have been met, this will include regression testing on the permits, license, and complaints to ensure the work performed to support planning application was not impacted with the

already live system. The planning department will determine the communication and training required to support the citizens, architects, and staff who will be responsible for creating these planning applications, and the deployment into the production environment where these citizens, architects, and staff can begin or continue to do business with the County in an efficient manner. The activities involved in the deployment will be based on the same approach as release one (1) and with each Features activity will be a 2 week sprint cycle.

In addition, the deployment will include data conversion activities, where the County will complete the data mapping document provided by Clariti after each Feature sprint with the TrakIT data. Clariti will conduct a dress rehearsal of two data conversion activities where the County will be responsible for validating the converted data in the staging environment.

### 3.5.1 Data Conversion Dress Rehearsal

The project team will work together in executing the data conversion dress rehearsal activities. The County will provide the extract of the TrakIT data in a formatted file supporting the mapping document provided by Clariti after each feature sprint. Clariti will use the formatted file provided by the County to load the data into the Yolo County Clariti Planning Solution environment. The County will review the converted data in the Clariti Planning Solution to ensure data has been converted and supports the County's business processes. If the County identifies an area within the data set requiring corrections based on the mapping fields, the County will be responsible for providing a second file to execute the data conversion actions. After the second data conversion activities, the County will run through a subset of test cases to ensure the Staging environment is ready for go-live activity. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Review the mapping data file to support data conversion activities
- Load the data file provided by the County into the Clariti Planning Solution
- Oversee the data validation activities performed by the County
- Review the updated data file provided by the County to load into Yolo's solutions

#### Yolo County Responsibilities

- Active participation in backlog grooming session to understand sprint expectations
- Active participation in reviewing the mapping data file to support data conversion activities
- Provide Clariti with the formatted data file to support data conversion activities
- Validate the data once converted in the Yolo County Planning Solution
- Identify areas of improvement for the next data conversion activities
- Provide Clariti with the updated formatted data file to support data conversion activities to support the next sprint, testing
- Support Sprint Design meeting on scenarios executed and closed issues

#### Outcome

- Yolo County login to the console and portal to ensure data conversion supports the County process
- Completion of two data conversion activities
- Acceptance of the sprint workbook

### 3.5.2 Testing Sprint

The functionality of Yolo County's console and community portal has been set up and configured to support testing. The Test Sprint will include a backlog grooming session, this session will focus on the functionality of the staff processing planning applications in the console and online portal that will be tested, for example can an existing user login, can a planner create a planning application and walk through the end-to-end process, can an existing user see their planning applications on the portal, etc. During each sprint feature the Clariti team provided by the sprint workbook will include a set of test cases, these test cases will be used by the County to support their testing activities in this sprint. The test scenarios will be assigned to County team members where they will dedicate time during the sprint to complete the testing tasks on the portal. The County testers will capture any issues they encounter during this testing cycle, these items will be captured in a backlog list where the Clariti team will monitor. The Clariti team will try to reproduce the issue and determine resolution steps that will be retested by the County. If issues are identified that were not included in the Feature sprint or configuration these items will be placed on the backlog list to be addressed at a future time outside this statement of work. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Conduct backlog grooming session to set sprint expectations
- Establish a test schedule to be executed within the two-week sprint in conjunction with the County
- Monitor testing issues reported by Testers for resolution
- Conduct sprint design session, by communicating which scenarios were tested and closed issues

#### Yolo County Responsibilities

- Active participation in the backlog grooming session to understand sprint expectations
- Collaborate and agree to the test schedule and execute the test scenarios outlined in the schedule to support the sprint
- Support Sprint Design meeting on scenarios executed and closed issues

#### Outcome

- Yolo County execute test cases
- Clariti address test issues to close out all critical issues identified
- Acceptance of the sprint workbook

### 3.5.3 Training Sprint

The functionality of Yolo County's console and community portal has been set up and configured and tested. The Training sprint will include communication to the staff, citizens and/or architects working with the County on the new console and community portal, recommendations for training these internal and external users, a schedule for how training will occur in the sprint, and execution of the training schedule. The Training Sprint will include a backlog grooming session, this session will focus the communications to internal and external users, an agreed upon training approach, and a schedule for training that will be executed within the two-week sprint schedule. This sprint will have the Clariti team supporting the SME's conducting training for their teams which may include a SME training dress rehearsal to validate all system functionality. The training may include video recordings or FAQs to assist the internal and/or external users on how to use the console and community portal. Any issues reported during training that impacts the objective of this statement of work will be addressed, and any process improvements or changes to the setup or configuration will be captured on the backlog list to be addressed at a future time outside this statement of work. In this sprint the following tasks will be completed:

### **Clariti's Responsibilities**

- Conduct backlog grooming session to set sprint expectations
- Establish a training schedule in collaboration with the County to be executed within the two-week sprint
- Monitor training if issues are reported these will be added to the backlog list
- Provide sessions for Yolo team to ask questions related to the solution in support of training
- Conduct sprint design session, this meeting will be the go/no-go decision for production

### **Yolo County Responsibilities**

- Collaborate with Clariti on the external communication and training approach
- Active participation in the backlog grooming session to better understand the expectations identified for the sprint
- Provide Clariti team with a list of questions to support the sessions in addressing questions
- Contribute to and agree to the training schedule and execute the internal and external communication and training sessions to support the sprint
- Support Sprint Design meeting on decision to go/no-go for production

### **Outcome**

- Yolo County console and community portal is ready for deployment to production
- Acceptance of the sprint workbook

### 3.5.4 Deployment

The functionality of the Yolo County's console and community portal has been set up and configured, tested and external and internal users have been trained on the new planning application solution. The console and community portal is now ready for production. During the go/no-go decision meeting the project team has determined the date for go-live and users will be directed to the new solution. The Deployment Sprint will include a backlog grooming session to outline all the steps in preparation and execution of deployment or go-live. Once the portal is live the Clariti team will support the production console and community portal for the duration of the sprint, this will include troubleshooting any issues that may be identified in production, the team will investigate the issue to resolution. The issues reported during production that impacts the objective of this statement of work will be addressed, and any process improvements or changes to the setup or configuration will be captured on the backlog list to be addressed at a future time outside this Statement of Work. In this sprint the following tasks will be completed:

#### Clariti's Responsibilities

- Collaborate with the County on backlog grooming activities for deployment (go-live) and support
- Execute the activities/tasks identified in grooming session (migrate from staging to production) and smoke test the portal (validate login, planning application creation, and payments)
- Support production during the sprint cycle and address any reported these will be added to the backlog list
- Close out project

#### Yolo County Responsibilities

- Collaborate with Clariti on the deployment (go-live) tasks
- Take ownership of the production environment and support external and internal users

#### Outcome

- Yolo County community portal is in production and used by external users
- Acceptance of the Sprint workbook

## 4 Assumptions

The following assumptions are critical to the time and price estimates provided in this SOW. In the event any of these assumptions are incorrect or become invalid during the course of this project, The Clariti Professional Services team reserves the right to request modifications to the schedule and/or charges via the Change Control procedure described herein.

- The County will procure the User and Community Portal licenses to support this migration
- The County will adopt the functionality of the Clariti Building Permitting Solution for both the Console and Community Portal and additional functionality will be captured in a Support case and will be determined by Clariti's Product Management team if and when the functionality will be included in Clariti's product roadmap
- Solution services will be performed between 10 am and 6pm PST, Monday through Friday, excluding holidays, vacations, sick days, and special training designated by Clariti. Clariti will make reasonable efforts to accommodate the County based on the sprint schedule
- The set-up and configuration of the Clariti Community portal will be based on configuration of

the console of Yolo County’s permits, license, and complaint applications.

- The County will be responsible for any data cleansing activities to support the data conversion activities.
- The County will be invoiced based on the Sprint Design Review session where the Clariti team will capture the agreed upon objective of the sprint, the features that will be developed during the sprint and the outcome of the sprint.
- The schedule outlined in this SOW is based on estimates for effort and timeline for each feature and activity can be completed in and will be agreed upon during the Sprint Pilot.
- All changes to this engagement will be addressed through a Change Control procedure set forth in Appendix A – Change Control.
- In situations where the County has to replace personnel during the project, the County will make commercially reasonable efforts to minimize the impact on the timeline of the schedule and Clariti team in regards to knowledge transfer on project objective and status and any background prior to starting on the project.
- Work performed on this engagement will be remote with zoom communication to support workshops during the duration of this agreement.
- The integration with Infor will be based on the version and design at the time of implementation, when the County converts to a different Infor version the Clariti team will evaluate impacts on the solution and if a redesign is required the Change Management Process will be followed
- The Public Works permit defined in section 3.2.7 and 3.2.7a assumes 6 permit types with sub-types driving the fees, referenced in appendix F. All reference to ‘days’ means business days during the Project, unless otherwise specified.
- The Planning Application configuration is based on the provided workflow in Appendix C and where the complexity of staff recommendations and hearing packages are performed outside the system. The initial release will include data capture of some of these complex processes and recommend the staff use the system to determine enhanced functionality through the Solution Implementation Adoption Support schedule.
- All functionalities will be configured in English.
- The commencement of this agreement may be adjusted based on the Clariti Community Portal functionality as enhancements are being developed that could impact this agreement.

## 5 Staffing

The table below outlines the staffing roles for this Statement of Work. This table identifies both Clariti team members and Yolo County team members for successfully deploying the new Clariti Building Permitting Solution. These resources should be able to prioritize the work supporting this SOW to ensure the objective of each sprint is achieved. The Project Manager (the “PM”) will conduct a weekly project status meeting to capture retrospectives on “what’s working well”, “what can be improved on”, and “what should continue”. If tasks are not being completed in a timely manner the team should escalate to their PM the issues so corrective action can take place and the schedule can be met.

Responsible	Role	Responsibilities
-------------	------	------------------

Clariti	Lead Business Analysis	<ul style="list-style-type: none"> <li>● Lead Clariti Building Permitting Solution for the Console and Community Portal setup and configuration activities</li> <li>● Collaborate with the County on backlog requirements</li> <li>● Support the County on knowledge transfer of the console and community portal setup and configuration</li> </ul>
Yolo County	Solution Owner – Business Owner –	<ul style="list-style-type: none"> <li>● Participate in Backlog Grooming sessions</li> <li>● Support Business Lead in understanding requirements</li> <li>● Manage County team on providing documentation and information to support sprint schedule</li> <li>● Support coordinate of County staff for testers and training external users</li> <li>● Support deployment and go-live activities</li> </ul>
Clariti	Configurators (# TBD)	<ul style="list-style-type: none"> <li>● Configures the applications per the approved design documents</li> <li>● Performs quality and system testing</li> <li>● Develops the configuration guide or sprint workbook</li> </ul>
Clariti, Yolo County	Project Manager	<ul style="list-style-type: none"> <li>● Support Sprint Pilot activities, Backlog Grooming sessions and design review session</li> <li>● Manage and Monitor risks identified during sprint pilot</li> <li>● Escalate issues and manage roadblocks during sprint execution</li> </ul>

## 6 Payment Schedule

Milestones			
Clariti BPS Console and Community Portal Implementation - Yolo County	Sprint Price	Discount	Total Price
<b>3.1 Project Management</b>			
3.1.1 Sprint Pilot	\$12,750	100%	\$0
3.1.2. Permit Needs Assessment	\$5,000	100%	\$0
<b>3.2 Clariti Building Permitting Solution Implementation</b>			
3.2.1 Feature: Setup Clariti Console, Profiles & Permissions	\$2,250	100%	\$0
3.2.1a Feature: Setup Clariti Community Portal	\$875	100%	\$0
3.2.1b Feature: Setup Account and Contracts	\$5,375	100%	\$0
3.2.2 Feature: Setup Permit w/out Review and Inspection (Quick Permits) (3)	\$4,500	100%	\$0
3.2.2a Feature: Setup permit w/out Review and Inspection (Quick Permits) (3) On Portal	\$1,000	100%	\$0
3.2.3 Feature: Setup Permit w/ Review Only (1), Permits w/ Inspection (7), and permits w/ Review OTC and Inspection (5)	\$13,650	100%	\$0
3.2.3a Feature: Setup Permit w/ Review Only (1), Permits w/ Inspection (7), and permits w/ Review OTC and Inspection (5)	\$7,800	100%	\$0
3.2.4 Feature: Setup Permit w/ Review and Inspections - Residential (15) & Fire Protection (6)	\$20,250	100%	\$0
3.2.4a Feature Setup Permit w/ Review and Inspections - Residential (15) & Fire Protection (6)	\$9,750	100%	\$0
3.2.5 Feature: Setup Permit w/ Review and Inspections - Electrical (10), Mechanical (7) & Site Improvements (8)	\$20,250	100%	\$0
3.2.5a Feature: Setup Permit w/ Review and Inspections - Electrical (10), Mechanical (7) & Site Improvements (8)	\$9,750	100%	\$0
3.2.6 Feature: Setup Permit w/ Review and Inspections - Nonresidential (26)	\$20,250	100%	\$0
3.2.6a Feature: Setup Permit w/ Review and Inspections - Nonresidential (26)	\$9,750	100%	\$0
3.2.7 Feature: Setup Code Enforcement (2), Business License (2), Public Works (6)	\$13,500	80%	\$2,700
3.2.7a Feature: Setup Code Enforcement (2), Business License (2), Public Works (6)	\$6,500	80%	\$1,300
3.2.8 Feature: Backlog Prioritization	\$10,000	100%	\$0

<b>3.3 Deployment/Go-Live Release 1</b>			
3.3.1 Data Conversion Dress Rehearsal	\$30,500	0%	\$30,500
3.3.2 Test Sprint	\$10,000	100%	\$0
3.3.3 Training Sprint	\$5,000	100%	\$0
3.3.4 Deployment	\$10,000	100%	\$0
<b>3.4 Planning Application Solution - Release (2)</b>			
3.4.1 Feature: Planning Applications in the Ministerial Workflow (12)	\$13,200	0%	\$13,200
3.4.1a Feature: Planning Applications in the Ministerial Workflow (12)	\$4,500	0%	\$4,500
3.4.2 Feature: Planning Applications in the Discretionary Workflow (12)	\$19,200	0%	\$19,200
3.4.2a Feature: Planning Applications in the Discretionary Workflow (12)	\$4,500	0%	\$4,500
3.4.3 Feature: Backlog Prioritization	\$10,000	0%	\$10,000
<b>3.5 Deployment/Go-Live Release 2</b>	\$0	0%	\$0
3.5.1 Data Conversion Dress Rehearsal	\$22,500	0%	\$22,500
3.5.2 Test Sprint	\$10,000	0%	\$10,000
3.5.3 Training Sprint	\$5,000	0%	\$5,000
3.5.4 Deployment	\$10,000	0%	\$10,000
Payment Gateway Integration	\$27,500	0%	\$27,500
Infor Integration	\$10,000	0%	\$10,000
CAMS Integration	\$10,000	0%	\$10,000
<b>Total</b>	<b>\$375,100</b>		<b>\$180,900</b>

At the completion of each sprint cycle, the Clariti Project Manager will invoice the County for the amount identified above along with the Sprint Design document that will capture the agreed upon objective of the sprint, the requirements and the outcomes. Clariti assumes the County will pay the invoice as per terms in the Agreement.

## 7 Signatures

**THE YOLO COUNTY ACKNOWLEDGES THAT IT HAS READ AND UNDERSTANDS THIS STATEMENT OF WORK, AND THAT IT IS NOT ENTERING INTO THIS STATEMENT OF WORK ON THE BASIS OF ANY REPRESENTATIONS NOT EXPRESSLY SET FORTH HEREIN. THIS STATEMENT OF WORK HAS BEEN SIGNED BY DULY AUTHORIZED REPRESENTATIVES OF THE PARTIES AND SHALL BECOME EFFECTIVE AS OF THE LATEST DATE SET FORTH BELOW.**

**ACCEPTED FOR:**

<b>Clariti Cloud Inc.</b>	<b>The Yolo County</b>
<b>By:</b> <i>Jake Dancyger</i>	<b>By:</b>
<b>Name:</b> Jake Dancyger	<b>Name:</b>
<b>Title:</b> Co-CEO	<b>Title:</b>
<b>Date:</b> December 24, 2021	<b>Date:</b>

## Appendix A – Change Control

If either party determines that a change to the contracted services is required, the party requesting the change will submit a Change Request Form to the other party. The following procedures will be used to process a Change Request.

The party requesting the change will submit a written Change Request Form to the other party. Such Change Request Form will bear a unique reference number assigned by the County and will outline the new or changed specification.

The Clariti Project Manager will evaluate the request in terms of the project impact with regard to completion milestones and the project's charges and will promptly submit to the County a Change Quotation. The Change Quotation shall indicate the detailed charges and the impact of the change request on the completion milestones, if any.

If the terms of the Change Quotation are not acceptable to both the County and Clariti, the existing Service, including any previously agreed-on changes, will continue in force and the Change Request will not be implemented.

## CHANGE REQUEST FORM

<b>Originator's Name:</b> <b>Functional Area:</b> <b>Phase/Process:</b> <b>Client Request?: YES/NO</b>	<b>Priority:</b> Critical/High/Medium/Low <b>Date Raised:</b> <b>Assigned to:</b> <b>Date Resolution Required:</b>
<b>Status:</b> Open/Assigned/Investigated/Resolved/Approved/Deferred/No Action	
<b>Change Details</b> (description of proposed change, the reason for the proposed change, the impact of the proposed change and the implications of not performing the proposed change):	
<b>Investigation:</b>  <b>Estimated Impact: Effort: Charge:</b> <b>Schedule:</b>	
<b>Possible Action</b> (list changes):  <b>Actual Impact: Effort: Charge:</b> <b>Schedule:</b>	
<b>Accepted (Clariti):</b> <b>Date:</b>	<b>Accepted (Yolo County):</b> <b>Date:</b>
<b>Completion Verified By:</b>	<b>Completion Date:</b>
<b>Associated Problem Report:</b>	<b>Associated Risk and Issue Form:</b>
Form CRF Page ___ of ___	

## Appendix B – Dispute Resolution

If disputes arise during the project, Clariti believes that it is in both parties' interests to attempt to resolve the issue through progressive management involvement before entering into any formal proceedings. Clariti and County shall use diligent efforts to arrange personal meetings or telephone conferences, as necessary, at mutually convenient times and places. These discussions will take place between each party at management levels.

If resolution is not achieved by negotiators at any given management level by the end of their allotted time, the allotted time for negotiations at the next management level, if any, shall begin. Thereafter, the process described in the Agreement shall apply.

# Appendix C – Yolo County Workflow samples

## Yolo County Building Permit Workflow

- Application submitted by applicant (online or in-person)
- Fees generated by permit type, geolocation, and fields on the application
- Reviewed by permit technician
- Applicant pays submittal fees
- Generate plan reviews and schedule due dates (varies 3-15 business days)
  - Building triggered by permit type/scope of work
  - Residential triggered by permit type/scope of work
  - Electrical triggered by permit type/scope of work
  - Mechanical triggered by permit type/scope of work
  - Plumbing triggered by permit type/scope of work
  - Fire Code triggered by permit type/scope of work
  - Planning triggered by permit type
  - Public Works triggered by permit type and answers to screening questions
  - Env. Health permit type, screening questions, reviewer assigned by geolocation
  - Fire District district assigned by geolocation flag
  - Air District triggered by permit type and answers to screening questions
  - Service District geolocation flag
  - Flood Review geolocation flag
  - WUI Review geolocation flag
- “Processing” permit (final checks, stamp plans, etc.)
- Notify applicant that the permit is ready to issue
- Issue the permit
- Schedule inspections: approved, partial, correction notice, not ready (triggers reinspection fee)
  - We have not used anything fancy on the inspection side. Customers can schedule any inspection at any time on any permit. It does occasionally create an inappropriate inspection request, but the inspector is generally able to adjust in the field or provide direction to the builder. We would like to include some more control of this, but we can be very flexible on how this is built.
- Permit Final
- Reporting: total permitting valuation, # new dwellings, # of demo dwellings, flood zone development, WUI development, solar (#, kW, valuation), fees paid on permits “Under Review”/“Issued” (to help determine unearned income each fiscal year)

## Yolo County Code Enforcement Workflow

- Complaint: either an online form (OpenGov) or traditional communication
- Staff assesses the complaint; jurisdiction? Potential violation? etc. -> Valid, Not Valid
- Assign/schedule inspection if valid
- Inspection performed, result: violation, no violation
- Courtesy Notice (optional – severe cases skip to NOV or Admin Cite)
- Notice of Violation
- Administrative Citation (fines levied)
- Recorded Violation (places restriction on the deed)
- Eventually: Compliance or Closed

## Yolo County Planning Workflow

### Minor Project

- Application submitted by applicant (online or in-person)
- Fees generated by type and geolocation
- Application checklist reviewed by planner
- Applicant pays submittal fees
- Generate reviews and schedule due dates
  - Planning triggered by permit type and geolocation
  - Public Works triggered by permit type
  - Env. Health permit type, screening questions, reviewer assigned by geolocation
- Circulate Request for Comments
- Approve Project- Documentation (Approval letter)

### Major Project

- Application submitted by applicant (online or in-person)
- Fees generated by type and geolocation
- Application checklist reviewed by planner
- Applicant pays submittal fees
- Generate reviews and schedule due dates
  - Planning triggered by permit type and geolocation
  - Public Works triggered by permit type
  - Env. Health permit type, screening questions, reviewer assigned by geolocation
- Circulate Request for Comments
- Deem application complete/incomplete
- Outside of System:
  - (courtesy notice if applicable)
  - Commence CEQA Review
  - Public Review of EIR, ND, or MND
  - Hearing Notice
  - Public Hearing
- Approve Project- Documentation (Approval Letter & COAs)
- (Optional) Reminder to send documents after appeals period

## Yolo County Business License Workflow

- Application submitted by applicant (online or in-person)
- Fees generated by license type, geolocation, and fields on the application
- Reviewed by BL staff
- Applicant pays application fees
- Generate reviews
- Issue the license
- Reporting

## Yolo County Public Works Workflow - Encroachment Permits

- Application submitted by applicant (online or in-person)
- Generate application review and schedule due date (10 business days)
  - Public Works
- Application reviewed by PW staff
- If acceptable encroachment, PW assembles draft encroachment permit
- Fees generated by permit type, and number of inspections required
- Notify applicant that the permit is ready to issue

- Applicant pays permit fees and signs permit
- PW staff signs and Issues the permit
- Schedule inspections
- Permit

## Yolo County Public Works Workflow - Transportation Permits

- Application submitted by applicant (online or in-person)
- Generate application review and schedule due date; usually turned around in day or two
  - Public Works
- Application reviewed by PW staff
- Fees generated by permit type
- If acceptable route, notify applicant that the permit is ready to issue and for payment
- Applicant pays permit fees, or provides scan of check to be sent in the mail (single trip only)
- PW staff signs and Issues the permit

## Yolo County Public Works Workflow - Engineering Review/Large Record-of-Survey Reviews:

- Application/request submitted by applicant (online or in-person)
- PW staff determine deposit amount needed for review
- Once deposit received, generate review and schedule due date (usually 10-15 business days)
  - Public Works
- Application reviewed by PW staff

# Appendix D – Yolo County Permit Types

## Permit Types/Subtypes

### Highlighting Key::

Application Only (administrative filing) (3)

Plan Review Only (1)

Inspection Only (7)

Plan Review OTC and Inspection (5)

Plan Review and Inspection (73)

### Administrative

1. Fire Administrative
2. Fireworks Booth
3. FSA Fees
4. Permit Exempt Agricultural Building

### Electrical

5. Energy Storage Batteries
6. EV Charging, Private
7. EV Charging, Public
8. Fire Detection and Alarms
9. Fuel Dispenser
10. General
11. Generator, Backup
12. Generator, Main Power
13. PV, Residential Ground Mount
14. PV, Residential Roof Mount
15. PV, Nonresidential Ground Mount
16. PV, Nonresidential Roof Mount
17. Service Panel 325 Amps or Less
18. Service Panel 326-1,000 Amps
19. Service Panel Over 1000 Amps
20. Temporary Service

### Fire Protection

21. ANSUL
22. General
23. Sprinklers, Residential
24. Sprinklers, Nonresidential
25. Water Pump
26. Water Storage

## Nonresidential

27. Addition
28. Construction Trailer
29. Disabled Accessibility
30. Group A-1, Theater
31. Group A-2, Food or Drink
32. Group A-3, General Assembly
33. Group A-4, Arena
34. Group A-5, Stadium
35. Group B, Office, Business
36. Group E, Educational K-12
37. Group F-1, Factory, Combustibles
38. Group F-2, Factory, Noncombustibles
39. Group H, High-Hazard
40. Group I-1, Hospital
41. Group I-2, Jail
42. Group L, Lab
43. Group M, Mercantile, Retail
44. Group S-1, Storage, Combustibles
45. Group S-2, Storage, Noncombustibles
46. Group U, Greenhouse
47. Group U, Tower
48. Group U, Other
49. Public Pool
50. Sign
51. Tenant Improvement
52. Trash Enclosure

## Plumbing/Mechanical

53. General
54. Fireplace
55. Fuel Gas Piping
56. Hood, Type I
57. HVAC
58. Propane Tank
59. Water Supply
60. Wastewater
61. Water Heater – Gas
62. Water Heater - Electric
63. Water Heater – Solar

## Residential

64. Addition
65. Alteration: Bath Remodel
66. Alteration: Kitchen Remodel
67. Alteration: Other
68. Deck/Dock
69. Fence
70. Garage/Accessory Structure
71. Move Dwelling
72. New Hotels
73. New Apartments
74. New ADU
75. New Dwelling
76. New Manufactured Home
77. Patio Cover
78. Pool/Spa
79. Reroof
80. Siding or Stucco
81. Window Replacement

## Site Improvements/Misc:

82. Demolition, Nonresidential
83. Demolition, Partial
84. Demolition, Pool
85. Demolition, Residential
86. Flood Hazard Development (Misc.)
87. Foundation Only
88. Grading
89. Site Utilities

# Appendix E - Yolo County Public Works Permits

<ul style="list-style-type: none"> <li>● Application only (no plan review or inspection)             <ul style="list-style-type: none"> <li>○ NONE</li> </ul> </li> <li>● Review Only             <ul style="list-style-type: none"> <li>○ County Surveyor                 <ul style="list-style-type: none"> <li>■ Record of Survey</li> <li>■ Certificate of Correction</li> <li>■ Corner Record</li> </ul> </li> <li>○ Transportation                 <ul style="list-style-type: none"> <li>■ Single Trip</li> <li>■ Annual Blanket</li> <li>■ Large Loads</li> </ul> </li> <li>○ Engineering Review                 <ul style="list-style-type: none"> <li>■ Improvement Plans</li> <li>■ Drainage Study</li> </ul> </li> </ul> </li> <li>● Inspection Only             <ul style="list-style-type: none"> <li>○ NONE</li> </ul> </li> <li>● Review and Inspection             <ul style="list-style-type: none"> <li>○ Encroachment                 <ul style="list-style-type: none"> <li>■ Adopt-A-Road</li> <li>■ Utility Annual Emergency</li> <li>■ Traffic Control</li> <li>■ Ag Driveway Approach</li> <li>■ Driveway Approach</li> <li>■ Crop Dusting</li> <li>■ Conduit</li> <li>■ Directional Boring</li> <li>■ Filming</li> <li>■ Frontage Improvements</li> <li>■ Geotechnical Boring</li> <li>■ Other</li> <li>■ Pavement Survey</li> <li>■ Road Repair</li> <li>■ Trenching</li> <li>■ Monitoring Well</li> <li>■ Native Grass Planting</li> <li>■ No Spray Zone</li> <li>■ Pipeline</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Review Only             <ul style="list-style-type: none"> <li>○ Parade-Race-Assemblage                 <ul style="list-style-type: none"> <li>■ Up to 100 participants</li> <li>■ 101 to 1000 participants</li> <li>■ Over 1000 participants</li> </ul> </li> <li>○ Stormwater                 <ul style="list-style-type: none"> <li>■ SWPPP</li> <li>■ Erosivity Waiver</li> </ul> </li> </ul> </li> </ul>
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# Appendix F - Yolo County Forms List

The forms that we normally generate from Trakit are the following:

- Service District form
- School District form
- Fire District form
- Permit
- Inspection Card
- Certificate of Occupancy
- Cannabis Notice
- Job Site Card
- Receipt
- Business License
- Business License Renewal form

The forms that we would also like to be retrieved with autofill info from the permit are:

- Addressing form
- FSA form
- Owner builder form
- Authorized Agent form
- Plan Check Letter

# Appendix G - Yolo County Planning Fee Items

<ul style="list-style-type: none"> <li>● Appeal             <ul style="list-style-type: none"> <li>○ Directors Decision</li> <li>○ Zoning Administration</li> </ul> </li> <li>● CEQA             <ul style="list-style-type: none"> <li>○ EIR</li> <li>○ Addendum EIR</li> <li>○ IS/MND</li> <li>○ IS/ND</li> <li>○ MMRP</li> <li>○ Notice of Exemption</li> <li>○ Initial Study</li> </ul> </li> <li>● Certification of Compliance             <ul style="list-style-type: none"> <li>○ Major</li> <li>○ Minor</li> </ul> </li> <li>● Flood Hazard Development Permit             <ul style="list-style-type: none"> <li>○ Cache Creek Flood Hazard DP</li> <li>○ Flood Hazard DP</li> </ul> </li> <li>● General Plan             <ul style="list-style-type: none"> <li>○ General Plan Amendment</li> </ul> </li> <li>● Code Interpretation             <ul style="list-style-type: none"> <li>○ Code Interpretation</li> </ul> </li> <li>● Development Agreement             <ul style="list-style-type: none"> <li>○ Development Agreement</li> <li>○ Development Agreement Amendment</li> <li>○ Development Agreement Review</li> </ul> </li> <li>● Lot Line Adjustment             <ul style="list-style-type: none"> <li>○ Lot Line Adjustment</li> <li>○ Lot Merger</li> <li>○ LLA with Williamson Act</li> </ul> </li> <li>● Subdivision Improvement Agreement             <ul style="list-style-type: none"> <li>○ Subdivision Improvement Agreement</li> </ul> </li> <li>● Land Division/Maps             <ul style="list-style-type: none"> <li>○ Condominium Conversion</li> <li>○ Final Parcel Map</li> <li>○ Final Subdivision Map</li> <li>○ Final Subdivision Map Amendment</li> <li>○ Tentative Parcel Map (up to 4 lots)</li> <li>○ Tentative Subdivision Map</li> <li>○ TPM Amendment/Extension</li> <li>○ TSM Amendment/Extension</li> <li>○ Final Parcel Map Amendment</li> </ul> </li> <li>● Mining Permit/Reclamation Plan             <ul style="list-style-type: none"> <li>○ Ag Mining (Planning)</li> <li>○ Flood Hazard (NR)</li> <li>○ Gravel Mining (NR)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● MISC             <ul style="list-style-type: none"> <li>○ Copies</li> <li>○ Notary Services</li> </ul> </li> <li>● Pre-Application Review             <ul style="list-style-type: none"> <li>○ Pre-Application Review</li> <li>○ General Plan Consistency Determination</li> </ul> </li> <li>● Planned Development (PD)             <ul style="list-style-type: none"> <li>○ PD Amendment</li> <li>○ PD Ordinance</li> </ul> </li> <li>● Road Abandonment             <ul style="list-style-type: none"> <li>○ Naming</li> <li>○ Abandonment</li> </ul> </li> <li>● Site Plan Review             <ul style="list-style-type: none"> <li>○ Landscape</li> <li>○ Major</li> <li>○ Minor</li> <li>○ Sign</li> </ul> </li> <li>● Use Permit             <ul style="list-style-type: none"> <li>○ ABC Beer &amp; Wine Permit</li> <li>○ ABC Liquor Permit</li> <li>○ Historic Building Alteration</li> <li>○ Major Amendment</li> <li>○ Major Extension</li> <li>○ Major Use Permit</li> <li>○ Minor Amendment/Extension</li> <li>○ Minor Use Permit</li> <li>○ Cannabis Use Permit</li> </ul> </li> <li>● Flood Variance             <ul style="list-style-type: none"> <li>○ Flood Variance</li> </ul> </li> <li>● Variance             <ul style="list-style-type: none"> <li>○ Major Amendment/Extension</li> <li>○ Major Variance</li> <li>○ Minor Amendment/Extension</li> <li>○ Minor Variance</li> </ul> </li> <li>● Williamson Act Agreement             <ul style="list-style-type: none"> <li>○ Cancellation</li> <li>○ FSZ</li> <li>○ New Contract</li> <li>○ Non-Renewal</li> <li>○ Amendment</li> </ul> </li> <li>● Zoning Confirmation             <ul style="list-style-type: none"> <li>○ Zoning Confirmation</li> </ul> </li> <li>● Rezoning/Zoning Code Amendment             <ul style="list-style-type: none"> <li>○ Rezoning/Zoning Code Amendment</li> <li>○ Minor Zoning Change</li> </ul> </li> <li>● Gas-Oil Well Permit             <ul style="list-style-type: none"> <li>○ Gas-Oil Well Certificate</li> </ul> </li> <li>● Ground Water Export             <ul style="list-style-type: none"> <li>○ Ground Water Export</li> </ul> </li> </ul>
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# Appendix H - Yolo County Planning Work Flows

<ul style="list-style-type: none"> <li>● <b>Minor Project</b> <ul style="list-style-type: none"> <li>○ Certification of Compliance-minor</li> <li>○ Certification of Compliance-major</li> <li>○ Code Interpretation</li> <li>○ General Plan Consistency Determination</li> <li>○ Lot Line Adjustment</li> <li>○ LLA with Williamson Act</li> <li>○ Lot Merger</li> <li>○ Minor Site Plan Review</li> <li>○ Pre-Application Review</li> <li>○ Zoning Confirmation</li> <li>○ Gas-Oil Well Permit</li> <li>○ Final Parcel Map</li> <li>○ Final Subdivision Map</li>   <li>○ Flood Hazard (NR)</li> <li>○ Gravel Mining (NR)</li> </ul> </li>   <hr style="border: 1px solid black;"/> <li>● CEQA (part of Complex Workflow) <ul style="list-style-type: none"> <li>○ EIR</li> <li>○ Addendum EIR</li> <li>○ Notice of Exemption</li> <li>○ Initial Study</li> </ul> </li> <li>● MISC (not projects) <ul style="list-style-type: none"> <li>○ Copies</li> <li>○ Notary Services</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● <b>Major Project</b> <ul style="list-style-type: none"> <li>○ Development Agreement</li> <li>○ Development Agreement Amendment</li> <li>○ Development Agreement Review</li> <li>○ Subdivision Improvement Agreement</li> <li>○ Condominium Conversion</li> <li>○ Final Subdivision Map Amendment</li> <li>○ Tentative Parcel Map (up to 4 lots)</li> <li>○ Tentative Subdivision Map</li> <li>○ TPM Amendment/Extension</li> <li>○ TSM Amendment/Extension</li> <li>○ Final Parcel Map Amendment</li> <li>○ Mining Permit/Reclamation Plan</li> <li>○ Ag Mining (Planning)</li> <li>○ PD Amendment</li> <li>○ PD Ordinance</li> <li>○ Road Naming</li> <li>○ Road Abandonment</li> <li>○ Major Site Plan Review</li> <li>○ ABC Beer &amp; Wine Permit</li> <li>○ ABC Liquor Permit</li> <li>○ Historic Building Alteration</li> <li>○ Major Use Permit Amendment</li> <li>○ Major Use Permit Extension</li> <li>○ Major Use Permit</li> <li>○ Minor Use Permit</li> <li>○ Amendment/Extension</li> <li>○ Minor Use Permit</li> <li>○ Cannabis Use Permit (Complex Workflow)</li> <li>○ Flood Variance</li> <li>○ Major Variance Amendment/Extension</li> <li>○ Major Variance</li> <li>○ Minor Variance Amendment/Extension</li> <li>○ Minor Variance</li> <li>○ Williamson Act Cancellation</li> <li>○ FSZ</li> <li>○ Williamson Act New Contract</li> <li>○ Williamson Act Non-Renewal</li> <li>○ Williamson Act Amendment</li> <li>○ Rezoning/Zoning Code Amendment</li> <li>○ Minor Zoning Change</li> <li>○ Ground Water Export</li> </ul> </li> </ul>
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EXHIBIT “C”

**PRICING QUOTE**

<b>Clariti Cloud Inc. - Recurring Costs</b>			
<b>Description</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Annual Fees<sup>1</sup></b>			
Clariti Licenses and Environment <sup>2</sup>	\$83,876.30 <sup>3</sup>	\$86,392.59	\$88,984.37
Solution Adoption Implementation Support <sup>4</sup>	\$0	\$38,400.00	\$38,400.00
<b>Total Recurring Fees</b>	<b>\$83,876.30</b>	<b>\$124,792.59</b>	<b>\$127,384.37</b>
Notes: 1. Year 1 Annual Fees due upon signature. 2. Price increases of 3% to begin in Year 2 for the initial term 3. For detailed SKU breakdown, refer to Clariti Quotation Form below. 4. Clariti to provide Elevated Basic support for enhancements post Go-Live			

<b>Clariti Cloud Inc. - Implementation Costs</b>	
<b>Description</b>	<b>Amount</b>
<b>Milestone Payments (Reference Exhibit B for breakdown)</b>	
Implementation Services, Data Migration and Training	\$375,100.00
Clariti Accelerator Discount	-\$194,200.00
<b>Total One-Time Fees</b>	<b>\$180,900.00</b>

**Clariti Accelerator Discount (Time Based Cost Proposal)**

Clariti is excited to present an equitable cost proposal detailed in the payment schedule above. This limited time-based offer has the following criteria:

1. Contract to be fully executed by January 24, 2022 including all named Exhibits in Order Form
2. Initial three-year term with auto renewing for additional one year term
3. Upon successful “Go Live” Yolo County agrees to provide:
  - o Joint press release
  - o Project case study
  - o Usage references to other municipalities
  - o Host a “Lunch and Learn” for neighboring communities within first 12 months of being “Live”

Clariti Quotation Form - Year 1

# Clariti Quotation Form

Clariti Cloud Inc.  
Toll free 1.866.999.1846  
[accounting@claritisoftware.com](mailto:accounting@claritisoftware.com)

**To:** Yolo County

**Terms:** Net 30 Days  
**Currency:** USD  
**Start Date:** January 24, 2022  
**End Date:** January 23, 2023

**Quote No:** C2021-1300  
**Quote Date:** December 12, 2021  
**Quote Valid Until:** January 24, 2022  
**Quote Year:** Year 1

Line No.	#Units	Description	Annual List Price	Discount %	Annual Disc. Price	Monthly Disc. Price	# of Months	Total Price
1.	40	Standard Licenses	\$1,800.00	44.4%	\$1,000.00	\$83.33	12.0	\$40,000.00
2.	1	Admin Licenses	\$1,800.00	44.4%	\$1,000.00	\$83.33	12.0	\$1,000.00
3.	1	Internal Admin Licenses	\$1,800.00	81.2%	\$339.00	\$83.33	12.0	\$339.00
4.	2000	Community Portal Logins (2000/Mth Bundle)	\$4.00	0.0%	\$4.00	\$0.33	12.0	\$8,000.00
5.	1	Shield	30% of Licensing		\$14,801.70	\$1,233.48	12.0	\$14,801.70
6.	1	Full Sandbox	20% of Licensing		\$9,867.80	\$822.32	12.0	\$9,867.80
7.	1	Software Support & Maintenance	20% of Licensing		\$9,867.80	\$822.32	12.0	\$9,867.80
<b>Totals</b>								<b>\$83,876.30</b>

**Notes:**

1. Clariti Standard User Seat - Includes 10 Custom Objects. Customer Community includes 10 Custom Objects. Total = 20 Custom Objects max.
2. Price increases of 3% to begin in Year 2 for the initial term.
3. Any purchase order generated on this quote, indicates acceptance of all terms and conditions in the SaaS Services Agreement.
4. Warranty is provided concurrent to licensing subscription for Clariti releases less than 1 year old.
5. 10% of licensing is attributable to Letters Engine for internal Clariti accounting purposes.

Exhibit "D"  
Service Level Terms



Clariti Cloud Inc.

Service Level Terms

Version: 4.5

Release Date: September 2020

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Clariti Cloud Inc.  
1.866.999.1846  
info@claritisoftware.com

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# Clariti Support

## Purpose

The purpose of this document is to describe the Clariti Cloud Inc. (“Clariti”) Paid Support model and guidelines around its use.

Support from Clariti is always paid for in the form of a direct payment for certain support types, or as part of a minimal support package that is granted with a Clariti license subscription in good standing.

For detailed questions about support, please contact your sales representative or contact us:

<http://www.claritisoftware.com/about/contact-us/>

## Clariti Support Types

Clariti provides several types of Paid and Warranty Support. In this section these support types and related definitions are described.

### Definitions

- “Warranty Support” covers functionality that was configured/developed by Clariti and has unexpectedly stopped working. Resolutions of Warranty issues do not draw down from any other support hours (See Warranty Restrictions below for more details.)
- “Ad-Hoc Support” is support paid at the highest rate as a result of being contracted to do the work at the time for post Go-Live customers

### Warranty Support

Functionality that was configured/developed by Clariti and has unexpectedly stopped working is covered during the Term of the Agreement. The combination of subscription renewal and applying Clariti release updates provides for ongoing warranty coverage. Warrantied items can only be diagnosed by Clariti. Custom development performed by anyone outside of Clariti and functionality related to payment processing is excluded from warranty.

1. Salesforce Development Lifecycle Restriction: Customers agree to have their technical staff or System Integrator staff maintain environments and Salesforce best practices described in [https://resources.docs.salesforce.com/196/latest/en-us/sfdc/pdf/salesforce\\_development\\_lifecycle.pdf](https://resources.docs.salesforce.com/196/latest/en-us/sfdc/pdf/salesforce_development_lifecycle.pdf), as exists on the Effective Date of the Agreement.
2. System issues that arise due to not following procedures described in sections “Chapter 2: Development Environments” (for single and multiple projects), “Chapter 4: Track and Synchronize Development Changes”, and “Chapter 5: Release Management” are excluded from Warranty coverage and draw down from other support types.
3. Customers agree to strictly monitor and manage all Users, System Integrators and Technical Staff use of subscriptions. The subscription capabilities are documented here [Clariti OEM License Comparison.htm, which is attached hereto as Exhibit --](#). Clariti may itself review the customer's use of subscriptions at any time through the Service. System issues that arise from exceeding subscription capabilities are excluded from Warranty coverage and fall under Tier 2 support.
4. Customer agrees to apply new Clariti Releases within 1 year of their release. Warranty is excluded from releases older than 1 year.

5. Customer understands that Clariti is built upon the Salesforce Platform and that from time to time Salesforce may introduce changes that may impact the Clariti modules. In most cases these issues can be resolved. In exceptional cases the change may be fundamental and cannot be resolved to original function. In such a case Clariti shall make every effort to resolve the issue alternatively.
6. Customer receives advance notice of Salesforce platform changes by registering to and monitoring one or more of the notification services described here: <https://help.salesforce.com/articleView?id=000212843&type=1>, which is attached hereto as Exhibit --.

## Ad-Hoc Support

When customers require a modification to a specific configuration in Clariti and they do not have Annual Support or Support Hours, customers can request ad-hoc support through a Change Order. Change Orders detail the requirements of the specific changes needed. Clariti will provide a detailed estimate of the hours needed to complete the modifications. Change Orders cover Tier 1 and Tier 2 support. The cost is \$250/hr. Tier 3 support cost is \$300/hr.

For further information about these support offerings, please contact your Customer Success representative.

## Clariti Support Definitions and Exclusions

### Support Contact Methods

- **Online**– Clariti will provide the customers with an online support portal to submit support requests. This is the preferred method of contact and results in the fastest responses to the issue.

### Severity Definitions

Clariti classifies and responds to Support calls based upon the underlying problem's effect on the client. The guidelines for determining the severity of a problem, and the appropriate classification of and response to it are described below.

#### Level 1 - Critical

- Critical production issue affecting all users consistently.
- Includes system unavailability and data integrity issues with no workaround available.

#### Level 2 - Urgent

- Major functionality is impacted, or significant performance degradation is experienced.
- Issue is persistent and affects many users and/or major functionality.
- No reasonable workaround available.
- Also includes time-sensitive requests within 7 business days of Go-Live deployment. We expect to be notified 30 business days in advance of the planned Go-Live.

#### Level 3 - High

- Production system performance issue or bug affecting some, but not all users.

- Non-production issues occurring during final UAT or issues within 30 business days of Go-Live deployment.
- Short-term workaround is available but cannot be scaled.

### Level 4 - Medium

- Bug affecting a small number of users.
- Reasonable workaround available.
- Issues that would meet the threshold for Level 2 or 3 but are occurring in a sandbox environment where Go-Live is more than 30 business days away.
- Resolution required as soon as reasonably practicable.

### Level 5 - Low Technical Questions / Inquiries

- Information requested on application capabilities, navigation, or configuration.
- Training requests.
- New Feature requests.

The communication timelines in accordance with severity are outlined below:

Severity	Acknowledgement of Issue (based on Clariti stated work hours)	Communication Cadence Commitment	Resolution Threshold (based on number of incidents)
1	1 business hour	Twice daily until resolution has been communicated or client / partner stops responding	100%
2	2 business hours	Every 2 days until resolution has been communicated or client / partner stops responding	100%
3	4 business hours	Weekly until resolution has been communicated or client / partner stops responding	90%
4	8 business hours		80%
5	Confirmation Email		

## Tier Definitions

Clariti Support Tiers further classify cases and work types, generally, from low complexity (Tier 1) to high complexity (Tier 3). All tiers are defined here. Tier definitions are independent of severity definitions. The Support Types define how the cases are handled.

### Tier 1

Covers all day-to-day activities and foreseeable daily adjustments required within normal business operations. These changes do not require re-branding, fee/pricing, data model, documentation, or training updates. The changes include standard configuration items such as: letter modifications or changes, reports, page layout changes, and field validation rules. Tier 1 changes do not affect system-wide functionality/operations and are considered superficial (for example moving fields on page layout, updating boilerplate on letter/email templates, and so on).

### Tier 2

Covers requested changes outside of original scope requiring configuration but no custom development or modification of code. Such a request would ultimately change how any user would interact with the system or provides/modifies new/existing options/workflows for users (i.e. permissions, fee changes/updates, creation/modification of letters, automation processes). All internal/affected users will need notification of the affected change(s). These support requests may require significant involvement of expert technical staff at Clariti as it results in workflow changes, fee/pricing changes, retraining, data model modification, and/or documentation changes.

### Tier 3

Covers requested changes outside of original scope requiring custom development/developer involvement (i.e. creation/modification of new/existing Apex triggers, Visualforce pages, efforts around writing/modifying code, etc.). Examples of Tier 3 include new modules, payment gateway modifications, and others.

Paid Support Type	Case Tier Coverage
Ad-Hoc Support	Tier 1, 2, 3

## General Conditions and Exclusions

Major system changes that should be done by the original System Integrator partner are excluded. If the original System Integrator is not available, then a managed service partner will be recommended by Clariti.

Clariti shall never directly investigate, update, change, or modify custom code done by partners or customers unless contracted to do so. If this is required, and there is no agreement in place with a System Integrator, Clariti can work with the customer to put an agreement in place or make available approved, trained and experienced third-party System Integrators on an as needed basis. At Clariti's discretion, it may consult or advise on an issue based on the support type the customer has in place.

Other than provided integrations (GIS, Bluebeam, payment API), Clariti shall not support other 3rd party integrations. GIS and Bluebeam integrations are included for a fee and are purchased "as-is". Functionality will be released on an ongoing basis. Work effort to take advantage of additional functionality is not included in any support types.

During the project, Clariti specifically does not provide support for: Data conversion, data loads, data mapping, custom code reviews and custom code debugging.

**SALESFORCE.COM END USER SUBSCRIPTION AGREEMENT (SFDC AGREEMENT)**

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This is an Agreement between Salesforce.com and the Customer and governs the Customer's access to and use of the Apex Platform and related services provided by Salesforce.com. This Agreement exempts Salesforce.com and other persons from liability or limits their liability and contains other important provisions that Customer should read. By signing the CLARITI SAAS Services Agreement Order Form, Customer acknowledges and signifies that it has read, understood, and agreed to this Agreement. If Customer does not accept and agree to this Agreement, Customer may not access or use the Apex Platform.

1. **Definitions.**

In this Agreement:

- (a) "AppExchange" means the online directory of on-demand applications that work with the Service, located at <http://www.appexchange.com> or at any successor websites.
- (b) "Reseller" means Clariti Cloud Inc.
- (c) "Service" means the online, Web-based application provided by SFDC via <http://www.salesforce.com> and/or other designated websites, including associated offline components but excluding AppExchange applications.
- (d) "Users" means Your employees, representatives, consultants, contractors or agents who are authorized to use the Service and have been supplied user identifications and passwords by You (or by Salesforce.com or Reseller at Your request).
- (e) "You" and "Your" means the customer entity which has contracted to purchase subscriptions to use the Service subject to the conditions of these End User Subscription Terms.
- (f) "Your Data" means all electronic data or information submitted by You to the Service.

2. **Use of Service.**

- (a) User subscriptions cannot be shared or used by more than one User (but may be reassigned from time to time to new Users who are replacing former Users who have terminated employment with You or otherwise changed job status or function and no longer require use of the Service).
- (b) You (i) are responsible for all activities occurring under Your User accounts; (ii) are responsible for the content of all Your Data; (iii) shall use commercially reasonable efforts to prevent unauthorized access to, or use of, the Service, and shall notify Reseller or Salesforce.com promptly of any such unauthorized use You become aware of; and (iv) shall comply with all applicable local, state, federal and foreign laws and regulations in using the Service.
- (c) You shall use the Service solely for Your internal business purposes and shall not: (i) license, sublicense, sell, resell, rent, lease, transfer, assign, distribute, time share or otherwise commercially exploit or make the Service available to any third party, other than to Users or as otherwise contemplated by these End User Subscription Terms; (ii) send spam or otherwise duplicative or unsolicited messages in violation of applicable laws; (iii) send or store infringing, obscene, threatening, libelous, or otherwise unlawful or tortious material, including material that is harmful to children or violates third party privacy rights; (iv) send or store viruses, worms, time bombs, Trojan horses and other harmful or malicious code, files, scripts, agents or programs; (v) interfere with or disrupt the integrity or performance of the Service or the data contained therein; or (vi) attempt to gain unauthorized access to the Service or its related systems or networks.
- (d) You shall not (i) modify, copy or create derivative works based on the Service; (ii) frame or mirror any content forming part of the Service, other than on Your own intranets or otherwise for Your own internal business purposes; (iii) reverse engineer the Service; or (iv) access the Service in order to (A) build a competitive product or service, or (B) copy any ideas, features, functions or graphics of the Service.

3. **Services Provided.** The Service will be made available to You pursuant to the terms and conditions set forth in this End User Subscription Agreement. Salesforce.com shall: (i) not use, modify, or disclose to anyone other than Users, Your Data; (ii) maintain the security and integrity of the Service and Your Data; (iii) provide basic support to Your Users, only to the extent such cases are escalated to SFDC by Reseller in Reseller's discretion; and (iv) use commercially reasonable efforts to make the Service available 24 hours a day, 7 days a week, except for: (a) planned downtime (of which Salesforce.com shall give at least 8 hours' notice via the Service and which Salesforce.com shall schedule to the extent reasonably practicable during the weekend hours from 6:00 p.m. U.S. Pacific Time Friday to 3:00 a.m. U.S. Pacific Time Monday); or (b) any unavailability caused by circumstances beyond Salesforce.com's reasonable control, including without limitation, acts of God, acts of government, flood, fire, earthquakes, civil unrest, acts of terror, strikes or other labor problems (other than those involving Salesforce.com employees), computer, telecommunications, Internet service provider or hosting facility failures or delays involving hardware, software or power systems not within Salesforce.com's possession or reasonable control, and denial of service attacks.

4. **Third-Party Providers.** Certain third-party providers, some of which may be listed on pages within Salesforce.com's website and including providers of AppExchange applications, offer products and services related to the Service, including implementation, customization and other consulting services related to customers' use of the Service and applications (both offline and online) that work in conjunction with the Service, such as by exchanging data with the Service or by offering additional functionality within the user interface of the Service through use of the Service's application programming interface. Salesforce.com does not warrant any such third-party providers or any of their products or services, whether or not such products or services are designated by Salesforce.com as "certified," "validated" or otherwise. Any exchange of data or other interaction between You and a third-party provider, and any purchase by You of any product or service offered by such third-party provider, is solely between You and such third-party provider. In addition, from time to time, certain additional functionality (not defined as part of the Service) may be offered by Salesforce.com or Reseller to You, for an additional fee, on a pass-through or OEM basis pursuant to terms specified by the licensor and agreed to by You in connection with a separate purchase by You of such additional functionality. Your use of any such additional

functionality shall be governed by such terms, which shall prevail in the event of any inconsistency with the terms of these End User Subscription Terms. No purchase of such third-party products or services is required to use the Service.

5. **Proprietary Rights.** Subject to the limited rights expressly granted hereunder, Salesforce.com reserves all rights, title and interest in and to the Service, including all related intellectual property rights. No rights are granted to You hereunder other than as expressly set forth in these End User Subscription Terms. The Service is deemed Salesforce.com confidential information, and You will not use it or disclose it to any third party except as permitted in these End User Subscription Terms.

6. **Your Data.** As between Salesforce.com and You, You exclusively own all rights, title and interest in and to all of Your Data. Your Data is deemed your confidential information, and Salesforce.com shall not access Your User accounts, including Your Data, except to respond to service or technical problems or at Your request. Upon request by You made within 30 days after the effective date of termination of all of your Salesforce.com User subscriptions, SFDC will make available to You for download a file of Your Data in comma separated value (.csv) format along with attachments in their native format. After such 30-day period, SFDC shall have no obligation to maintain or provide any of Your Data and shall thereafter, unless legally prohibited, delete all of Your Data in its systems or otherwise in its possession or under its control.

7. **Compelled Disclosure.** If either You or Salesforce.com is compelled by law to disclose confidential information of the other party, it shall provide the other party with prior notice of such compelled disclosure (to the extent legally permitted) and reasonable assistance, at the other party's cost, if the other party wishes to contest the disclosure.

8. **Suggestions.** You agree that Salesforce.com shall have a royalty-free, worldwide, transferable, sublicenseable, irrevocable, perpetual license to use or incorporate into the Service any suggestions, enhancement requests, recommendations or other feedback provided by You or Your Users relating to the operation of the Service.

9. **Fees.** Contracted for fees for use of the Service represent a firm commitment: i.e., an order cannot be canceled during the term of the subscriptions, and the number of User subscriptions contracted for cannot be reduced in the middle of a subscription term.

10. **Termination.** You may not cancel or terminate an executed subscription order. User subscriptions will automatically renew unless (a) either party gives the other party, or salesforce.com gives You, notice of termination at least 30 days prior to the end of the relevant subscription term, or (b) your Reseller's right to resell the Service has been terminated or expired, in which case any existing subscriptions will continue in effect until the end of their then-existing term and salesforce.com will contact You to discuss renewal directly with salesforce.com. Any automatic renewal will be at the list price in effect at the time of renewal unless otherwise prior agreed in writing by Your Reseller, or salesforce.com, as applicable. Your use of the Service may be immediately terminated and/or suspended upon notice due to a breach of the terms of this End User Subscription Agreement by You or any User, including but not limited to failure to pay any fees due.

11. **Data Storage.** You are entitled to 10GB of data storage or a per-user limit of 20MB per user plus 10GB, whichever is greater. You may purchase additional storage if necessary, and you may contact Reseller for then-current rates.

12. **File Storage.** You are entitled to 11GB of file storage or a per-user limit of 2GB per user plus 11GB, whichever is greater. You may purchase additional storage if necessary, and you may contact Reseller for then-current rates.

13. **No Warranty.** Salesforce.com makes no warranties of any kind, whether express, implied, statutory or otherwise, and specifically disclaims all implied warranties, including any warranties of merchantability or fitness for a particular purpose, to the maximum extent permitted by applicable law.

14. **No Liability.** In no event shall salesforce.com have any liability to you or any user for any damages whatsoever, including but not limited to direct, indirect, special, incidental, punitive, or consequential damages, or damages based on lost profits, however caused and, whether in contract, tort or under any other theory of liability, whether or not you have been advised of the possibility of such damages.

15. **Further Contact.** Salesforce.com may contact you regarding new Salesforce.com service features and offerings.

16. **Google AdWords Program.** Service features that interoperate with the Google AdWords program depend on the continuing availability of the Google AdWords application programming interface ("API") and program for use with the Service. If Google Inc. ceases to make the Google AdWords API or program available on reasonable terms for the Service, Salesforce.com may cease providing such Service features without entitling You to any refund, credit, or other compensation.