Tab I – Title Page

Part IA – Technical Proposal	
RFP Title:	Taxicab Authority Records Management Modernization Project (RMS)
RFP:	3422
Vendor Name:	TruePoint Solutions, LLC
Address:	774 Mays Blvd., #10-377 Incline Village, NV 89451
Opening Date:	June 15, 2017
Opening Time:	2:00 PM

Submitted by:

TruePoint Solutions

3262 Penryn Rd.
Suite 100-B
Loomis, CA 95650

Submittal Date
June 15, 2017 @
2:00 PM

June 14, 2017

State of Nevada
Purchasing Division
Marti Marsh, Purchasing Officer
State of Nevada, Purchasing Division
515 E. Musser Street, Suite 300
Carson City, NV 89701

RE: RFP 3422 - Taxicab Authority RMS Project

Dear Ms. Marsh and Evaluation Committee:

TruePoint Solutions – in collaboration with Accela, Inc. – is pleased to offer our response to the Nevada Department of Business & Industry, Taxicab Authority's (TA) RFP 3422 for a Taxicab Authority Records Management Modernization Project (RMS). After a thorough reading of the TA's solicitation, we feel that we are well positioned to successfully provide the services required by the TA for this important project.

The TA seeks a vendor to implement an enterprise system(s) that supports all the agency's core business functions. The new system is to provide an integrated records management system that will capture all necessary data elements, provide pre-set and ad-hoc queries, and allow for communication between all work areas within the Taxicab Authority. The Taxicab RMS will integrate functional units of driver permits/licensing, medallion issuance/inventory, investigation (with evidence), vehicle inspections, court proceedings, auditing/accounting, asset management, personnel, and dispatching for a single jurisdiction regulatory and law enforcement agency.

On the pages that follow, we will propose a new system to streamline operations and provide integration of information across business functions (eliminating information silos). We are offering an innovative, cost effective solution that will transform your operation and modernize your information technology infrastructure.

Systems Integrators such as ourselves can bring far more industry and product specific experience to an implementation of this nature, providing a valuable, substantial, and rewarding experience to the client. As our customer references will attest, our numerous successes in this area have made TruePoint Solutions the premier platinum partner at implementing the Accela Civic Platform product. We have worked with many customers in your region to make the Accela Civic Platform a success; We have also worked on sixteen successful Tidemark to Accela Civic Platform upgrades.

TruePoint Solutions is the team who can provide the TA with the services necessary to ensure success in the timeframe desired by the State, on time and on budget. Developing an Accela implementation strategy and providing professional services, along with guidance, advice, best practices

COMPANY OVERVIEW
- *TruePoint Solutions*

Incorporated:
- *2004*
- *51 employees*

Professional Services:
- *Business Analysis*
- *Configuration*
- *Data Conversion*
- *Report Development*
- *Event Scripting*
- *Interface Development*
- *Consulting*
- *Training*

Industry:
- *State and Local Government*

Industry Focus:
- *Land Management and Permitting*
- *Business and Trade Licensing*
- *Code Enforcement*
- *Asset Management*
- *Utility Billing*
- *IT Consulting*

experience, and the technical abilities to deliver the solution, is exactly the type of service which TruePoint has successfully delivered on numerous occasions.

There can be no doubt about the extent to which the TruePoint Solutions team can vouch for Accela's products, and can demonstrate our firm's expertise in putting these products to use. We firmly believe that the Accela solution fulfills the mandatory and optional requirements of the scope of work that they address. TruePoint will focus on implementing the solution to improve permit processing time, improve customer satisfaction and improve employee satisfaction.

These goals will be met by strong business analysis sessions that will lead to the automation of business processes and workflows that support TA standards and create a user friendly customer experience.

TruePoint is comprised of some of the most talented individuals in the country in the arena of implementing complex government software solutions. Our company has a combined staff experience of over 700 years of designing, developing, implementing, training, and supporting IT systems for local government. Not only does TruePoint possess a phenomenal amount of directly related experience in the industry, it's a shared experience. The owners and much of our company's staff all have a common origin of having worked at the same company prior to the creation of TruePoint. This means that most of our resources have worked together for more than a decade, and some staff have worked together for more than two decades. The owners have worked together for almost 30 years. As a result of these long term working relationships – our entire team shares the same perspective on customer service, delivery, and ultimate client satisfaction.

Regards,

Kent Johnson
TruePoint Solutions
(916) 259-1293 office
(916) 607-4490 mobile
(916) 256-1975 fax
www.truepointsolutions.com

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Tab III – Vendor Information Sheet

The vendor information sheet completed with an original signature by an individual authorized to bind the organization must be included in this tab.

VENDOR INFORMATION SHEET FOR RFP 3422

Vendor Must:

A) Provide all requested information in the space provided next to each numbered question. The information provided in Sections V1 through V6 will be used for development of the contract;

B) Type or print responses; and

C) Include this Vendor Information Sheet in Tab III of the Technical Proposal.

V1	Company Name	TruePoint Solutions, LLC

V2	Street Address	774 Mays Blvd., #10-377

V3	City, State, ZIP	Incline Village, NV 89451

V4	Telephone Number		
	Area Code: 916	Number: 259-1293	Extension: 202

V5	Facsimile Number		
	Area Code: 916	Number: 256-1975	Extension:

V6	Toll Free Number		
	Area Code:	Number:	Extension:

V7	***Contact Person for Questions / Contract Negotiations, including address if different than above***
	Name: Kent Johnson
	Title: Chief Executive Office
	Address: 774 Mays Blvd., #10-377, Incline Village, NV 89451
	Email Address: kjohnson@truepointsolutions.com

V8	Telephone Number for Contact Person		
	Area Code: 916	Number: 259-1293	Extension: 202

V9	Facsimile Number for Contact Person		
	Area Code: 916	Number: 256-1975	Extension:

V10	***Name of Individual Authorized to Bind the Organization***	
	Name: Kent Johnson	Title: Chief Executive Officer

V11	Signature ***(Individual must be legally authorized to bind the vendor per NRS 333.337)***	
	Signature: Kent Johnson	Date: June 13, 2017

Tab IV – State Documents

The State documents tab must include the following:

A. Acknowledgement of Addenda

A. The signature page from all amendments with an original signature by an individual authorized to bind the organization.

Reporting & Reconciliation Implementation Guides

Reporting Developer Guide
View | Download
Merchant Account Reports Developer Guide
View | Download
Merchant Account Reports User Guide
View | Download

Gateway Developers Guides For Card and eCheck services

Credit Card Services Using the Simple Order API: View | Download
Card-Present Processing Using the Simple Order API (Supplement to *Credit Card Services Using the Simple Order API*): View | Download
Electronic Check Services for the Simple Order API: View | Download

ALL ELSE REMAINS THE SAME FOR RFP 3422.

Vendor must sign and return this amendment with proposal submitted.

Vendor Name: TruePoint Solutions, LLC

Authorized Signature: Kent Johnson

Title: Chief Executive Officer Date: June 13, 2017

This document must be submitted in the "State Documents" section/tab of vendors' technical proposal.

ALL ELSE REMAINS THE SAME FOR RFP 3422.

Vendor must sign and return this amendment with proposal submitted.

Vendor Name: TruePoint Solutions, LLC

Authorized Signature: Kent Johnson

Title: Chief Executive Officer Date: June 13, 2017

This document must be submitted in the "State Documents" section/tab of vendors' technical proposal.

B. Attachment A – Confidentiality & Certification

B. Attachment A – Confidentiality and Certification of Indemnification with an original signature by an individual authorized to bind the organization.

ATTACHMENT A – CONFIDENTIALITY AND CERTIFICATION OF INDEMNIFICATION

Submitted proposals, which are marked "confidential" in their entirety, or those in which a significant portion of the submitted proposal is marked "confidential" **will not** be accepted by the State of Nevada. Pursuant to NRS 333.333, only specific parts of the proposal may be labeled a "trade secret" as defined in NRS 600A.030(5). All proposals are confidential until the contract is awarded; at which time, both successful and unsuccessful vendors' technical and cost proposals become public information.

In accordance with the Submittal Instructions of this RFP, vendors are requested to submit confidential information in separate binders marked "**Part IB Confidential Technical**" and "**Part III Confidential Financial**".

The State will not be responsible for any information contained within the proposal. Should vendors not comply with the labeling and packing requirements, proposals will be released as submitted. In the event a governing board acts as the final authority, there may be public discussion regarding the submitted proposals that will be in an open meeting format, the proposals will remain confidential.

By signing below, I understand it is my responsibility as the vendor to act in protection of the labeled information and agree to defend and indemnify the State of Nevada for honoring such designation. I duly realize failure to so act will constitute a complete waiver and all submitted information will become public information; additionally, failure to label any information that is released by the State shall constitute a complete waiver of any and all claims for damages caused by the release of the information.

This proposal contains Confidential Information, Trade Secrets and/or Proprietary information as defined in ***Section 2 "ACRONYMS/DEFINITIONS."***

Please initial the appropriate response in the boxes below and provide the justification for confidential status.

Part IB – Confidential Technical Information			
YES		NO	KTJ
Justification for Confidential Status			

A Public Records CD/Flash Drive has been included for the Technical and Cost Proposal			
YES	KTJ	NO (See note below)	
Note: By marking "NO" for Public Record CD/Flash Drive included, you are authorizing the State to use the "Master CD/Flash Drive" for Public Records requests.			

Part III – Confidential Financial Information			
YES		NO	KTJ
Justification for Confidential Status			

TruePoint Solutions, LLC
Company Name

Kent Johnson
Signature

Kent Johnson, Chief Executive Officer
Print Name

June 13, 2017
Date

C. Attachment C – Vendor Certifications

C. Attachment C – Vendor Certifications with an original signature by an individual authorized to bind the organization.

ATTACHMENT C – VENDOR CERTIFICATIONS

Vendor agrees and will comply with the following:

(1) Any and all prices that may be charged under the terms of the contract do not and will not violate any existing federal, State or municipal laws or regulations concerning discrimination and/or price fixing. The vendor agrees to indemnify, exonerate and hold the State harmless from liability for any such violation now and throughout the term of the contract.

(2) All proposed capabilities can be demonstrated by the vendor.

(3) The price(s) and amount of this proposal have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other contractor, vendor or potential vendor.

(4) All proposal terms, including prices, will remain in effect for a minimum of 180 days after the proposal due date. In the case of the awarded vendor, all proposal terms, including prices, will remain in effect throughout the contract negotiation process.

(5) No attempt has been made at any time to induce any firm or person to refrain from proposing or to submit a proposal higher than this proposal, or to submit any intentionally high or noncompetitive proposal. All proposals must be made in good faith and without collusion.

(6) All conditions and provisions of this RFP are deemed to be accepted by the vendor and incorporated by reference in the proposal, except such conditions and provisions that the vendor expressly excludes in the proposal. Any exclusion must be in writing and included in the proposal at the time of submission.

(7) Each vendor must disclose any existing or potential conflict of interest relative to the performance of the contractual services resulting from this RFP. Any such relationship that might be perceived or represented as a conflict should be disclosed. By submitting a proposal in response to this RFP, vendors affirm that they have not given, nor intend to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant or any employee or representative of same, in connection with this procurement. Any attempt to intentionally or unintentionally conceal or obfuscate a conflict of interest will automatically result in the disqualification of a vendor's proposal. An award will not be made where a conflict of interest exists. The State will determine whether a conflict of interest exists and whether it may reflect negatively on the State's selection of a vendor. The State reserves the right to disqualify any vendor on the grounds of actual or apparent conflict of interest.

(8) All employees assigned to the project are authorized to work in this country.

(9) The company has a written equal opportunity policy that does not discriminate in employment practices with regard to race, color, national origin, physical condition, creed, religion, age, sex, marital status, sexual orientation, developmental disability or handicap.

(10) The company has a written policy regarding compliance for maintaining a drug-free workplace.

(11) Vendor understands and acknowledges that the representations within their proposal are material and important, and will be relied on by the State in evaluation of the proposal. Any vendor misrepresentations shall be treated as fraudulent concealment from the State of the true facts relating to the proposal.

(12) Vendor must certify that any and all subcontractors comply with Sections 7, 8, 9, and 10, above.

(13) The proposal must be signed by the individual(s) legally authorized to bind the vendor per NRS 333.337.

TruePoint Solutions, LLC
Company Name

Signature

Kent Johnson, Chief Executive Officer
Print Name

June 13, 2017
Date

D. Attachment I – Certification Regarding Lobbying

D. Attachment I – Certification Regarding Lobbying with an original signature by an individual authorized to bind the organization.

In accordance with Addendum 1, we have not included this form as it is required for federal contracts only.

E. Licensing/Hardware/Software Agreements

E. Copies of any vendor licensing agreements and/or hardware and software maintenance agreements, if applicable.

ACCELA SUBSCRIPTION TERMS AND CONDITIONS

Version 52615a

1. As used herein, "Accela" refers to Accela, Inc. and "Customer" refers to the subscribing customer designated on the attached Order. Accela and Customer are collectively designated as the "Parties".

2. These Subscription Terms and Conditions ("Terms") are effective upon execution of the Order by Customer and are for the exclusive benefit of the Parties. Nothing herein will be construed to create any benefits, rights, or responsibilities in any other parties.

3. Customer's subscription term commences on the date Accela provides appropriate access credentials to Customer's designated technical contact, indicating that the application services identified in the Order ("Subscribed Services") are available for Customer's subscription use. Said date is Customer's "Service Date" for purposes of designating the start of any subscription term.

4. Subscription terms are twelve (12) calendar months in duration. At the end of Customer's subscription term or, if a multi-term subscription is indicated on the Order, the last of Customer's subscription terms, Customer's subscription will renew for an additional term. The per-unit pricing during said additional term will be the same as the prior term's annual fees unless Accela notifies Customer otherwise not less than sixty (60) calendar days prior to the end of said prior term. Any price increase will be effective at the start of the renewal term. No such price increase will exceed seven percent (7%) of the prior term's annual pricing. Customer may opt-out from said automatic renewal by providing written notice to Accela not less than sixty (60) calendar days prior to the Service Date anniversary which begins the renewal term. During said sixty-day period, Customer may decrease the number of users for which it has subscribed; said decrease will be effective during the next subscription term. Customer may not decrease its number of subscribed users at any other time during a subscription term. At any time during a subscription term, Customer may increase its number of subscribed users by submitting an order to Accela and paying the fees associated with the increase. Such fees will be calculated as the pro-rata remaining portion of the subscription term, rounded-up to the nearest full month.

5. In exchange for its use of the Subscribed Services, Customer will pay to Accela the amounts indicated in the Order. Said amounts are based on services purchased and not actual usage; payment obligations are non-cancelable and fees paid are non-refundable, except as otherwise specifically-provided herein. Unless otherwise stated, such fees do not include any taxes, levies, duties or similar governmental assessments of any nature, including but not limited to value-added, sales, use or withholding taxes, assessable by any local, state, provincial, federal or foreign jurisdiction ("Taxes"). Customer is responsible for paying all Taxes associated with its purchases hereunder. If Accela has the legal obligation to pay or collect Taxes for which Customer is responsible, the appropriate amount will be invoiced to and paid by Customer, unless Accela is provided with a valid tax exemption certificate authorized by the appropriate taxing authority. Accela is solely responsible for taxes assessable against it based on its income, property and employees.

6. The Subscribed Services are protected under the laws of the United States and the individual states and by international treaty provisions. Accela retains full ownership in the Subscribed Services and grants to Customer a limited, nonexclusive, nontransferable right to use the Subscribed Services, subject to the following terms and conditions: a) The Subscribed Services are provided for use only by Customer employees and to the extent of their duties for Customer, Customer's agents, contractors and officials; b) Customer may not make any form of derivative work from the Subscribed Services, although Customer is permitted to develop additional or alternative functionality for the Software using tools and/or techniques provided to Customer by Accela; c) Customer may not obscure, alter, or remove any confidentiality or proprietary rights notices; d) Customer may use the Subscribed Services only to process transactions relating to properties within both its own geographical and political boundaries and may not sell, rent, assign, lend, or share any of its rights

hereunder; e) Customer is responsible for all activities conducted using its user credentials and for its users' compliance with the provisions of these Terms; and f) All rights not expressly granted to Customer are retained by Accela. Accela will make the Subscribed Services available to Customer pursuant to these Terms during a subscription term. Customer agrees that its purchases hereunder are neither contingent on the delivery of any future functionality or features nor dependent on any oral or written public comments made by Accela regarding future functionality or features.

7. Accela warrants that it has full power and authority to agree to these Terms and that, as of the effective date hereof, the Subscribed Services do not infringe on any existing intellectual property rights of any third party. If a third party claims that the Subscribed Services do infringe, Accela may, at its sole option, secure for Customer the right to continue using the Subscribed Services or modify the Subscribed Services so that these do not infringe. Accela will have the sole right to conduct the defense and will defend any legal action and conduct all negotiations for its settlement or compromise.

8. Accela has no obligation for any claim based upon a modified version of the Subscribed Services, where such modifications were not made or authorized by Accela, or the combination or operation of the Subscribed Services with any product, data, or apparatus not provided by Accela. Accela provides no warranty whatsoever for any third-party hardware or software products. If a third-party product is supplied by Accela, no support for any third party product is provided, unless an addendum is attached hereto, identifying the product and specifying the terms and conditions of any support. **Except as expressly set forth herein, Accela disclaims any and all express and implied warranties, including but not limited to warranties of merchantability and fitness for a particular purpose.**

9. The Subscribed Services will be hosted by Accela on Accela-owned equipment at a physically-secure commercial third-party hosting facility. Accela will perform system administration duties as required to maintain the service levels described below and to facilitate timely restoration of Customer's data and operations, if necessary, following unanticipated interruptions of the Subscribed Services. Accela will implement suitable network security measures to minimize the likelihood of unanticipated interruptions of the Subscribed Services.

10. Accela will endeavor to provide Customer with no less than twenty-four (24) hours' notice prior to Subscribed Services unavailability due to planned maintenance (other than during Accela's standard maintenance window between the hours of 9:00 PM [21:00] Thursday and 1:00 AM [1:00] Friday Pacific time); Accela will endeavor to provide as much notice as is practicable under the circumstances for updates and fixes which may be applied on a more urgent basis. Accela will provide five (5) business days' notice prior to any planned network, server hardware, operating environment, or database modifications of a material nature.

11. Excluding the foregoing events, Accela warrants that the Subscribed Services will be available no less than ninety-nine point nine percent (99.9%) of each calendar month. For each month during which the availability of the Subscribed Services does not achieve the established standard, Accela will provide a credit to Customer's account as calculated pursuant to Section 12 below, provided that the substandard availability is timely identified by Customer in writing, can be objectively verified, and the Subscribed Services are being used in live-production. Credits accumulated pursuant to this Section may be applied to additional Accela products and/or services, but will not be refunded to Customer.

12. The performance requirements for the Subscribed Services, excluding planned maintenance downtime, are below. Uptime is calculated on a calendar month basis as U=O/(M-P)*100, where U is Uptime, O is the amount of operational uptime for the Subscribed Services during a given month, M is the number of minutes in the month, and P is the number of minutes of planned downtime during the month. Credits are calculated on pro-rated monthly fees.

Uptime	*Credit*
≥99.9%	None
<99.9% but ≥99.0%	15%
<99.0% but ≥95.0%	35%
<95.0%	100%

13. In support of the Subscribed Services, Accela will provide Customer with a) a telephone number to

contact the Customer Resource Center (CRC), Accela's live technical support facility, which is available from 4:00 a.m. until 6:00 p.m. Pacific time Monday through Friday, excluding Accela's observed holidays; b) one or more electronic mail addresses to which Customer may submit routine or non-critical support requests, which Accela will address during its regular business hours; and c) access to archived software updates and other technical information in Accela's online support databases, which are continuously available. Where support is needed to address non-functioning or seriously impaired Services and there is no reasonable workaround available, Accela will promptly respond to the support request and use commercially reasonable efforts to provide updates toward resolution of the issue.

14. The following are not covered by these Terms, but may be separately available at rates and on terms which may vary from those described herein: a) Services required due to misuse of the Subscribed Services; b) Services required by Customer to be performed by Accela outside of Accela's usual working hours; c) Services required due to external factors including, but not necessarily limited to, Customer's use of software or hardware not authorized by Accela; or d) Services required to resolve or work-around conditions which cannot be reproduced in Accela's support environment.

15. Customer warrants that it owns or has been authorized to provide the data to Accela. Customer retains full ownership of said data and grants to Accela a limited, nonexclusive, nontransferable license to use said data only to perform Accela's obligations in accordance with these Terms.

16. Throughout the term of the agreement, upon the request of Customer, Accela will provide Customer with:
(i) a copy of its data in a database dump file not more than once per calendar quarter, ;
(ii) an APO property conversion upload, not more than twice per annual term, and
(iii) a Crystal Report placement not more than ten (10) times per annual term.

Within thirty (30) calendar days following the end of its final Subscribed Services term ("End of Term"), Customer may request that Accela provide a complete copy of Customer's data and associated documents, as updated or modified by Customer's use of the Subscribed Services, in a database dump file format. Accela will comply in a timely manner with such request, provided that Customer a) pays all costs of and associated with such copying, as calculated at Accela's then-current time-and-materials rates; and b) pays any and all unpaid amounts due to Accela.

17. Subject to the limitations of Section 6, Customer may authorize access to the Subscribed Services by creating unique user names and passwords ("Logins") up to the number of users indicated in the Order.

18. Each Login must be assigned to a single individual and may not be shared or used by more than one such user. Customer may reassign any Login to another individual, provided that such reassignments do not circumvent the "single individual" requirement described in this Section.

19. Customer acknowledges that transmissions and processing of Customer's electronic communications are fundamental to Customer's use of the Subscribed Services. Customer further acknowledges that portions of such transmissions and processing may occur within various computer networks not owned or operated by Accela. Customer agrees that Accela is not responsible for any delays, losses, alterations, interceptions, or storage of its electronic communications which occur in computer networks not owned or operated by Accela.

20. Either party may end Customer's access to the Subscribed Services if the other materially breaches these Terms and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination for cause by Customer, Accela will refund any prepaid subscription fees covering the remainder of the subscription term after the effective date of termination.

21. "Disclosing Party" and "Recipient" refer respectively to the party which discloses information and the party to which information is disclosed in a given exchange. Either Accela or Customer may be deemed Disclosing Party or Recipient depending on the circumstances of a particular communication or transfer of information. "Confidential Information" means all disclosed information relating in whole or in part to non-public data, proprietary data compilations,

computer source codes, compiled or object codes, scripted programming statements, byte codes, or data codes, entity-relation or workflow diagrams, financial records or information, client records or information, organizational or personnel information, business plans, or works-in-progress, even where such works, when completed, would not necessarily comprise Confidential Information. The foregoing listing is not intended by the Parties to be comprehensive, and any information which Disclosing Party marks or otherwise designates as "Confidential" or "Proprietary" will be deemed and treated as Confidential Information. Information which qualifies as "Confidential Information" may be presented to Recipient in oral, written, graphic, and/or machine-readable formats. Regardless of presentation format, such information will be deemed and treated as Confidential Information. Notwithstanding, the following specific classes of information are not "Confidential Information" within the meaning of this Section: a) information which is in Recipient's possession prior to disclosure by Disclosing Party; b) information which is available to Recipient from a third party without violation of this Section or Disclosing Party's intellectual property rights; c) information which is in the public domain at the time of disclosure by Disclosing Party, or which enters the public domain from a source other than Recipient after disclosure by Disclosing Party; d) information which is subpoenaed by governmental or judicial authority; and e) information subject to disclosure pursuant to a state's public records laws. Recipient will protect the confidentiality of Confidential Information using the same degree of care that it uses to protect its own information of similar importance, but will in any case use no less than a reasonable degree of care to protect Confidential Information. Recipient will not directly or indirectly disclose Confidential Information or any part thereof to any third party without Disclosing Party's advance express written authorization to do so. Recipient may disclose Confidential Information only to its employees or agents under its control and direction in the normal course of its business and only on a need-to-know basis. In responding to a request for Confidential Information, Recipient will cooperate with Disclosing Party, in a timely fashion and in a manner not inconsistent with applicable laws, to protect the Confidential Information to the fullest extent possible.

22. **ACCELA WILL, AT ALL TIMES DURING THE AGREEMENT, MAINTAIN APPROPRIATE INSURANCE COVERAGE. TO THE EXTENT NOT OFFSET BY ITS INSURANCE COVERAGE AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAWS, IN NO EVENT WILL ACCELA'S CUMULATIVE LIABILITY FOR ANY GENERAL, INCIDENTAL, SPECIAL, COMPENSATORY, OR PUNITIVE DAMAGES WHATSOEVER SUFFERED BY CUSTOMER OR ANY OTHER PERSON OR ENTITY EXCEED THE FEES PAID TO ACCELA BY CUSTOMER DURING THE TWELVE (12) CALENDAR MONTHS IMMEDIATELY PRECEDING THE CIRCUMSTANCES WHICH GIVE RISE TO SUCH CLAIM(S) OF LIABILITY, EVEN IF ACCELA OR ITS AGENTS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.**

23. If Accela is delayed in its performance of any obligation hereunder due to causes or effects beyond its control, Accela will give timely notice to Customer of such circumstances and will act in good faith to resume performance as soon as practicable.

24. Accela may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets.

25. The Parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

26. Section 5 will survive the End of Term for so long as is required to complete collection of unpaid amounts. The limitations and waivers described in Sections 8, 19, 22, and 27 will survive the End of Term. Section 12 will survive the End of Term for a period of thirty (30) calendar days. Section 16 will survive the End of Term for a period of thirty (30) calendar days or for so long as is required for Accela to complete its response to a Customer request made during said thirty-days period. Section 21 will survive the End of Term for a period of two (2) years. With the exceptions of the foregoing surviving sections, the remainder of these Terms will terminate at the End of Term.

27. If any particular provision of these Terms is determined to be invalid or unenforceable, that determination will not affect the other provisions, which will be construed in all respects as if the invalid or unenforceable provision were omitted. No extension, modification, or amendment of these Terms will be effective unless it is described in writing and signed by the Parties.

F. Certifications/Licenses.

F.	*Copies of applicable certifications and/or licenses.*

Accela has extensive experience in the regulatory and compliance environment, specifically including the following:

- PCI-DSS compliance
- SOC II compliance
- SSAE 16 compliance
- Completed FISMA (NIST 800-53) audit that guides the organization's best practices as it relates to Information Security and Information Systems Management.

Accela's Security and Compliance team is CISSP, CISM and ITIL certified, and is actively pursuing PCI ISA certification.

Tab V - Attachment B, Vendor Certification of Compliance

A. Attachment B with an original signature by an individual authorized to bind the organization must be included in this tab.

ATTACHMENT B – VENDOR CERTIFICATION OF COMPLIANCE

I have read, understand and agree to comply with ***all*** the terms and conditions specified in the attachments noted in the table below.

Vendors must initial next to each noted attachment and then sign with an original signature in the designated space.

Attachment	Attachment Title	Agree to Comply *Initials Required*
A	Confidentiality and Certification of Indemnification	KTJ
C	Vendor Certifications	KTJ
D	Contract for Services of Independent Contractor	KTJ
E	Insurance Schedule for RFP 3422	KTJ
I	Certification Regarding Lobbying	KTJ

TruePoint Solutions, LLC
Company Name

Kent Johnson
Signature

Kent Johnson, Chief Executive Officer
Print Name

June 13, 2017
Date

Tab VI – Section 3 – Scope of Work

Vendors must place their written response(s) in bold/italics immediately following the applicable RFP question, statement, and/or section.

5.8 Planning and Administration

5.8.1 Objective
The objective of this task is to ensure that adequate planning and project management are dedicated to this project.

5.8.2 Activities
The awarded vendor must:
5.8.2.1 Work with the State to provide a detailed project plan with fixed deadlines that take into consideration the State holiday schedule provided in Section 2.1, State Observed Holidays to include, but not be limited to:
A. Project schedule including tasks, activities, activity duration, sequencing and dependencies;
B. Project work plan for each deliverable, including a work breakdown structure;
C. Completion date of each task;
D. Project milestones;
E. Entrance and exit criteria for specific project milestones; and
F. Project organization including a resource plan defining roles and responsibilities for the awarded vendor, subcontractors (if applicable) and State.

5.8.2.2 Attend and participate in all project related meetings requested by the State at a location to be determined by the State. Attendance may be in person or via teleconferencing, as mutually agreed to by the project team. These meetings shall follow an agenda mutually developed by the awarded vendor and the State. The awarded vendor shall prepare materials or briefings for these meetings as requested by the State. Minutes will be taken and distributed by State staff within five (5) working days after the meeting. Minutes may be distributed via facsimile or email.

The agenda may include, but not be limited to:

A. Review and approval of previous meeting minutes;
B. Contractor project status;
C. State project status;
D. Contract status and issues, including resolutions;
E. Quality Assurance status;
F. New action items;
G. Outstanding action items, including resolutions;
H. Setting of next meeting date; and
I. Other business.

5.8.2.3 Provide written semi-monthly project status reports delivered to State project management by the third (3rd) working day following the end of each reporting period. The format must be approved by the State prior to issuance of the first semi-monthly project status report. The first semi-monthly report covers the reporting period from the 1st through the 15th of each month; and the second semi-monthly report covers the reporting period from the 16th through the end of the month. The status reports must include, but not be limited to the following:

A. Overall completion status of the project in terms of the State approved project work plan and deliverable schedule;
B. Accomplishments during the period, including State staff/stakeholders interviewed, meetings held, JAD sessions and conclusions/decisions determined;
C. Problems encountered and proposed/actual resolutions;
D. What is to be accomplished during the next reporting period;
E. Issues that need to be addressed, including contractual;
F. Quality Assurance status;
G. Updated MS Project time line showing percentage completed, tasks assigned, completed and remaining;
H. Identification of schedule slippage and strategy for resolution;
I. Contractor staff assigned and their location/schedule;
J. State resources required for activities during the next time period; and
K. Resource allocation percentages including planned versus actual by project milestone.

5.8.2.4 Develop a comprehensive approach for handling communications with both internal and external audiences. Effective communication is critical to the development of productive relationships with concerned stakeholders. The communication plan must include, but not be limited to: a plan for generation, documentation, storage, transmission and disposal of all project information.
5.8.2.5 Develop a risk management plan to ensure that risks are identified, planned for, analyzed, communicated and acted upon effectively.
5.8.2.6 Develop a quality assurance plan including, but not limited to, the methodology for maintaining quality of the code, workmanship, project schedules and subcontractor(s) activities.
5.8.2.7 Develop a Change Management Plan and Control Procedures and present it to the State for acceptance. This plan will be used by the vendor and the State in the design, specification, construction, implementation and support of the system.
5.8.2.8 Develop a Knowledge Transfer Plan, present the plan to the State, execute the plan and obtain State acceptance before and after the plan is executed. The plan must include sufficient time and resources to accomplish a full transfer of knowledge to assure that the State can operate the system independently and obtain timely and effective support from the vendor.
5.8.2.9 The State will perform a Post Implementation Evaluation Review (PIER) approximately six (6) months after full implementation and State acceptance of all deliverables. The awarded vendor's Project Manager will be required to participate on site for a period of not to exceed three (3) days.

5.8.3 Deliverables

5.8 PLANNING AND ADMINISTRATION DELIVERABLES

DELIVERABLE NUMBER	DESCRIPTION OF DELIVERABLE	ACTIVITY	STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)
5.8.3.1	Detailed Project Plan	5.8.2.1	15
5.8.3.2	Attendance at all scheduled meetings	5.8.2.2	N/A
5.8.3.3	Written Semi-Monthly Project Status Report	5.8.2.3	5
5.8.3.4	Communication Plan	5.8.2.4	10
5.8.3.5	Risk Management Plan	5.8.2.5	10
5.8.3.6	Quality Assurance Plan	5.8.2.6	10
5.8.3.7	Change Management Plan	5.8.2.7	10
5.8.3.8	Knowledge Transfer Plan	5.8.2.8	10

5.8 PLANNING AND ADMINISTRATION DELIVERABLES			
5.8.3.9	Post Implementation Evaluation Review	5.8.2.9	5

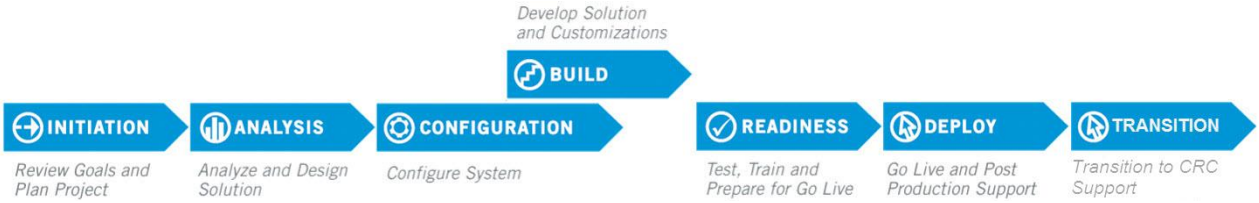
Implementation Methodology

TruePoint will deliver services to the TA by employing the methodology detailed in this section. This is a proven methodology that guides the project from inception to deployment, thereby increasing the chances of successfully implementing TruePoint software products. Project delivery through execution of this Implementation Life Cycle is described below.

For this proposal TruePoint will assume a 3-phase project. We are interested to talking with the TA to possibly propose combining Phase 1 and Phase 2 OR combining Phase 2 and Phase 3. This might provide possibilities to reduce the professional services budget while still delivering a quality product with a shorter timeline.

THE IMPLEMENTATION LIFE CYCLE (REPEATS FOR EACH PHASE)

Thorough execution of these six stages ensures that TruePoint customers receive high-quality services throughout the project engagement.



As illustrated in the figure above, the stages of project delivery flow in linear direction, although many tasks run in parallel as appropriate to avoid unnecessary project delays. Each stage has pre-defined objectives, tasks and associated deliverables. Depending on the exact scope of the project, a full complement or subset of all available deliverables will be delivered through the services defined for the project. Employing this deliverables-based approach ensures that TruePoint and the TA understand the composition and 'downstream' impact of each project deliverable to ensure the project is delivered with quality and in a timely manner.

INITIATION

Initiation represents the first stage in the lifecycle. During the Initiation stage, project contracts and the SOW are finalized, project scope and objectives are reviewed, and project planning activities and deliverables are completed.

ANALYSIS

Analysis is the second stage in the lifecycle. During the Analysis stage, TruePoint reviews existing TA documentation, interviews TA staff, and conducts workshops to understand the "To-Be" vision of the TA that can be executed with the aid of the Civic Platform. It is during this Phase that TruePoint gains a deeper understanding of TA processes and business rules; simultaneously, the TA begins to gain a deeper understanding of the methodology and the Civic Platform capabilities. A key output of this Phase is the To-Be Analysis Document(s) which serve as the 'foundation' for configuration of the Civic Platform to support germane elements of the TA "To-Be" vision. Supplementing the To-Be Analysis Document(s) are all other configuration specifications documents related to data conversion, interfaces, reports, and event scripts.

SOLUTION FOUNDATION

Solution Foundation is the third stage in the lifecycle. It begins upon completion of Stage 2 and should be completed prior to the next stage, Build. During the Solution Foundation stage, the Civic Platform will be built to match the to-be processes agreed to in the Analysis stage. Essential to this effort is the configuration of the Record (Case, Application, Permit, Work Order, etc.) types that were agreed to during the Analysis phase.

BUILD

Build serves as the fourth stage in the lifecycle, and execution of this stage overlaps Configuration, but ends after Configuration is complete. During the Build stage, all defined elements during the Analysis stage beyond the Solution Foundation will be implemented. This includes conversions, event scripts, interfaces and reports.

READINESS

Readiness is the fifth stage in the lifecycle. During the Readiness stage the Civic Platform is fully tested, errors are identified, documented and corrected. Additionally, the solution is prepared for deployment. In addition, system administrators and end users are trained so that all appropriate TA staff members are prepared to use and maintain the software once the move to production occurs.

DEPLOY

Deploy is the sixth and final stage in the lifecycle. During the Deploy stage the applications are moved to production; all requisite pre-production activities are identified, tracked and completed, and post-production analysis and review is completed. Upon moving to production, the Civic Platform applications are transitioned to the Accela Customer Resource Center ('CRC") for ongoing support. A formal transition will occur between the Services team and the CRC that instructs the TA on available communication channels (telephone, email, online tracking system) and use of the Accela knowledge base.

Project Initiation and Project Management

Project initiation is an opportunity to ensure the project starts in a well-organized, structured fashion while re-confirming the TA and TruePoint expectations regarding the implementation. This Task is comprised of project planning activities, core project management documents and templates and the first on-site meeting conducted between the TA and TruePoint after the signing of the Statement of Work.

In conjunction with the TA representatives, TruePoint will perform the following tasks:

- ***Finalize staffing for the project teams.***
- ***Conduct a formal onsite Kickoff meeting. The objective of this meeting is to review the purpose of the project and discuss the project scope, roles and responsibilities, deliverables, and timeline.***
- ***Provide TruePoint standard Project Status Report Template format.***
- ***Finalize and document formal deliverable signoff procedures, identify team members that will be responsible for signoff from the TA and TruePoint.***
- ***Finalize an integrated baseline project plan that includes resource allocation for all tasks (in cooperation with the TA Project Manager).***
- ***Develop a Project Charter that defines how the project will be governed, including a detailed escalation plan.***
- ***Conduct Core Team training in order to prepare the Subject Matter Experts for the To-Be Analysis stage.***
- ***Perform a Gap Analysis***

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

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

- ***Detailed Project Plan***
- ***Project Status Report Template***
- ***Communication Plan***
- ***Risk Management Plan***
- ***Quality Assurance Plan***
- ***Change Management Plan***
- ***Knowledge Transfer Plan***
- ***Project Kickoff Presentation***
- ***Participation in meetings for the life of the project***

TruePoint Responsibilities:

- ***Provide timely and appropriate responses to TA's request for information.***
- ***Coordinate project planning activities.***
- ***Communicate the TruePoint Implementation Methodology that will be used by TruePoint to deliver Services.***
- ***Complete Baseline Project Plan, Project Status Report Template, and Project Kickoff Presentation deliverables with input from appropriate TA resources.***

TA Responsibilities:

- ***Identify and set expectations with key resources and subject matter experts for ongoing participation in the project.***
- ***Provide timely and appropriate responses to TruePoint's requests for project planning input and meeting logistics requests.***
- ***Provide meeting facilities for Project Kickoff and other onsite activities.***
- ***Include Project Sponsor in Project Kickoff Meeting.***
- ***Provide suitable TA facilities to accommodate training.***
- ***Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the training.***
- ***Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the training.***

Deliverables:

- ***Review and acceptance of the Project Status Report Template***
- ***Review and acceptance of the Project Plan***
- ***Review and acceptance of the Communication Plan***
- ***Review and acceptance of the Rick Management Plan***
- ***Review and acceptance of the Quality Assurance Plan***
- ***Review and acceptance of the Knowledge Transfer Plan***
- ***Completion of the Project Kickoff Meeting***
- ***Completion of Core Team Training***

5.9 Review & Validate Reqs & Gap/Fit Analysis

5.9.1 Objective:

5.9.1.1 To ensure the vendor has a clear understanding of the TA's requirements, "map" the requirements to their system, identify gaps and identify options to address the gaps. If the vendor proposes a custom solution, this task will focus on the system design.

5.9.2 Activities:
5.9.2.1 The vendor will review relevant TA artifacts (e.g. documentation, forms, reports, etc.) and interview key TA staff to fully understand the TA's operation and system requirements.
5.9.2.2 The vendor will document the gaps between TA's needs and what their software supports. They will also document options (including cost estimates) to address the gaps, including: custom development, process work-arounds, and utilization of 3rd party projects.
5.9.2.3 The vendor will perform a thorough walk-through demonstration of their system showing how it supports the TA's business processes, and explaining the various options to address the gaps in software functionality. Based on the results of the review, the TA, working with the vendor will make decisions on how the gaps will be addressed. The agreed upon implementation scope will then formally documented.

5.9.3 Deliverables

5.9 REVIEW AND VALIDATE REQUIREMENTS & GAP/FIT ANALYSIS			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
5.9.3.1	Gap Analysis Report, which includes description of gaps and options to address the gaps, including costs (one-time and ongoing). If a custom system, then focus will be on the Design Report below.	5.9.2.2	15
5.9.3.2	Implementation Scope Document (That documents how each of the TA's core business processes will be supported and how the gaps will be addressed).	5.9.2.3	10

GAP Analysis and To-Be ANALYSIS

To-Be Analysis is comprised of the activities required to define the Civic Platform Solution Foundation for the TA. The key output of the process is To-Be Analysis Document(s), which serves as a 'blueprint' for design and baseline configuration efforts throughout the implementation project and establishes the benchmarks for testing and acceptance at the conclusion of the project.

The To-Be Analysis Document(s) include detailed information on the TA's business processes to be configured in the Civic Platform Solution Foundation, including the following topics:

- ***Process Overview***

- ***Intake Process, user defined and required fields***
- ***Required/Optional Review Tasks***
- ***Issuance requirements***
- ***Inspection Types, scheduling and checklists***
- ***Workflow and processing requirements***
- ***Fee's – types, processing and schedules***
- ***Citizen Portal (Accela Citizen Access) specific to online submittal, inquiry, inspection scheduling and fee payments***

The Project Team, consisting of representatives from both TruePoint and the TA, will conduct a formal review of the To-Be Analysis Documents for the purpose of approval and sign-off on the deliverable. TruePoint will build 1 prototypes for each module. Prototyping is intended to demonstrate selected aspects of the Civic Platform functionality to assist in understanding how it will operate for the TA. Prototyping is not meant to be a complete end-to-end solution.

To-Be Analysis Sessions

In order to develop the content for the To-Be Analysis Document(s), TruePoint will work closely with designated TA personnel and will conduct analysis sessions to capture the "to-be" required business processes.

In conjunction with the TA representatives, TruePoint will perform the following tasks:

- ***Review and understand existing business processes intended for migration into the Civic Platform.***
- ***Review the developed business process as a basis for configuration in the Civic Platform's workflow tool.***
- ***Assist the TA in streamlining existing business processes for fit into the Civic Platform.***
- ***Collect employee names and associated roles and identify user group setups.***
- ***Review the collected document intake requirements, forms, and data fields for each process.***
- ***Review the collected document output requirements (documents/letters/reports).***
- ***Review the collected document fees, fee schedules, and collection procedures for each process.***
- ***Review the collected document all required inspections and inspection result options for each type.***

TruePoint's Project Manager will coordinate and schedule the Analysis Sessions in conjunction with the TA Project Manager and according to the agreed upon Project Plan. In terms of specific output, the following will be executed for this deliverable:

- ***To-Be Analysis data gathering activities including workshops, interviews and web conferencing sessions.***

<u>TruePoint Responsibilities</u>:

- ***Provide timely and appropriate responses to TA's request for information.***
- ***Interview staff in order to understand existing business processes.***
- ***Conduct to-be analysis sessions to capture the required business processes to be automated within the system.***
- ***Conduct meetings via email, web conference, phone, and in person to gather and validate analysis input.***

<u>TA Responsibilities</u>:

- ***Provide timely and appropriate responses to TruePoint's requests for information.***

- ***Make available the appropriate TA key users and content experts to provide required information, participate in the configuration analysis and verify the accuracy of the documented workflows, input/output formats, and data elements.***
- ***Provide any existing business process documentation, including process flows; fee schedules; commonly used applications, reports and forms; and other relevant information.***
- ***Schedule participants and meeting locations for analysis activities.***

Deliverables Criteria:
- ***Gap Analysis Report***
- ***Completion of To-Be Analysis Sessions.***

5.10 System Design/Implementation Configuration

5.10.1 Objective:

5.10.1.1 The objective of this task is to develop a design document that describes the system architecture, the software and hardware components. The design documentation should be to a level of detail that all project stakeholders can understand what will be developed/implemented. Note: For COTS solutions, this does not need to be an extensive document.

5.10.2 Activities:
5.10.2.1 Based on requirements and gap analysis, the vendor will develop system design specifications. This includes, but not limited to:
A. Overall system architecture, including technology that will be used (hardware & software), including any third-party products that will be used;
B. Configuration parameters, including, but not limited to: lookup values, event triggers, key data fields, user roles, user interface and screen navigation, list of key reports and description on how they will be developed, etc.
C. Description of administrative functions (technical and non-technical) the TA will need to perform for the ongoing support of the system; and
D. Description of security and backup and recovery methods and technology.

5.10.3 Deliverables

5.10 SYSTEM DESIGN/IMPLEMENTATION CONFIGURATION			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
5.10.3.1	System Design/Implementation Configuration	5.10.2.1 (A-D)	10

The Configuration document prepared in the Analysis sessions will be design document for the configuration.

Since a hosted solution is being proposed, final system architecture documents and information on the hosted solution will be provided by Accela.

The TA will be trained on aspects of the configuration admin tools during the length of the project.

Security and backup procedures will be performed by the Accela hosting facility.

5.11 Setup and Configure/Build System

5.11.1 Objective:

5.11.1.1 The objective of this task is to configure/customize/develop, test, and deliver a fully functional system that meets the TA's requirements. Throughout this task, the vendor must work closely with TA staff to verify the system will meet their requirements in an intuitive and efficient manner.

5.11.2 Activities:

5.11.2.1 Establish System Environments

A. Setup development & test environment;
B. Setup UAT/training environment; and
C. Setup production environment.

5.11.2.2 Configure/Customize/Develop System
A. Configure/develop system components according to specifications.
B. Perform structured demonstrations/pilots/walk-throughs of system components to users at various stages this task to ensure the end product is on target. Prior to UAT, users need to see how the system will provide end-to-end support for all their business processes.
C. Adjust/modify system based on user feedback. If necessary, re-demonstrate system after making the changes.
D. The vendor will conduct thorough quality assurance testing of system and correct defects prior to delivering it for User Acceptance Testing (UAT) and production. The vendor will also ensure the system meets appropriate performance and throughput requirements.
E. Conduct walkthrough of entire system with users prior to UAT.
F. Deliver fully functional system that has been thoroughly tested by the vendor (ready for the TA UAT team to test).

5.11.3 Deliverables

5.11 SET UP AND CONFIGURE/BUILD SYSTEM			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
5.11.3.1	Establish development & test, UAT/training and production environments	5.11.2.1 (A-C)	10
5.11.3.2	Configure/develop working system; vendor to conduct demonstrations/ pilot/walk-throughs of system components.	5.11.2.2 (A-D and F)	TBD
5.11.3.3	Walk-through of entire system prior to UAT.	5.11.2.2 (E)	10

As described above in the project methodology "BUILD" (Stage 3) business rule creation, report development and configuration of Accela add-on products. Also, the data conversion to be described in the next section.

STAGE 4 – Build

The Build stage includes data conversions, development of all Business Process Validation and Automation (Event Manager Scripts and Expressions) configuration of add-on products and custom report development. It comprises all of the additional activities outside of solution foundation that are required to complete the total solution for the TA. Similar to the Configuration Stage, it is critical that appropriate TA representatives are involved in each step of the process to ensure success.

Business Process Validation and Automation (Scripting)

During the configuration analysis phase of the implementation project, TruePoint will identify opportunities to supplement the Civic Platform base functionality via Event Manager Script Engine (EMSE) scripts and Expression Builder in order to validate and automate business processes. TruePoint will work with TA to identify desired functionality, and subsequently will assist with prioritizing the needs in order to determine that will be developed by TruePoint within the scope of this implementation.

Business Process Validation and Automation is broken out into two functional areas of the TruePoint solution, as defined below:

- ***EMSE (Event Manager Scripting Engine) – used to script based on system activities, such as a before or after event, that allow the system to automate activities (example: do not allow an inspection to be scheduled prior to a specific workflow task, or, auto-calculate and invoice a fee upon application submittal)***
- ***Expression Builder – used to script form based interactions that occur prior to triggering and event or master script activity (example: auto-population form based data fields based on user-selected values)***

Prior to the development, the TA will approve a design specification document that will be created jointly by the TA and TruePoint. The approved document will be used as a basis for determining completion and approval of the deliverable.

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

- ***Prioritized list of requirements that require Automation***
- ***Specification documents for each required Automation***
- ***Demonstration of completed Automations in development or test environments per the specifications document(s)***

<u>TruePoint Responsibilities</u>:

- ***Work with TA staff to identify potential uses of scripting***
- ***Assist with development of list of desired functionality***
- ***Aid the TA in prioritizing which scripts will be developed by TruePoint***
- ***Develop scripts based on the specifications***
- ***Demonstrate functionality of scripts per specifications***

<u>TA Responsibilities</u>:

- ***Allocate the time for qualified business and technical experts for the script requirements sessions that are critical to the project success***

- ***Identify resources that will learn scripting tools and approaches for ongoing maintenance***
- ***Prioritize desired functionality to determine which scripts TruePoint will develop***
- ***Provide timely and appropriate responses to TruePoint's request for information***
- ***Verify the Script Specification meets the intended business requirement***
- ***Allocate the time for qualified personnel to test the script for acceptance***

Acceptance Criteria:
- ***Review and acceptance of design document with written sign-off from the TA***
- ***Demonstration of all developed script within the system to the TA***

Reports
Reports are defined as anything that can be generated from the system, including but not limited to, reports, forms, documents, notices, and letters that the TA wishes to print as identified in the RFP. The Configuration Document will define the reports and documents that are required by the TA to effectively use the Civic Platform. These reports will be broken down by level of effort and identified in the configuration document. It is expected that, after the appropriate training on the database and the selected report writing tool is completed, TA personnel will be able to handle additional and future report requirements.

These reports can be developed using the integral TruePoint Report Writer included with the Civic Platform, Microsoft Report Service (SRS) or Crystal Reports XI Server at the TA's discretion. These custom reports, whether developed with TruePoint Report Writer, SRS or Crystal Reports, will be deployed in the Report Manager for use within the Civic Platform.

Report Specifications
TruePoint will develop documents/letters/reports from those identified by the TA in the RFP.

Prior to the development of a report the TA will approve report design specification documents that will be created jointly by the TA and TruePoint. The approved documents will be used as a basis for determining completion and approval of the reports. Development of each report cannot begin until agreement on each specification is complete.

A proven strategy that combines the use of the Civic Platform Quick Queries, Ad-Hoc reports and custom reports developed by TruePoint, or TA, can ensure that all required reporting requirements are met.

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

- ***List of identified reports with assigned responsibility for specification and development***
- ***Completed Report Specification Documents for each report assigned to TruePoint***

TruePoint Responsibilities:
- ***Assist in determining level of effort for reports to assist with prioritization***
- ***Develop report specifications***

TA Responsibilities:
- ***Provide timely and appropriate responses to TruePoint's request for information***

- ***Make available the appropriate key users and content experts to participate in the report specification***
- ***Provide information and data in the formats specified by TruePoint that will be needed for agreement on the Deliverable***

Acceptance Criteria:
- ***Agreement on prioritized list of reports that will be developed by TruePoint***
- ***Review and approval of individual Report Specifications documents. The TA will not unreasonably withhold acceptance if the TA requests changes to the reports specifications after the initial signoff of the specification by the TA***
- ***TA will have 5 business days to review the Report Specification Documents. If no changes or comments are requested within the 5 days, the Report Specification Documents are considered approved by the TA.***

Report development

TruePoint will develop custom documents/letters/reports per the specifications developed and approved in Report Specifications. Changes to the report specifications after approval can negatively impact project progress and the overall schedule. Therefore, changes to the report specifications after approval requires an analysis by TruePoint to determine the level of effort required, and if a change order would be required to complete the work.

TruePoint Responsibilities:
- ***Provide timely and appropriate responses to TA's request for information***
- ***Develop reports per specifications***
- ***Assist in the validation of the reports in test environment***
-

TA Responsibilities:
- ***Provide timely and appropriate responses to TruePoint's request for information***
- ***Make available the appropriate key users and content experts to participate in the report development and validation activities***
- ***Request change order if changes to specifications are required***

Acceptance Criteria:
- ***Confirmation of report accuracy in the development or test environment per Report Specifications.***

Accela Citizen Access configuration (Project Phase 3)

This deliverable includes setup and configuration of Accela Citizen Access (ACA) on the TA SUPP and PROD site per the Requirements gathered in the To-Be Analysis Phase. TruePoint will work with the TA representatives validate and implement Accela Citizen Access to extend certain aspects of the internal the Civic Platform configuration for use by the general public. Specifically, the following items will be configured:
- ***Integration into existing TA website***
- ***Text Settings, including disclaimers, help text and watermarks***
- ***Form Layout***
- ***User registration settings***
- ***User rights and permissions***
- ***Payment processing***

In terms of specific output, the following will be executed for this deliverable:
- ***Accela Citizen Access Specifications Document (MS Word)***
- ***Configure ACA***

- ***TruePoint Citizen Access Admin Training***

<u>TruePoint Responsibilities</u>:

- ***Setup TruePoint Citizen Access in Dev and Test environments***
- ***Assist TA in set up and validation of merchant account integration***
- ***Work with the TA to determine which services to expose to the public via Accela Citizen Access***
- ***Create configuration specification for Accela Citizen Access based on analysis with the TA***
- ***Configure the Online Record types defined in the System Configuration Document in Accela Citizen Access***

<u>TA Responsibilities</u>:

- ***Obtain a merchant account, and deploy an internet-enabled payment engine***
- ***Validate that the configuration specification for Accela Citizen Access meets TA requirements based on details from the Configuration phase of the project***
- ***Perform testing of all Online Record types for purposes of validating the configuration***

<u>Acceptance Criteria</u>:

- ***Accela Citizen Access Configuration Analysis Document provides details of all configuration elements based on the Civic Platform back office configuration***
- ***The base configuration of Accela Citizen Access is configured as documented in the approved Accela Citizen Access Configuration Specification Document.***
- ***Demonstration of the operational Accela Citizen Access functionality per the specification document(s)***

5.12 Data Migration

5.12.1 Objective:
5.12.1.1 The objective of this task is to migrate historical data from the existing legacy systems to the new system.

5.12.2 Activities:
5.12.2.1 The vendor shall work with the TA to develop a comprehensive data migration plan. The TA will work with the vendor to develop a plan that is feasible, given limited funds. The TA wishes to focus on converting data that add value. The plan must include at a minimum:

A. Map legacy data to the new system. The TA will provide staff knowledgeable of the existing systems.
B. Document business rules and program specifications for extracting legacy data, performing data cleansing, and loading it to the new system and validating it.
1. The legacy systems will include the following databases:
a. Licensing Database, LicenseEase –COTS (Oracle database)
b. Inspections Database (Access)
c. Events/Dispatch Database (Access)
d. Hearings Database (Access)

5.12.2.2 The vendor will work with the TA to define test cases for validating the migrated data.
5.12.2.3 Migrate legacy data to the test environment for demonstrations and UAT.
5.12.2.4 Migrate legacy data to the production environment prior to go-live.

5.12.3 Deliverables

5.12 DATA MIGRATION			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
5.12.3.1	Develop comprehensive data migration plan.	5.12.2.1 5.12.2.2	10
5.12.3.2	Define test cases for validating converted data (ensure accuracy of data migration).	5.12.2.3	10
5.12.3.3	Migrate data to test environment.	5.12.2.4	10
5.12.3.4	Migrate data to production environment.	5.12.2.5	10

Data Conversion

Data conversion of historic/legacy data from current systems is a critical activity for the success of this project. The TruePoint team is highly experienced in planning for, and executing these activities and will work closely with TA staff to ensure a successful transition of data.

TruePoint will lead the conversion effort and specifically assist in the following areas: data mapping, script development for conversion, assistance in data testing and validation, and with the planning and execution of the final data conversion. For conversions, it is expected and anticipated that the TA will provide resources knowledgeable with the historical data to assist in the data migration/conversion effort.

The required data mapping effort will be a conducted by TruePoint personnel with assistance from the TA. Once the data mapping has been defined, TruePoint will ask that a representative of the TA sign off on the data maps. TruePoint will be responsible for the data conversion programs to load data from the staging tables to the Civic Platform database.

Data Conversion Assumptions

- ***"As-Is" Approach: Conversion of transactional tables, Address/Parcel/Owner (APO) data, Professional License data is executed "As-is" into the Civic Platform. "As-is" means that the data will be transformed as mapped to existing configuration elements in the Civic Platform. The conversion process will not create configuration data or alter the mapped data when processed into the Civic Platform. Additionally this means if invalid, inaccurate, or incomplete data is provided, it will be loaded into the Civic Platform "As-Is". Data cleanup should occur prior to execution into the Civic Platform.***
- ***Accela Data Conversion Tools: Data will be mapped and converted utilizing Accela Extract, Translate and Load ("ETL") toolset. This will assist to ensure the accuracy of the mapping. The data mapping tool ensures that the legacy source to the Civic Platform solution is accurate and prevents data from failing to convert, while the execution tool can be used to consistently run conversion process and track statistics.***
- ***Acceptable Data Formats for Historical Conversion: It is expected that the Conversion Source Data be provided in an Oracle 10g/11g or Microsoft SQL Server 2000/2005/2008***

database format. In the event that the source is not in an acceptable format, TruePoint will provide recommendations for transposing the data in the proper format.

TruePoint will conduct Analysis/Mapping and Data Conversion Development for the Legacy Data.

Historical Data Conversion Analysis

TruePoint will create a Data Conversion Mapping Document detailing the data conversion process, mutually agreed upon requirements and mapping of TA's historical data into the Civic Platform.

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

- ***Historical Data Conversion Mapping Document***

TruePoint Responsibilities:

- ***Work with the TA to define and document historical data elements that are required for the conversion.***
- ***Facilitate the data analysis and mapping process***
- ***Complete the Data Conversion Specifications Document.***

TA Responsibilities:

- ***Provide historical data in acceptable formats.***
- ***Provide subject matter experts on the data source to aid TruePoint in identifying key components of the historical data***
- ***Provide subject matter experts on the historical configuration to aid in the data mapping process***
- ***Review and sign-off on completed Data Conversion Specifications document.***

Acceptance Criteria:

- ***The Historical Data Conversion Specifications document identifies historical data elements that will be converted into the Civic Platform as well as document special consideration (ex. merging data sources, phasing, etc.)***

Historical data Conversion development

Upon TA approval of the Historical Data Conversion Specifications document, TruePoint will provide a program(s) to migrate appropriate historical data into the Civic Platform.

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

- ***Completion of migrated data into the Civic Platform development or test environment.***

TruePoint Responsibilities:

- ***Provide a program to migrate historical data into the TA's AA test database environment.***
- ***Each data conversion will include up to three (3) conversion loads for client testing***
- ***Validate the successful completion of the migration of historical data into the TA's test environment.***

TA Responsibilities:

- ***Providing the legacy data source in an accepted format***

- ***Assist in the execution of the data conversion program and provide access to environments as needed***
- ***Provide resources to validate the conversion statistics and the quality of the data converted into the Civic Platform.***

Acceptance Criteria:

- ***Historical data has been converted to the Civic Platform testing environment according to the Data Conversion Mapping document.***

5.13 User Acceptance Testing

5.13.1 Objective:
5.13.1.1 The objective of this task is to ensure the system meets The TA's functional requirements. The TA, with the assistance of the vendor will develop a User Acceptance Test (UAT) Plan and test cases. The vendor will need to provide a fully functional system for UAT.

5.13.2 Activities:
5.13.2.1 The vendor will provide a fully functional test environment and system prior to the start of UAT. This includes ensuring the database tables are properly populated to support all test cases, including daily, weekly, monthly, quarterly and annual processes.
5.13.2.2 The vendor will provide training to the TA UAT team that so that they understand how to use the system prior to testing.
5.13.2.3 The vendor will review the TA's UAT plan and test cases and provide constructive feedback on the approach and testing coverage.
5.13.2.4 Vendor will provide technical support throughout the UAT task and correct software defects, data issues, and other system issues in an expedient manner to keep testing on schedule.

5.13.3 Deliverables

5.13 USER ACCEPTANCE TESTING			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
5.13.3.1	Provide test environment and fully functioning system, including test data (vendor to have performed comprehensive system testing).	5.13.2.1	NA
5.13.3.2	Provide training of TA UAT team so that they understand the system to a level necessary to effectively complete UAT.	5.13.2.2	5
5.13.3.3	Review of TA's UAT plan and cases.	5.13.2.3	NA

User Acceptance Testing (UAT)

This task is comprised of the assistance TruePoint will provide to allow the TA to accept that the solution meets the requirements as documented in all the deliverables. TruePoint will assist the TA in the testing and validation of the solution and its readiness to be

migrated to production for active use and will assist in transferring the solution and any required data from Support to Production.

TruePoint will provide of support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that the TA devote ample time and resources to his effort to ensure that the system is operating per signed specifications and ready for the move to production. The testing effort will require a significant time investment by the TA, and coordination of resources is critical. At this point in the implementation process, the TA should test individual components of functionality of the solution (i.e., functional and/or unit testing), and also test to ensure that the interrelated parts of the Civic Platform solution are operating properly (i.e., integration testing).

TruePoint will provide assistance to the TA as needed by providing User Acceptance Testing (UAT) support and a defined testing process. TruePoint will address and rectify issues discovered during the UAT process as TA staff executes testing activities.

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

- ***Resolution of issues resulting from TA User Acceptance Testing***
- ***Fully tested system that is ready to move to production for go-live***

TruePoint Responsibilities:

- ***Provide recommendations on testing strategy and best practices.***
- ***Lead the TA in up to [3] weeks of User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.***
- ***Resolution of issues as a result of User Acceptance Testing activities.***

TA Responsibilities:

- ***Make available the appropriate TA key users and content experts to participate in user acceptance testing as defined and managed by TA.***
- ***Develop the User Acceptance test scripts.***
- ***Utilize the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.***

Acceptance Criteria:

- ***Completion of UAT***

5.14 Documentation

5.14.1 Objective:
5.14.1.1 The objective of this task is to develop user and system documentation that will allow the TA to effectively utilize, operate and maintain the system.

5.14.2 Activities:
5.14.2.1 Vendor will develop user manual for system users, tailored to the TA's terminology and business processes.
5.14.2.2 Vendor will provide online user help that tie to the context of the specific area of the system (or function) that is in use.
5.14.2.3 Vendor will develop system administration/operations guide for the TA and state technical staff to operate and maintain the system. The includes, but not limited to: maintenance of user accounts and roles, configuring system parameters and business rules, security features, running of jobs, backup and recovery, building and running reports, setup of letter templates, etc.

5.14.3 Deliverables

5.14 DOCUMENTATION			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
5.14.3.1	Develop user manual for system users.	5.14.2.1	15
5.14.3.2	Provide online help functionality and content.	5.14.2.2	NA
5.14.3.3	Develop system administration/operations guide.	5.14.2.3	10

Documentation

The Accela Civic platform comes with detailed documentation for both Admins and end users. How to documents and training videos are made available to all Civic Platform clients through the Accela Community site.

Online help functionality in available on all pages of the Civic Platform user interface.

TruePoint also has time allotted in the budget to create basic how-to documentation specific to TA configuration and needs.

5.15 Training

5.15.1 Objective:
5.15.1.1 Develop and execute training for users, trainers and technical staff. Training will need to cover all key aspects of the system and presented in the context of how TA staff performs their business processes.

5.15.2 Activities:
5.15.2.1 The vendor and the TA will work together to develop a training plan that describes the objectives, content and duration for each topic/module, as well as the delivery approach.
5.15.2.2 The vendor, working with the TA will develop training materials and scenarios. The training must cover the core business functions performed within the TA.
5.15.2.3 The vendor will provide a training environment with a fully functional system that is populated with data necessary to cover the subject matter described in the training plan and materials.
5.15.2.4 The vendor will conduct training which is tailored to the TA's business processes. The TA is open to the train-the-trainer approach.

5.15.3 Deliverables

5.15 TRAINING			
DELIVERABLE NUMBER	DESCRIPTION OF DELIVERABLE	ACTIVITY	STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)
5.15.3.1	Develop training plan, and training materials	5.15.2.1 5.15.2.2	5
5.15.3.2	Provide a fully functional training environment with data.	5.15.2.3	5
5.15.3.3	Conduct user training.	5.15.2.4	5

Training

TruePoint will provide on-site training for TA staff that focuses on the administration, maintenance, and augmentation of its the Civic Platform configuration. Our aim at TruePoint is to educate TA resources on all aspects of the Civic Platform in an effort to ensure the TA is self-sufficient. This allows the TA to best react to changing requirements and ongoing maintenance, which can allow the TA to be reactive and significantly reduce system maintenance costs over time.

In terms of specific output, the following training classes are proposed:

- ***Civic Platform - Core Team Training – 1 days (SME's and Admins)***
- ***Civic Platform Admin Training – 3 days (System Admin)***
- ***Civic Platform Event Manager Scripting Usage (Basic) – 1 day***
- ***Accela Citizen Access Admin – 4 hours***
- ***Civic Platform Database Schema Fundamentals – 1 day (report writers)***
- ***Report Workshop and Ad-Hoc Report Training 1 day of workshop training***
- ***Train the Trainer and End User Training 10 days***

TruePoint Responsibilities:

- ***Coordinate with the TA to define training schedule and logistics.***
- ***Deliver training per the specific requirements listed above.***
-
- ***TA Responsibilities:***
- ***Select and prepare the power-users who will be participating in the training and subsequently training end users.***
- ***Arrange the time and qualified people for the training who are critical to the project success.***
- ***Provide suitable TA facilities to accommodate various training classes.***
- ***Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.***
- ***Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.***
- ***For the Report Workshop TA will need to provide a local oracle environment loaded with a current copy of the configured Data Base. Crystal Report licenses will also be required for each student.***

5.16 Transition to Production

5.16.1 Objective:
5.16.1.1 The objective of this task is to migrate to the new production system and ensure a smooth transition for the TA's operations.

5.16.2 Activities:
5.16.2.1 The vendor and the TA will work together to develop a transition plan that will insure system availability to all users and minimize the impact to the TA's operations.
5.16.2.2 The vendor performs a final conversion from the legacy systems just prior to go live. The final data conversion will be scheduled to minimize the impact to the TA's operations.
5.16.2.3 The vendor will provide immediate technical support at least the first four weeks of production to address any critical issues that may arise. Vendor will have staff available to monitor system and communicate with TA staff.

5.16.3 Deliverables

5.16 TRANSITION TO PRODUCTION			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
5.16.3.1	Provide technical support after go-live for at least four weeks.	5.16.2.3	N/A

Transition to Production and Production Support

Production date is defined as the official date in which the Civic Platform moves from the test environment to production for daily TA usage. This date will be agreed to by both TruePoint and the TA at project inception. It may be altered only by change order agreed to by both parties. In the weeks prior to moving to Production, TruePoint will assist in final data conversions, system validation, staff preparation assistance and training, and coordination of deployment.

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

- ***Deployment support prior to moving to Production***
- ***Setup of Integration points in Production***
- ***Final Conversion run during cutover***
- ***the Civic Platform used in Production environment for TA daily use***

<u>TruePoint Responsibilities</u>:

- ***Provide on-site and remote resources for up to 96 hours to support the move to Production and Post-Production Support effort***
- ***With assistance from the TA, lead the effort to transfer the system configuration and any required data from Support to Production***
- ***Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production***

<u>TA Responsibilities</u>:

- ***Provide technical and functional user support for pre and post Production Planning, execution, and monitoring***
- ***Provide timely and appropriate responses to TruePoint's request for information***
- ***Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production***
- ***Make available the appropriate TA key users and content experts to participate in user acceptance testing as defined and managed by TA***

5.17 Post Implementation Review

5.17.1 Objective:
5.17.1.1 The objective of this task is to evaluate the new system from a functional and performance perspective approximately eight to ten weeks after completion of the production rollout.

5.17.2 Activities:
5.17.2.1 The vendor and the TA will work together to develop a Post Implementation Review Plan (PIRP).
5.17.2.2 The TA, working closely with the vendor, will execute the PIPR to validate that the production system meets the TA's requirements and that the vendor is meeting their service level requirements.
5.17.2.3 The vendor will resolve reported deficiencies in a timely manner.

5.17.3 Deliverables

5.17 POST IMPLEMENTATION REVIEW			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
5.17.3.1	Vendor and the TA work together to develop a Post Implementation Review Plan	5.17.2.1	N/A
5.17.3.2	Resolution of system and vendor operational issues.	5.17.2.3	N/A

Post Implementation Review

TruePoint and the TA will work together to develop a Post Implementation Review Plan (PIRP) and agreed upon number of months after go-live. TruePoint and the TA, will work closely to execute the PIPR to validate that the production system meets the TA's requirements and that the vendor is meeting their service level requirements.

TruePoint will than provide a post implementation audit report to the TA that will be used to determine possible next steps in the implementation.

Tab VII– Section 4 – Company Background and References

Vendors must place their written response(s) in bold/italics immediately following the applicable RFP question, statement, and/or section. This section must also include the requested information in Section 6.2, Subcontractor Information, if applicable.

6. COMPANY BACKGROUND AND REFERENCES

Vendor Information (RFP 6.1)

6.1.1 Vendors must provide a company profile in the table format below.

Question	Response
Company name:	TruePoint Solutions, LLC
Ownership (sole proprietor, partnership, etc.):	Limited Liability Company, S-Corp
State of incorporation:	Nevada
Date of incorporation:	November 2004
# of years in business:	12
List of top officers:	Kent Johnson, Chief Executive Keith Hobday, VP, Services Robert Strouse, Chief Technical Officer Don Hunsinger, Director, Development
Location of company headquarters:	CA
Location(s) of the company offices:	Incline Village, NV Loomis, CA Tucson, AZ
Location(s) of the office that will provide the services described in this RFP:	Incline Village, NV Loomis, CA
Number of employees locally with the expertise to support the requirements identified in this RFP:	22
Number of employees nationally with the expertise to support the requirements in this RFP:	22
Location(s) from which employees will be assigned for this project:	Incline Village, NV Loomis, CA

6.1.2 Please be advised, pursuant to NRS 80.010, a corporation organized pursuant to the laws of another state must register with the State of Nevada, Secretary of State's Office as a foreign corporation before a contract can be executed between the State of Nevada and the awarded vendor, unless specifically exempted by NRS 80.015.

6.1.3 The selected vendor, prior to doing business in the State of Nevada, must be appropriately licensed by the State of Nevada, Secretary of State's Office pursuant to NRS76. Information regarding the Nevada Business License can be located at http://nvsos.gov.

Question	Response
Nevada Business License Number:	NV2011143792
Legal Entity Name:	TruePoint Solutions, LLC

Is “Legal Entity Name” the same name as vendor is doing business as?

Yes	X	No	

If “No”, provide explanation.

6.1.4 Vendors are cautioned that some services may contain licensing requirement(s). Vendors shall be proactive in verification of these requirements prior to proposal submittal. Proposals that do not contain the requisite licensure may be deemed non-responsive.

6.1.5 Has the vendor ever been engaged under contract by any State of Nevada agency?

Yes		No	X

If “Yes”, complete the following table for each State agency for whom the work was performed. Table can be duplicated for each contract being identified.

Question	Response
Name of State agency:	
State agency contact name:	
Dates when services were performed:	
Type of duties performed:	
Total dollar value of the contract:	

6.1.6 Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions?

Yes		No	X

If “Yes”, please explain when the employee is planning to render services, while on annual leave, compensatory time, or on their own time?

If you employ (a) any person who is a current employee of an agency of the State of Nevada, or (b) any person who has been an employee of an agency of the State of Nevada within the past two (2) years, and if such person will be performing or producing the services which you will be contracted to provide under this contract, you must disclose the identity of each such person in your response to this RFP, and specify the services that each person will be expected to perform.

6.1.7 Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor’s

ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP must also be disclosed.

Does any of the above apply to your company?

Yes		No	X

If "Yes", please provide the following information. Table can be duplicated for each issue being identified.

Question	Response	
Date of alleged contract failure or breach:		
Parties involved:		
Description of the contract failure, contract breach, litigation, or investigation, including the products or services involved:		
Amount in controversy:		
Resolution or current status of the dispute:		
If the matter has resulted in a court case:	Court	Case Number
Status of the litigation:		

6.1.8 Vendors must review the insurance requirements specified in Attachment E, Insurance Schedule for RFP 3422. Does your organization currently have or will your organization be able to provide the insurance requirements as specified in Attachment E.

Yes	X	No	

Upon contract award, the successful vendor must provide the Certificate of Insurance identifying the coverages as specified in Attachment E, Insurance Schedule for RFP 3422.

Company Background / History, etc. (RFP 6.1.9)

6.1.9 Company background/history and why vendor is qualified to provide the services described in this RFP. Limit response to no more than five (5) pages.

6.1.10 Length of time vendor has been providing services described in this RFP to the public and/or private sector. Please provide a brief description.
6.1.11 Financial information and documentation to be included in Part III, Confidential Financial Information of vendor's response in accordance with Section 12.5, Part III – Confidential Financial.
6.1.11.1 Dun and Bradstreet Number
6.1.11.2 Federal Tax Identification Number
6.1.11.3 The last two (2) years and current year interim:

A. Profit and Loss Statement
B. Balance Statement

TruePoint Solutions is a privately held company registered as an LLC and files taxes as an S corporation. The company was incorporated in 2004 and began operations in 2005. TruePoint has since enjoyed steady growth and achieved a strong financial position. Being a small, privately held company we have not undertaken the expense of having an 'audited' review of our financials. We do have 'reviewed' financials, which if selected we would be happy to share. Our CPA is Tom Balarsky. He can be reached at (916) 921-2600. Our Banking reference would be made through James Harcharik, Wells Fargo Bank, (916) 678-3712

Although it is not our policy to disclose specific financial information, we would be happy to provide specific financial information that includes financial references, growth rate, etc. under separate cover if we are selected as a finalist in your process.

Further, TruePoint Solutions is not, nor have we been in the last five years, involved in an ongoing bankruptcy as a debtor, or in a reorganization, liquidation, or dissolution proceeding. No trustee or receiver at TruePoint has been appointed over all or a substantial portion of the property of the proponent under federal bankruptcy law or any state insolvency.

Subcontractor Information (RFP 6.2)

6.2.1 Does this proposal include the use of subcontractors?

Yes	**X**	No	

If "Yes", vendor must:

6.2.1.1 Identify specific subcontractors and the specific requirements of this RFP for which each proposed subcontractor will perform services.

6.2.1.2 If any tasks are to be completed by subcontractor(s), vendors must:
A. Describe the relevant contractual arrangements;
B. Describe how the work of any subcontractor(s) will be supervised, channels of communication will be maintained and compliance with contract terms assured; and
C. Describe your previous experience with subcontractor(s).

6.2.1.3 Vendors must describe the methodology, processes and tools utilized for:
A. Selecting and qualifying appropriate subcontractors for the project;
B. Incorporating the subcontractor's development and testing processes into the vendor's methodologies;
C. Ensuring subcontractor compliance with the overall performance objectives for the project; and
D. Ensuring that subcontractor deliverables meet the quality objectives of the project.

6.2.1.4 Provide the same information for any proposed subcontractors as requested in Section 6.1, Vendor Information.

Company Background / History, etc. (RFP 6.1.9)

6.1.9 Company background/history and why vendor is qualified to provide the services described in this RFP. Limit response to no more than five (5) pages.

Question	Response
Company name:	Accela, Inc.
Ownership (sole proprietor, partnership, etc.):	Corporation
State of incorporation:	California
Date of incorporation:	1999
# of years in business:	38
List of top officers:	Ed Daihl, CEO Jim Burns, Chief Financial Officer Max Schnoedl, COO Jay Colfer, Chief Revenue Officer Troy Coggiola, Chief Product Officer Kris Trujillo, Sr. VP Products Srini Kakkera, Sr. VP Engineering Dani Chehak, Sr. VP People and Culture Angela Langston, Sr. VP Customer Care and Delivery Rob Cassetti, Sr. VP Sales and Marketing
Location of company headquarters:	Accela's headquarters are in San Ramon, California: 2633 Camino Ramon, Suite 500 San Ramon, CA 94583
Location(s) of the company offices:	Boston, MA Draper, UT McLean, VA New York, NY Portland, OR Ronkonkoma, NY San Francisco, CA Williamsville, NY Abu Dhabi, UAE Melbourne, AUS
Location(s) of the office that will provide the services described in this RFP:	San Ramon, CA

Question	Response
Number of employees locally with the expertise to support the requirements identified in this RFP:	157
Number of employees nationally with the expertise to support the requirements in this RFP:	480
Location(s) from which employees will be assigned for this project:	San Ramon, CA

6.1.2 Please be advised, pursuant to NRS 80.010, a corporation organized pursuant to the laws of another state must register with the State of Nevada, Secretary of State's Office as a foreign corporation before a contract can be executed between the State of Nevada and the awarded vendor, unless specifically exempted by NRS 80.015.

6.1.3 The selected vendor, prior to doing business in the State of Nevada, must be appropriately licensed by the State of Nevada, Secretary of State's Office pursuant to NRS76. Information regarding the Nevada Business License can be located at http://nvsos.gov.

Question	Response
Nevada Business License Number:	NV20141641164
Legal Entity Name:	Accela, Inc.

Is "Legal Entity Name" the same name as vendor is doing business as?

Yes	X	No	

If "No", provide explanation.

6.1.4 Vendors are cautioned that some services may contain licensing requirement(s). Vendors shall be proactive in verification of these requirements prior to proposal submittal. Proposals that do not contain the requisite licensure may be deemed non-responsive.

6.1.5 Has the vendor ever been engaged under contract by any State of Nevada agency?

Yes		No	X

If "Yes", complete the following table for each State agency for whom the work was performed. Table can be duplicated for each contract being identified.

Question	Response
Name of State agency:	
State agency contact name:	
Dates when services were performed:	
Type of duties performed:	
Total dollar value of the contract:	

6.1.6 Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions?

Yes		No	X

If "Yes", please explain when the employee is planning to render services, while on annual leave, compensatory time, or on their own time?

If you employ (a) any person who is a current employee of an agency of the State of Nevada, or (b) any person who has been an employee of an agency of the State of Nevada within the past two (2) years, and if such person will be performing or producing the services which you will be contracted to provide under this contract, you must disclose the identity of each such person in your response to this RFP, and specify the services that each person will be expected to perform.

6.1.7 Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor's ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP must also be disclosed.

Does any of the above apply to your company?

Yes		No	X

If "Yes", please provide the following information. Table can be duplicated for each issue being identified.

Question	Response	
Date of alleged contract failure or breach:		
Parties involved:		
Description of the contract failure, contract breach, litigation, or investigation, including the products or services involved:		
Amount in controversy:		
Resolution or current status of the dispute:		
If the matter has resulted in a court case:	Court	Case Number
Status of the litigation:		

6.1.8 Vendors must review the insurance requirements specified in Attachment E, Insurance Schedule for RFP 3422. Does your organization currently have or will your organization be able to provide the insurance requirements as specified in Attachment E.

Yes	X	No	

Accela provides solutions to government agencies of all sizes to automate and streamline civic process around land and asset management, licensing, legislative management, finance and administration, Environmental Health, and more.

Its tested, secure Civic Platform provides the foundation for creating the two-way flow of data that makes engagement possible and helps to build the bridge between agencies and citizens.

Accela was formed in 1979 and incorporated in California in 1999. It is a privately held corporation with headquarters in San Ramon, California. To meet growing global demand, it employs hundreds of technology professionals and maintain business offices in the United States, United Arab Emirates, and Australia. The Accela Civic Platform is implemented in virtually all 50 states, as well as in Canada, Puerto Rico, Australia, New Zealand, and the United Arab Emirates.

Throughout its history, Accela has served over 2,200 separate agencies and thousands of their departments with our Civic Platform:

- ***Atlanta, GA***
- ***California***
- ***City and State of New York***
- ***District of Columbia***
- ***Internal Revenue Service***
- ***Maryland***
- ***Massachusetts***
- ***Michigan***
- ***Mississippi***
- ***Montana***
- ***National Park Service***
- ***New Mexico***
- ***New York***
- ***North Carolina***
- ***Oakland, CA***
- ***San Francisco, CA***
- ***Seattle, WA***
- ***U.S. Fish and Wildlife***
- ***U.S. Forest Service***
- ***Virginia***
- ***Washington***
- ***Washington, D.C.***

In 1999, Accela launched the Accela Civic Platform — a web-enabled enterprise platform. For the last 18 years, the company's focus has been delivering advanced web-based solutions to back-office and field-based government worker.

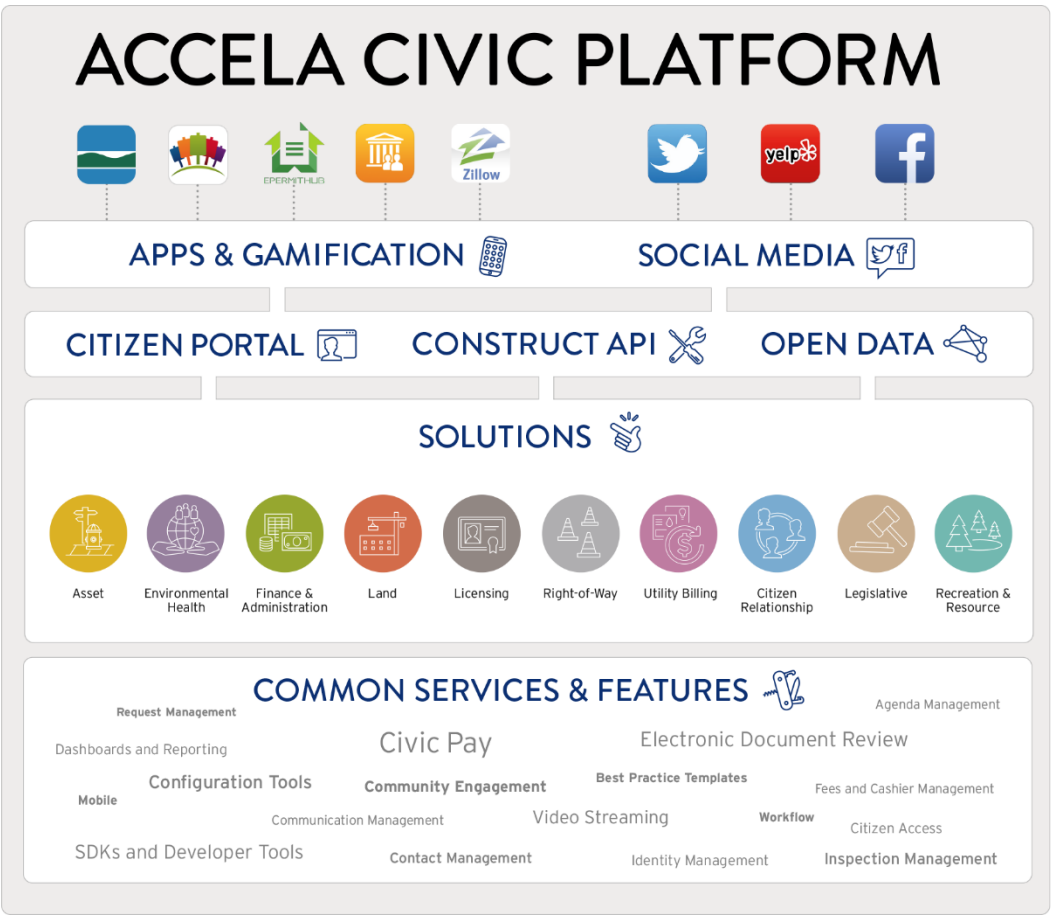


Exhibit 1: The Accela Civic Platform offers powerful, trusted solutions designed to fit government agencies of all sizes.

Accela has consistently been first to market with groundbreaking technology for government:

- ***First web-based enterprise platform***
- ***First cloud applications***
- ***First fully customizable web interface***
- ***First 508-compliant product***
- ***First internationalized product***
- ***First iPhone app***
- ***First tablet/PC app***
- ***First free Open Data Platform with CivicData***

See how Accela is advancing civic engagement at http://www.accela.com/company/blog

Throughout its history, Accela has implemented Civic Platform solutions for over 50 percent of the top 50 cities in the United States. Accela solutions worldwide power tens of thousands of services and millions of transactions for thousands of public agencies, allowing these agencies to connect with over 150 million citizens.

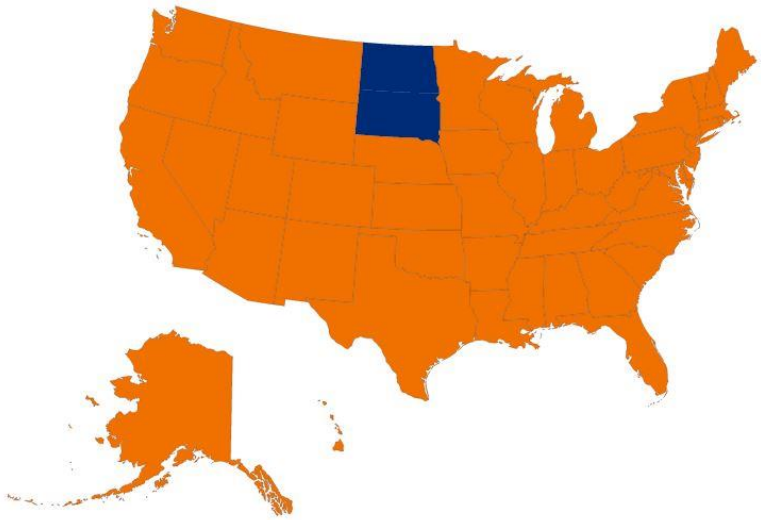


Exhibit 2: Accela's Civic Platform serves 48 of the 50 U.S. states

Accela focuses on delivering enterprise-class, scalable solutions for complex transactions, information collection, management, and reporting processes using the innovative Accela Civic Platform, a time-tested, proven COTS solution. Accela invests millions annually to improve the Civic Platform and keep it at the forefront of government software solutions.

6.1.10 Length of time vendor has been providing services described in this RFP to the public and/or private sector. Please provide a brief description. 6.1.11 Financial information and documentation to be included in Part III, Confidential Financial Information of vendor's response in accordance with Section 12.5, Part III – Confidential Financial. 6.1.11.1 Dun and Bradstreet Number 6.1.11.2 Federal Tax Identification Number 6.1.11.3 The last two (2) years and current year interim: A. Profit and Loss Statement B. Balance Statement

Confidential Statement
Accela, Inc. is a privately held corporate entity, organized and maintained pursuant to the laws of the State of California.

As a non-public corporation and in accordance with its longstanding corporate policies, Accela does not make public disclosures of its financial records or general fiscal condition. Accela is subject to the corporate governance established by its shareholders and board of directors and, as such, Accela maintains its financial condition and related statements confidential. Due to the sensitivity of this information, and the fact that Accela is not publicly traded, releasing such information to the public would open the company to undue scrutiny by its competitors. Aceela also does not issue annual reports.

Accela voluntarily submits to a complete annual audit of its financial statements. Each audit is performed by KPMG — one of the world's premier accounting companies, and they have issued an unqualified opinion on Accela's most recent annual audited financial statements.

If selected, Accela will provide financial statements as part of the contract and under strict non-disclosure agreement with the Taxicab Authority

Financial Viability
Accela is fortunate to have the investment backing of marquee investors like ABRY Partners and Bregal Sagemount. In March 2015, Accela announced it had closed a $143.5 million round of equity financing, led by ABRY Partners. This latest funding round brings the total capital raised by the company to more than $200 million in the past 15 months. This includes a $40 million growth equity investment led by Bregal Sagemount in October 2013 and $20 million in debt financing raised from Wells Fargo. Accela will deploy the new capital to round out its cloud offering, expand the capabilities of the Civic Platform and scale sales efforts for its worldwide installed base of government agency customers.

Accela holds a leading market position in a rapidly growing industry with exceptionally high barriers to entry that favors incumbents with deep sector knowledge and an established, referenceable client base. Accela has developed deep relationships with key customers and acquired additional technology solutions to rapidly expand its recurring revenue base. Hence, Accela has historically grown its revenue annually by 30+ percent. Moreover, its consistently high levels of contract backlog provide strong future revenue visibility. Its specialized solutions and strong customer service have been instrumental in its ability to achieve industry-leading revenue retention rates of 100+ percent in a market with exceptionally high barriers to entry.

Accela has a robust go-to-market strategy powered by a global network of direct sales representatives, channel partners, and other industry professionals targeting government agencies throughout North America, Australia and the South Pacific, and the Middle East. With a 50 percent market share in the 50 largest U.S. cities, Accela is poised to maintain a leadership position in the growing government technology market.

6.2.1.5 Business references as specified in Section 6.3, Business References must be provided for any proposed subcontractors.
6.2.1.6 Provide the same information for any proposed subcontractor staff as specified in Section 6.4, Vendor Staff Skills and Experience Required.

6.2.1.7 Staff resumes for any proposed subcontractors as specified in Section 6.5, Vendor Staff Resumes.

6.2.1.8 Vendor shall not allow any subcontractor to commence work until all insurance required of the subcontractor is provided to the vendor.

6.2.1.9 Vendor must notify the using agency of the intended use of any subcontractors not identified within their original proposal and provide the information originally requested in the RFP in Section 6.2, Subcontractor Information. The vendor must receive agency approval prior to subcontractor commencing work.

6.2.1.10 All subcontractor employees assigned to the project must be authorized to work in this country.

We have provided references in the following section.

Business References (RFP 6.3)

6.3.1 Vendors should provide a minimum of five (5) business references from similar projects performed for private, state and/or large local government clients within the last five (5) years.
6.3.2 Business references must show a proven ability of:
6.3.2.1 Developing, designing, implementing and/or transferring a large scale application with public and/or private sectors;
6.3.2.2 Implementing systems that support business functions similar to those performed by the TA;
6.3.2.3 Developing and executing a comprehensive application test plan;
6.3.2.4 Developing and implementing a comprehensive training plan;
6.3.2.5 Experience with comprehensive project management;
6.3.2.6 Experience with user training and organizational change management;
6.3.2.7 Experience with data migration;
6.3.2.8 Experience maintaining effective backup and recovery infrastructure;
6.3.2.9 Experience with managing subcontractors; and
6.3.2.10 Development and execution of a comprehensive project management plan.
6.3.3 Vendors must provide the following information for every business reference provided by the vendor and/or subcontractor:
The "Company Name" must be the name of the proposing vendor or the vendor's proposed subcontractor.

Reference #:	**1**		
Company Name:	City of Omaha		
Identify role company will have for this RFP project (Check appropriate role below):			
X	***VENDOR***	***X***	***SUBCONTRACTOR***
Project Name:	Accela Implementation		
Primary Contact Information			
Name:	Stu Craven Senior Applications Analyst Building and Development City of Omaha Planning Dept		
Street Address:	1819 Farnam St,		
City, State, Zip:	Omaha, NE 68183		
Phone, including area code:	402-444-5355		
Facsimile, including area code:			
Email address:	stuart.craven@ci.omaha.ne.us		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code:			
Facsimile, including area code:			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:	Accela Automation implementation for Code Enforcement, Business Licensing and Fire.		

	Implementation for Citizen Access minor building permits and Business Licensing Applications and Renewals.
Original Project/Contract Start Date:	Nov 2013
Original Project/Contract End Date:	Dec 2015
Original Project/Contract Value:	$450,000
Final Project/Contract Date:	
Was project/contract completed in time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget / cost proposal, and if not, why not?	Yes

Reference #:	2		
Company Name:	City of Oklahoma City		
Identify role company will have for this RFP project (Check appropriate role below):			
X	***VENDOR***	***X***	***SUBCONTRACTOR***
Project Name:			
Primary Contact Information			
Name:	Stan Reichert IT Project Manager Oklahoma City, OK City Hall,		
Street Address:	200 N Walker		
City, State, Zip:	Oklahoma City, OK 73102		
Phone, including area code:	405-297-3886		
Facsimile, including area code:			
Email address:	stan.reichert@okc.gov		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code:			
Facsimile, including area code:			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:	Accela Automation - Code Enforcement – implementation. Support for other Accela modules as needed		
Original Project/Contract Start Date:	March 2011		

Original Project/Contract End Date:	Jan 2014 – Still provide as needed support
Original Project/Contract Value:	300,000
Final Project/Contract Date:	
Was project/contract completed in time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget / cost proposal, and if not, why not?	Yes

Reference #:	3		
Company Name:	Sacramento County		
Identify role company will have for this RFP project (Check appropriate role below):			
X	***VENDOR***	***X***	***SUBCONTRACTOR***
Project Name:			
Primary Contact Information			
Name:		Kristin Echols – Chief of E-Government and Business Services	
Street Address:		9700 Goethe Road, Suite D	
City, State, Zip:		Sacramento, CA 95827	
Phone, including area code:		(916) 876.6414,	
Facsimile, including area code:			
Email address:		echolsk@saccounty.net	
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code:			
Facsimile, including area code:			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:		Accela Automation implementation and on-going support services for Building, Planning, Code Enforcement, Public Works, Department of Transportation, Water Resources and Business Licensing. Modules: Accela Automation 7.3 Accela Citizen Access Accela GIS Accela Mobile Office Selectron IVR Key Interfaces: FileNet, CSLB, SAP	
Original Project/Contract Start Date:		March 2006, 14 month project. On-going support	

Original Project/Contract End Date:	May 2007
Original Project/Contract Value:	$250-500K
Final Project/Contract Date:	On-going support
Was project/contract completed in time originally allotted, and if not, why not?	On time
Was project/contract completed within or under the original budget / cost proposal, and if not, why not?	On budget

Reference #:	4		
Company Name:	Washoe County, NV		
Identify role company will have for this RFP project (Check appropriate role below):			
X	***VENDOR***	***X***	***SUBCONTRACTOR***
Project Name:			
Primary Contact Information			
Name:	Lori Piccinini, PMP Project Coordinator, Technology Services Department		
Street Address:	1001 E. Ninth St.,		
City, State, Zip:	Reno, NV 89512		
Phone, including area code:	(775) 328-2376		
Facsimile, including area code:			
Email address:	lpiccinini@washoecounty.us,		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code:			
Facsimile, including area code:			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:	Implementation of Accela Building, Code Licensing and Health modules for Washoe County, Reno and Sparks. The "ONE" project. Business Licenses include Annual, Business, Gaming, Medical Marijuana, and Franchise Licenses The County uses the Civic Platform for all back offices functions, Citizen Access, Accela Mobile and Acela GIS		
Original Project/Contract Start Date:	June 2015		

Original Project/Contract End Date:	November 2016
Original Project/Contract Value:	450,000
Final Project/Contract Date:	On Going Support
Was project/contract completed in time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget / cost proposal, and if not, why not?	Yes

Reference #:	5		
Company Name:	Pasco County, FL		
Identify role company will have for this RFP project (Check appropriate role below):			
X	***VENDOR***	***X***	***SUBCONTRACTOR***
Project Name:			
Primary Contact Information			
Name:	Debra Jadick		
Street Address:	8731 Citizens Dr Ste 230		
City, State, Zip:	New Port Richey FL 34654		
Phone, including area code:	(727) 847-8009 x8411		
Facsimile, including area code:			
Email address:	djadick@pascocountyfl.net		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code:			
Facsimile, including area code:			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:	Implementation of Accela Building, Code and Licensing modules for the County. Business Licenses included County Local, and State Registered Licenses for over 50 License types. The County uses the Civic Platform for back offices functions, Citizen Access, Accela Mobile and Acela GIS		
Original Project/Contract Start Date:	9/01/20914		

Original Project/Contract End Date:	12/12/2016
Original Project/Contract Value:	550,000
Final Project/Contract Date:	
Was project/contract completed in time originally allotted, and if not, why not?	There was a 3-month delay as data conversion was finalized from the mainframe
Was project/contract completed within or under the original budget / cost proposal, and if not, why not?	Yes

Reference #:	6		
Company Name:	State of Montana Department of Labor & Industry		
Identify role company will have for this RFP project (Check appropriate role below):			
	VENDOR	***X***	***SUBCONTRACTOR***
Project Name:	State of Montana Building Codes One-Stop ePermit System		
Primary Contact Information			
Name:	David Cook		
Street Address:	301 South Park Avenue		
City, State, Zip:	Helena, MT 59620		
Phone, including area code:	(406) 439-1394		
Facsimile, including area code:	(406) 841-2050		
Email address:	dcook@mt.gov		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code:			
Facsimile, including area code:			
Email address:			
Project Information			
Brief description of the project/contract and description of services performed:	Two bureaus within the State of Montana's Department of Labor & Industry (DLI) Business Standards Division (BSD) – the Business & Occupational Licensing Bureau and the Health Care Licensing Bureau deployed Accela Automation. The bureaus deployed the Accela Automation web-based enterprise software to streamline licensing and inspections for healthcare and other professions across the state. The Accela Licensing & Case Management™ module of Accela Automation is a Business Express		

	enabler, which automates licensing and regulatory programs (including business, health professions, liquor, and occupational and professional licenses), based on an agency's unique regulations, requirements, and internal procedures. Customers are able to apply for and renew licenses online; while bureau staff has the tools to track and report on cases using state-of-the-art field technology and GIS mapping.
Original Project/Contract Start Date:	December 2009
Original Project/Contract End Date:	December 2010
Original Project/Contract Value:	$1,017,249.48
Final Project/Contract Date:	Actual Go Live: October 10
Was project/contract completed in time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget / cost proposal, and if not, why not?	Yes

Reference #:	7		
Company Name:	State of Michigan Department of Licensing and Regulatory Affairs		
Identify role company will have for this RFP project (Check appropriate role below):			
	VENDOR	***X***	***SUBCONTRACTOR***
Project Name:	State of Michigan LARA Construction Codes Software		
Primary Contact Information			
Name:	Shelly Edgerton		
Street Address:	2501 Woodlake Circle, Suite 116		
City, State, Zip:	Okemos, MI 48864		
Phone, including area code:	(517) 373-2792		
Facsimile, including area code:	(517) 333-4987		
Email address:	Edgertons1@michigan.gov		
Alternate Contact Information			
Name:			
Street Address:			
City, State, Zip:			
Phone, including area code:			
Facsimile, including area code:			
Email address:			
Project Information			

Brief description of the project/contract and description of services performed:	The Department of Licensing and Regulatory Affairs (LARA) has engaged Accela to modernize our licensing platform. The Bureau of Professional Licensing (BPL) oversees over 125 license types, we are planning on going live with Phase 1 of this project in mid-July. The first release will be for the nursing profession. The BPL Nursing project is still in flight, due to be deployed mid-July. The following Accela projects were previously completed and are in production: Bureau of Construction Codes (BCC) Permits Plus Replacement: This project involved the implementation of licensing for five professions (Electrical, Plumbing, Mechanical, Boiler and Elevator). The new implementation manages over 60k licenses and 24k annual permits. It included a data conversion for the legacy environment.
Original Project/Contract Start Date:	March 2013
Original Project/Contract End Date:	February 2016
Original Project/Contract Value:	$3,032,213
Final Project/Contract Date:	Actual Go Live: August 2015
Was project/contract completed in time originally allotted, and if not, why not?	Yes
Was project/contract completed within or under the original budget / cost proposal, and if not, why not?	Yes

Preliminary Project Plan (RFP 6.6)

6.6.1 Vendors must submit a preliminary project plan as part of the proposal, including, but not limited to:
6.6.1.1 Gantt charts that show all proposed project activities;
6.6.1.2 Planning methodologies;
6.6.1.3 Milestones;
6.6.1.4 Task conflicts and/or interdependencies;
6.6.1.5 Estimated time frame for each task identified in Section 5, Scope of Work; and
6.6.1.6 Overall estimated time frame from project start to completion for both Contractor and State activities, including strategies to avoid schedule slippage.
6.6.2 Vendors must provide a written plan addressing the roles and responsibilities and method of communication between the contractor and any subcontractor(s).
6.6.3 The preliminary project plan will be incorporated into the contract.
6.6.4 The first project deliverable is the finalized detailed project plan that must include fixed deliverable due dates for all subsequent project tasks as defined in Section 5, Scope of Work. The contract will be amended to include the State approved detailed project plan.
6.6.5 Vendors must identify all potential risks associated with the project, their proposed plan to mitigate the potential risks and include recommended strategies for managing those risks.
6.6.6 Vendors must provide information on the staff that will be located on-site in Carson City. If staff will be located at remote locations, vendors must include specific information on plans to accommodate the exchange of information and transfer of technical and procedural knowledge. The State encourages alternate methods of communication other than in person meetings, such as transmission of documents via email and teleconferencing, as appropriate.

TruePoint's Preliminary Project Plan can be found in Tab X of this proposal.

Project Management (RFP 6.7)

Vendors must describe the project management methodology and processes utilized for:
6.7.1 Project integration to ensure that the various elements of the project are properly coordinated;
6.7.2 Project scope to ensure that the project includes all the work required and only the work required to complete the project successfully;
6.7.3 Time management to ensure timely completion of the project. Include defining activities, estimating activity duration, developing and controlling the project schedule;
6.7.4 Management of contractor and/or subcontractor issues and resolution process;
6.7.5 Responding to and covering requested changes in the project time frames;
6.7.6 Responding to State generated issues;
6.7.7 Cost management to ensure that the project is completed within the approved budget. Include resource planning, cost estimating, cost budgeting and cost control;
6.7.8 Resource management to ensure the most effective use of people involved in the project including subcontractors;
6.7.9 Communications management to ensure effective information generation, documentation, storage, transmission and disposal of project information; and
6.7.10 Risk management to ensure that risks are identified, planned for, analyzed, communicated and acted upon effectively.

TruePoint's Project Manager will lead our project team on-site to ensure all tasks are progressing according to schedule. S/he is empowered to make decisions on behalf of TruePoint to best suit the City's needs. S/he will work closely with the remainder of our proposed project team, which

comprises industry professionals who are highly experienced in implementing our Civic Platform. We present details regarding the qualifications and experience of this exceptional team later in this section. Project management services are defined as the following activities:

- Development and Management of a Project Plan: Our project management team will develop a realistic and detailed project plan that will serve as the timeline for all activities comprising this implementation. The project plan is a Microsoft Project document, and will be updated periodically. All status updates will include the most recent update to the project plan, as required.
- Project Document Management: All documentation relating to this implementation will be uploaded and organized on a shared secure web portal on Accela's SharePoint intranet site. The City will have access to this document repository to view, track, and download any documentation associated with this project. Documents included within this site include status reports, project plans, change notices, etc.
- Issue Log Management and Escalation: During scheduled implementation meetings, it is incumbent upon our Project Manager to identify and bring forth discussion on any issues for immediate resolution. S/he will ensure the ongoing maintenance of an issue log, wherein issue severity, resolution, assignments, and timelines are documented throughout the implementation.
- Status Reporting: We will provide a bi-weekly status report that outlines completed tasks, upcoming tasks and resources needed, an updated version of the project plan, and a listing of any issues that may place the project at risk (e.g., issues that may delay the project or jeopardize one or more of the go-live dates).
- Change Management: Change management is handled at the operations management level, where our Project Manager is empowered to make decisions and approvals relative change. Often change orders can be affected through appropriate management of other tasks, without change in costs or significant changes to project timelines. All change orders will be documented and approved prior to execution.
- Resource Management: Effective management of all technical resources is imperative. With guidance from our executive team, our Project Manager is empowered to make decisions on how, when, and where resources are allocated to specific activities throughout the implementation.
- Executive Project Oversight and Quality Assurance: A regional services team leader will provide executive level oversight and, in partnership with City staff, review quality testing results.

TruePoint Staffing

The table below represents TruePoint's staffing to support the proposed Licensing System implementation. Our Project Manager assumes full responsibility for the coordination of this team and its interaction with key City resources assigned to the effort.

TruePoint Project Team Member	Responsibilities
Project Director	The Project Director oversees the project's progress/direction and works with the Project Manager to ensure efficiency, consistency and quality in delivery of Accela implementations. The Project Director will meet with Agency Executives monthly or upon request throughout the duration of the project.
Project Manager	TruePoint's Project Manager is responsible for the overall project management and works directly with the City throughout all aspects

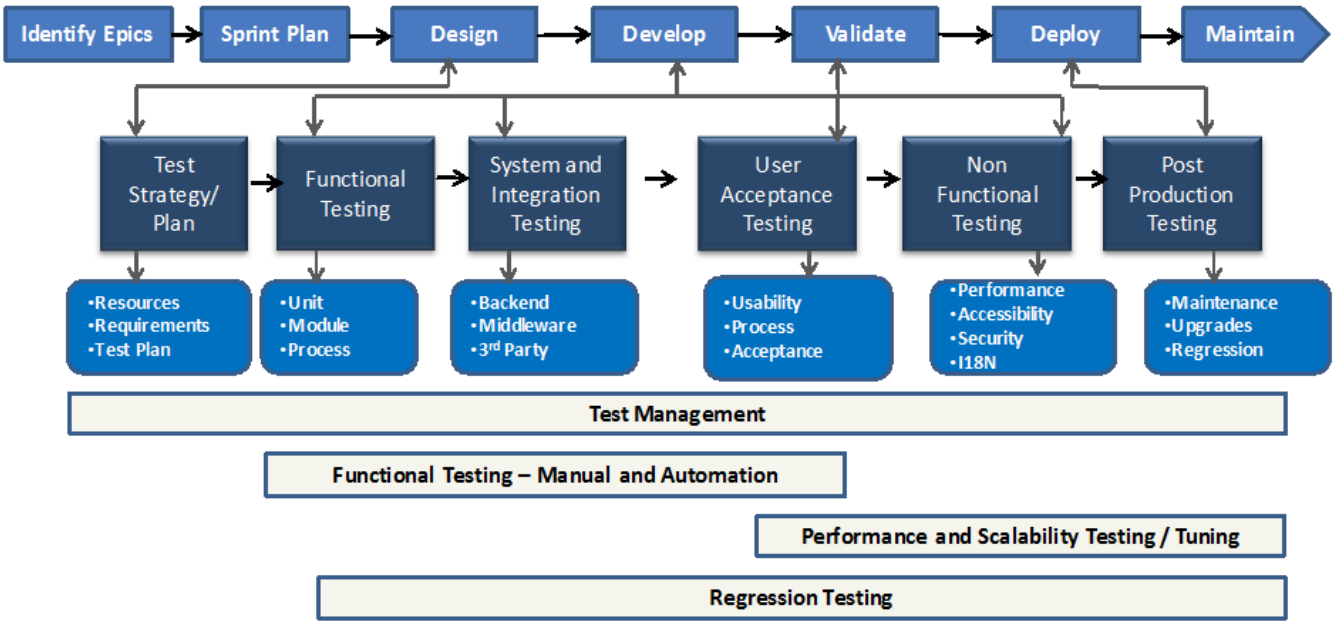
TruePoint Project Team Member	Responsibilities
	of Accela implementations—from the initial scoping, planning, staffing, to delivery. S/he undertakes the project administration tasks: ▪ Project plan management ▪ Change order management ▪ Issue log management and escalation ▪ Status reporting ▪ Project workspace management ▪ Resources management ▪ Work plan management ▪ Meeting management ▪ Project review with Project Director
Implementation Consultants	Implementation Consultant resources have significant Accela platform and business experience. Each Consultant is responsible for one or more of the following: ▪ Lead and conduct To-Be Analysis sessions ▪ System Configuration based on analysis documentation ▪ Data migration specification mapping ▪ Report configuration ▪ Administrator and/or End User training
Technical Consultants	The Technical Lead sets the direction and leads the effort in all areas that require technical involvement. Additionally, they work directly with the Consulting Lead and the Project Manager to ensure that overall direction and timeline requirements are being met. ▪ Application installation and setup (Accela Civic Platform, Accela GIS, Accela Mobile, and Citizen Access) ▪ Report definition and creation ▪ Data Conversion Mapping and Development ▪ Interface Requirements and Development ▪ Business Rules definition and programming
Database Conversion Lead	The Database Conversion Lead provides expertise in the area of data conversions and interfaces, including data mapping, configuration of conversion programs and interfaces, and database training.
Report Developer	The Report Developer will provide expertise in the area of reporting, including development of report specification documents and report development.

Quality Assurance (RFP 6.8)

Vendors must describe the quality assurance methodology and processes utilized to ensure that the project will satisfy State requirements as outlined in Section 5, Scope of Work of this RFP.

Accela's Civic Platform is a Commercial-off-the-Shelf product. As such, we have established our own quality assurance methodologies under which our products are developed.

The figure below illustrates the workflow of our Quality Assurance process.



The main objective of our QA approach is to test the effectiveness of each software release. The following techniques may be used depending on the release scope:

- Detail Test Plan
- Effective Test Cases
- Improve Test Coverage
- Implementing Check gates (Entry and Exit Criteria) of every milestone phase
- Defect Prevention approaches based on the bug history
- Bug tracking
- Testing Dashboard to monitor overall release quality
- Test Automation
- Preproduction Testing
- Update Test Repository
- Dedicated Test Environments
- Continuous Build Deployments & Validations

The Accela development team uses the following testing tools at various stages:

- Test Rail for Test Case Management
- Jira for requirement and defect tracking
- Test Studio for functional test automation
- Ready API for API testing/automation
- HP Load Runner for performance testing
- HP Web Inspect for security testing
- Github/Confluence for document repository
- Compliance Sheriff for accessibility

The table below outlines the QA criteria used prior to each software release.

Entry Criteria	Exit Criteria	Suspension Criteria	Resumption Criteria
▪ Code is available in test environment. ▪ Test plan is defined.	▪ For all stories listed in scope, test case development is completed. ▪ 100% test execution. ▪ Severity 1,2 and Priority 1,2 resolved. ▪ All Resolved bugs are verified.	Blockers exist like test environment issues, build issues, and critical bugs.	Blockers are resolved.

Metrics Management (RFP 6.9)

Vendors must describe the metrics management methodology and processes utilized to satisfy State requirements as outlined in Section 5, Scope of Work of this RFP. The methodology must include the metrics captured and how they are tracked and measured.

Metrics can be a powerful tool for informing and guiding decision making at all levels of an organization. TruePoint implementation methodology ensures that each phase of the project is accepted and tested before moving forward. During the design, the creation of prototypes ensures that all parties understand what the design will eventually look like.

During project initiation TruePoint will be introduced to the capabilities and requirements of the TA to capture and document the final success metrics. The Gap Analysis will list any challenges outside the current off the shelf solution that will be track and analysed. The configuration document will provide a blue print that will eventually be used to test the configured solution during UAT.

Throughout the implementation the Cloud Hosed Accela Civic Platform will be used for testing and stress tested in the TA environment.

Participation by TA staff, TruePoint staff and management form both organizations will make sure proper communication is in place for the duration of the project. Status reports will be updated bi-weekly and the project plan will be review constantly by the Project Managers form both organizations.

Design and Development Processes (RFP 6.10)

Vendors must describe the methodology, processes and tools utilized for:
6.10.1 Analyzing potential solutions, including identifying alternatives for evaluation in addition to those suggested by the State;
6.10.2 Developing a detailed operational concept of the interaction of the system, the user and the environment that satisfies the operational need;
6.10.3 Identifying the key design issues that must be resolved to support successful development of the system; and
6.10.4 Integrating the disciplines that are essential to system functional requirements definition.

To-Be Analysis is comprised of the activities required to define the Accela Civic Platform Solution Foundation for the Agency. The key output of the process are To-Be Analysis Document(s), which serves as a 'blueprint' for design and baseline configuration efforts throughout the implementation project and establishes the benchmarks for testing and acceptance at the conclusion of the project.

The To-Be Analysis Document(s) include detailed information on the Agency's business processes to be configured in the Accela Automation Solution Foundation, including the following topics:

- Process Overview
- Intake Process, user defined and required fields
- Required/Optional Review Tasks
- Issuance requirements
- Inspection Types, scheduling and checklists
- Workflow and processing requirements
- Fee's – types, processing and schedules
- Citizen Portal (Accela Citizen Access) specific to online submittal, inquiry, inspection scheduling and fee payments

The Analysis will include the record types defined in the RFP and SOW. The Project Team, consisting of representatives from both TruePoint and the TA, will conduct a formal review of the To-Be Analysis Documents for the purpose of approval and sign-off on the deliverable. TruePoint will build 1 prototype for each module. Prototyping is intended to demonstrate selected aspects of Accela Automation functionality to assist in understanding how it will operate for the Agency. Prototyping is not meant to be a complete end-to-end solution.

Configuration Management (RFP 6.11)

Vendors must describe the methodology, processes and tools utilized for:
6.11.1 Control of changes to requirements, design and code;
6.11.2 Control of interface changes;
6.11.3 Traceability of requirements, design and code;
6.11.4 Tools to help control versions and builds;
6.11.5 Parameters established for regression testing;
6.11.6 Baselines established for tools, change log and modules;

6.11.7 Documentation of the change request process including check in/out, review and regular testing;
6.11.8 Documentation of the change control board and change proposal process; and
6.11.9 Change log that tracks open/closed change requests.

The configuration document created during the Business Analysis and prototyping sessions will be the blueprint for the configuration. If changes to the agreed upon configuration are needed they will be agreed to by both TruePoint and the TA.

There will be a traceability matrix in place that verifies that all TA requirements are met by the final configuration document. Once the configuration is built a change log will be established to track all change requests. An issues log will also be maintained to track each issue, steps for resolution and how the resolution will be deployed to the Development environment. If need the change log will also note and regression testing that would be need for the change.

If issues/changes are not agreed to by the project team they will be escalated to management. If changes that are requested fall outside the scope of the project a change order will be developed and agreed to by both PM's

Peer Review Management (RFP 6.12)

Vendors must describe the methodology, processes and tools utilized for:
6.12.1 Peer reviews conducted for design, code and test cases;
6.12.2 Number of types of people normally involved in peer reviews;
6.12.3 Types of procedures and checklists utilized;
6.12.4 Types of statistics compiled on the type, severity and location of errors; and
6.12.5 How errors are tracked to closure.

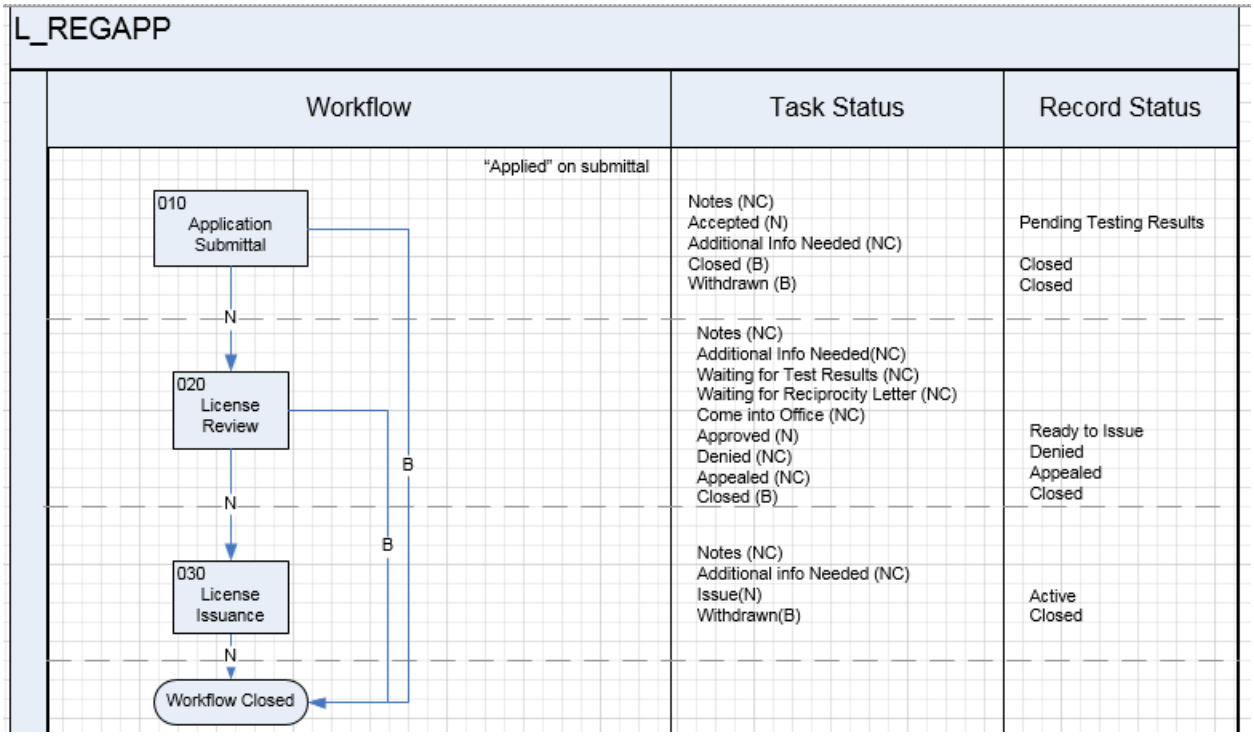
TruePoint implementation consults will always compare ideas with co-workers during an implementation. During the configuration, there will be internal review/brainstorming sessions on the best approach for configuration. This review is typically done with configuration experts, business analysts and trainers. Staff that is working on other projects also get involved with these review sessions to compare lessons learned from other implementations.

Any issues/errors identified during these sessions will be noted in the proper configuration/design documents or tracked in the project issues log for further review with the TA.

Project Software Tools (RFP 6.13)

6.13.1 Vendors must describe any software tools and equipment resources to be utilized during the course of the project including minimum hardware requirements and compatibility with existing computing resources as described in Section 3.4, Current Computing Environment.
*6.13.2 Costs and training associated with the project software tools identified must be included in **Attachment J, Project Costs**.*

TruePoint will gather information from the analysis sessions in a Configuration Document format that we have used on may successful projects. All aspects of the configuration will be document in our standard excel based configuration document. Workflows will be captured and documented in Visio.



Project test logs or issues logs will be developed in share point, smart sheet or other agreed upon shared environments.

Tab VIII – Attachment G – Proposed Staff Resumes

Vendor Staff Resumes (RFP 6.5)

A. Vendors must include all proposed staff resumes per Section 6.5, Vendor Staff Resumes in this section.

A resume must be completed for each proposed individual on the State format provided in Attachment I, Proposed Staff Resume, including identification of key personnel per Section 13.3.19, Key Personnel.

The vendor shall provide qualified personnel to perform the work necessary to accomplish the tasks defined in the Scope of Work. The State must approve all awarded vendor resources. The State reserves the right to require the removal of any member of the awarded vendor's staff from the project.

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	TruePoint Solutions		
☑ **Contractor**		☐ **Subcontractor**	
Name:	Keith Hobday	☑ **Key Personnel**	
Classification:	Project Executive	**# of Years in Classification:**	28
Brief Summary of Experience:	28 years leading professional services teams		
# of Years with Firm:	12		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	2010 to Present County of Sacramento Kristin Echols – Chief of E-Government and Business Services (916) 876.6414, echolsk@saccounty.net 9700 Goethe Road, Suite D Sacramento, CA 95827 Project Director Implementation and expansion of the Accela Civic Platform
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	2014 to Present Washoe County NV Lori Piccinini, PMP Project Coordinator | Washoe County| Technology Services Department lpiccinini@washoecounty.us, (775) 328-2376 Project Director Implementation and expansion of the Accela Civic Platform

EDUCATION

Institution Name:	California State University Sacramento
City:	Sacramento
State:	CA
Degree/Achievement:	BA – Computer Science
Certifications:	

HARDWARE/SOFTWARE SUMMARY (Be Specific)

Description		***# of Year's Experience***
Environments:		
Hardware:		

Software:	Accela Civic Platform	12
Tools:	Microsoft Project	20
Databases:	SQL, Oracle, MS Access	20

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	Erin Garcia, (510) 747-6816, Accela System Administrator, egarcia@ci.alameda.ca.us 2263 Santa Clara Ave, Rm. 190, Alameda, CA 94501 Peter Pirnejad, Director of Development Services 650-329-2349, Peter.Pirnejad@CityofPaloAlto.org 250 Hamilton Avenue, Palo Alto, CA 94301 Mike Telliano tellianom@reno.gov (757) 745-3546 1 E. First Street, Reno, NV 89501

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	TruePoint Solutions, LLC		
☑ **Contractor**		☐ **Subcontractor**	
Name:	David Brown		☑ **Key Personnel**
Classification:	Regional Services Manager	**# of Years in Classification:**	3
Brief Summary of Experience:	Manage multiple groups for implementation and application development in a government environment. Manage multiple projects in all aspects of execution including budgeting, implementation design, execution, training and post go-live support.		
# of Years with Firm:	5+		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	09/2016 to Present TruePoint Solutions City of Visalia, CA Jason Huckleberry 315 E. Acequia Ave., Visalia, CA 93291 559/713-4259 Jason.Huckleberry@visalia.city Project Manager Accela Civic Platform, SQL Server 2016, Crystal Reports 2016, SSIS, JavaScript
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	01/2016 – 07/2016 TruePoint Solutions Town of Queen Creek, AZ Michael Williams 22358 S. Ellsworth Rd. Queen Creek, AZ 85142 480/358-3009 michael.williams@queencreek.org Project Manager, Business Analysis Accela Civic Platform, SQL Server 2016, Crystal Reports 2016, SSIS, JavaScript

EDUCATION

Institution Name:	Pima College, University of Arizona
City:	Tucson
State:	AZ
Degree/Achievement:	Bachelor of Science, Computer Science
Certifications:	

HARDWARE/SOFTWARE SUMMARY (Be Specific)

	Description	***# of Year's Experience***
Environments:	MS Server 2005, 2012. VMWare	12, 6
Hardware:	F5 BigIP	4

Software:	MS Office Products	20
Tools:	Visual Studio, Visual Basic	13
Databases:	SQL Server 2005-2016	13

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	David Ellison Server Application Specialist Pinal County, AZ 520/866-6645 David.ellison@pinalcountyaz.gov Doyle Johnson ITD Relationship Mgr. Pima County, AZ 520/724-9090 Doyle.johnson@pima.gov David van Gilluwe IT Systems & Project Analyst 559/713-4119 David.vangilluwe@visalia.city

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	TruePoint Solutions		
☑ **Contractor**		☐ **Subcontractor**	
Name:	Tyler Suarez		☑ **Key Personnel**
Classification:	Business Analyst	**# of Years in Classification:**	3
Brief Summary of Experience:	Business Analysis, Accela Automation configuration and scripting for more than 10 different agencies.		
# of Years with Firm:	3		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	08/2016 to Present TruePoint Solutions City of Visalia, California Jason Huckleberry 315 E Acequia Ave, Visalia, CA 93291 559-713-4444 Jason.Huckleberry@visalia.city Analysis, Configuration, Scripting Permits Plus Conversion, over 60 new Record Types, heavy automation, Accela Citizen Access. Accela Automation (Civic Platform)
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	06/2016 to 12/2016 TruePoint Solutions City of Cleveland, Ohio Michael Banks 601 Lakeside Ave E, Cleveland, OH 44114 216-664-2958 Mbanks2@city.cleveland.oh.us Analysis, Configuration, Scripting Created 4 record types with heavy automation to manage Lead Safe Living Program. Interface used to import data from the Ohio Dept. of Health into Accela. Accela Automation (Civic Platform)

EDUCATION

Institution Name:	University of Arizona
City:	Tucson
State:	AZ
Degree/Achievement:	Bachelor of Science in Business Administration (Business Economics)
Certifications:	Accela Bronze Certified Implementation Professional W3 Schools Certified JavaScript Developer

HARDWARE/SOFTWARE SUMMARY (Be Specific)		
Description		***# of Year's Experience***
Environments:	Civic Platform, Accela Citizen Access	3+
Hardware:	NA	NA
Software:	Accela Automation	3+
Tools:	NA	NA
Databases:	SQL and Oracle	2

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	Amy Shackelford Special Projects Manager Town of Queen Creek, Development Services 480-358-3906 p 480-358-3001 f amy.shackelford@queencreek.org Tom Vanover Chief Building Official City of Cleveland, Building and Housing Dept. 216-420-8416 p 216-664-3590 f Tvanover@city.cleveland.oh.us Pamela Sing Sr Administrative Analyst City of Visalia, Community Development 559-713-4445 p 559-713-4813 f Pamela.Sing@visalia.city

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	TruePoint Solutions		
☑ **Contractor**		☐ **Subcontractor**	
Name:	Shauna Minor	☑ **Key Personnel**	
Classification:	Business Consultant	**# of Years in Classification:**	9
Brief Summary of Experience:	Manage multiple groups for implementation and application development in a government environment. Manage multiple projects in all aspects of execution including budgeting, implementation design, execution, training and post go-live support.		
# of Years with Firm:	9		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	09/2016 to Present TruePoint Solutions Paso Robles, CA Devon Vandergon 1000 Spring Street, Paso Robles, CA 93446 805/237-3850 dvandergon@prcity.com Business Analysis Accela Civic Platform, SQL Server 2016, Crystal Reports 2016, SSIS, JavaScript
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	01/2016 – 07/2016 TruePoint Solutions Town of Queen Creek, AZ Michael Williams 22358 S. Ellsworth Rd. Queen Creek, AZ 85142 480/358-3009 michael.williams@queencreek.org Business Analysis Accela Civic Platform, SQL Server 2016, Crystal Reports 2016, SSIS, JavaScript

EDUCATION

Institution Name:	Pima Community College
City:	Tucson
State:	Arizona
Degree/Achievement:	
Certifications:	Business Studies

HARDWARE/SOFTWARE SUMMARY (Be Specific)

Description		***# of Year's Experience***
Environments:		
Hardware:		

Software:	MS Office Products	9
Tools:	Visual Studio, Visual Basic	9
Databases:		

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	David Ellison Server Application Specialist Pinal County, AZ 520/866-6645 David.ellison@pinalcountyaz.gov Doyle Johnson ITD Relationship Mgr. Pima County, AZ 520/724-9090 Doyle.johnson@pima.gov Tom Vanover Deputy Commissioner of Building and Housing Department/Chief Building Official City of Cleveland, OH 216/420-8416 TVanover@city.cleveland.oh.us

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	TruePoint Solutions		
☑ **Contractor**		☐ **Subcontractor**	
Name:	Erin Griffith	☑ **Key Personnel**	
Classification:		**# of Years in Classification:**	
Brief Summary of Experience:	Over 17 years of report development experience using Crystal and SSRS writing queries in T-SQL and PL/SQL		
# of Years with Firm:	5.5		

RELEVANT PROFESSIONAL EXPERIENCE

Required Information: ***MMYYYY to Present:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	June 2015 – November 2016 Lori Piccinini, PMP Project Coordinator, Technology Services Department 1001 E. Ninth St., Reno, NV 89512 (775) 328-2376 lpiccinini@washoecounty.us, Report writer and reporting trainer Lead Report Developer
Required Information: ***MMYYYY to MMYYYY:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	7/1/2009 to 10/1/2011 Clear Capital Kenon Chen – (530) – 582-2270 10266 Truckee Airport Rd, Truckee, CA 96161 Lead Report Developer Employee developing reports Crystal Reports, PL/SQL

EDUCATION

Institution Name:	Portland State University
City:	Portland
State:	OR
Degree/Achievement:	B.S Liberal Studies
Certifications:	

HARDWARE/SOFTWARE SUMMARY (Be Specific)

	Description	***# of Year's Experience***
Environments:	Variety of Windows	20
Hardware:		
Software:	Crystal Reports, Visual Studio	
Tools:		

Databases:	Oracle, Microsoft SQL	8, 17
REFERENCES		
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	Lori Piccinini, PMP Project Coordinator, Technology Services Department 1001 E. Ninth St., Reno, NV 89512 (775) 328-2376 lpiccinini@washoecounty.us, Linda Allen Accela Program Manager Research and Analysis Division Tahoe Regional Planning Agency 128 Market Street, Stateline, NV 89449 (775) 589-5264 Gary Sterle TPM Research, Data and Analytics at Clear Capital in Truckee, CA Phone: (530) 582-2270 Email: gsterle@hotmail.com	

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	TruePoint Solutions		
☑ **Contractor**		☐ **Subcontractor**	
Name:	Suzanne Santo	☑ **Key Personnel**	
Classification:	Business Consultant	**# of Years in Classification:**	
Brief Summary of Experience:	4 years as Business Consultant with TruePoint Solutions; 10 years System Admin for Tidemark Advantage, Accela Civic Platform, Selectron IVR, Avolve's ProjectDox Electronic Document Review and ACF's QFlow Customer Management System for the City of El Paso, Texas.		
# of Years with Firm:			
RELEVANT PROFESSIONAL EXPERIENCE			

Required Information: ***01/2014 to 1/2015:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	 Accela Inc. City of Tacoma, WA Terry Forslund 747 Market St., Tacoma, WA 98402 (253) 502-2298 tforslund@ci.tacoma.wa.us Project Manager 12 Months – Fast Track Approach; Migrate existing Permitting System to Accela Civic Platform/ Two Legacy conversions - Tidemark and Sap/ Multiple integrations; Uniqueness of project – all customers use Citizen Access to make all record payments in the office or online; Front counter provides tethered iPads for customers Accela Civic Platform: Automation, Mobile Solution, Citizen Access (web)
Required Information: ***09/2014 to 06/2016:*** ***Vendor Name:*** ***Client Name:*** ***Client Contact Name:*** ***Client Address, Phone Number, Email:*** ***Role in Project:*** ***Details and Duration of Project:*** ***Software/hardware used in engagement:***	 Accela Inc. Pasco County BOCC David Boucher 8744 Government Drive, New Port Richey, FL 43654 (727) 847-8127 ext. 8299 dboucher@pascocountyfl.net Project Manager/Business Consultant 16 Months – TruePoint stepped in after Client removed original implementer at 75% project completeness. Required Complete overhaul of system concept to provide client with desired configuration and successful implementation. Project included 4 Legacy conversions and a Financial Interface Accela Civic Platform: Automation, Mobile Solution, and Citizen Access (web)

EDUCATION

Institution Name:	University of Phoenix
City:	El Paso
State:	Texas
Degree/Achievement:	Bachelor of Science in Business Administration
Certifications:	

HARDWARE/SOFTWARE SUMMARY (Be Specific)

Description		# of Year's Experience
Environments:		
Hardware:		
Software:	Accela Civic Platform, Tidemark Advantage	10 years
Tools:	Office Professional	
Databases:		

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	Ellen Smyth, PE Director of Environmental Services City of El Paso 7968 San Paulo Dr., El Paso, Texas 79907 (915) 621-6700 smythea@elpasotexas.gov
	R. Alan Shubert, PE Vice President, Operations and Technical Services El Paso Water Utilities 1154 Hawkins Blvd., El Paso Texas 79915 (915) 594-5644 AShubert@epwu.org
	Sonya M. Cahalan Code Field Operations Supervisor City of El Paso /Planning and Inspections Building Safety Division 801 Texas Ave, El Paso, Texas 79901 Cahalansm@elpasotexas.gov (915) 474-0781
	David Boucher Business Analyst/System Administrator Pasco Co BOCC 8744 Government Drive, New Port Richey, FL 43654 (727) 847-8127 ext. 8299 dboucher@pascocountyfl.net

PROPOSED STAFF RESUME

A resume must be completed for all proposed contractor staff and proposed subcontractor staff.

COMPANY NAME:	TruePoint Solutions		
☑ **Contractor**		☐ **Subcontractor**	
Name:	Joseph Cipriano	☑ **Key Personnel**	
Classification:	Technical Services	**# of Years in Classification:**	18 years

Brief Summary of Experience:	18 years of experience in the field of data analysis and conversions. Development of SQL code for process and migrating various data for migration from one application to another. Development of various reports used for permitting applications and data performance.
# of Years with Firm:	10 years

RELEVANT PROFESSIONAL EXPERIENCE

Required Information:	
MMYYYY to Present:	11/01/2015 to Present
Vendor Name:	Accela
Client Name:	City of Seattle, WA
Client Contact Name:	Jennifer Hager
Client Address, Phone Number, Email:	(206) 727-8601, Jennifer.hager@seattle.gov
Role in Project:	Project Manager
Details and Duration of Project:	Data conversion of Hansen application data into Accela Automation
Software/hardware used in engagement:	Oracle 11g to Microsoft SQL Server 2012
Required Information:	01/15/2016 to 10/24/2016
MMYYYY to MMYYYY:	Accela
Vendor Name:	City of Tacoma, WA
Client Name:	Terry Forslund
Client Contact Name:	747 Market St. Tacoma, WA 98402
Client Address, Phone Number, Email:	(253) 502-2298
Role in Project:	tforslun@ci.tacoma.wa.us
Details and Duration of Project:	Project Manager
Software/hardware used in engagement:	Data conversion of historical SAP data and Tidemark data into Accela Automation
	Oracle 11g

EDUCATION

Institution Name:	
City:	
State:	
Degree/Achievement:	
Certifications:	

HARDWARE/SOFTWARE SUMMARY (Be Specific)

	Description	***# of Year's Experience***
Environments:		
Hardware:		
Software:	Microsoft Office (Excel, Word, Access, OneNote), Crystal Reports 2008, Microsoft SQL Server Development, Microsoft Visual Studio, Oracle TrueBill Accela Infor Sharepoint	18 years

Tools:	SQL code Oracle Client PL SQL Developer (third party Oracle tool) Microsoft SQL Server Developer WebEx Zoom Java Script	18 years
Databases:	Oracle 7.3/8/8i/9i/10g/11g Microsoft SQL Server /2005/2008 R2/2012	18 years

REFERENCES	
Minimum of three (3) required, including name, title, organization, phone number, fax number and email address	Jim White Manager, Solution Architecture Accela, Inc. (404) 661-7792 jwhite@accela.com Patricia Palmer Project Manager Seattle Information Technology (206) 240-2595 patricia.palmer@seattle.gov

B.	This section should also include any subcontractor proposed staff resumes, if applicable.

Tab IX – Other Informational Material

TruePoint Accela Resource Chart

Accela

				Configuration						Reporting						
Consultant	Primary Role	Public Sector	Proj. Manager	Business Analysis	Accela Automation	Citizen Access	Mobile Office	Accela GIS	EDR	Ad-hoc	Crystal Reports	SSRS	Event Scripts	Interfaces	Conversion	End User Training
Keith Hobday	Implementation Consultant	28 yrs.	●				●		●	●			●	●		●
Paula Montoya	Implementation Consultant	20 yrs.	●	●	●	●	●	●	●	●			●	●	●	●
Terry Dunn	Implementation Consultant	20 yrs.	●	●	●	●	●			●			●			●
Cory Probasco	Implementation Consultant	23 yrs.	●	●	●	●	●	●	●	●			●			●
Melissa Dancy	Implementation Consultant	20 yrs	●	●	●	●	●			●			●			●
David Brown	Implementation Consultant	17 yrs.	●	●	●	●	●	●	●	●			●			●
Thomas Hornick	Technical Consultant	21 yrs.		●	●	●	●			●	●	●	●		●	
Joe Cipriano	Technical Consultant	22 yrs.								●	●	●	●	●	●	
Caleb Harshbarger	Technical Consultant	12 yrs.								●	●	●	●	●	●	
Richard Holland	Technical Consultant	12 yrs.								●	●	●		●	●	
Michele Niccore	Implementation Consultant	12 yrs.	●	●	●	●	●			●			●	●		●
Shauna Minor	Implementation Consultant	8 yrs.		●	●	●	●		●				●			●
Lo Saelee	Technical Consultant	7 yrs.								●	●	●				
McKenzie Helvick	Implementation Consultant	7 yrs.		●	●	●	●		●	●			●			●
Mike Cox	Technical Consultant	12 yrs.								●	●	●		●	●	
Jay Lum	Technical Consultant	29 yrs.								●	●	●				
Suzy Santo	Implementation Consultant	22 yrs.	●	●	●	●	●		●	●			●			●
Deborah Herman	Implementation Consultant	22 yrs.	●	●	●	●	●			●	●	●	●			●
Johnny Guest	Implementation Consultant	14 yrs.		●	●											
Erin Griffith	Technical Consultant	14 yrs.								●	●	●				
Maureen McAleer	Implementation Consultant	32 yrs.		●	●	●				●	●		●			●
Jackie Ramirez	Implementation Consultant	10 yrs.		●	●	●	●			●			●		●	●
Tyler Suarez	Implementation Consultant	4 yrs.		●	●	●				●	●	●		●		●
Ray Schug	Implementation Consultant	26 yrs.	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Erica Rodriguez	Implementation Consultant	14 yrs.		●	●	●				●	●	●		●		●
Greg Lamy	Implementation Consultant	1 yr		●	●	●				●	●	●		●		●
Michael Becker	Implementation Consultant	1 yr								●	●	●	●	●	●	

TruePoint Accela Clients

	Cities		Cities		Counties
●	Alameda, CA	●	Roseville, CA	●	Adams County, CO
	Atlanta, GA		Sacramento, CA		Arapahoe County, CO
	Asheville, NC		San Antonio, TX		Bexar County, TX
	Berkeley, CA	●	San Leandro, CA		Boulder County, CO
	Ceres, CA	●	Santa Monica, CA	●	Buncombe County, NC
●	Clearwater, FL		Spokane, WA	●	Clackamas County, OR
	Cleveland, OH		Seattle, WA		Carroll County, MD
	Concord, CA		Stockton, CA		Cobb County, GA
●	Corvallis, OR		Sunnyvale, CA		Contra Costa County, CA
●	El Paso, TX	●	Tacoma, WA		Guilford County, NC
	Fort Collins, CO	●	Tigard, OR	●	Gwinnett County, GA
	Fremont, CA		Virginia Beach, VA		Hillsborough County, FL
	Grand Rapids, MI		Visalia, CA		Jackson County, OR
	Grass Valley, CA		Walnut Creek, CA		King County, WA
	Hesperia, CA	●	Watertown, WI	●	Maricopa County, AZ
●	Indianapolis, IN	●	West Sacramento, CA	●	Marion County, IN
	Lincoln, NE		Westminster, CO	●	Monterey County, CA
	Martinez, CA		Yorba Linda, CA		Multnomah County, OR
●	Maryland Heights, MO		**Towns**	●	Napa County, CA
	McAllen, TX		Elk Grove Village, IL		Nevada County, CA
	Menlo Park Fire, CA		Los Gatos, CA		Olmstead County, MN
	Meridian, ID		Paradise, CA		Pasco County, FL
	Missoula, MT		Queen Creek, AZ	●	Placer County, CA
	Moreno Valley, CA		**Other Government Agencies**		Pinal County, AZ
	New York City, NY	●	DC – OSSE		Pima County, AZ
●	Oklahoma City, OK		CA, Dept. of Water Resources	●	Sacramento County, CA
	Omaha, NE		CA – OSHPD	●	San Diego County, CA
	Ontario, CA		State of Massachusetts	●	San Mateo County, CA
	Palo Alto, CA		State of Montana		Santa Barbara County, CA
●	Peoria, AZ		State of New York	●	Stanislaus County, CA
●	Pleasanton, CA		TRPA-Tahoe Regional Planning Auth.		Weld County, CO
	Pleasant Hill, CA		CA State Lands Commission		Washoe County, NV
●	Reno, NV		City & County of Denver		Yakima County, WA
	Rochester, MN		City & County of San Francisco		

Legend	
	TruePoint Accela Automation Projects
●	Accela Legacy Upgrade - Tidemark
●	Accela Legacy Upgrade - Permits Plus
●	Hansen Upgrades
●	Accela Legacy Upgrade - Kiva

Accela

Accela Licensing and Case Management

Keep licensing processes moving and empower customers

Accela Licensing and Case Management is a fully integrated solution for tracking and managing the regulatory processes associated with licensing, certifications, inspections, investigations, complaint handling and legal action – letting you focus on revenue-generating activities while delivering outstanding customer service.

Get started fast with the perfect product for your needs

Accela quickly delivers on the unique needs of local, regional and state governments with products built specifically for meeting the regulatory needs of:

- Alcoholic Beverage Control and Tobacco licensing
- Agricultural licensing and control
- Business licensing
- Environmental licensing and permits
- Healthcare Professional and Facility licensing
- Professional and Occupational licensing and credentialing
- And more

Enhance and automate internal processes for improved productivity

Accela Licensing and Case Management streamlines complex internal procedures with simultaneous online reviews, automated scheduling and notifications, and a robust workflow engine for tracking tasks from application to issuance.

Deliver a transparent and seamless experience for customers

A growing percentage of citizens prefer to conduct business online. Accela's multilingual, public-facing portal accepts applications, renewals, payments, complaints and FOIA requests 24/7, reducing long lines and phone calls while improving satisfaction. Customers can also sign in to manage existing licenses, track the status of an open item and communicate with your team.

"The Accela Civic Platform is robust and has a lot of functionality; it's so much better than anything we had before. You can tell where things are and how the application is progressing... it helps us work smarter."

Judy Steele, Deputy Director, Department of Excise and Licenses, City and County of Denver, CO (Pop. 663,682)

Licensing and Case Management

Benefits

- **Streamline internal processes** to improve productivity and support staff needs
- **Reduce phone calls and office visits** with a 24/7, multilingual online portal for applications, renewals, complaints and more
- **Easily keep customers in the loop** with automated web, email and text notifications
- **Improve ROI** with auditable financial management and online fee collection
- **Protect the safety of your citizens** and the quality of services available
- **Share best practices,** reports and configurations with your peers in Accela's online Success Community

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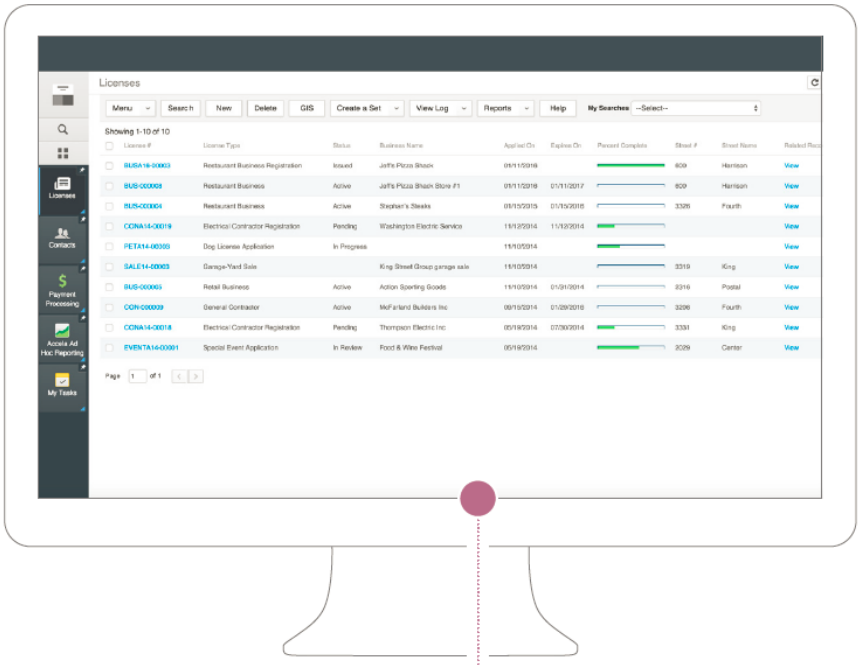
Accela

Meet unique licensing requirements

Accela Licensing and Case Management's flexible user interface supports your form design needs, while underlying business rule automation eliminates unnecessary steps. It's easy to make updates as laws and regulations change.

Report on your productivity and effectiveness

Instead of maintaining and duplicating data across various systems that don't communicate, all data lives in one place and can be used to gain fresh insight. Through configurable dashboards, built-in reports and advanced ad-hoc reporting functionality, you can monitor staff and department performance, better allocate resources and promote your successes to external stakeholders.



Features

- Custom reports, quick queries and easy batch generation of letters and forms
- Award-winning Esri integration* produces interactive maps and visualizations
- Scheduling of reviews, inspections, hearings and meetings
- Unlimited number of license types
- **Robust workflow engine allows for task tracking**
- Add-on services for public hearing management, 311 services, mobile apps and more
- Configurable toolset to meet your specific needs without costly customization

Accela was named Esri 2013 Partner of the Year for Private Web Application – Federal, State and Local Government

CIVIC PLATFORM

The Accela Civic Platform advantage

The Accela Civic Platform is a foundation of software solutions for governments of all sizes that powers more connected and informed communities, unifies departments and systems, and provides real-time, actionable data to maximize efficiencies from office to field.

Our cloud-based productivity and citizen engagement offerings range from land, finance, CRM and legislative management to right of way, asset management and more. Governments leverage services such as workflow, GIS, mobile tools, dashboards, online payments and web portals to further extend the capabilities of the platform.

Through platform-wide APIs, SDKs and open data, developers are empowered to create complementary solutions that meet the unique needs of any community.

WANT TO LEARN MORE?

To learn more about Accela Licensing and Case Management and other Accela offerings, visit us at www.accela.com/licensing-management or call (888) 722-2352.

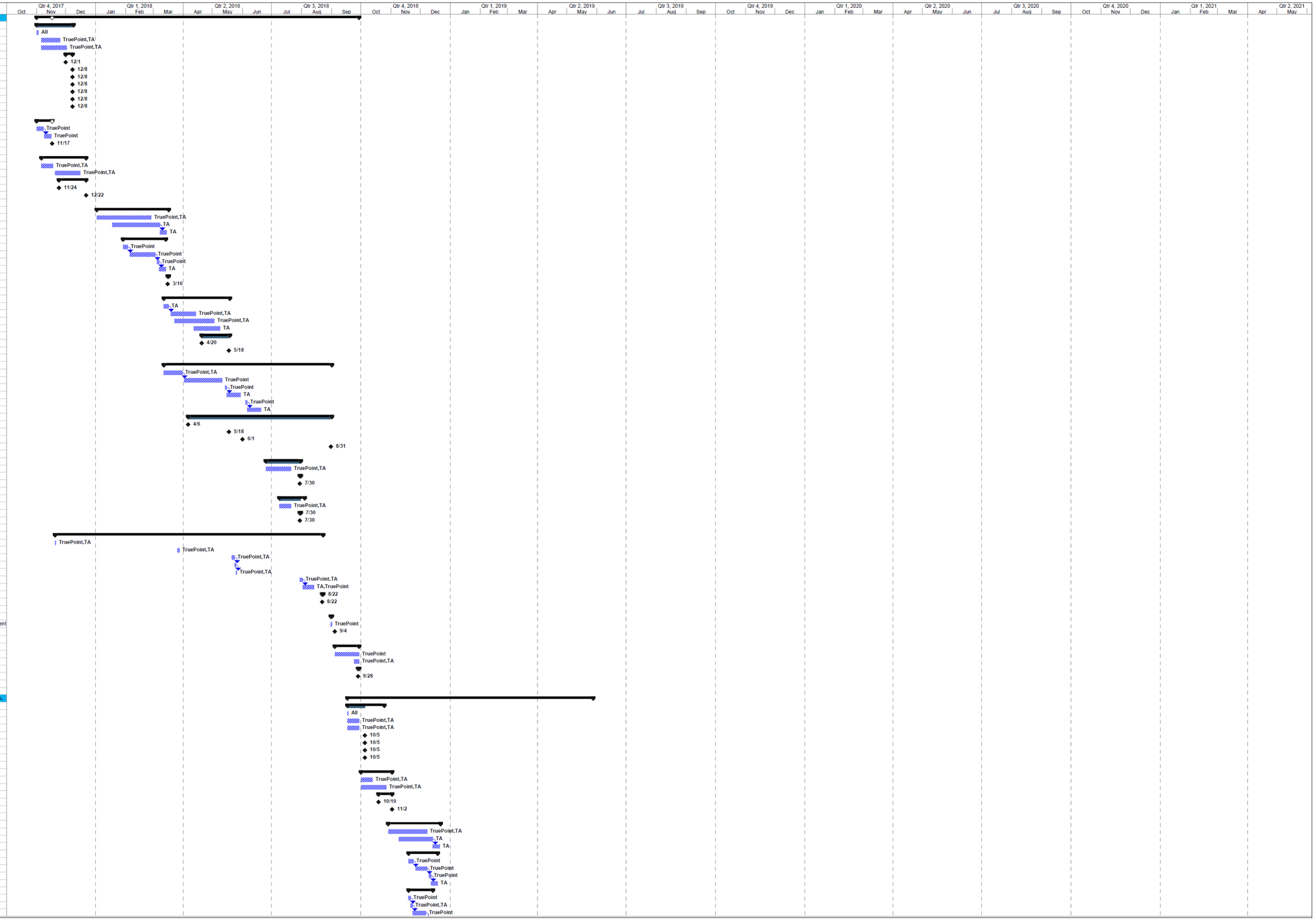
Accela's Exceptions to TA Requirements

Section	Exception	Proposed
10.a.	Accela would prefer to not have the client with an option to unilaterally terminate.	Delete: The State unilaterally may terminate this contract without cause by giving not less than 30 days' notice in the manner specified in Section 4, Notice.
10.b.	Accela understands the need for certain government terminations but we would prefer to limit the funds on which payment is based to still be paid even if those funds have just been limited or impaired.	Delete: "limited, or impaired." after the word "withdrawn" at the contract's end.
10. E.1	Accela believes that withholding payment can prevent unjust enrichment and damages later.	Delete: Neither party may withhold performance of winding up provisions solely based on nonpayment of fees or expenses accrued up to the time of termination."
11	Remedy for attorney's fees is too low	Replace hourly attorney fee to $500.
12	Accela believes a failure of public transportation is not an act of God.	Delete: Failure of public transportation
20	Accela shall only assign by written consent. The first party of the section is a bit redundant in Accela's opinion.	Delete: "To the extent that any assignment… to and shall be a breach of this contract."
21	This section does not account for Accela's transfer of information and ownership therein	Any data provided by the Parties to the other Party and any documents or materials provided by the Parties in the course of this Contract (Property) shall and remain the exclusive Property of the providing Party and all such Property shall be delivered into the providing Party possession by receiving Party upon completion, termination, or cancellation of this Contract.

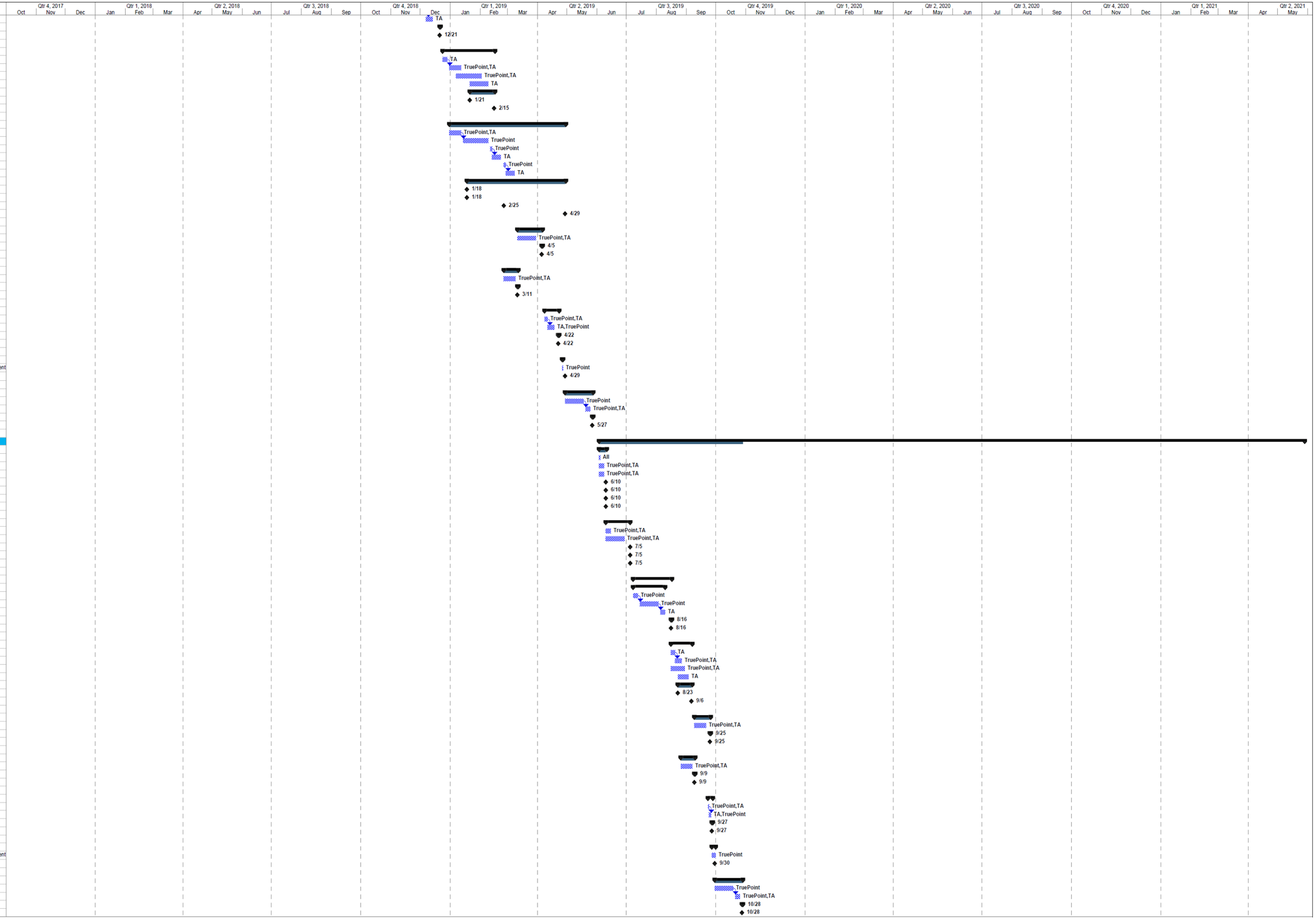
Tab X – Preliminary Project Plan

TruePoint's Project plan has been included below and would be gladly provided in MS Project format if the TA be interested.

ID	Task Name
1	**Phase 1 - Permits, Driver Protal, Medallions, Payments,**
2	**Initiation**
3	Project Kickoff Meeting
4	Create Project Plan
5	Create Project Documents
6	**5.8 Deliverables**
7	Project Plan
8	Communication Plan
9	Risk Management Plan
10	Quality Assurance Plan
11	Change Management Plan
12	Knowledge Transfer Plan
13	Project Management
14	
15	**Environment (Accela Hosted)**
16	AA Activate (SUPP 9.0)
17	Setup Configuration Base
18	**5.11.3.1 Deliverable - Environments**
19	
20	**Gap Analysis/ Business Analysis/ System Prototypes**
21	Gap Analysis
22	Business Analysis and System Prototypes
23	**5.9 Deliverables**
24	Gap Analysis Report
25	Configuration Document Review and Signoff
26	
27	**System Configuration**
28	Accela Automation Configuration and Scripting
29	Configuration Testing
30	Configuration Acceptance
31	**Accela Citizen Access - Driver Portal**
32	Define Requirements
33	Configure ACA and Establish Mercahat Account
34	Build ACA permit and Receipt
35	Test ACA
36	**5.10 Deliverables**
37	Configuration
38	
39	**Report Development**
40	Report List
41	Report Specifications
42	Develop Reports
43	Report Testing
44	**5.xx Deliverables**
45	Report Specifications
46	Reports
47	
48	**Conversion - Licensing and Madallion**
49	Conversion Mapping
50	Conversion Development
51	Conversion Run 1
52	Test Conversion 1
53	Conversion Run 2
54	Test Conversion 2
55	**5.12 Deliverables**
56	Develop comprehensive Data Migration Plan
57	Define Test Cases for Validating Converted Data
58	Migrate Data to Test Environment
59	Migrate Data to Production Environment
60	
61	**UAT**
62	UAT
63	**5.13 Deliverables**
64	UAT
65	
66	**Documentation**
67	Basic User Manual
68	**5.14 Deliverables**
69	User Manaual
70	
71	**Training**
72	Core Team Training
73	Data Base Schema and Report Training
74	Administrator Training
75	Citizen Access Training
76	ESME Training
77	Train the Trainer Training
78	End User Training
79	**5.15 Deliverables**
80	Traing Deliverables/Dates TBD
81	
82	**Production Readiness**
83	Move Database and Applications to Production Environment
84	**Go Live**
85	
86	**Post Production Support**
87	Go Live and Post Go-Live Support
88	Post Implementation Evaluation Review
89	**5.16 Deliverables**
90	Go Live Support
91	
92	
93	**Phase 2 - Vehicles, Enforcement, Dispatch, Court, Payments,**
94	**Initiation**
95	Project Kickoff Meeting
96	Create Project Plan
97	Create Project Documents
98	**5.8 Deliverables**
99	Project Plan
100	Communication Plan
101	Project Management
102	
103	**Gap Analysis/ Business Analysis/ System Prototypes**
104	Gap Analysis
105	Business Analysis and System Prototypes
106	**5.9 Deliverables**
107	Gap Analysis Report
108	Configuration Document Review and Signoff
109	
110	**System Configuration**
111	Accela Automation Configuration and Scripting
112	Configuration Testing
113	Configuration Acceptance
114	**Accela Citizen Access - Driver Portal**
115	Define Requirements
116	Configure ACA and Establish Mercahat Account
117	Build ACA permit and Receipt
118	Test ACA
119	**Accela Mobile**
120	Define Requirements
121	Establish APP Cloud site
122	Configure AMO or APPs



ID	Task Name
123	Test Mobile Solution
124	5.10 Deliverables
125	Configuration
126	
127	Report Development
128	Report List
129	Report Specifications
130	Develop Reports
131	Report Testing
132	5.xx Deliverables
133	Report Specifications
134	Reports
135	
136	Conversion - Vehicel, Events and Hearings
137	Conversion Mapping
138	Conversion Development
139	Conversion Run 1
140	Test Conversion 1
141	Conversion Run 2
142	Test Conversion 2
143	5.12 Deliverables
144	Develop comprehensive Data Migration Plan
145	Define Test Cases for Validating Converted Data
146	Migrate Data to Test Environment
147	Migrate Data to Production Environment
148	
149	UAT
150	UAT
151	5.13 Deliverables
152	UAT
153	
154	Documentation
155	Basic User Manual
156	5.14 Deliverables
157	User Manaual
158	
159	Training
160	Train the Trainer Training
161	End User Training
162	5.15 Deliverables
163	Traing Deliverables/Dates TBD
164	
165	Production Readiness
166	Move Database and Applications to Production Environment
167	Go Live
168	
169	Post Production Support
170	Go Live and Post Go-Live Support
171	Post Implementation Evaluation Review
172	5.16 Deliverables
173	Go Live Support
174	
175	Phase 3 - Citizen Portal for Taxi Companies
176	Initiation
177	Project Kickoff Meeting
178	Create Project Plan
179	Create Project Documents
180	5.8 Deliverables
181	Project Plan
182	Communication Plan
183	Project Management
184	
185	Gap Analysis/ Business Analysis/ System Prototypes
186	Gap Analysis
187	Business Analysis and System Prototypes
188	5.9 Deliverables
189	Gap Analysis Report
190	Configuration Document Review and Signoff
191	
192	System Configuration
193	Accela Citizen Access - Driver Portal
194	Define Requirements
195	Configure ACA
196	Test ACA
197	5.10 Deliverables
198	Configuration
199	
200	Report Development
201	Report List
202	Report Specifications
203	Develop Reports
204	Report Testing
205	5.xx Deliverables
206	Report Specifications
207	Reports
208	
209	UAT
210	UAT
211	5.13 Deliverables
212	UAT
213	
214	Documentation
215	Basic User Manual
216	5.14 Deliverables
217	User Manaual
218	
219	Training
220	Train the Trainer Training
221	End User Training
222	5.15 Deliverables
223	Traing Deliverables/Dates TBD
224	
225	Production Readiness
226	Move Database and Applications to Production Environment
227	Go Live
228	
229	Post Production Support
230	Go Live and Post Go-Live Support
231	Post Implementation Evaluation Review
232	5.16 Deliverables
233	Go Live Support



Tab X – Requirements Matrix

Our requirements matrix begins on the following page.

STATE OF NEVADA	
RFP # 3422	
Taxicab Authority Function	
BR01	Taxi Driver Permits
BR02	Certificate Holders
BR03	Medallions
BR04	Enforcement
BR05	Vehicle Inspections
BR06	Dispatch /Events
BR07	Web Portal
BR08	Reports Management
BR09	Interfaces
BR10	Technology
BR11	Conversion

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S	Standard Function (Out of the box); must indicate how requirement is satisfied
W	Current functionality and capable of being modified (configured) by system admin
M	Modification. Explain and include cost in Att J
F	Future; Explain; and when available
C	Custom Design and Development; source code addition; Explain and costs to Att J
N	Cannot meet. Explain why.
O	Other Software. Identify/Explain what other software and describe integration.
Q2	Customer Correspondence System. Various requirements cite use or access to the TA Customer Correspondence System. Is this a third party solution or is this assumed to be functionality within the vendor's solution?

Nevada Taxicab Authority Records Management System Modernization RFP # 3422

BR01 - Taxicab Driver Permit

The Taxicab Driver's Permit application is undergoing a revamp in process due to the introduction of new technology. To obtain a Taxicab Driver Permit, an applicant applies with a cab company and has successfully completed the initial Taxicab Driver's Test. The taxicab company then issues a referral and a Successful Initial Test notice. The applicant can then begin the Taxicab Driver's Permit application process. The long term vision expects to have Taxicab Company (Certificate Holders) web portal where all required forms for the Permit process will be submitted from this web portal to the TA. Currently these forms are paper based and will be scanned and attached to the applicants Taxicab Driver's Permit application. The driver will complete the Taxicab Driver's Permit application online initially using computers available at the Taxicab Authority along with providing the required documents that again will be attached to the applicants application. The long term version will have this process available through a Taxicab Driver's portal where completed applications will be submitted into a TA Permit workflow queue for TA staff review and processing. The TA will collect an initial Application fee of $51.25 and a computerized preliminary background check and fingerprint check is done. The TA will issue a 90-day temporary permit with a TA Permit # assigned, a photo of the applicant is taken, a training class is scheduled for a future date. If no issues with the fingerprint check or background check are identified upon return (approx. 2-4 weeks later), the driver will be contacted to returns to the TA and is issued a permanent permit after paying a

The TA Taxicab Driver Permits include a color photo of the driver, a unique TA Permit #, physical descriptors, expiration dates, additional information, and an electronic signature of the Administrator in blue, with fonts in black and red. **A new requirement will be the printing of a barcode (format to be determined) of the Taxicab Drivers Permit Number on the printed permit form for scanning by wireless hand-held devices and wired barcode scanners.** Auto-population of Taxicab driver

The TA requires background verification with various mandated Federal and State entities including fingerprint verification prior to issuance of the Driver's Permit.

Three different Taxicab Driver Permit categories will be available, but only one permit type - A permit may be issued to an **employee only driver**, a **lease only driver**, or an **employee and lease combination driver**.

The designation will be derived through a checkbox or drop down box selection on the TA RMS Permit module. Also required will be the Taxicab company name issuing a referral (employee driver or lease driver referral), and the lease contract expiration date. It is a requirement for the lease contract dates to be entered into the new TA RMS Permit module. Multiple leases can occur for different periods of time but they cannot overlap. It is a requirement that once a lease contract is entered into the TA RMS Module a change in permit status is triggered (permit status is separate from permit expiration). **The lease-only driver permitting procedure is identical to the**

It is a requirement that the TA RMS module data (Read Only) be available to TA Agency staff, via multiple platforms (wireless hand-held devices issued by the TA) for verification of the Taxicab driver information by TA Permit #. Data available includes permit status, and citation history and TA Permit photo (with search capabilities in other fields to arrive at the TA Permit #).

The TA renewal processes will be available TA front office during the Pilot period and will be available on the Taxicab Driver's portal. The Taxicab Driver Permit Renewal process does include a fingerprint check but does include a background check (SCOPE). The renewal fee is $10.00.

Currently, driver permits are valid for up to one year. If the permit is expired for 366 days, issuance of a new permit must follow the "Original Issuance" procedure,

Please see: NAC 706.525 and NAC 706.528 for further details.

The TA issues Taxicab Driver Permits (for employee drivers, lease drivers, and employee/lease drivers) to customers. The permits are printed, laminated (5" x 7"), and

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired	Vendor Response	Vendor Response Explanation
BR01.01	**TA Driver's Permit - Original Issuance (or reapplication when expired at least one day)**	The system shall allow for The Taxicab Driver Permit Application Form fields to become the main input screen for the Taxicab Driver's Permit process. In addition the system shall allow for e-mail address and communication preference (e-mail/text/phone).	M	**W**	System configuration using the native System Administration Tools for custom fields and application intake forms. The system also offers customers the ability to define their communication preference such as via email, SMS, phone and mail.
BR01.02	**Applicant**	The system will allow for Driver Permit type drop down selections such as, but not limited to: Driver, Lease Driver, Employee Lease Driver during the initial application information entry. This selection should a mandatory field where a selection must be made before a submission of the application is allowed.	M	**W**	System configuration using the native System Administration Tools to provide for the extensive configuration ability of the solution. Drop down selections may be configured for any needed fields with agency-defined values. Mandatory fields are likewise a configurable aspect and will be seen by the user by a red asterisk preceding the field. A customer can be prevented from preceding to the next section of the application and/or from submission of their application
BR01.03	**Applicant**	The system shall allow for the Taxicab Company (Certificate Holder) to submit the following uploaded forms or information to the TA for a New Taxicab Driver's Permit application for a new applicant. • Taxicab Driver Referral form • Proof of successful passing the taxicab drivers permit test. • Proof of attendance for the Driver's Awareness Program (DAP) Class. **This feature will be available when the Taxicab Company web portal is online but the system should allow this information to be recorded on the applicants Permit screen when entered at the TA office.**	M	**S**	Customers (Taxicab Companies or Drivers where applicable) accessing the online web portal (Citizen Access) have the ability to upload forms or other information that exists in an electronic format, including the documents shown in this requirement. TA has the ability to set requirement parameters in the system that will uphold both file size and file types restrictions. During the phase where submittals are accepted in the TA Office, these documents may be submitted as hard copies or adhere to the same business rules governing the future online web portal submission (electronic only).
BR01.04	**Applicant**	The system shall prompt the applicant for the uploading of the following TA Required Forms. The uploaded forms should include the Form Name as prompted with the Nevada Driver's License prefix as the file name to the applicant's application. Child Support Form, DOT Medical Form, Authorization for Release of Information, Fingerprint Background Waiver Form.	M	**W**	Business rules can be established that will govern when applicants must submit requested documentation, including those documents listed and can enforce applicable document naming conventions.

BR01.05	**Applicant**	The system shall allow the applicant to Submit the completed Taxicab Driver's Permit Application if all mandatory fields have entries. The application should be submitted into the Incoming Application Queue with a application status of 'submitted'	M	**S**	All aspects of this requirement are natively available out of the box with respect to submission once mandatory fields have been completed. Workflow configuration supports the receipt of the application into a given queue for subsequent assignment.
BR01.06	**TA**	The system shall allow for a workflow process to route submitted permit application from the Incoming Application Queue to an available signed-on TA Front Desk staff member.	M	**W**	This routing is fully determined by workflow configuration.
BR01.07	**TA**	The system shall allow for the routing of the Taxicab Drivers Permit Application to the Administrative Investigators work queue if a response of 'Yes' is selected on any of the Criminal Background Questions.	M	**W**	System configuration provides the ability for the "yes" answer to route the application to the work queue of Administrative Investigators.
BR01.08	**TA**	The system shall allow the TA Front Desk Staff member to Open and review the application for completeness of information and verification of documents submitted. Once the application is opened the application status should be updated to 'Review' with a timestamp. The TA Front Desk Staff will call the applicate to the appropriate window for verification of the application.	M	**W**	Reviews of the type described in this requirement can be configured where necessary at any point designated by TA business rules and/or within the application workflow. The default status of this task may be likewise configured as "Review" indicating when it was opened by the staff member. The system will next await any further inputs by the task owner.
BR01.09	**TA**	The system shall allow the TA Front Desk Staff member to insert notes into the application identifying any missing documentation that is required for the application to proceed. If the applicant cannot provide the missing documentation then the TA staff member will Save and close the application. The status of the application will be update to 'Info Needed' and the application will remain in the Incoming workflow queue until the applicate returns to the TA office with the required documentation.	M	**W**	Each Workflow task allows the task owner to insert notes regarding missing documentation or otherwise. If such information is missing, the task owner will select the status of "Info Needed" and await further submission(s) on the part of the applicant. Automatic electronic notification of missing information (via email, SMS, online, etc.) can be produced immediately following the "Info Needed" disposition. Reminders of approaching deadlines, if any, can likewise be configured as notifications to the applicant as a reminder of his/her duties.
BR01.10	**TA**	The system shall allow the TA Front Desk Staff member to proceed with the next step if all application information and documents are correct. The photo of the applicant will be taken and uploaded to the applicant screen and a TA# will be generated and included on the application screen.	M	**W**	These various steps may be configured in Workflow individually or may be collectively configured as a single task. The digital photo can be uploaded to the application. In the Accela Civic Platform, the application or tracking number is assigned upon the initial submission of the application. This acts as a tracking number. If TA desires a separate "license number" to be designated later on by business rules, configuration of the Business Rules Engine can trigger another record that ultimately becomes the license record. Both the initial application and the later one can be linked or associated to display all tasks and activities committed.
BR01.11	**TA**	The system shall allow for the payment of $51.25 once the Taxicab Drivers' Permit application has been reviewed and all required information and documentation is correct. The TA staff member will process the application payment and provide a receipt to the applicant or enter an e-mail address to e-mail the receipt to the applicant.	M	**W**	Payment can be assessed and made payable at any time(s) governed by business rules. The solution provides a PCI-DSS compliant system for all financial transactions. If payment is made by credit/debit cards, an interface to the designated TA payment engine must be developed in order to process the payment (at the front counter as well as later on the online web portal). Receipts can be configured with all applicable information and automatically issued upon successful receipt of payment. Alternatively, the receipt can exist in an electronic format and then attached to an email and sent to the applicant or downloaded at any time online.
BR01.12	**TA**	The system shall allow for the printing of a 90-day temporary permit which includes the applicants photo, physical description and a barcode (TA#). The permit form is a (5" x 7") and is laminated with the Nevada State Seal.	M	**W**	All aspects of this requirement are supported by the solution. The temporary permit exists as a report template that can include the applicant's photo, barcode and any needed text. TA printers will determine the supported output formats and other equipment as needed to laminate the license and apply the Nevada State Seal (if its to be a raised seal).

BR01.13	**TA**	The system shall allow the TA Staff member to capture the SCOPE background check control information on the applicant screen. No Criminal History records are recorded or captured. Once the TA staff member Saves and closes the application the application status should be changed to 'Background'.	M	**W**	The solution allows for an unlimited number of user-defined fields to be configured to capture information including that related to the background check. Upon entry of this information, the task owner (e.g. TA staff member) will select the status of his/her task to "Background" as indicated and the subsequent status of the application will be dispositioned as "Background" automatically as a result of the TA staff member updating their workflow task status.
BR01.14	**TA**	The system will allow the TA Front Desk Staff to notify the applicant via their communication preference when their fingerprint background check has been received and an appointment can be made to come into the TA Office to turn in the temporary permit and be issued a permanent permit. Once the contact information is entered into the application and the record is Saved the application status should be updated to 'Notified'.	M	**W**	All tasks associated with the fingerprint background check can be configured to support business rules, including an appointment for the noted exchange of permits. Configuration similarly supports the entry of Contact information (unlimited user defined fields) and upon that completion the TA staff member can select "Notified" to correspond to the task.
BR01.15	**TA**	The system shall allow for the printing of the Permanent Permit and a $10.00 Permit Reprint Fee payment and provide a receipt to the applicant or enter an e-mail address to e-mail the receipt to the applicant. Once the Permit is printed and the record Saved, the status of the application should be updated to 'Complete' and the application removed from the queue.	M	**W**	All listed activities pertaining to this requirement can be configured in the solution. Permit printing by the TA staff member can allow this task owner to select the "Complete" status. If business rules establish this task as the last task item, the system will end further consideration of the application, otherwise subsequent tasks can exist for completion by appropriate task owners.
BR01.16		The system shall provide an electronic signature process for applicant signature capture.	M	**S**	The solution allows for the capture of electronic signatures through the online portal. If the State is interested in capturing digital signatures (i.e. physically signing on a digital signature pad at the counter), this is also supported within the solution but would require the State to procure applicable hardware (such as a Topaz brand signature pad). Additional integration costs may apply to development an integration to a signature Pad.
BR01.17		The system shall allow for manual entry of NCJIS negative response.	M	**S**	Manual entry of data/disposition can occur when mandated or prescribed by business rules.
BR01.18		The system shall allow for manual date and time entry of when NCJIS response received.	M	**S**	Assuming that the receipt of the response has been configured, every Workflow task has an associated date and time when a task status has been selected. This information is permanently recorded in the solution under the System Audit Trail for accountability and transparency to your business operations. Additionally, "NCJIS Receipt Date" and "NCJIS Receipt Time" can be tracked as distinctly different data fields from the date/time when the TA user notes the disposition of the NCJIS workflow task.
BR01.19		The system shall allow for the complete tracking of all Taxicab Driver's Permit Applications through the system regardless of status.	M	**S**	The Workflow element of the Civic Platform provides every public agency with the flexibility to track any type of application (e.g. taxicab or otherwise) and follow the prescribed business rules for that application type (e.g. permits). This has been proven at hundreds of government permitting agencies nationwide operating under the Civic Platform.
BR01.20		The system shall allow for Supervisory staff to assign Taxicab Driver's Permit applications to TA Staff for review and processing.	M	**W**	The solution allows for authorized users to assign and/or re-assign workflow tasks as needed. All such assignments are subject to provisions of the System Audit Trail. Assignment may also take place at the overall application level as well as at the granular workflow task level.
BR01.21	**Lease**	The system shall prompt for addition required information when categorized as a Lease Driver such as cab company name and lease contract start and end dates	M	**W**	Business rules configuration provides for triggering the indicated prompt to secure additional information.
BR01.22		When designated as a **Lease Driver permit**, when all lease contracts are expired, the system shall auto-change the permit status to inactive	M	**W**	Regular evaluation of lease contract dates can be configured into a batch process job, with applicable status changes automatically applied when date milestones are reached/exceeded.
BR01.23		When a Lease Driver permit record is queried, all non-expired lease contracted cab companies will display	M	**W**	Applicable configuration can restrict the display of Lease Driver permit records based on the record status; meaning those with a status indicating expiration can be hidden from view for specific users/user groups in both the back-office and online solutions respectively.

BR01.24		The system shall provide for a "permit type" designation of "Driver" and "Lease", allowing for either or both to be selected. If "lease" is selected either alone or in conjunction with "Driver", additional data must be able to be captured such as lease contract information.	M	**W**	Each of the elements of this requirement is supported in the solution by system configuration of custom fields and application intake forms that can be dynamic based on permit type designation.
BR01.25		The system shall provide for a Permit status designation for each permit type ("Driver" and "Lease") such as, but not limited to: Active, Inactive, Expired, Terminated, Suspended, Revoked, Temporary, Incomplete, Expired with Fine, etc.	M	**W**	The listed statuses as well as others of TA's designation can be made available by configuration for ultimate selection as appropriate. These status groups can be unique based on the selected permit type.
BR01.26		The system shall display the latest customer/driver image to the technician.	M	**W**	Applicable business rules configuration can ensure that the latest customer/driver image is set as the "Display Image" for the record.
BR01.27		The system shall retrieve the latest outstanding fine information.	M	**S**	As a system operating in real-time all system data is displayed accordingly, including the latest outstanding fine information. The default sorting logic is to show the latest element first but this can be adjusted based on user and/or organizational preference.
BR01.28		The system shall allow for the inquiry, changes, to administrative court records.	M	**S**	Authorized users can be granted such access by the assignment of appropriate roles and privileges by your system administrators.
BR01.29		The system shall prompt for addition required information when noted as a Lease Driver	M	**W**	Applicable configuration is designed to support business rules, workflow and field presentation/requirement including those related for the prompting/addition of required information when needed for a Lease Driver.
BR01.30		The system shall accept customer electronic signatures.	M	**S**	The solution allows for the capture of electronic signatures through the online portal. If the State is interested in capturing digital signatures (i.e. physically signing on a digital signature pad at the counter), this is also supported within the solution but would require the State to procure applicable hardware (such as a Topaz brand signature pad).Additional integration costs may apply to development an integration to a signature Pad.
BR01.31		The system shall interface with the Real-time tracking system - future (SB430)	M	**O**	The solution has been interfaced to innumerable third party systems and has an Open API library to facilitate such integrations. No integration has been contemplated or priced under this proposal since it is a future acquisition.
BR01.32		The system shall allow for manual entry of NCJIS negative response	M	**W**	A NCJIS negative response can exist as a status to a given task or activity configured in Workflow and/or a configurable data attribute on the record.
BR01.33		The system shall allow for manual date and time entry of when NCJIS response received	M	**W**	Assuming that the receipt of the response has been configured, every Workflow task has an associated date and time when a task status has been selected. This information is permanently recorded in the solution under the System Audit Trail for accountability and transparency to your business operations. Additionally, "NCJIS Receipt Date" and "NCJIS Receipt Time" can be tracked as distinctly different data fields from the date/time when the TA user notes the disposition of the NCJIS workflow task.
BR01.34		The system shall allow for manual entry of SCOPE negative response	M	**W**	A SCOPE negative response can exist as a status to a given task or activity configured in Workflow and/or a configurable data attribute on the record.
BR01.35		The system shall allow for manual date and time entry of when SCOPE response received	M	**W**	Assuming that the receipt of the response has been configured, every Workflow task has an associated date and time when a task status has been selected. This information is permanently recorded in the solution under the System Audit Trail for accountability and transparency to your business operations. Additionally, SCOPE Receipt Date" and SCOPE Receipt Time" can be tracked as distinctly different data fields from the date/time when the TA user notes the disposition of the SCOPE workflow task.

BR01.36		The system shall allow for the application process to be routed to the Administrative Investigator, tracking the date & time of the route at the manual determination of the application processing staff with comments	M	**W**	This requirement would be achieved through Workflow configuration. In this case, routing can be pre-determined to the Admin Investigator based on a range of factors present on the record. The system will upon completion of the previous workflow task, automatically indicate the date and time this action was completed (e.g. task assigned). The system will then follow any pre-configured task routing logic defined by/for the TA. Alternatively, authorized users can reroute one or more tasks and the System Audit Trail will track who did what and when
BR01.37		The system shall allow for the Administrative Investigator to re-route the application process back to the application processing staff with comments	M	**W**	This requirement is supported by the roles and privileges assigned to the Admin Investigator.
BR01.38		When the permit status is changed from "temporary" to "Active", the system shall change the expiration to one year to the calendar day of the date of the initial temporary permit issue date.	M	**W**	This action can be automatically achieved through system configuration.
BR01.39		The system shall generate a confirmation sheet document for the content to be confirmed by the applicant/driver prior to final printing of the TA Permit.	M	**W**	All aspects of this requirement can be achieved through system configuration of the Accela Workflow.
BR01.40		The system shall allow for the capture of customer approval of confirmation sheet.	D	**W**	This can be achieved through the online (Citizen Access) portal, where the customer can indicate their review and acceptance of the Approval Confirmation Sheet.
BR01.41		The system shall generate a unique Driver Permit number (TA number).	D	**W**	The system can generate this unique number when called for by business rules. This requirement is supported by system configuration.
BR01.42		The system shall assign an initial expiration date of 90 days, allowing for manual adjustment when the status is "temporary".	M	**W**	The listed business rules are fully supported by the solution through system configuration.
BR01.43		The system shall generate the permit Issue dates.	M	**S**	Issuance of such dates are inherent to the functionality of the Civic Platform.
BR01.44		The system shall generate the required permit fees.	M	**S**	The system can access, calculate and make payable fees or other charges at any time governed by business rules.
BR01.45		The system shall accept customer payment.	M	**S**	Customer payment can be accepted by the system at the back office, via mail-in (if allowed) and through Citizen Access, the online web portal of the Civic Platform.
BR01.46	**TA Permit Renewal**	The system shall generate TA Permit renewal notices using designated communication preferences according to the applicant/driver profile.	M	**W**	Renewal notices (as reports or as emails) can be generated by the solution and according to applicant/driver designated communication preference. System configuration also supports generation of these notices X days prior to the expiration.
BR01.47		The system shall allow an inquiry on the TA Permit status through all available fields	M	**S**	End users and customers (where permitted) have the ability to query virtually every field in the solution even those that have been user-defined.
BR01.48		The system shall allow for the creation, inquiry, changes, and cancelation of renewal TA Permits.	M	**S**	All of the listed elements of this requirement can be performed and/or configured in the Civic Platform.
BR01.49		The system shall allow for scanning and uploading of submitted TA Permit application/renewal documentation.	M	**S**	The solution allows for the submission of any type of electronic documents as part of any application or renewal process. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR01.50		The system shall allow for scanning and uploading of submitted TA Permit physical certification documentation.	M	**S**	The solution allows for the submission of any type of electronic documents as part of any application or renewal process. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR01.51		The system shall allow for the creation, inquiry, changes, and deletions of Driver Permits	M	**S**	All of the listed elements of this requirement can be performed and/or configured in the Civic Platform.

BR01.52		The system shall allow for scanning and uploading of submitted Driver Permit renewal documentation.	M	**S**	The solution allows for the submission of any type of electronic documents as part of any application or renewal process. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR01.53		The system shall allow a renewed Driver Permit status such as, but not limited to: Active, Inactive, Expired, Terminated, Suspended, Revoked, Temporary, Incomplete, Expired with Fine, Inactive with Fine, etc.	M	**W**	Statuses such as those shown and others that TA may choose to employ can be configured within the solution.
BR01.54		The system shall capture Customer information such as, but not limited to: Customer legal name, middle initial, prefix (Mr., Mrs., etc.), suffix (Jr., III, etc.), physical residence address, mailing address, cell phone number, alternate phone number, e-mail address	M	**S**	All fields listed in this requirement are representative of out-of-the-box fields within the solution.
BR01.55		The system shall capture customer identity information such as, but not limited to: Date of birth, Race, Gender, Height, Weight, Hair Color, Eye Color, Sex, etc.	M	**W**	While the majority of these fields are included out-of-the-box, system configuration extends to the creation of any type of additional customer information that TA may require.
BR01.56		The system shall capture customer PII information such as, but not limited to: SSN Number, Driver's license number with State, Driver's license expiration date, Etc.	M	**W**	While such PII information can be captured in the system, to uphold the security certifications present in the system, all PII data should be masked and made available to only selected users.
BR01.57		The system shall capture medical requirements such as, but not limited to: Physical (medical card) date, Medical Card expiration etc.	M	**W**	While such PII information can be captured in the system, to uphold the security certifications present in the system, all PII data should be masked and made available to only selected users.
BR01.58		The system should verify the mailing address against the U.S. Postal Service or a like service in alignment with the U.S. Postal Service	M	**O**	While out-of-the-box configuration can be applied to enforce applicable/required data entry additional integration to address validation services such as those provided by Melissa Data and USPS have been produced for similar projects where required by the agency. This would be treated as an integration and produced accordingly for the TA implementation.
BR01.59		The system shall capture Driver Permit type such as, but not limited to: Driver, Lease Driver, etc.	D	**W**	Fields of the type indicated can be easily configured in the system by authorized users as part of the overall configuration of the record type (e.g. Driver Permit).
BR01.60		The system shall require specific customer documentation based on permit-type selected (driver permit or lease driver permit).	M	**S**	As a system designed to follow business rules, customer documentation of any type and relative to any type of record or application type can be required at any point(s) in their workflow processes.
BR01.61		The system shall allow for renewal through the web-portal, refer to web-portal tab.	M	**S**	Hundreds of Civic Platform clients are employing the online web portal to handle renewal processes 24/7/365.
BR01.62		The system shall provide the ability to waive renewal fees due to extenuating circumstances. A summary of fees waived shall be available for reporting purposes.		**S**	Fees can be waived manually or automatically (via configuration). All such waivers are subject to business rules and would be seen under provisions of the System Audit Trail. Any summary of fees would be developed using the Ad Hoc Report Writer or the supported and seamlessly integrated Reporting Engines (Crystal Reports, MS Reporting Services and Oracle Reports).
BR01.63	**Renewal Issuance by alternate services**	The system shall generate renewal notices.	M	**S**	Renewal notices like other outputs are generated from report templates that can be created by authorized users for use and reuse.
BR01.64		The system shall accept customer address information.	M	**S**	Address information may be entered by customers themselves via the web portal or by staff at the back office.
BR01.65		The Permit issuance shall issue the TA Permit as listed above.	M	**S**	Permit processes can strictly adhere to TA business rules.

BR01.66		The system shall accept electronic payments.	M	**S**	Accela provides for online and back-office payments by credit card using the State's preferred payment gateway/third-party merchant service provider or Accela's own CivicPay, the built-on merchant service provider solution of the Accela Civic Platform. If the State prefers that an interface to a third-party merchant service provider be implemented to provide real-time processing then this would be treated as an integration and the "O" response code would also need to be checked here. Costs related to this interface development for a currently non supported payment vendor would need to be determined
BR01.67					
	TA Permit - Duplicate Issuance	The system shall allow an inquiry on the TA Permit such as, but not limited to: TA Permit number, Customer name, AKA, etc.		**S**	End user inquiries can be made of any and all system data, including the attributes shown in this requirement.
BR01.71		The system shall allow for the creation, inquiry, changes, and cancelation of Duplicate TA Permits.	M	**S**	All of the listed elements of this requirement can be performed and/or configured in the Civic Platform by those with the appropriate role rights.
BR01.72		The system shall allow a Driver Permit status such as, but not limited to: Active, Inactive, Expired, Terminated, Suspended, Revoked, Temporary, Incomplete, Expired with Fine, Inactive with Fine, etc.	M	**W**	Statuses such as those shown and others that TA may choose to employ can be configured as options for Driver Permits.
BR01.73		The system shall allow for scanning and uploading of submitted TA Permit application documentation.	M	**S**	The solution allows for the submission of any type of electronic documents as part of any application or renewal process. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR01.74		The system shall allow for scanning and uploading of submitted TA Permit physical certification documentation.	M	**S**	The solution allows for the submission of any type of electronic documents as part of any application or renewal process. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR01.75		The system shall capture duplicate indicators such as, but not limited to: Stolen, Lost, etc.	M	**W**	These indicators may captured in a number of ways within the system such as via status, workflow task, condition or custom field.
BR01.76		The TA Permit issuance shall issue the TA Permit as listed above.	M	**S**	The permit processes within the solution will adhere to TA business rules of TA Permit issuance as outlined in the above requirements.
BR01.77	**CDL - Clearance Letter**	The system shall allow an inquiry on the CDL Card such as, but not limited to: CDL/ CDL number, Customer name, AKA, etc.	M	**S**	End user inquiries can be made of any and all system data, including the attributes shown in this requirement.
BR01.78		The system shall allow TA staff to generate a clearance transaction with the option to print a hard copy if requested.	M	**W**	TA clearance transactions can be configured to generate the clearance letter automatically in both digital and hard copy form. These letters may also be generated on-demand by those users with the appropriate role rights. The template for the clearance letter would be deployed as a report within the solution and can be created using Accela's built-in report authoring tool or via any of the supported 3rd party reporting tools such as Crystal Reports
BR01.79		The system shall allow TA staff to generate an electronic clearance notice to the email address on record, if requested.	M	**S**	The system supports the generation of a notice and directing to the email address on record.

BR01.80		The system shall allow for scanning and uploading of submitted clearance letter documentation.		**S**	The solution allows for the submission of any type of electronic documents as part of any application or renewal process. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR01.81		The system shall send clearance letter to the customer correspondence management system.	M	**S**	Accela's Communication Manager tool can be utilized to send notifications to internal or external stakeholders. These notifications can be automated when specific milestones are met. Notifications can be made via internal Alert, Actionable Task, Email, SMS, etc. and can reference the preferred communication method of the recipient where available. Reports/documents generated within Accela may also be included as .PDF attachments to outbound email correspondence where applicable. All outbound Email and SMS notifications generated from within Accela will also be cataloged within the "Communications" section of the related record. Users with the appropriate role rights can reference these emails in full including information on date/time sent, status, TO/CC/BCC/FROM email accounts and more. If the TA is utilizing Microsoft Exchange Server then Accela can also monitor the configured inboxes that the outbound Email notifications were sent and retrieve and catalog any reply emails within the same Communications section of the related record.
BR01.82		The system shall allow clearance letter to have specific verbiage to include, but not limited to: Name, address, clearance date, etc.	M	**S**	All reports allow the end user to specifically include the information desired and listed in this requirement.
BR01.83	**Suspension - Failure to Appear, failure to comply, delinquent fines**	The system shall retrieve customer records based on CDL/ID number received in batch file.	M	**W**	Batch file intake is capable of being configured into the solution. This can be done though manual batch file upload/export or through the creation of an integration to the batch file source.
BR01.84		The system shall capture court information such as, but not limited: Court citation number, Citation date, Event number, etc.	M	**W**	Whether through the use of out-of-the-box fields or the configuration of TA specific custom data fields, the proposed solution meets this requirement.
BR01.85		The system shall update the Suspension action on customer record.	M	**W**	This action can be manually or automatically supported (via system configuration).
BR01.86		The system shall generate notification to the current cab company(ies) for which the driver is employed and/or from which company the driver is leasing.	M	**S**	The noted functionality is supported in the solution and can be performed automatically or manually by authorized users.
BR01.87		The system shall send all notices to the customer correspondence management system.	M	**S**	Accela's Communication Manager tool can be utilized to send notifications to internal or external stakeholders. These notifications can be automated when specific milestones are met. Notifications can be made via internal Alert, Actionable Task, Email, SMS, etc. and can reference the prefered communication method of the recipeint where available. Reports/documents generated within Accela may also be included as .PDF attachements to outbound email correspondence where applicable.
BR01.88	**Suspension/Revocation - Judgments**	The system shall allow for changes to the status of the TA Permit based upon citation/court workflow process	M	**W**	Automated status changes to TA Permits based on related associations such cab company(ies), driver, etc. are easily configured within the solution. Furthermore, those with the appropriate role rights may also manually set the status for a TA Permit where applicable.
BR01.89		The system shall capture attorney information such as, but not limited to: Attorney company name, representing attorney, address, contact information, etc.	M	**W**	This would be handled using the solutions Contact Management system for both reference contacts (global contact library where the Attorney would be entered and referenced by any record they play a role on) or transaction contacts (contacts created one-off for a record but that do not need to be referenced globally by other records/users). This includes capturing all of the information listed within this requirement.

BR01.90		The system shall retrieve driver records based on TA Permit number.	M	**S**	The TA Permit number can be used to retrieve system records although other fields in the record can also be employed for search/retrieval purposes.
BR01.91		The system shall update the Suspension/Revocation action on customer record.	M	**S**	Automated status, locks, holds and notices may be applied to a customer record based on related associations such cab company(ies), driver, TA Permit, etc. are easily configured within the solution. Furthermore, those with the appropriate role rights may also manually apply suspension/revocation actions onto a customer record where applicable.
BR01.92		The system shall send all notices to the customer correspondence management system.	M	**S**	Accela's Communication Manager tool can be utilized to send notifications to internal or external stakeholders. These notifications can be automated when specific milestones are met. Notifications can be made via internal Alert, Actionable Task, Email, SMS, etc. and can reference the preferred communication method of the recipient where available. Reports/documents generated within Accela may also be included as .PDF attachments to outbound email correspondence where applicable. All outbound Email and SMS notifications generated from within Accela will also be cataloged within the "Communications" section of the related record. Users with the appropriate role rights can reference these emails in full including information on date/time sent, status, TO/CC/BCC/FROM email accounts and more. If the TA is utilizing Microsoft Exchange Server then Accela can also monitor the configured inboxes that the outbound Email notifications were sent and retrieve and catalog any reply emails within the same Communications section of the related record.
BR01.93		The system shall send all notices to the customer correspondence management system.	M	**S**	DUPLICATE TO BR01.92
BR01.94		The system shall allow an CDL Card status such as, but not limited to: Active, canceled, denied, hold, deceased, suspended, etc.	M	**W**	Statuses such as those shown and others that TA may choose to employ can be configured as options for CDL Cards.
BR01.95		The system shall process a workflow process at 6:01 pm each weekday that will generate a delinquent fine report (to include payment plans) and place the TA Permit status into "suspended" for those identified on this report. A fine is delinquent if it was due that day by 6:00 pm. These times must be able to be modified by the system administrator.	M	**W**	The entire process described can be configured in the Civic Platform utilizing the Batch Engine tool. A batch process would trigger the running of the report as well as changing the status of affected Permits. All aspects of this automation is completely definable and redefinable using the out-of-the-box administrative tool sets.
BR01.96		The system shall generate a notification to the cab company immediately thereafter, notifying of the suspension, providing the TA # and citation #.	M	**W**	For any records affected by the delinquent fine report, a notification can be created that would provide the listed details.
BR01.97		The system shall send notice to the customer correspondence management system notifying the TA Permit holder/driver of the suspension, providing the citation #.	M	**W**	Accela's Communication Manager tool can be utilized to send notifications to internal or external stakeholders. These notifications can be automated when specific milestones are met. Notifications can be made via internal Alert, Actionable Task, Email, SMS, etc. and can reference the preferred communication method of the recipient where available. Reports/documents generated within Accela may also be included as .PDF attachments to outbound email correspondence where applicable. All outbound Email and SMS notifications generated from within Accela will also be cataloged within the "Communications" section of the related record. Users with the appropriate role rights can reference these emails in full including information on date/time sent, status, TO/CC/BCC/FROM email accounts and more. If the TA is utilizing Microsoft Exchange Server then Accela can also monitor the configured inboxes that the outbound Email notifications were sent and retrieve and catalog any reply emails within the same Communications section of the related record.

BR01.98		The system shall allow for electronic and mobile payment to be applied to the delinquent fine, and if paid, shall allow immediate change in TA Permit status to "active", if no other existing cause for suspension or revocation exist.	M	**W**	Electronic payments are accepted in the back office and on the web portal. Mobile payments made in the field using Accela Mobile, the field component of the Civic Platform, does not accept field payments however. All payments successfully transacted shall appear in the system to authorized users. The transaction can also be configured to change the permit status to Active providing there are no other impinging business rules in effect.
BR01.99		The system shall retrieve customer records based on CDL/ID number received in batch file.	M	**S**	Customer records can be accessed by any authorized user by the CDL/ID number of other fields that exist in the record.
BR01.100		The system shall capture court information such as, but not limited: Court citation number, Citation date, Case number, etc.	M	**W**	Whether through the use of out-of-the-box fields or the configuration of TA specific custom data fields, the proposed solution meets this requirement.
BR01.101		The system shall capture court delinquent fines information such as, but not limited: Fine amount, date, etc.	M	**S**	All information related to fees, fines and transactions may be configured for capture and management in the solution.
BR01.102		The system shall allow for the creation, inquiry, changes, and cancelation of denial Requests.	M	**S**	Authorized users can be granted such access to perform the listed actions by the assignment of appropriate roles and privileges by your system administrators.
BR01.103		The system shall allow for scanning and uploading of submitted denial documentation.	M	**S**	The solution allows for the submission of any type of electronic documents as part of any application or renewal process. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR01.104		The systems shall place TA Permit denials into a Case management system.	M	**S**	The solution provides the capability for the capture and management of all cases and they can include configuration or processes related to permit denials.
BR01.105		The system shall allow review and approval of TA Permit denials in the case management system.	M	**S**	The noted functionality is native to any configured Workflow process in the Civic Platform.
BR01.106		The system shall retrieve customer records based on CDL/ID number received.	M	**S**	Customer records can be accessed by any authorized user by the CDL/ID number of other fields that exist in the record.
BR01.107		The system shall send all notices to the customer communications preference selected by the driver. This option should be available for update on the Taxicab Driver's Web Portal with an audit trail of all changes.	M	**S**	Customer preferences as to notification method (i.e. email, SMS, mail, etc.) is supported by the solution. Such information can be made available on the web portal to allow customers to update these preferences.
BR01.108	**Confidential Physicians Report**	The system shall allow for uploading of the Medical Examiner's Certificate to be appended to the TA Permit record	M	**S**	Any one or more documents that exist in an electronic format may be appended/associated with a given record.
BR01.109		The system shall require the manual entry of the "Medical Certification Expiration Date"	M	**W**	Business Rule configuration can support the required entry of the Medical Certification Expiration Date value.
BR01.110		The system shall process a workflow process at 12:01 am each day (7 days/week) that will generate medical Certification expiration report and provide the Taxicab Driver with notices through the customer communications preference of those certifications going to expire in 30 days and 15 days prior to expiration.	M	**W**	The entire process described can be configured in the Civic Platform utilizing the Batch Engine tool. A batch process would trigger the running of the report as well as changing the status of affected Certifications All aspects of this automation is completely definable and redefinable using the out-of-the-box administrative tool sets.
BR01.111		The system shall process a workflow process at 12:01 am each day (7 days/week) that will generate an expired Medical Certification report and place the TA Permit status into "suspended" for those identified on this report. Medical Certifications expire at 12:00 am of the day following the listed expiration date.	M	**W**	The entire process described can be configured in the Civic Platform utilizing the Batch Engine tool. A batch process would trigger the running of the report as well as changing the status of affected Permits. All aspects of this automation is completely definable and redefinable using the out-of-the-box administrative tool sets.

BR01.112		The system shall provide notices to the TA Permit holder and the Certificate Holder through the customer correspondence management system preferred communication method of the suspension.	M	**W**	Accela's Communication Manager tool can be utilized to send notifications to internal or external stakeholders. These notifications can be automated when specific milestones are met. Notifications can be made via internal Alert, Actionable Task, Email, SMS, etc. and can reference the preferred communication method of the recipient where available. Reports/documents generated within Accela may also be included as .PDF attachments to outbound email correspondence where applicable. All outbound Email and SMS notifications generated from within Accela will also be cataloged within the "Communications" section of the related record. Users with the appropriate role rights can reference these emails in full including information on date/time sent, status, TO/CC/BCC/FROM email accounts and more. If the TA is utilizing Microsoft Exchange Server then Accela can also monitor the configured inboxes that the outbound Email notifications were sent and retrieve and catalog any reply emails within the same Communications section of the related record.
BR01.113		The system shall generate a notification to the cab company immediately thereafter, notifying of the suspension, providing the TA # and expiration date.	M	**W**	Any subsequent notifications occurring as part of the above-noted batch engine functionality can also be supported through system configuration.
BR01.114		The system shall protect all medical information using HIPPA guidelines.	M	**S**	Under existing PCI and FISMA certification obligations, Accela is proudly organized to protect your data in transit and at rest. Accela is also party to several Business Associate (BA) agreements, establishing and enforcing our obligations under the HIPAA law. Employees are trained on HIPAA, including definitions and responsibilities when handling PII and PHI. If necessary, Accela may enter into a Business Association
BR01.115	**TA Permit Terminations**	When the system receives a "termination notice" through the web portal, the system shall compare the cab company name on the termination notice to the currently named cab company of the TA permit records. If the company name matches, the TA permit status shall change to "terminated". If the company name does not match, the "termination notice" shall post to the TA permit history and a notice shall be submitted to TA staff through further defined business rules.	M	**W**	This would be supported through the use of the online Amendment functionality; whereby authorized online users/companies could submit a "termination notice." Applicable business rules configuration will account for the confirmation of applicability of the termination based on the mentioned criteria and either change the TA permit status to "Terminated" or notify TA staff of an attempted termination.
BR01.116	**Photo Line up**	The system shall provide for a method to generate a photo line up based upon searchable fields such as but not limited to physical description in the permit file and print the selected photos in a photo line-up manner.	M	**W**	This would be achieved through the development of a "Lineup Report" that would allow TA staff to enter desired criteria (height, weight, eye color, etc.) and generate a resulting document that includes the default/primary photo for the drivers meeting said criteria.
BR01.117	**Incomplete Records**	The system shall allow for an expiration and archival of incomplete permit applications after a set time-frame, to be determined according to retention guidelines.	M	**W**	This would be achieved through a Batch Engine job that runs nightly and archives or purges any incomplete applications meeting TA defined criteria.
BR01.118		**The system allow for the testing of applicants if driver testing has not become the responsibility of the individual Certificate Holders.**	M	**O**	Accela does not include a "testing" module that would meet this requirement. However, we have integrated to 3rd party testing solutions to aid in the facilitation of tests/exams. The proposed solution does possess an exam request/scheduling tool as well as the ability to track and record all aspects of the exam including date, time, facilitator, score, etc.
	TA Permit Testing	The system shall provide for a testing module consisting of a bank of approximately 100 questions, randomly assigning fifteen to each driver test.		**O**	Accela does not include a "testing" module that would meet this requirement. However, we have integrated to 3rd party testing solutions to aid in the facilitation of tests/exams. The proposed solution does possess an exam request/scheduling tool as well as the ability to track and record all aspects of the exam including date, time, facilitator, score, etc.

BR01.119		The system shall allow for the addition of test questions and the retirement (not deletion) of test questions with associated dates of being active or inactive.	M	**O**	Accela does not include a "testing" module that would meet this requirement. However, we have integrated to 3rd party testing solutions to aid in the facilitation of tests/exams. The proposed solution does possess an exam request/scheduling tool as well as the ability to track and record all aspects of the exam including date, time, facilitator, score, etc.
BR01.120		The system shall require the test taker to log into the testing module using the driver's license number	M	**O**	Accela does not include a "testing" module that would meet this requirement. However, we have integrated to 3rd party testing solutions to aid in the facilitation of tests/exams. The proposed solution does possess an exam request/scheduling tool as well as the ability to track and record all aspects of the exam including date, time, facilitator, score, etc.
BR01.121		The testing module shall not be available on the web portal.	M	**O**	Accela does not include a "testing" module that would meet this requirement. However, we have integrated to 3rd party testing solutions to aid in the facilitation of tests/exams. The proposed solution does possess an exam request/scheduling tool as well as the ability to track and record all aspects of the exam including date, time, facilitator, score, etc.
BR01.122		The system shall allow for one login and submission of answers per calendar day per driver's license number.	M	**O**	Accela does not include a "testing" module that would meet this requirement. However, we have integrated to 3rd party testing solutions to aid in the facilitation of tests/exams. The proposed solution does possess an exam request/scheduling tool as well as the ability to track and record all aspects of the exam including date,
BR01.123		The system shall provide for all attempts to be tracked and maintained as historical records by driver's license number, and TA # when applicable (once TA # has been assigned)	M	**W**	The proposed solution does possess an exam request/scheduling tool as well as the ability to track and record all aspects of the exam including date, time, facilitator, score, etc.
BR01.124		The system shall provide for the capture of test scores on a pass/fail basis	M	**W**	The proposed solution does possess an exam request/scheduling tool as well as the ability to track and record all aspects of the exam including date, time, facilitator, score, etc. Scores can be tracked simply as Pass/Fail and/or via an actual numeric or character-based score (i.e. 98% or A+).
BR01.125		The system shall require an established passing score prior to issuance of a new taxicab permit.	M	**W**	Minimum score requirements can be defined and enforced as a part of the TA permit application and/or renewal process.
BR01.126		The system shall submit test results to append to the TA permit application record	M	**W**	Yes. Any documents comprising information on test results may be appended as electronic attachments to a given permit application record.
BR01.127		The system shall capture statistical information on test questions answered correctly, incorrectly, number of tests taken per applicant, allowing for date ranges, and other associated statistical parameters. This will be included in the TA monthly statistics report previously identified under the Reports module, as well as for ad-hoc reporting.	M	**W**	The information outlined in tis requirement can be captured, searched and reported on within the proposed solution.
BR01.128	**Payment Processing**	The system shall provide a payment 'Add to Cart' type feature for both invoicing, payment and receipt payment processing.	M	**S**	Both the web portal and back-office solutions of the Civic Platform provide for Shopping Cart functionality. Payments may be made by any configured method (i.e. credit card, debit card, eCheck, trust account, etc.). Receipts can be generated and issued upon any successful transaction. Invoices and reports can also be generated using the solution's supported reporting options.
BR01.129		The system shall allow for payment of all fees and fines to be by Credit/Debit card, and exact change cash. TA Front Desk staff do not use Bank Draws.	M	**S**	The back-office solution supports this requirement without the TA Front Desk staff requiring the use of Bank Drawers.
BR01.129		The system shall provide for an end-of-shift reconciliation and balanceing process with a audit report for accountability of all fees accepted.	M	**S**	These types of end of day/shift transactions are typically being accomplished using the proposed solution at our client sites. All credits and debits transacted in the system are automatically under the System Audit Trail for accountability and transparency to TA operations.
BR01.129	**Conunterfit Money**	The system shall allow for a counterfeit money tracking process.	M	**W**	Any process, including those related to counterfeit money, may be configured in the solution to prescribe strictly to TA business rules.

BR01.130		The system shall capture payment types allowed such as, but not limited to: Cash, Credit Card Type (Visa, MasterCard, Amex, Discover, etc.), Debit Cards (Pinless, pin based, signature), check, eChecks, Wire/EFT, JV, etc.	M	**W**	All of the listed payment methods/types can be configured and support within the proposed solution.
BR01.131		The system shall interface with the TA's existing credit card processor.	M	**O**	As part of Delivery Services, an interface to the existing credit card processor of TA will be developed. Please see Attachment J for estimated costs. Final cost may need to be determined during the Gap Analysis.
BR01.132	**Revenue Recovery**	The system shall allow for a Revenue Recovery process for fines or fees not paid).	M	**W**	Business rules governing the Revenue Recovery process may be system configured.
BR01.133	**Fine Payment Plans**	The system shall allow payment plans to be created for Taxicab Drivers Citation payments based on current Business Rules.	M	**W**	Payment plans may be configured in the solution according to applicable TA business rules.
BR01.134	**Bonds**	The system shall provide a method to capture bonds received, link the bond receipt to the associated records, and provide an ability to keep the bond or return it, based upon	M	**S**	The solution has applicable fields and functionality for tracking bonds as they relate to associated records.

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR02 - Certificate Holders					
The Taxicab Authority issues Certificates of Public Convenience and Necessity to taxicab companies meeting application and background requirements to provide taxicab service in Clark County, NV					
There are currently sixteen (16) authorized taxicab companies (Certificate Holders) under nine (9) ownership groups in Clark County, NV, regulated by the Taxicab Authority.					
Certificated taxicab companies are required to maintain certain financial standards, county business license, and Nevada Secretary of State business licenses, each of which must be auditable.					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired**	**Vendor Response**	**Vendor Response Explanation**
BR02.01	**Certificate Holder**	The system shall allow for a table by certificate holder (taxicab company)	**M**	**W**	Certificate Holders, such as Taxicab Companies would be maintained within a reference library where they can be searched/selected in relation to TA Permits, Drivers, etc.
BR02.02		The system shall allow for the creation, inquiry, and changes of certificate holders and status	**M**	**S**	The Civic Platform natively provides each of the listed elements cited in this requirement.
BR02.03		The system shall allow for the uploading of supporting documentation	**M**	**S**	This requirement is natively available in the solution.
BR02.04		The system shall allow for the creation of a master list by certificate holder as a table for vehicles, medallions, permits, events, records, etc.	**M**	**W**	This requirement can be satisfied a number of ways including saved searches and/or the creation of a report template that would include the data described in this requirement.
BR02.05		The system shall allow for a status of the certificate, i.e., application only , pending background, pending Board approval, denied, appealed, revoked, suspended, active, inactive, transfer pending, etc.	**M**	**W**	Status groups can be configured in the system and applied appropriately to Certificates both automatically (based on State-defined business rules) or manually by those with the appropriate role rights.
BR02.06		The system shall allow creation, inquiry, and changes of SOS Common Business data retrieved by TA staff	**M**	**S**	SOS data provided to TA and employed in the solution can be captured, inquired upon and changed accordingly by authorized users.
BR02.07		The system shall allow creation, inquiry, and changes of Clark County business license data retrieved by TA staff	**M**	**S**	License data provided to TA and employed in the solution can be captured, inquired upon and changed accordingly by authorized users.
BR02.08		The system shall capture business corporate information such as, but not limited to: Legal business name, contact information, etc., DBA business name, business structure types, mailing and physical address, business phone and fax numbers, email address, FEIN number, corporation status, filing effective date, Nevada Secretary of State business license number, etc.	**M**	**W**	Configuration of the system using its System Administration tools provides staff with the flexibility of creating any system fields, including those listed in this requirement.
BR02.09		The system shall capture business principal information such as, but not limited to: Individual name, address, contact information, background check, etc.	**M**	**W**	Configuration of the system using its System Administration tools provides staff with the flexibility of creating any system fields, including those listed in this requirement.
BR02.10		The system shall capture business insurance information.	**M**	**W**	User-defined fields can be configured to support the capture of all business insurance information.
BR02.11		The system shall generate user defined Certificate of Public Convenience and Necessity using modifiable template	**M**	**W**	This Certificate would first be developed as a report template using the supported and seamlessly integrated Reporting Engines or using Accela's built-in Ad Hoc Report Writer. Once created it could be used as many times as necessary or modified by authorized users to fit new data capture requirements.
BR02.12		The system shall link the taxicab number record to the Certificate Holder and the VIN.	**M**	**W**	The noted association can be configured in the solution.
BR02.13		The system shall allow uploaded documents to be associated with one or multiple certificate holder files	**M**	**S**	One or more documents can be uploaded and associated with one or more certificate holder records (e.g. files).
BR02.14		The system shall capture CPCN number and sub number, and assign the next sequential sub number when changes are made to actual certificate	**M**	**W**	Workflow configuration and use of the Business Rules Engine supports adherence and support of this requirement.
BR02.15		The system shall capture the amount of medallions allocated to a certificate holder according to the CPCN, and will maintain historical records for additional medallions issued	**M**	**S**	Once configured, the system will uphold to this data capture and association. All such records will exist as historical records permanently in the solution unless modified by authorized users. Modifications will be subject to System Audit Trail provisions.

BR02.16		The system shall allow for scanning and uploading of submitted certificate holder documents, i.e., interventions, pleadings, insurance documentation, etc.	**M**	**S**	The solution allows for the submission of any type of electronic documents as part of any application or renewal process. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR02.17	**Ownership Group**	the system shall allow for a table by ownership group	**M**	**W**	Owners and/or Ownership groups would be maintained within a reference library where they can be searched/selected in relation to cab companies, TA Permits, Drivers, etc.
BR02.18		The system shall allow for the update of user defined fields for one entry to populate all companies within an ownership group when entry is designated as such	**M**	**W**	Such auto-population of data based on a single field is supported by configuration of the Business Rules Engine.
BR02.19		The system shall allow for the relationship to associate a certificate holder to an ownership group	**M**	**S**	This relationship is natively supported by the solution.
BR02.20		The system shall allow for the creation, inquiry, and changes of ownership groups and status	**M**	**W**	All of the listed elements of this requirement can be performed and/or configured in the Civic Platform.
BR02.21		The system shall allow for the uploading of supporting documentation	**M**	**S**	This functionality is natively inherent to the solution.
BR02.22		The system shall capture business principal information such as, but not limited to: Individual name, address, contact information, background check, etc.	**M**	**W**	User-defined fields can be configured to support the capture of all business insurance information.

Nevada Taxicab Authority Records Management System Modernization RFP # 3422
BR03 - Medallions
The Taxicab Authority issues metal medallion plates, 4" x 7" to Certificate Holders, which must be attached to a taxicab prior to being available for service. Medallions are not permanently affixed to a single taxicab, but rather, are able to be moved from taxicab to taxicab within the same taxicab company, as long as it is allocated to that company (exception of handicap medallions, which are transferable between companies within the same ownership group).
Vehicle plates and sub-plates can be issued at time of new vehicle registration, plate substitution, or may be transferred to another vehicle. Medallions are issued annually (plate substitution), as a result of an increase in allocation when ordered by the Taxicab Authority Board, when reported lost/stolen, or when a special event allocation is granted by the Board (temporary).
The Taxicab authority issues approximately three (3) medallion types: permanent, handicap, and temporary
The Taxicab Authority issues different alpha-numeric sequencing to each of the sixteen (16) taxicab companies, i.e., Y345 (Yellow Cab Co.), W345 (Western Cab Co.), etc.
Medallions are currently issued at the Taxicab Authority office.
The Taxicab Authority issues different quantities to different companies, dependent upon Certificate of Public Convenience and Board Ordered quantities.
Medallions are issued to Certificated Taxicab Companies and are not transferable to other companies.
The Taxicab Authority plans to move to electronic medallions upon implementation and in support of NRS 706.88183.
Permanent medallions do not have an expiration date but are physically exchanged for a new set when TA Staff requires (approximately annually)
The medallions are allowed to be moved from one authorized taxicab to another.

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired (F)future	Vendor Response	Vendor Response Explanation
BR03.01	**Medallion Issuance**	The system shall allow for the creation, inquiry, changes, and deletions of medallion plates and status	M	**S**	The Accela Civic Platform provides authorized users the inherent ability to accomplish all aspects listed as part of this requirement.
BR03.02		The system shall capture medallion information as defined in the attached Requirements Specs document.	M	**W**	The solution allows for the configuration of an unlimited number of user-defined fields including the medallion information outlined in the Requirements Specs document.
BR03.03		The system shall link the medallion to various TA functions such as, but not limited to: Certificate Holders, Inspections, Events, Investigations, etc.	M	**W**	System configuration enables the linkage of the medallion to the objects listed both automatically (where State business rules would dictate) and/or through manual linking by authorized users.
BR03.04		The system shall allow a medallion classification such as permanent, handicap, and temporary, etc.	M	**W**	Medallions may be classified according to TA terminology and business rules. Such classifications can be configured accordingly in the system.
BR03.05		The system shall allow a medallion plate status such as, but not limited to: Active, New, Not Issued, Damaged, Lost, Used, etc.	M	**W**	Status groups can be configured in the system and applied appropriately to Medallions both automatically (based on State-defined business rules) or manually by those with the appropriate role rights.
BR03.06		The system shall include a note field for information on lost or stolen medallions or for various other information.	M	**S**	Various note fields exist for data entry by authorized individuals in the back-office and in the field. Should additional note fields be required, the solution allows for their configuration
BR03.07		The system shall allow for the medallion inventory to be link to the Certificate Holder Asset List.	M	**W**	System configuration enables the linkage of medallions to the appropriate Certificate Holder. As such, medallion inventory lists may be generated through saved searches and/or configured report templates.
BR03.08		The system shall generate the required medallion fees/invoices.	M	**W**	All fee and invoicing logic may be configured in the solution corresponding to a given medallion. Outbound documentation such as Invoice forms, delinquency letters, etc. may be configured as report templates using any of the support reporting engines and/or Accela's built-in Ad Hoc Report Writer.
BR03.09		The system shall accept certificate holder payment.	M	**S**	As with all types of transactions, the solution accepts payment at the back office and through the online portal.
BR03.10		The system shall capture date medallion was issued.	M	**W**	Configuration of the system can include accommodation for the medallion issuance date as well as any associated notes.
BR03.11		The system shall allow for reconciliation of medallions by way Hand-held device on a annual basis.	M	**S**	Accela's mobile applications support the ability to search and/or QR/Barcode scan medallions for reconciliation purposes (i.e. confirming information, status, etc.). This includes the ability to update detailed related to the Medallion and/or Certificate Holder from the field.
BR03.12		The system shall allow for central issuance of plates.	M	**S**	The agency has the ability to decide on the specific and central location where plates are to be issued. User-defined fields can be configured to indicate that the task is accomplished from a designated location.

BR03.13		The system shall make medallion information available to certificate holders via web portal (only available to the certificate holder it has been issued to)	M	**W**	Configuration can uphold the rule that medallion information is only provided to those individuals who have been issued the Certificate. This is achieved by requiring logins by these users that enable their visibility of this system information.
BR03.14		The system shall allow the validation of the status of the medallion by the future real-time tracking system.	M	**W**	If Accela is to serve as the "real-time tracking system" then status validation can be triggered and enforced through applicable business rules configuration within the solution. If a third-party solution is to serve as the "real-time tracking system" then status then the response code should be "O" and an integration (web services, API, etc.) would be produced to facilitate this requirement.
BR03.15		The system shall allow the use tracking of the medallion by the future real-time tracking system.	M	**W**	If Accela is to serve as the "real-time tracking system" then use tracking and enforcement would be managed through applicable business rules configuration within the solution. If a third-party solution is to serve as the "real-time tracking system" then the response code should be "O" and an integration (web services, API, etc.) would be produced to facilitate this requirement.
BR03.16		The system shall allow for the uploading of medallion orders and other forms associated with medallions including Lost, Damaged or Stolen Medallion Notices, Medallion Invoices and Receipts with named links for easy identification.		**S**	Uploading of any type of order, document or form is enabled in the system out of the box.
BR03.17		The system shall provide for bar code (or similar) tracking and medallion management, allowing for real-time retrieval of medallion status and inventory purposes - maximum size 1" x 1"	M	**S**	The solution supports barcode and/or QR code application onto Medallions for the rapid retrieval of Medallion information in the field or through the back-office. Accela's iOS and Android mobile apps include a "Scan" feature that allows for the rapid retrieval of Medallion details when the barcode or QR code is scanned. Back-office users would require a physical scanning device to facilitate the rapid retrieval of the related medallion record within the Accela back-office solution. Accela does not resell scanner hardware.
BR03.18	**Medallion Turn-In**	The system shall allow for medallion turn-ins.	M	**W**	System configuration can be performed to enable any step or series of steps to be associated with the turn-in of medallions.
BR03.19		The system shall allow for replacement medallion fee.	M	**W**	Fees relative to any business purpose can be configured in the solution, including those related to replacement medallions.
BR03.20		The system shall allow any user, based on role/permission, to update the status of a medallion and require enter comments related to the update	M	**W**	All aspects of this requirement can be achieved by system configuration. The solution provides the ability for the assigned task owner to make any comments related to the update. Configuration also supports such comments as mandatory for entry.

Medallion Specifications: For Informational Purposes Only

Fields	Field Type	Comments	Mandatory Field	
Reports	Link or tab or button on main screen to open list of canned reports based on data obtained through the fields identified on Medallions Fields tab	Supported through applicable field and report configuration within the solution.	Link	W
New	Link or tab or button on main screen to open blank main screen of fields identified on Medallions Fields tab	Achieved through the presence of the "New" button on the launchpad, map and Medallion Records list screen.	Link	S

Search	Link or tab or button on main screen to provide search of all data pieces in Medallion Inventory Module, including history, providing ability to search using partial, wild card, date range, by field title, etc.	Supported through Global Search screen (i.e. for Google-like search experience) or through the Medallion Records List search screen (i.e. and advanced field-by-field search screen). The latter search screen supports using partial, wild card, date range, by field title, etc.	Link	S
Print	Link or tab or button on main screen to bring up print dialogue box	Supported as an out-of-the box function on virtually every screen throughout the solution; including the Medallion record details screen.	Link	S
Back Arrow	Link or tab or button on main screen to move backwards one record	This functionality is typically found in legacy MS Access and thick-client style applications. As a web-based solution, Accela offers the user with a detailed list of relevant records that they user can open on an as needed basis with a single click; rather than having to tab forward and backward through a GUI where the list of records isn't inherently visible. However, this could be achieved through a Report Link on the main screen the loads the records into a forwards/backward-style navigation experience (i.e. paging each record out)	Link	W
Forward Arrow	Link or tab or button on main screen to move forward one record	This functionality is typically found in legacy MS Access and thick-client style applications. As a web-based solution, Accela offers the user with a detailed list of relevant records that they user can open on an as needed basis with a single click; rather than having to tab forward and backward through a GUI where the list of records isn't inherently visible. However, this could be achieved through a Report Link on the main screen the loads the records into a forwards/backward-style navigation experience (i.e. paging each record out)	Link	W
Medallion Use History	Link or tab or button on main screen to bring up chronological order, newest on top, of all successful and unsuccessful log ins by driver verifying status,	Accela does not currently maintain a complete historical audit log of all successful and unsuccessful logins by Drivers. However, Accela does log the last successful login including logged in user ID (leading to associated TA # and cab #) and date/time stamp).	Link	N

Medallion Association	This is future functionality for the Real-Time Tracking, for NRS 706.8825.4(d) The system must be capable of allowing, in a	System configuration enables the linkage of medallions to the appropriate Certificate Holder. As such, validation based on medallion state (temporary, permanent, etc.) can be enforced and managed through configured business rules where applicable. Furthermore, the association between Certificate Holder and Medallion can be automated or manual based on a user's role rights.		W
Field History	All field titles are to be links, that when selected, provide an immediate history of all entries in that field, by whom, and date and time of entry, chronologically, newest on top	While each individual field is not able to be clicked to view its history; the Accela solution does provide an Audit Log on each record that allows a user to filter/search by specific field, date range, user id, change type, etc. The audit log is default sorted in chronological order but can be resorted ad-hoc by a user on a case-by-case basis. The audit log may also be printed/exported where applicable or be included in a configurable report template. No user, regardless of their role rights may edit/alter the audit log of a record.	Link	W
Medallion #	Alpha Numeric, 2-7 characters, do not allow for spaces in front or within, but allow for blanks after final character	This requirement can be achieved by system configuration.	Y	**W**
Handicap Medallion Designation	Check Box, checked = yes, blank = no	System configuration can enable the creation of this check box where needed.	N	**W**
Medallion Type	Drop Down with values of REGULAR PERMANENT - 24/7; HANDICAP/SPECIAL SERVICES	System configuration can account for the creation of a drop down with the needed values for selection.	Y	**W**
Colors	Drop Down with values of RED W/BLACK LETTERING; WHITE W/BLUE LETTERING	System configuration provides for the ability to set colors as indicated for field naming.	Y	**W**
Company	Drop Down with values of A-Cab; A NLV; ACE; Union; Vegas Western; Virgin Valley; Checker; Yellow; Star; Deluxe; Desert; Lucky; Nellis; Western; Whittlesea; Henderson	System configuration can account for the creation of a drop down with the needed values for selection.	Y	**W**

Date in Inventory	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App	While many common Calendar/date picker fields are standard within the solution; additional, State-defined date fields may also be configured where needed.	Y	**W**
Issued	Check Box, checked = yes, blank = no	System configuration can enable the creation of this check box where needed. However, if this is commonly configured as a task, the "Issued" designation can be established as one of various statuses available for selection.	N	**W**
Date Issued	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App	While many common Calendar/date picker fields are standard within the solution; additional, State-defined date fields may also be configured where needed. Business rules and/or applicable record configuration can be applied to automatically populate this date value.	C - Mandatory if Issued status is Y	W
Issued To	Alpha, 20 characters	Configurable text field within the solution. Business rules and/or applicable record configuration can be applied to automatically populate this field value.	C - Mandatory if Issued status is Y	W
Reason Issued	Drop Down with values of New Issue; Replace Lost; Replace Stolen; Replace Damaged; Cab Stolen	System configuration can account for the establishment of this drop down however, we suggest that this is better indicated as part of Workflow configuration where the reason is given as a status.	C - Mandatory if Issued status is Y	W
Medallion Status	Values of Active or Inactive; This is for immediate functionality; however, for future functionality for the Real-Time Tracking, for NRS 706.8825.4(d), when a driver logs into a device such as a meter, the driver will enter the medallion #. The device must in real-time verify the status of the medallion to determine if	This is representative of a standard field within Accela; with the values of Active or Inactive being configurable options within that field. Automatic validation medallion status may be configured using Accela's Business Rules Engine. If a third-party solution (i.e. meters) require real-time medallion status validation within Accela then this would be facilitated via integration using Accela's published web services, APIs and/or SDKs. Documentation and examples of these can be found here: https://developer.accela.com/	Y	**W**
Medallion Sub Status	Values of New or Not Issued; Damaged; Lost; Used	Medallion sub status can be configured in Workflow with the listed elements shown as status options or as an individual status field on the record. Business rules may also be configured to enforce any applicable dependencies between Status and Sub Status.	Y	**W**

Use Status	Auto-fills the status of "in use", "available", "not available" Defaults to "not available" for all medallion status choices except "Active"; When a medallion status is changed to "Active", the	Medallion sub status can be configured as an individual status field on the record. Business rules may also be configured to enforce any applicable dependencies between Status and/or Sub Status. Automatic updates (i.e. In Use) to the Use Status may be triggered as a result of an integration to a third-party solution (i.e. meters) in real-time through the use of Accela's published web services, APIs and/or SDKs. Documentation and examples of these can be found here: https://developer.accela.com/	auto-fill	**W**
Entered by	Drop Down with values of All Agency Staff Names	Accela Workflow will automatically log the specific user who has entered data as part of a process. If the intent is to have this action taken by another individual other than the intended task owner, the system can also be configured to account for these entry options. There are also several out-of-the box fields where active users are available in a dropdown box.	Y	**S**
Set	Drop Down with values of M1; M2; M3	System configuration can account for the inclusion of this dropdown as indicated.	Y	**W**
Lost (L)	Check Box, checked = yes, blank = no	System configuration can account for the inclusion of this checkbox as indicated.	N	**W**
Stolen (S)	Check Box, checked = yes, blank = no	System configuration can account for the inclusion of this checkbox as indicated.	N	**W**
Damaged (D)	Check Box, checked = yes, blank = no	System configuration can account for the inclusion of this checkbox as indicated.	N	**W**
Date Lost, Stolen or Damaged	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App	While many common Calendar/date picker fields are standard within the solution; additional, State-defined date fields may also be configured where needed.	C - Mandatory if L S or D checked	**W**
Time Lost, Stolen or Damaged	Numeric, HH:MM with Drop Down AM and PM, 12 hour clock	System configuration can account for the inclusion of this time stamp field as indicated.	C - Mandatory if L S or D checked	**W**
Date Reported	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App	While many common Calendar/date picker fields are standard within the solution; additional, State-defined date fields may also be configured where needed.	C - Mandatory if L S or D checked	**W**
Time Reported	Numeric, HH:MM with Drop Down AM and PM, 12 hour clock	System configuration can account for the inclusion of this time stamp field as indicated.	C - Mandatory if L S or D checked	**W**
Person Reporting	Alpha, 20 characters	This field can be added as a user-defined field as noted.	C - Mandatory if L S or D checked	**W**
All entries in the following Replacement (Temporary and Permanent) Medallion fields auto-update the master record of the specific medallion being updated when this is being filled out				

REPLACEMENT MEDALLION	Link to auto-open Temporary Replacement Medallion page with fields identified in Medallion Fields Tab, Rows 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34; Part 2 - Main screen displays most current entries of rows 24, 25, 26, 27, 28, 29, 31, 32, 33; all data pieces may be written over but when written over, but all entries are saved in history	Related records (i.e. a Replacement Medallion) may be generated from an existing record (i.e. an original Medallion) using the Clone feature within Accela. This allows the user to copy all applicable/matching fields (such as those listed in this requirement) while also provide the ability to overwritten/updated on an as needed basis by those users with the appropriate role rights.		**S**
Temporary Replacement Medallion #	Alpha-numeric, 7 characters	This field as well as the number format and sequencing can be configured within the solution.	C - Mandatory if issuing temporary medallion	**W**
Person Taking Report	Drop Down with values of All Agency Staff Names	Standard field within the solution.	C - Mandatory if issuing temporary medallion	**S**
Date Temporary Issued	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App When issued, auto-updates the Medallion Status (line 21), and Use Status (line 22) of the respective medallion.	While many common Calendar/date picker fields are standard within the solution; additional, State-defined date fields may also be configured where needed. Business rules and/or applicable record configuration can be applied to automatically populate this date value.	C - Mandatory if issuing temporary medallion	**W**
Date Temporary Returned	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App When issued, auto-updates the Medallion Status (line 21), and Use Status (line 22) of the respective medallion	While many common Calendar/date picker fields are standard within the solution; additional, State-defined date fields may also be configured where needed. Business rules and/or applicable record configuration can be applied to automatically populate this date value.	C - Mandatory if temporary issued	**W**

Time Returned	Numeric, HH:MM with Drop Down AM and PM, 12 hour clock	System configuration can account for the inclusion of this time stamp field as indicated.	C - Mandatory if Date Temporary Returned filled in	**W**
Cab #	Numeric, 6 digits, do not allow for spaces in front or within, but allow for blanks after final digit (ex. 123, 1234)	This field as well as the number format and sequencing can be configured within the solution.	N	**W**
Temporary Replacement of medallion #	Alpha-numeric, 7 characters	This field as well as the number format and sequencing can be configured within the solution.	C - Mandatory if issuing temporary medallion	**W**
Permanent Replacement Medallion #	Alpha-numeric, 7 characters	This field as well as the number format and sequencing can be configured within the solution.	C - Mandatory is issuing permanent replacement medallion	**W**
Date of Final Transaction	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App When issued, auto-updates the Medallion Status (line 21), and Use Status (line 22) of the respective medallion	While many common Calendar/date picker fields are standard within the solution; additional, State-defined date fields may also be configured where needed. Business rules and/or applicable record configuration can be applied to automatically populate this date value.	C-Mandatory if issuing permanent replacement medallion	**W**
Time of Final Transaction	Numeric, MM/DD/YYYY - auto-inject slashes for display purposes only; Calendar App	System configuration can account for the inclusion of this time stamp field as indicated.	C - Mandatory if Date of Final transaction filled in	**W**
Permanent Replacement of Medallion #	Alpha-numeric, 7 characters	This field as well as the number format and sequencing can be configured within the solution.	C - Mandatory if issuing permanent replacement medallion	**W**

Comments	On-screen "hyperlink" where dialogue box opens, and includes all prior comments for all activity with option to add a new comment. To read chronologically with newest on top, with the ability to click on individual entry to identify operator ID, date, time of entry; 2nd part - three to five of the most current lines of comments	The Comments section of a record behaves in this exact manner out of the box.	Y	**S**

Nevada Taxicab Authority Records Management System Modernization RFP # 3422

BR04 - Enforcement

The TA is required by statute and regulation to hold hearings based on citations issued for violations of statute and regulations, and for other administrative actions

The hearings may be requested when the TA is taking an action against a customer such as, but not limited to: TA Permit denial, suspension, and revocation;

The type of hearing is predicated on the action to be taken and data requirements may vary. The business requirements below have been generalized. The business requirements for the wireless handheld device address citations issued, but are also required for vehicle inspection documentation. Examples of hearing types include, but are not limited to: Citations for violations of NRS & NAC chapters 706 specifically (in addition to all other Nevada laws), Denial of Permit; Revocation of Permit; Suspension of Permit; "Gypsy" cabs; CPCN violations by Certificate Holder (either through issuance of a citation or issuance of an order to show cause why a sanction should not be applied), etc.

An individual or a business may request or be subject to a hearing.

Citations may be issued under the jurisdiction of the TA Administrative Courts (at the Las Vegas TA office) or directly into Clark County Justice Court.

Hearings conducted in the TA Administrative Courts are heard by an Administrative Attorney/Hearing Officer and are prosecuted by a Nevada Deputy Attorney General.

Pre-trial hearings are conducted on Tuesdays and Thursdays. Trials are conducted on Wednesdays. All citations/violations are initially assigned a pre-trial date (Tuesday or Thursday) except for a 2nd or greater offense of long hauling, after a guilty adjudication within the previous 12 months. When there is at least one guilty adjudication within the previous 12 months for long hauling, the citation is assigned a trial date of a Wednesday (the pre-trial is not held).

A recipient of a citation written into the TA Administrative Court may "settle" or "take care of" a citation prior to the scheduled pre-trial date

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired	Vendor Response	Vendor Response Explanation
BR04.01	**Citations**	The system shall provide a bidirectional interface and open API's for data passing from the Records Management System to mobile hand-held devices and from the mobile hand-held to the Records Management system. This interface will support the issuance of a citation by Agency Compliance Enforcement Investigators using a wireless handheld device.	M	**S**	The Accela Civic Platform provides full and complete functionality, features and automation to serve the most complex Enforcement processes of government agencies. The solution has an open API for all interface development and completely fulfills each aspect of this requirement, including the issuance of citations in the field.
BR04.02		The system shall allow for the Taxicab Driver Permit module to auto-populate the hand-held citation screen once the Compliance Enforcement Investigator scans or enters The TA # of the Taxicab Driver. Data that will need to be available to the hand-held devices include but is not limited to: Name, Address, Taxicab Company, List of Outstanding citations, outstanding Admin Court dates, and Permit Status.	M	**S**	The solution provides its field users, via its Mobile component, with the same information that is available to back office users thus fulfilling the elements of this requirement. Information entered at the back office or in the field (if Internet connectivity is available and in use) will be seen by users in the back office and in the field.
BR04.03		The system shall allow for a calendar app with Admin Court Trial dates and times to be available on the hand-held device. Business Rules will be defined with the available dates and time of available Admin Court slots. This function needs to be fully configurable by TA Staff.	M	**W**	Through configuration, the Accela Code Officer app can allow field personnel to advance a case to the point where the solution will automatically slot itself into the applicable Admin Courts slot. Within the back-office solution TA Staff can define hearing/meeting schedules that include recurring cycles, start/end times, number of available slots, etc.
BR04.04		The system shall allow the Compliance Enforcement Investigator to select the next available Admin Court Date and Time on the hand-held device and populate the citation screen on the hand-held device.	M	**W**	With appropriate configuration this could be achieved both manually or automatically.
BR04.05		The system shall allow the a Violations module containing the NRS violation number and description to be available on a wireless hand-held device for use by the hand-held device.	M	**S**	The information noted as part of this requirement is available to field users employing Accela Mobile.
BR04.06		The system shall allow for the capture of citation form and update of the Records management System Citation and Court modules with their appropriate updated data. The system shall allow for the capture of the electronic signature of the Taxicab Driver or person being cited and the citing investigator.	M	**S**	Accela mobile supports the capturing of both the investigator and person being cited as well as the ability to capture and manage citation information in the field.
BR04.07		The system shall allow for the update of the Citation information to the Records Management System either in Real-time or when docked at the TA office or when a cellular signal strength permits.	M	**S**	The solution supports both aspects of this requirement.
BR04.08	**Investigative Reports**	The system shall provide for a report writing module, providing a variety of law enforcement investigative report templates. Each written citation will require a report to be written and attached to the citation number file.	M	**S**	Reporting is offered inherently by the Ad Hoc Report Writer and by the solution's seamless integration with three Reporting Engines. Authorized users can create, save and/or modify existing report templates according to business rules.
BR04.09		The system shall allow the investigative reports to be written using desk-top, lap-top, and mobile apps by TA staff.	M	**S**	Reports can be generated from all three device types listed in this requirement. Content within the reports will be drawn dynamically from the case and can include fields/content provided by the citation officer at the time of citation.

BR04.10		The system shall associate law enforcement investigative reports to be associated with related records, i.e., event #, citation #, TA Permit #, taxicab #, investigator #, vehicle inspections, etc.	M	**S**	Any document or file in an electronic format may be attached to a given record. This can include the generated citation document mentioned in the above requirements.
BR04.11		The system shall move the reports through the approval cycle of a report, i.e., completed by investigator, approved or not approved by supervisor, inclusion into event # file, etc.	M	**W**	Configuration of Accela Workflow can be conducted to process reporting as indicated.
BR04.12		The system shall provide an audit trail of all changes and actions of the investigative report.	M	**S**	The system will audit log the citation report review and approval process such as disposition, comments/recommended changes, date/time, etc. However, the Accela solution will not "track changes" within the body of the report/document itself (i.e. functionality similar to MS Word's Track Changes does not exist within Accela).
BR04.13		The system shall assign and follow record retention schedules for the investigative report (retention period does not begin until criteria is met).	M	**W**	The solution can be configured to conform to a record retention schedule including that described by this requirement.
BR04.14		The system shall apply business rules to records retention.	M	**S**	Business rules can be translated as configuration as it applies to records retention.
BR04.15	**Court Date Scheduler**	The system shall provide for a court date/time scheduler.	M	**S**	The solution provides for a hearing calendar that can be employed/configured as indicated.
BR04.16		The system shall allow the system administrator to assign new or additional business rules as needed .	M	**S**	System Administrators have the ability to assign configure new business rules into the solution.
BR04.17		The system shall allow for the court date/time scheduler to have specific business rules based on violation type, i.e., 1st long haul violation will result in Tuesday or Thursday court date, if adjudicated guilty prior to a subsequent citation/violation for long haul. The actual fine amount will also be determined by these Business Rules.	M	**W**	Accela's Business Rules Engine will be utilized to meet this requirement.
BR04.18		When a citation is written, when the violation(s) are selected, the system shall prompt for an adjudication history, and if the same violation has been adjudicated as guilty within the previous 12 months, the system will evaluate how many previous guilty adjudications and adjust court dates accordingly.	M	**W**	Accela's Business Rules Engine will be utilized to meet this requirement.
BR04.19		When a citation is written and a violation on the citation is for long hauling, the system will query the database for any guilty adjudications within the previous 12 months for the same NRS. If one or more guilty adjudications in the previous 12 months is identified, the system shall mark the citation as mandatory court appearance	M	**W**	Accela's Business Rules Engine will be utilized to meet this requirement.
BR04.20		The system shall allow the calendar app (Court calendar) to stack add'l citations for the same court date, up until a pre-determined cut off time.	M	**W**	Accela's Business Rules Engine will be utilized to meet this requirement.
BR04.21	**Wireless hand-held device technology**	The system shall allow for a calendar scheduling process that will populate the electronic citation court date field with the appropriate date/time of the hearing. The court date to be assigned will include multiple variables such as schedule of officer, quantity and types of hearings already scheduled, etc.	M	**W**	Accela's Business Rules Engine and Hearing/Meeting Management functionality will be utilized to meet this requirement.
BR04.22		The system shall allow defined business rules that can be modified by the system administrator based upon business requirements, i.e., 2nd long-haul violation requires mandatory court date of Wednesday while other violation types require a Tuesday or Thursday court date, even if the fine is paid	M	**W**	Accela's Business Rules Engine and Hearing/Meeting Management functionality will be utilized to meet this requirement.
BR04.23		The system shall allow for the populated court/date time to be manually over-written prior to final issuance of the citation.	M	**S**	Authorized users have the ability to make overrides as provided but all such overrides will be subject to the provisions of the System Audit Trail.
BR04.24		Once the citation has been issued/submitted through the hearings module, the system shall allow for it to be modified by a designee with supervisory permissions.	M	**S**	Authorized users have the ability to make overrides as provided but all such overrides will be subject to the provisions of the System Audit Trail.

BR04.25		The system shall generate a notification letter of the changes addressed to the subject of the citation for review, printing, signing and mailing by designated TA Staff.	M	**W**	This letter can be created using the Reporting Engines and capturing system data to populate its information. Signing can be done manually or electronically, and mailing actions can be captured if configured.
BR04.26		The system shall generate a notification of the changes addressed to the investigator who issued the citation.	M	**W**	Accela's Communication Manager tool can be utilized to send notifications to internal or external stakeholders. These notifications can be automated when specific milestones are met. Notifications can be made via internal Alert, Actionable Task, Email, SMS, etc.
BR04.27		The system shall provide an audit trail of all changes and actions of the citation record.	M	**S**	All key transactional information in the solution is subject to the System Audit Trail.
BR04.28		The system shall allow for the entry of a paper citation issued, creating the electronic record as the base for the remainder of the process.	M	**S**	Paper citations can be issued and constitute the output from a generated report of system data. A digital copy of the paper-based citation can also be automatically attached to the record in parallel to the printing.
BR04.29		The system shall allow for scanning of all documentation to be tied to the citation record.	M	**S**	Once scanned any documentation can be attached to a given record as necessary. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR04.30		The system shall attach the citation record to all related records, i.e., TA permit #, taxicab #, medallion #, etc.	M	**S**	Any file or document in an electronic format may be attached to records. If the citation record is related to the other record types listed in this requirement then said attachment can be seen as a related record attachment direct from the related record.
BR04.31		The system shall allow for the uploading of electronic citations to the database created as a result of this RFP, reducing/eliminating the need for data entry.	M	**S**	Any existing electronic citations may be attached to records created as part of the implementation of the Civic Platform.
BR04.32		The system will provide the hardware, software, and resources needed to implement an e-citation solution, which allows for future technology advancements.	M	**S**	The Accela Civic Platform provides an e-citation solution that can operate on agency hardware/software (if existing as an On-Premise solution) or on Accela provided hardware and software (if existing in the Accela Cloud).
BR04.33		The wireless technology system shall extend different applications to each singular device; data will be allowed to be sent from each module to each device and data collected will be submitted from each device to its associated module	M	**S**	The solution operates to support the functionality of allowing system data to be accessed and displayed at the back office, in the field and on the web portal and may further limit data exposure based on a user's role and applicable role rights.
BR04.34		The wireless technology system shall allow for easily entered data, allowing for auto-population in real-time, when a TA permit or taxicab is scanned (bar code type technology)	M	**S**	The solution supports barcode and/or QR code application onto Medallions for the rapid retrieval of record information in the field or through the back-office. Accela's iOS and Android mobile apps include a "Scan" feature that allows for the rapid retrieval of record details when the barcode or QR code is scanned. Back-office users would require a physical scanning device to facilitate the rapid retrieval of the related record within the Accela back-office solution. Accela does not resell scanner hardware
BR04.35		The wireless technology system shall allow for compliance enforcement investigators to easily enter, read, change, modify data	M	**S**	All of the listed functionalities to compliance enforcement investigators are available under Accela Mobile according to their assigned roles and privileges by system administrators.
BR04.36		The wireless technology system shall connect to a printer mounted in an agency vehicle (but which can be removed) via Bluetooth or similar wireless technology, allowing for immediate printing.	M	**S**	Portable or mounted printers that connect wireless with Accela Mobile allow field staff to print pre-configured reports (e.g. Citations, etc.) when needed.
BR04.37		The wireless technology system shall allow for the real-time uploading of documents created directly into the database created as a result of this RFP.	M	**S**	As long as those documents exist in an electronic format, they may be uploaded in the field via Accela Mobile directly into the system database of the solution. This can include documents generated within Accela (i.e. Citation letters) being automatically attached in digital form.
BR04.38		The wireless technology system must allow for TA specific business rules, changes in laws, and upgrades of the back-end system and the mobile devices.	M	**S**	All business rules configured in the solution will also apply to field users employing Accela Mobile.

BR04.39		The wireless technology system must allow for use in rain, and varying levels of sunlight.	M	**N**	The ability for Accela Mobile to operate successfully in rain and in various light levels is not dependent on the solution per se but on the specific hardware device in use by the TA.
BR04.40		The wireless technology system must provide an autofocus camera to capture pictures and associate the pictures with the citation.	M	**N**	As previously noted any digital photos may be associated with a citation/record. However the ability to provide autofocus is not dependent on the solution but on the specific hardware device in use by the TA.
BR04.41		The wireless technology system printer shall provide convenient charging methods which have the ability to be mounted and removed from the agency vehicle.	M	**N**	This requirement is satisfied by the hardware selected to operate in the field as described and is not dependent on the solution.
BR04.42		The wireless technology system shall provide an alternate printer solution for bicycle units (not mounted)	M	**N**	This requirement is satisfied by the hardware selected to operate in the field as described and is not dependent on the solution.
BR04.43		The wireless technology system shall allow for user-friendly and intuitive interfaces on both the hand-held device and printer	M	**S**	The solution has been specifically designed to operate in a user-friendly manner. Accela is not proposing client-side hardware and as such cannot comment on the user-friendly intuitive interface of the printer hardware ultimately selected by the TA.
BR04.44		The wireless technology system shall provide built-in GPS.	M	**N**	While Accela Mobile supports GPS, the provisioning of this functionality is dependent on the specific hardware device in use by the TA and not dependent on the solution's software.
BR04.45		The wireless technology system shall submit all citations into the Hearings module as "incomplete" until supporting documentation is appended and the record is marked as "pending approval".	M	**W**	The described functionality is inherent and pertains to Accela Workflow where statuses marked as "incomplete" can remain until other actions are committed (e.g. documentation appended) and then the task status can be marked as "Pending Approval".
BR04.46		Upon being marked as "pending approval", the system will post the citation into the Supervisory Compliance Enforcement workflow queue for approval.	M	**W**	The actions listed can all be performed as part of workflow configuration.
BR04.47		The system shall allow for the approval or denial of a citation by Supervisory role/permission	M	**W**	This functionality is supported by workflow configuration by authorized users.
BR04.48		The system shall move the citation through the hearings process when approved by the Enforcement Supervisor	M	**S**	Any movement as described is inherent to the functionality inherent to Accela Workflow.
BR04.49		When an Enforcement Supervisor is denying the approval of a citation, the system will require comments by the Supervisor and will return the denied citation into the queue of the issuing investigator (this cycle will be repeated until approval by the Supervisor)	M	**W**	All aspects of this requirement can be configured as indicated in the solution in the workflow.
BR04.50		The system shall provide for a dashboard tool for Supervisory Compliance Enforcement Officers to know which citations have not been submitted for approval and time-frames, etc.	M	**W**	This can be configured through Dashboard and Report templates using Accela's Ad Hoc Report Writer as well complemented with Saved Searches and/or through the use of Task Dashboard feature within the solution.
BR04.51		The system shall provide for a dashboard tool for the Chief Compliance Officer to know the status of all citations pending submission by the Compliance Enforcement Investigator, the status of all citations awaiting Supervisory approval, and providing the lapsed time since original citation issuance (or similar management tools)	M	**W**	This can be configured through Dashboard and Report templates using Accela's Ad Hoc Report Writer as well complemented with Saved Searches and/or through the use of Task Dashboard feature within the solution as long as the user has an Civic Platfrom login.
BR04.52		Upon approval by Supervisory Enforcement Investigator, the citation and supporting documentation will move into the Hearings Workflow Module.	M	**W**	The functionality expressed in this requirement can be configured as indicated in Accela Workflow.
BR04.53	**Hearings**	The system shall provide a complete method to support the life cycle of all citations issued by the Taxicab Authority	M	**S**	The Civic Platform is designed for configuration to support the specific life cycle of any citation, application, permit, license or other process the Taxicab Authority desires to configure.
BR04.54		The system shall provide a method to capture the life cycle of a show-cause hearing	M	**W**	The Civic Platform is designed for configuration to support the specific life cycle of any citation, application, permit, hearing, license or other process the Taxicab Authority desires to configure.
BR04.55		The system shall assign a recommended fine amount based on business rules which will be provided	M	**W**	The Civic Platform is designed for configuration to support the specific life cycle of any citation, application, permit, hearing, license or other process the Taxicab Authority desires to configure.

BR04.56		The system shall allow for the assigned recommended fine amount to automatically adjust based on additional defined business rules.	M	**W**	Configuration of the Business Rules Engine supports the automatic adjustments needed and defined by business rules.
BR04.57		The system shall allow for manual modification of assigned recommended fine, and require justification in comments section (mandatory entry).	M	**S**	Authorized users have the ability to manually modify system-levied fines and the system also supports that all such modifications require a comment by the individual committing the modification.
BR04.58		The system shall allow for a separate entry of actual fine imposed/collected.	M	**S**	Configuration can support adherence to this business rule regarding fines imposed or collected.
BR04.59		The system shall allow attaching of associated various documents/forms in the citation history, using the citation # as the primary key for attachment.	M	**S**	Any file or document in an electronic format may be attached to records. These documents are attached directly to the record/Citation and thus will maintain/enforce that relationship.
BR04.60		The system shall allow for manually scanned documents to be attached to the citation file.	M	**S**	All such scanned documents can be attached to the citation file. Furthermore, the back-office solution includes a "New from Scan" upload option that will call the local TWAIN driver on the user's machine in order to upload a document into the system directly from an external scanner. Note that Accela is not a hardware provider and the TA would need to use its own scanning hardware to facilitate this where needed.
BR04.61		The system shall accept payment on a citation, in any approved tender, in person at TA office, via web portal, or via smart phone app.	M	**S**	While the Accela solution does support citation payments via TA office and web portal; there does not currently exist a mobile app for payment processing. However, the web portal does offer mobile-responsive design; meaning when a users access the customer web portal they're presented with a version that has been optimized for mobile browsing and does support payment processing.
BR04.62		The system shall apply payment to specified citation and "close out" the citation when the balance is zero.	M	**W**	Workflow/business rules configuration can be performed to adhere to this requirement when a payment balance is zero.
BR04.63		The system shall remove the citation from the court calendar when the citation is closed out (paid in full), and allow a future citation to be assigned the now-available court calendar slot, based upon business rules (time-frames).	M	**W**	Business rules can be defined to enforce/automate this behavior. There is not an integration currently defined to a "Court calendar"
BR04.64		The system shall not make available for payment, any citation for which the fine has not yet been recommended.	M	**S**	Standard behavior for Accela so to only allow payment on Invoiced fees (i.e. those confirmed and ready for payment) while uninvoiced fees remain available for viewing/manipulation (by appropriate staff) until such point when they should be invoiced and payable.
BR04.65		The system shall require payment in full for any citation being paid on the web portal.	M	**W**	The solution can be configured such that all a single payment for the entire balance is the only acceptable payment.
BR04.66		The system shall display defined fields when a driver accesses his/her citations through the Taxicab Driver's web portal and allow the driver to select any outstanding citations for payment.	M	**W**	Through system configuration drivers can access their citations through Citizen Access and have the ability to make secure payment on any outstanding citations using credit/debit cards and/or e-checks. The web portal also offers a Shopping Cart functionality allowing for aggregate payment to be made on two or more outstanding citations, if allowed by business rules.
BR04.67		The system shall allow for issuance of payment plans when option selected by TA staff, and must follow business rules to be defined	M	**S**	The solution supports this requirement allowing for business rules to be configured in terms of payment plans.
BR04.68		When a payment plan is in place, the system shall generate notice to the TA permit holder based upon his/her communication preference as a reminder when a payment is due	M	**W**	While these communications can be configured and sent according to permit holder preference, the permit holder has the ability to view his/her citations on the online web portal and view when such payments are due and payable.
BR04.69		The system shall "suspend" the TA permit when a payment is not made according to the payment plan.	M	**W**	Business rules governing permit suspensions can be configured in the system after X days after payment has not been received.
BR04.70		The system shall generate notice to the TA permit holder and the current employing taxicab company (may be different than the taxicab company on the citation) notifying of the suspension and reason.	M	**W**	The actual suspension may also trigger the additional notification to parties of the suspension and the reason for the suspension.

BR04.71		The system shall allow payment in full of outstanding fines in-person at TA office, via web portal, when permit status is "suspended", and re-instate in real time, as "active" if no other flags affect the status, such as expired or FTA, and shall generate a notice of the reinstatement (business rules will apply)	M	**W**	All of the various elements of this requirement are met either inherently by the solution (e.g. Out of the Box) or by system configuration and can occur at the precise points dictated by business rules.
BR04.72		The system shall maintain and display a history of all actions for each citation number.	M	**W**	The system will track and display an accurate history of all actions committed as part of every citation which by default has its own unique and automatically assigned number.
BR04.73		The system shall create a customer record if one does not exist.	M	**W**	Customer records can be created by the customer him/herself or by staff at the back office capturing any needed information for a given customer.
BR04.74	**FTAs (Failure to Appear)**	The system shall allow TA staff to manually notate a failure to appear for a court date/time	M	**S**	Assuming that this ability has been configured in the system or the TA is using one of the out-of-the-box Accela comment/note fields, the manual entry is allowed by all authorized users.
BR04.75		The system shall change the TA Permit status to "Suspended FTA"	M	**W**	The new status can be configured to be triggered automatically by a previous status or other entry into the system.
BR04.76	**Suspensions**	The system shall allow TA staff to manually suspend a TA permit and assign a starting date and time, and ending date and time	M	**S**	The solution allows authorized staff to make the noted entries into the permit record. All such entries will be subject to provisions of the System Audit Trail for accountability and transparency to TA operations.
BR04.77		The system shall allow for the differentiation for cause of suspension	M	**W**	This differentiation can be achieved by the configuration of a drop down list showing the various suspension alternatives and allowing the end user to select from.
BR04.78		The system shall allow for hierarchy of suspension causes - applying business rules	M	**W**	Business rule configuration is entirely supported in the Civic Platform and can account for the noted hierarchy of suspension cases, each with their own specific system actions.
BR04.79	**Hearings - Court Attendance**	The system shall generate a court calendar of all scheduled actions to be heard	M	**W**	System information regarding the dates for court events can be generated as a report by authorized users.
BR04.80		The system shall capture customer information such as, but not limited to: Customer name, contact information, physical address, mailing address, telephone number, email address etc.	M	**S**	All fields listed in this requirement are part of the standard solution.
BR04.81		The system shall capture hearing reason.	M	**S**	Hearing Reason is an out-of-the-box field as part of the standard solution.
BR04.82		The system shall capture all citation information.	M	**W**	Citation templates may be configured to capture all needed information according to the citation type.
BR04.83		The system shall capture associated law-enforcement agency information such as, but not limited to: Agency information, officer information, officer badge information, address, contact information, etc.	M	**W**	Information of the type listed can be configured, managed and reported upon in the Civic Platform.
BR04.84		The system shall capture attorney information such as, but not limited to: Attorney company name, representing attorney, address, contact information etc.	M	**W**	Information of the type listed can be configured, managed and reported upon in the Civic Platform.
BR04.85		The system shall allow for comments to be added to hearing records.	M	**S**	Accela workflow allows for hearings to have associated comments and/or documents.
BR04.86		The system shall allow for scanning of all documentation to be tied to the customer record.	M	**S**	The solution provides the ability for scanned documents and others existing in electronic formats to be attached to the customer record.
BR04.87	**Evidence**	The system shall provide a method to document, track, and dispose of all evidence in accordance with International Association of Property and Evidence (IAPE) standards	M	**S**	While the Accela Civic Platform has not been formally certified against the IAPE standards the solution does possess and Evidence Tracking feature that managed evidence tracking, chain of custody/access logging and more through the back-office solution.
BR04.88		The system shall provide a method to attach evidence records to all associated records, i.e., bar code or similar technology	M	**S**	Evidence tracking is done at the record level with the ability to log multiple evidence items to a single record. Barcode and/or QR codes may be generated from within Accela on a "per evidence item" basis; at which point the evidence item could be tagged with the barcode/QR code and scanned for rapid retrieval.
BR04.89		The system shall allow designation of evidence as blood and allow manual entry of DUI blood test information such as, but not limited to: Blood Alcohol Content (BAC).	M	**W**	Evidence Types are configurable within Accela and logging of evidence includes the ability to capture additional information related to that evidence item including Blood Alcohol Content (BAC) details.

BR04.90		The system shall generate notice to TA staff (to be identified) when blood evidence will be sent out for processing.	M	**W**	Accela's Communication Manager tool can be utilized to send notifications to internal or external stakeholders. These notifications can be automated when specific milestones are met. Notifications can be made via internal Alert, Actionable Task, Email, SMS, etc.
BR04.91		The system shall capture inventory storage location such as, but not limited to: Aisle, row, rack, shelf, etc. (evidence)	M	**W**	Evidence Locations are configurable within Accela and appear as a dropdown box for the location type (i.e. aisle, row, rack, etc.) and can also include an alphanumeric location value to compliment the dropdown box (i.e. location type = aisle with alphanumeric value = A5).
BR04.92		The system shall create bar-code labels such as, but not limited to: inventory labels, location labels, etc. (evidence)	M	**S**	Barcode and/or QR codes may be generated from within Accela on a "per evidence item" basis; at which point the evidence item could be tagged with the barcode/QR code and scanned for rapid retrieval. The barcode/QR codes can draw in any attributes of the evidence item including unique ID, location, etc. Multiple difference barcode/QR codes can be generated from a single evidence item; each containing different underlying details from the evidence item.
BR04.93		The system shall interface with a bar-code reader for all transaction processing. (evidence)	M	**S**	Accela supports the reading and interpretation of barcodes/QR codes into application data/search fields. However, Accela is not a hardware provider and as such the TA is responsible for securing the scanning hardware as needed.
BR04.94	**Hearings**	The system shall allow for the notation that a bond is required.	M	**W**	Configuration supports the creation of a field or a comment box to indicate the requirement of a bond.
BR04.95		The system shall capture Bond company information such as, but not limited to: Bond company name, bond number, amount, effective date, etc.	M	**W**	The solution allows for configuration of any and all Bond company information to be captured and managed.
BR04.96		The system shall capture bond adjuster information such as, but not limited to: Adjustor name, Contact information, physical address, mailing address, contact information, attorney representing bond company, attorney contact information, etc.	M	**W**	The solution allow for configuration of any and all Bond Adjuster information to be captured and managed.
BR04.97		The system shall capture audio recording requests.	M	**S**	The solution allows for any file, including those related to audio transcriptions, to be associated to a given record. The recording would be created outside of Accela then
BR04.98		The system shall capture discovery requests.	M	**W**	Discovery Requests may be configured as record types in the solution.
BR04.99		The system shall allow for inquiries and selection of DMV customer records.	M	**S**	If DMV custom record information is housed within Accela (i.e. as an attribute for a specific record) then it will be searchable within the proposed solution. However, if the TA is requesting that Accela allow a user's search to extend beyond the data housed within Accela and into the State's DMV solution then that would require an integration/interface and the response code could change to "O".
BR04.100		The system shall allow the ability to capture and tie all scanned information the customer hearing record.	M	**S**	This ability exists natively in the solution.
BR04.101		The system shall allow for adding, changing, updating, deleting hearing information.	M	**S**	Authorized users have the ability and all such actions are subject to provisions of the System Audit Trail.
BR04.102		The system shall allow hearing scheduling.	M	**S**	Hearing scheduling is an intrinsic function available in the Civic Platform.
BR04.103		The system shall generate hearing letters to customers.	M	**S**	Hearing letters can be generated as report templates and then sent to customers according to their receipt preferences.
BR04.104		The system shall retain all historical records of all hearings with all recorded information.	M	**S**	The solution natively supports this requirement.
BR04.105		The system shall allow TA staff to search for hearings using one or more search criteria.	M	**S**	TA staff have the ability to search the entire system for data as needed, including searches related to hearings.
BR04.106		The system shall allow hearing records to be retrieved along with all supporting documentation.	M	**S**	Such records and their attachments can be accessed and viewed by authorized staff.
BR04.107	**Update Hearing Request**	The system shall allow the ability to retrieve hearing information such as, but not limited to: Hearing information, attorney information, court information, law enforcement information, permit review, compliance enforcement, bond information, etc.	M	**S**	The system allows users to search based on any system field or combination of fields.

BR04.108		The system shall allow the staff to update hearing status.	M	**S**	Hearing status is typically updated upon the conclusion of a given hearing. However, authorized users can update the hearing status which will be tracked by the System Audit Trail.
BR04.109		The system shall notify TA staff about additional actions to be taken such as, but not limited to: review for suspension, fraud, etc.	M	**W**	While such notifications can be sent out to staff, staff members having access to the solution can view this information directly on the record or on the Status Summary screen of the record's workflow.
BR04.110		The system shall allow a technician to reassign hearing dates.	M	**W**	Hearing dates can be re-assigned by authorized users and all such re-assignments will be subject to System Audit Trail provisions.
BR04.111	**Schedule Hearing Appointmen t**	The system shall allow a hearing to be scheduled and tied to the customer record.	M	**S**	This relationship is inherent in the solution.
BR04.112		The system shall allow for scheduling information to be established such as, but not limited to: Date, Time, location, Additional comments, etc.	M	**S**	Information of the type listed exists and can be added through the configuration of user-defined fields.
BR04.113		The system shall provide a calendar with time slots identifying them as opened, filled, blocked, etc.	M	**S**	This functionality exists in the Civic Platform as part of its Hearing component.
BR04.114		The system shall allow for administrative hearing officers to be assigned to hearing calendars.	M	**W**	Configuration allows for administrative officers to be assigned to hearings.
BR04.115		The system shall allow for compliance enforcement investigators to be assigned to hearing calendars.	M	**W**	Configuration allows for enforcement investigators to be assigned to hearings.
BR04.116		The system shall allow for continuances to be scheduled.	M	**S**	Hearing continuances can be listed as statuses for hearings as well as scheduled.
BR04.117		The system shall capture any 'no-show' parties such as but not limited to: law officers, attorneys, etc.	M	**S**	Attendance status is a standard feature for attendees at a hearing.
BR04.118		The system shall provide access through the driver portal for drivers to review their scheduled hearings.	M	**W**	While not a dedicated section of a given Citation record in the online web portal, customers can run a report through the customer web portal that shows of all their upcoming hearings (dates, times, etc.). This will read their logged in user ID dynamically and only shoe them those hearings that they're directly related to.
BR04.119		The system shall easily interact with each associated module.	M	**S**	The solution represents one single solution with seamlessly integrated modules and functionality operating under a single relational database management system.
BR04.120		The system shall allow updates to courts information such as, but not limited to: address, phone number, web address references, etc.	M	**W**	Authorized users can make updates to court information as needed.
BR04.121		The system shall provide hearing scheduled information on external platforms, such as, but not limited to: driver portal, smart phone app, etc.	M	**W**	While not a dedicated section of a given Citation record in the online web portal, customers can run a report through the customer web portal that shows of all their upcoming hearings (dates, times, etc.). This will read their logged in user ID dynamically and only shoe them those hearings that they're directly related to. Accela's mobile app for drivers does not currently include a view to see hearing/meeting calendars.
BR04.122	**Reschedule Hearing**	The system shall allow the ability to reschedule hearings by TA staff (only), and capture required information such as but not limited to: reason for reschedule, comments, reason for denials, etc.	M	**W**	The roles and privileges assigned to TA staff can include their ability to input the listed information into the solution.
BR04.123		The system shall allow TA staff to reschedule previous hearings.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR04.124		The system shall allow TA staff to reschedule future hearings for the same case.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR04.125		The system shall tie all additional hearings scheduled to original case.	M	**S**	The listed ability is inherent to the Civic Platform.
BR04.126	**Calendar Updates**	The system shall provide the ability for users to block specific calendar day(s) on the hearing appointments calendar for administrative purposes. The user shall have the optional ability to enter specific reasons while blocking calendar day(s).	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR04.127		The system shall have the ability to display a list of dates and time slots available for users to reschedule a hearing. Any hearing appointment time slots must be adjustable. There is only one hearing officer, so only one hearing can be scheduled for any one time.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.

BR04.128		The system shall have the ability to display the list of dates and time slots that are available for TA Staff to select in order to reschedule a hearing. The user may indicate the amount time (hours/minutes) for each hearing.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR04.129		The system shall automatically update the calendar when a hearing is scheduled.	M	**S**	The solution operates in the fashion described in this requirement.
BR04.130		The system shall allow the user to update an individual's existing appointment to reference multiple hearings in the same time slot. In cases where more than one hearing has been indicated in a single session (time slot) the system shall maintain the combined appointment session time. In addition, each hearing will be shall be unique and each shall require that a final disposition be entered.	M	**S**	The solution operates in the fashion described in this requirement.
BR04.131	**Hold hearings**	The system shall allow the ability to capture all attending parties scheduled to attend a hearing.	M	**S**	The solution operates in the fashion described in this requirement.
BR04.132		The system shall allow the ability to capture all no-shows at a scheduled hearing.	M	**S**	The solution operates in the fashion described in this requirement.
BR04.133		The system shall allow the ability to capture hearing start/end times.	M	**S**	The solution operates in the fashion described in this requirement.
BR04.134		The system shall allow the ability to capture attorney information representing customer at a scheduled hearing.	M	**S**	The solution operates in the fashion described in this requirement.
BR04.135		The system shall allow the ability to capture information for the law enforcement officer attending a scheduled hearing.	M	**S**	The solution operates in the fashion described in this requirement.
BR04.136		The system shall allow the ability to capture administrative hearing officer presiding over the case and deputy attorney general prosecuting the case.	M	**S**	The solution operates in the fashion described in this requirement.
BR04.137	**Update Hearing Disposition**	The system shall allow the ability to enter final hearing disposition.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR04.138		The system shall generate forms/notices before, during, and after hearings at the request of TA staff (to be defined).	M	**W**	Authorized users have the ability to create and/or generate any forms or notices (e.g. reports) needed prior, during or after a given hearing.
BR04.139		They system shall allow the ability to upload and tie files to the hearing record. The files shall include file types such as, but are not limited to: audio, video, data, documents, etc.	M	**S**	The ability to associate electronic files to the hearing record is inherent in the solution.
BR04.140		The system shall allow for purging of files based on State's retention schedule.	M	**S**	The solution can adhere to the State's record retention schedule. This might not be an automatic proccess.
BR04.141		The system shall update the status to closed upon completion of final disposition.	M	**W**	Assuming that closure is a configured task, the assigned task owner has the ability to select the "Closed" status upon completion. If this is not configured, the Business Rules Engine can be configured to change the existing status to "Closed".
BR04.142		The system shall allow for updates if the case is submitted to a district or justice court for further proceedings after a hearing is held and disposition made.	M	**W**	All needed configuration to account for this update requirement can be conducted in the system by authorized users. All such updates will be reflected as part of the System Audit Trail.
BR04.143		The system shall allow the ability to impose varying progressive sanction and fees for citations/violations based upon guilty adjudication.	M	**W**	The system can be configured to adhere to any fees, fines, sanctions relative to citations, violations, etc. upon the "guilty" disposition.
BR04.144	**Subpoenas**	The system shall allow for the creation, inquiry, changes, and deletions of a Subpoena Requests.	M	**W**	All aspects regarding Subpoena Requests can be configured, changed, deleted while also allowing authorized users to make inquiry on this information.
BR04.145		The system shall capture subpoena information such as, but not limited to: Subpoena date, received date, subject, requested information, etc.	M	**W**	All aspects regarding Subpoena Requests can be configured, changed, deleted while also allowing authorized users to make inquiry on this information.

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR05 - VEHICLE INSPECTIONS					
Taxicab companies, prior to placing a taxicab into service, must submit a request to the TA for inspection for that taxicab to ensure it meets requirements in NRS and NAC. The TA conducts these inspections prior to it being allowed to be placed into service.					
The TA conducts inspections on taxicabs quarterly, prior to operation in passenger service, when there is an outstanding 24-hour or out-of-service notice, when there is an accident or complaint regarding mechanical malfunctions, when a taxicab has been converted to propane, and when a taxicab has been "wrapped".					
Taxicabs have a maximum life, defined in months, that they are able to be used as taxicabs in Clark County. Time-frames are defined by whether the cab is "new" or "used" (defined by NRS 482.076.3, a new vehicle is placed into service with 2500 miles or less), and whether it is a "hybrid electric vehicle", as defined in 40 C.F.R. §					
The TA is looking to the vendor to provide a mobile application that will allow an investigator or inspector to retrieve vehicle data from the TA RMS in this RFP and to capture/submit and print the on-site vehicle inspection information on a wireless mobile device, as part of the solution to this RFP.					
The TA inspects many vehicle types and models. The captured information should be easily selected, verified, and uploaded to the customer's vehicle record.					
Taxicab Inspections					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired**	**Vendor Response**	**Vendor Response Explanation**
BR05.01	**Vehicle Description Records**	The system shall allow for the creation, inquiry, changes, and deletions of taxicabs.	M	**W**	The proposed solution allows for the definition and management of Taxicabs as records that can include creation, inquiry, changes, and deletions among many other functions.
BR05.02		The system shall allow for status such as, but not limited to: Active, OSN, 24, Removed From Service, Pending, etc.	M	**W**	Status groups can be configured in the system and applied appropriately to Taxicabs both automatically (based on State-defined business rules) or manually by those with the appropriate role rights.
BR05.03		The system shall capture vehicle information such as, but not limited to: Taxicab Company, Taxicab number, vehicle identification number, make, model, year, Fuel type, License Number, Taxi Meter Number, Handicap, Hybrid, In service date, in service mileage, Date out of service, comments, etc.	M	**W**	These are all examples of configurable fields within the proposed solution.
BR05.04		The system shall link cab information to CPCN.	M	**S**	The ability to link records in a related fashion (parent, child, peer, etc.) is a standard feature within the proposed solution. Furthermore, business rules may be configured to enforce/require these relationships where applicable.
BR05.05		The system shall retrieve previous and current vehicle inspection information	M	**S**	Inspection history related to a given Taxicab can be viewed in list fashion, in chronological order directly from the Taxicab record with each inspection able to be drilled-into for more detailed inspection information as needed.
BR05.06	**Inspections**	The system shall provide an application that allows the Vehicle Inspector to utilize an alternate device to capture the vehicle information.	M	**S**	Accela's Mobile Inspector app can be used for this requirement.
BR05.07		The system shall link the captured inspection information to the vehicle record in real-time, allowing for the immediately removal from service or place back into service	M	**S**	Inspections are required to be associated to a record; in this case a Taxicab. Inspection can be recorded in the back-office and/or mobile inspection app. If the mobile app has internet connectivity then the information is updated/synced to the back-office immediately. If there is intermittent connectivity then the mobile app will automatically poll for internet connectivity until a connection is secured and the information can be synced to the back-office
BR05.08		The system shall allow the application to upload captured information to the Vehicle Inspectors technician computer upon connectivity.	M	**S**	Inspections are required to be associated to a record; in this case a Taxicab. Inspection can be recorded in the back-office and/or mobile inspection app. If the mobile app has internet connectivity then the information is updated/synced to the back-office immediately. If there is intermittent connectivity then the mobile app will automatically poll for internet connectivity until a connection is secured and the information can be synced to the back-office
BR05.09		The system shall allow for the scanning of the VIN barcode by a hand-held device to retrieve vehicle records and auto-populate inspection screen fields or web enabled forms.	M	**S**	If the TA is wanting to scan a barcode on the vehicle using the Accela Mobile Inspector app then that barcode must the Accela Record ID (which could be the VIN number of that's what the TA prefers) in order to bring the vehicle/Taxicab record up in the mobile app and create an inspection on the fly. In the back-office solution the user can use a hand-held scanner to scan any barcdoded value into an applicable search field; at which point the solution will retrieve the desired record if housed within Accela.

BR05.10		The system shall integrate with the records management system to retrieve vehicle information for all vehicle inspections.	M	**S**	The inspection functionality within Accela is a part of the broader enterprise solution; thus all content managed within Accela (Permits, Certificates, Medallions, Citations, Taxicabs, etc.) is able to be shared/related for a comprehensive records management solution. This includes in electronic documents stored against those record types (i.e. photos, citation letters, scanned documents, etc.)
BR05.11	**Regular Vehicle**	The system shall allow for the creation, inquiry, changes, and deletions of vehicle inspections.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR05.12		The system shall capture vehicle information such as, but not limited to: Vehicle Identification Number, make, model, year, body type, etc.	M	**W**	These are all examples of configurable fields within the proposed solution.
BR05.13		The system shall create a new vehicle records using vehicle VIN.	M	**S**	New Taxicab records can have their unique identifier be the Vehicle Identification Number (VIN) if so desired/required by the TA.
BR05.14		The system shall link the vehicle to the Certificate Holder record.	M	**S**	The ability to link records in a related fashion (parent, child, peer, etc.) is a standard feature within the proposed solution. Furthermore, business rules may be configured to enforce/require these relationships where applicable.
BR05.15		The system shall capture odometer reading.	M	**W**	This is an example of a configurable field within the proposed solution. This field can also be updated with each inspection and even required information for completion of an inspection by TA staff.
BR05.16		The system shall capture the Taxicab company representative signature on required forms.	M	**S**	The Accela Mobile Inspector app includes out-of-the-box signature fields for the inspector (aka TA staffer) and Taxicab/Company representative. These signatures are captured on an inspection-by-inspection basis and may be affixed to any applicable reports related to the inspection.
		The system shall move the taxicab record to history when the taxicab has been removed from service and a new cab of the same cab # record is created (will allow only one active record of each cab #, but multiple inactive records of each cab #)	M	**W**	The system can be configured to enforce uniqueness within the cab # value in conjunction with the taxicab status as described in this requirement.
BR05.17	**New Cab**	The system shall capture fuel type indicators such as, but not limited to: Gas, propane, hybrid, electric, other, additional (as required by statute or regulation), etc.	M	**W**	This is an example of a configurable field within the proposed solution.
BR05.18		The system shall capture the authorized vehicle inspector information such as, but not limited to: name, date of signature, etc.	M	**S**	These are standard fields captured with each inspection out-of-the-box.
BR05.19		The system shall capture authorized vehicle inspector signatures electronically on any inspection forms as required.	M	**S**	The Accela Mobile Inspector app includes out-of-the-box signature fields for the inspector (aka TA staffer) and Taxicab/Company representative. These signatures are captured on an inspection-by-inspection basis and may be affixed to any applicable reports related to the inspection.
BR05.20		The system shall capture external assisting agency information.	M	**W**	This information can be configured for capture with each inspection.
BR05.21	**VDR**	The system shall capture vehicle inspection information such as, but not limited to: Cab #, Event #, VDR #, Employee Issuing, Notice type (Other, OSN, 24-Hour), Reason for Inspection (Accident, Complaint, Inspection, Meter Seal, Other), Incident Location, New Cab designation, Driver Permit #, Driver Cited designation, Check Engine Light On designation, Date Issued, Time Issued, Meter #, Seal #, Date Cleared, Employee Clearing (from agency employee list), Comments .	M	**W**	These are all examples of configurable fields within the proposed solution.
BR05.22		The system shall provide for the use of pre-formatted forms on wireless hand-held devices for investigators/inspectors to fill in when conducting inspections	M	**W**	The Accela Mobile Inspector app includes the ability to present inspector's with a checklist for inspection completion. These include the ability to capture additional information for each checklist item/task, disposition, notes/comments, photos, videos, score, etc. The checklists, disposition statuses, standard comment libraries, etc. are examples of configurable elements within the proposed solution.

BR05.23		The system shall capture the cab company's signature electronically.	M	**S**	The Accela Mobile Inspector app includes out-of-the-box signature fields for the inspector (aka TA staffer) and Taxicab/Company representative. These signatures are captured on an inspection-by-inspection basis and may be affixed to any applicable reports related to the inspection.
BR05.24		The system shall capture vehicle information such as, but not limited to: Vehicle identification number, license plate, make, model, year, zip code, etc.	M	**W**	These are all examples of configurable fields within the proposed solution.
BR05.25		The system shall allow an inquiry on the vehicle such as, but not limited to: vehicle identification, license plate, etc.	M	**S**	These are examples of searchable fields within the solution (assuming those fields have been configured).
BR05.26		The system shall retrieve vehicle information.	M	**S**	Supported through Global Search screen (i.e. for Google-like search experience) or through the Vehicle Records List search screen (i.e. and advanced field-by-field search screen). The latter search screen supports using partial, wild card, date range, by field title, etc.
BR05.27		The system shall retrieve vehicle registration information.	M	**S**	If vehicle registration information has been configured and housed within the Accela solution then it will be available as searchable criteria.
BR05.28		The system shall calculate required testing.	M	**W**	Required testing parameters can be configured and enforced within the solution using Accela's Business Rules Engine.
BR05.29		The system shall generate a unique Vehicle inspection report number.	M	**S**	Each inspection within the Accela solution is assigned a unique identifier.
BR05.30		The system shall generate Out-of-Service and 24-hour notices to include elements such as, but not limited to: Vehicle identification number, license plate, make, model, year, etc.	M	**W**	These are examples of reports that can be configured and deployed using any of the supported Reporting Engines and/or Accela's built-in Ad Hoc Report Writer. Furthermore, using Accela's Report Manager tool and Batch Engine tool the solution can be further configured to define who can see/execute these reports as well as automated their execution and distribution to specified recipients on a schedule of the TA's choosing.
BR05.31		The system shall assign a scheduled "remove from service" date on any taxicab upon entry into the system, based upon parameters which will be provided.	M	**W**	The "Remove from Service" date field is an example of a configurable field within the solution. These field, once defined can be auto-populated based on TA-defined business rules while also being able to be manually set/overwritten by those with the appropriate user rights.
BR05.32		The system shall allow a taxicab to manually be removed from service, and require a date and reason entry	M	**W**	Adjustment of a Taxicab's service status can be mode by those users with the appropriate role rights and require a provided reason (hand written, via a dropdown box or predefined reasons or both) based on TA-defined business rules.
BR05.33		The system shall link vehicle inspection report to taxicab records.	M	**S**	Inspections are required to be associated to a record; in this case a Taxicab. Inspection history related to a given Taxicab can be viewed in list fashion, in chronological order directly from the Taxicab record with each inspection able to be drilled-into for more detailed inspection information as needed. If/when an inspection report is generated upon completion, that document can be automatically affixed to the related record for future reference; above and beyond the ability to refer to the related inspections as described above.
BR05.34		The system shall generate a unique Vehicle inspection report number.	M	**S**	Each inspection within the Accela solution is assigned a unique identifier.
BR05.35		The system shall link vehicle inspection report to vehicle account.	M	**S**	Inspections are required to be associated to a record; in this case a Taxicab. Inspection history related to a given Taxicab can be viewed in list fashion, in chronological order directly from the Taxicab record with each inspection able to be drilled-into for more detailed inspection information as needed. If/when an inspection report is generated upon completion, that document can be automatically affixed to the related record for future reference; above and beyond the ability to refer to the related inspections as described above.
BR05.36		The system shall allow for creation, inquiry, changes, and modify VDR numbers.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR05.37		The system shall allow for VIR Reprints.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR05.38		The system shall allow creation, and inquiry, of VIR reports.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.

BR05.39		The system shall allow printing of VDR reports.	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR05.40		The system shall allow a vehicle inspector to edit all pre-filled fields	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR05.41		The system shall allow a record to be re-printed	M	**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR05.42		The system shall allow a vehicle inspector to "accept" the submitted new taxicab record upon inspection when the inspection is passed, resulting in the addition of the taxicab to the inventory	M	**N**	Inspections can only be done on vehicles that exist in the inventory.

Nevada Taxicab Authority Records Management System Modernization RFP # 3422

BR06 - Dispatch/Call Management/Events

Public complaints are currently received via email, telephone, fax, in person, and through the existing Taxicab Authority website where there is a form to fill out and when "submit" is selected, an email is generated and the complaint is delivered to an assigned email inbox to taxicomplaints@taxi.state.nv.us for review and possible action. All complaints are routed to one TA employee who logs them into an excel spreadsheet. Refer to Complaints work flow process diagram.

Taxicab companies are mandated to report complaints of violations of applicable statutes by drivers to the TA. Cab Companies currently report complaints either by submitting a web form on the TA website (when "submit" is selected, an email is generated and the complaint is delivered to an assigned email inbox to taxicomplaints@taxi.state.nv.us for review and possible action), or by selecting the link on the TA website taxicomplaints@taxi.state.nv.us and attaching a document providing the required information

Complaints received by the TA are either "actionable" or "inactionable". "Inactionable" complaints are customer service complaints, not violations of applicable statutes or regulations. "Actionable" complaints are complaints against a driver or cab company for violations of NRS or NAC chapters 706.

TA staff monitoring complaints have the functionality to route a customer to other staff, supervisors or sections, or the respective cab company representatives based on complaint content.

When TA staff monitoring complaints determines a complaint is "Actionable", it is routed to a TA Enforcement Investigator to conduct an investigation.

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired	Vendor Response	Vendor Response Explanation
BR06.01	**Complaints**	The system shall allow for TA staff to enter customer "complaint" information in the system and assign an 'event' number or other tracking identifier..	M	**S**	The solution allows for customers to access the online web portal of the solution 24/7/365 to register complaints into pre-configured fields (required and/or optional). Upon submission and via pre-configuration, the solution will automatically assign a unique number and provide the customer with a notification that the complaint has been successfully submitted.
BR06.02		The system shall allow for TA staff to classify the complaint as "actionable" or "non-actionable".	M	**W**	System configuration of the Accela Workflow can direct the complaint to TA staff for the appropriate classification to be made. It is also possible for this classification to be made automatically depending on the information submitted by the complainant. This is also supported by system configuration.
BR06.03		The system shall allow for TA staff to input a disposition code to a "non-actionable" complaint such as "referred to cab company", "not enough information", or the like, closing the complaint entry for no further action required.	M	**W**	These types of statuses can be selected and the subsequent steps configured in Workflow will send the complaint to its proper party/closure as applicable.
BR06.04		The system shall allow for TA staff to assign an "actionable" event to other TA staff.	M	**W**	Workflow tasks can be assigned to users or departments
BR06.05		The system shall allow for TA staff to "close" the complaint, based upon permissions, upon receiving the closing disposition from the assigned investigator.	M	**W**	All business rules of this type may be configured in the solution as part of the complaint's workflow.
BR06.06		The system shall allow for the re-assignment of a complaint to a different investigator by supervisory or Dispatch/Call Management personnel, based upon permissions.	M	**W**	Authorized users have the ability to re-assignment any pre-configured Workflow task to another user.
BR06.07		The system shall allow for any TA staff to update the complaint information with actions taken, people involved, etc., to resolve the complaint.	M	**W**	Such updates to saved information can be enacted by authorized users. All updated information will be subject to provisions of the System Audit Trail to preserve accountability and transparency to TA operations.
BR06.08		The system shall provide a method for monitoring outstanding complaints with their details to include the creation date and due date (if assigned).	M	**S**	All submitted complaints can be monitored by any authorized users. Configuration will account for all prescribed tasks and activities to be undertaken according to business rules. Access to the complaint record will provide the user with all information regarding the complaint including the active workflow task and due date as well as all previously completed tasks and those which follow.
BR06.09		The system shall allow supervisory staff to review and assign activities, and due dates.	M	**S**	If these activities have not been previously undertaken by workflow configuration, supervisory staff have the ability to review and assign activities and due dates.

BR06.10		The system shall allow supervisor monitoring tools, such as a dashboard, displaying each subordinate investigator's outstanding assignments/events, sorted by type and date, oldest at top, newest on bottom, and shall receive some type of notification if a creation date is older than a determined time frame; last updated field; ability to see all activity that has been completed, etc.	M	**S**	Given the various elements of this requirement we will respond in a segmented fashion. The solution provides all users with the ability to create Dashboards that portray real-time statistics in a wide variety of graphical formats. Investigator assignments appear on the end user's Dashboard listing the newest on top. Notifications can be preconfigured that would allow for notifying a given individual(s) of applicable due dates (upcoming and past due). The solution provides end users with the ability to view all information, processes, fines, citations, etc. that exist on a given record providing a verifiable history of that record
BR06.11		The system must provide the ability to report the % of written complaints resolved within 30 days	M	**W**	This can be achieved through the configuration of a report template and/or dashboard.
BR06.12		The system must provide an audit trail of all actions taken on each complaint.	M	**S**	The solution provides an Audit Trail on all transactions committed as part of any record, including complaints.
BR06.13		The system shall tie the "complaint" information to the TA permit #, taxicab #, and/or the cab company name, when included in the record.	M	**S**	The complaint record can be attached/related to the given record to which other items noted are also associated.
BR06.14		The system shall capture information on the "complaint" record such as, but not limited to: Date, Time, etc. (Refer to specifications)	M	**W**	Any information that TA desires to capture, required or optional, can be configured for capture, including those elements shown. Accela Workflow will capture the date and time of all assignments and task selections automatically.
BR06.15		The system shall allow the "complaint" to be forwarded to a taxicab company if required.	M	**S**	The complaint can be forwarded to any licensed user of the system, including taxicab company individuals.
BR06.16		The system shall allow the "complaint" to be escalated to a supervisor after a specified period of no action.	M	**W**	Escalation can be configured along with notifications as necessary in case a complaint task sits with a given task owner for X days (e.g. no action).
BR06.17		The system shall allow TA Staff to view all applicable policies and procedures per transaction processed.	M	**S**	Authorized users have this inherent ability regarding any complaint or other configured case type if such policies/procedures are included, attached or linked to the record.
BR06.18		The Dispatch/Call Management system shall provide an entry screen of all 'events' with fields to be identified.	M	**W**	This requirement is supported by system configuration. Events may be configured individually in Accela Workflow.
BR06.19		The Dispatch/Call Management system shall provide a method to create and view incidents, assign enforcement personnel, and monitor the progress of each incident from receipt to completion for a single jurisdiction.	M	**S**	Each aspect noted in this requirement is inherently available for authorized users. Incidents may be configured and viewed. Assignments may be made to specific events (e.g. tasks, activities, etc.). Viewing and monitoring is afforded to all authorized users of all aspects of the incident unless otherwise not made available.
BR06.20		The Dispatch/Call Management system shall direct the flow of enforcement personnel and monitor the progress of each call from receipt to completion for a single jurisdiction.	M	**S**	The solution and its configuration around TA business rules provides the needed flow of all processes for any case type (citation, enforcement activity, complaint, etc.). Authorized users have the ability to access the solution and view the real-time and historical progress of each record.
BR06.21		The system shall provide user-definable features and customizable screens, mouse, and keyboard functionality with keystroke shortcut commands to quickly add, modify, assign, and complete calls.	M	**S**	All listed elements of this requirement are inherent to the Civic Platform.
BR06.22		The system shall append event numbers to associated database tables related to that event, i.e., if TA Permit # 123 is listed in an event, that event # appends to TA Permit # 123's history.	M	**S**	Records within the proposed solution housed actions in a number of ways (configurable to meet the TA's needs). These actions can be associated to the records quickly and easily as they're undertaken and are available in a consolidated Activity Summary view on the record.
BR06.23		The system shall allow the TA Staff to see all documentation, correspondence, transaction history and all event interactions for a specific TA Permit Holder, taxicab, or medallion, and certificate holder.	M	**S**	Authorized users have this inherent ability in the solution for any initiated record.
BR06.24		The system shall allow cut and paste functionality within the transaction records.	M	**S**	Cut and paste functionality is supported within the system.
BR06.25		The system shall allow TA Staff searches such as, but not limited to: Soundex, Wildcard, exact spelling, etc.	M	**S**	Each of the elements noted in this requirement are supported as a search type to authorized users.

BR06.26		The system shall allow the Dispatch Supervisor shadow the Dispatch/Call Management desktop input screen to observe activities or transactions.	M	**S**	Supervisors have the ability to access the system at any time to view system information that has been committed and saved to the solution database. The Supervisor can view the end user's desktop externally but not internally.
BR06.27		The system shall allow the remote shadowing functionality to be used as a training tool.	M	**N**	The Accela solution does not offer co-browsing/remote shadowing as a function of the proposed solution. A third-arty solution such as LogMeIn would be recommended to meet this requirement: https://secure.logmein.com/home
BR06.28		The system shall allow database table historical searches to be initiated using a from-date and to-date. Only transactions within the specified period will be available to the Dispatch/Call Management.	M	**W**	The solution natively offers the ability to limit search results based on from-to dates; including searching with the audit log of any given record. If the TA is asking that the solution be able to limit search result data to a limited date range then this would require applicable configuration to achieve
BR06.29		The system shall prevent certain transactions from being saved without data entered into mandatory fields.	M	**S**	The system is designed such that if fields are configured as "required", that end users are required to insert or select data to populate all such fields before the system will allow the user to submit the data.
BR06.30		The system shall follow security requirements for all computer inactivity time-out displays.	M	**S**	All system administration governed security requirements for logoff of inactivity are followed by the solution.
BR06.31		The system shall allow an audit query that will report the number of times an employee has accessed a TA Driver's record.	M	**N**	Assuming the user made some form of edit/update to the record then there will be an audit entry made and be searchable within the record's audit log. However, Accela does not create an audit log entry whenever a record is simply viewed.
BR06.32		The system shall allow for real-time access to automated instruction guides to be made available to Dispatch/Call Management staff.	M	**W**	Links can be embedded in the solution to take Dispatch/Call Management staff to the location of these instructional guides in real time.
BR06.33		The system shall allow for log notes to be entered without the creation of an event.	M	**S**	A general "Comments" section exists on all records where date, time, staffer-stamped comment entries can be logged against a record without a formal event taking place (i.e. inspection, workflow task, etc.)
BR06.34		The system shall allow for comments to be created and tied to event or log notes	M	**S**	Specific events such as Activities, Workflow Tasks, Inspections, etc. may have comments tied directly to them.
BR06.35		The system shall allow for auditing of event entries and transactions initiated by Dispatch/Call Management staff.	M	**S**	The System Audit Trail would apply to event entries and transactions.
BR06.36		The system shall provide the ability to view all individual driver status and history information in single screen.	M	**N**	This might be available and supported by scrolling through the driver record.
BR06.37		The system shall provide the ability to synchronize data across all TA system fields. For example a TA Permit suspended in one screen must reflect suspended on all screens.	M	**S**	This functionality is supported system-wide; in the back office, in the field and on the online web portal.
BR06.38		The system shall allow a Dispatch/Call Management staff to review all customer correspondence.	M	**S**	Staff with the appropriate assigned privileges have the ability to view all correspondence associated with a given customer.
BR06.39		The system shall allow for metrics and analytics to be captured for a technician.	M	**W**	Metrics around the data captured in the system and pertaining to work efforts committed by individual technicians can be generated into reports using the Reporting Engines.
BR06.40	**Receive Customer Email**	The system shall provide a central email inbox using taxicomplaints@state.nv.us.	M	**W**	Accela's Communication Manager tool can integrate with external email accounts such as taxicomplaints@state.nv.us whereby outbound and inbound emails to this account can be referenced from an "In Box" view within the solution. Some of this functionality requires Microsoft Exchange Server be in use by the TA.
BR06.41		The system shall provide the ability to tie all email correspondence to a record but not require it.	M	**S**	This is standard functionality within the solution for all communication related to a record
BR06.42		The system shall provide the ability to carbon copy the inbox when a reply is sent to a customer.	M	**S**	This is standard functionality within the solution for all communication related to a record
BR06.43		The system will provide statistics on total number of emails received and allow for an event # to be assigned to track how many emails resulted in an event #.	M	**N**	This might be possible but would require applicable configuration and report template definition to meet this requirement.
BR06.44	**Record Review**	The system shall provide the ability to review events in real-time.	M	**S**	All data for events and other processes exist in the system in real-time.
BR06.45		The system shall have the ability to provide the Dispatch/Call Management staff to inquiry and update access to those areas defined to complete their specified duties.	M	**S**	The assignment of roles and privileges to Management staff governs what they can access and complete.

BR06.46		The system shall allow a Dispatch/Call Management staff to have the same system functionality in any environment such as, but not limited to: Test, System Test, User Acceptance, Production, etc.	M	**S**	This requirement is supported as described.
BR06.47	**Hearings/Court Scheduling**	**The system shall allow the Dispatch/Call Management to schedule, cancel or change a court date.**	M	**S**	The assignment of roles and privileges to Management staff governs what they can access and complete.
BR06.48	**Reporting**	The system shall provide reports as defined in the enterprise reports requirements.	M	**S**	Truepoint will deliver enterprise reports as described in the pricing seen as part of this Proposal.
BR06.49		The system shall provide reports of time spent on events by Dispatch/Call Management Staff.	M	**W**	If not provided by the standard reports, such reports can be developed by authorized staff.
BR06.50	**Dispatch/Call Management**	The system shall allow inquiry access of TA Permit Holders and CPCN Holders	M	**S**	The assignment of roles and privileges to Management staff governs what they can access and complete.T
BR06.51		The system shall allow inquiry of the citations/hearings database.	M	**S**	The assignment of roles and privileges to Management staff governs what they can access and complete. All data exists in the solution in a single database.
BR06.52		The system shall provide a method to track and coordinate officers	M	**S**	Combinations of standard configuration tools and unique TA-defined business rules can be defined to aid in the tracking and coordination of officers including but not limited to trade qualifications, assigned GIS areas, available bandwidth and calendaring tools.
BR06.53		The system shall provide for the documentation of pertinent information provided by investigators and vehicle inspectors to include call details, log notes, and dispositions of calls.	M	**W**	Existing fields, user-defined fields, and new documents can all provide the ability of investigators and inspectors to complete their duties as listed.
BR06.54		The system shall provide for the fields necessary to record all pertinent information from callers.		**W**	While many standard fields exist in the solution, user-defined fields can be configured to record all information TA requires from callers.
BR06.55		The system shall capture pertinent information related to the status of investigators, events, etc.	M	**W**	Existing fields, user-defined fields, and new documents can all provide the ability of investigators and inspectors to complete their duties as listed.
BR06.56		The system shall provide for a method to assign priority levels to active calls/events.	M	**W**	Configuration accounts for the setting of priority levels to calls and events.
BR06.57		The system shall provide for the classification of call types at initial receipt, and track the reclassification as initial and final call-type.	M	**W**	System configuration accounts for supporting this requirement as described.
BR06.58		The system shall capture the source of the event, i.e., witness, victim, suspect, TA Investigator, other law enforcement agency, etc., as the initiator of the event.	M	**W**	Existing fields, user-defined fields, and new documents can all provide the ability of investigators and inspectors to complete their data entry duties as listed.
BR06.59		The system shall allow for additional TA investigators or other resources to be assigned to an event	M	**S**	Additional resources can be assigned to an event at any time governed by business rules.
BR06.60		The system shall provide for the capture of the status of an event, i.e., open, closed, suspended, pending, etc., and shall require a disposition when being closed.	M	**S**	This requirement is fully supported by the inherent functionality of Accela Workflow.
BR06.61		The system shall provide for the entry of vehicle information of vehicles impounded, with associated records and supporting documentation, and "holds" placed on the vehicle, searchable by all fields.	M	**W**	The solution provides the ability to capture any and all impounded vehicle information, to associate any additional and supporting documents, and to place "holds" where necessary. All fields in the system are searchable.
BR06.62		The system shall provide Dispatch/Call Management Staff with a Dashboard to include Active calls and tasks.	M	**W**	This can be configured through Dashboard and Report templates using Accela's Ad Hoc Report Writer as well complemented with Saved Searches and/or through the use of Task Dashboard feature within the solution.
BR06.63	**Radio Communications**	The system shall allow for Event ID's to be assigned by Dispatch to various TA functions such as, but not limited to: complaint tracking, telephone call tracking where a TA action is required, radio communications with field investagators and vehicle inspectors. If the solution selected by the TA has it's own means of tracking the above the term events is not mandatory. The critical part is tracking of the above mentioned items.		**W**	The following responses within the "Radio Communications" section are provided under the assumption that radio communications are a form of "Event" to be tracked against a related record (i.e. complaint or otherwise). The information outlined in this requirement can be achieved through Activity (aka Event) type configuration and applicable custom data fields for attributes unique to each activity type.
BR06.64		The system shall allow for the creation, inquiry, changes, suspension, and closure of event management entries.		**S**	This is supported out-of-the-box for those users with the appropriate role rights.
BR06.65		The system shall keep history information on all actions completed in the system.		**N**	Most actions can be tracked historically. Need a better difination of "ALL" before this can be "S"
BR06.66		The system shall keep historical information on all actions completed.		**N**	Most actions can be tracked historically. Need a better difination of "ALL" before this can be "S"

BR06.67		The system shall keep audit logs on all actions completed.		**N**	Audit Log are tracked in may spots in the system Need a better difination of "ALL" before this can be "S"
BR06.68		The system shall allow for incomplete entries received to be created and saved in the system		**S**	This is standard functionality within the proposed solution.
BR06.69		The system shall allow for an event status of but not limited to: Open, close, reopened, hold, assigned, reassigned, research, etc.		**W**	Status groups can be configured in the system and applied appropriately to Events both automatically (based on State-defined business rules) or manually by those with the appropriate role rights.

Nevada Taxicab Authority Records Management System Modernization RFP # 3422
BR07 - Web Portal
The TA would like a public facing web portal function for applicants and Taxicab Drivers to submit their initial Taxicab Driver Application as well as Renewal Applications using this web portal as a Phase 1 goal. This portal will be used internally as the main input source for Applicants and Drivers to complete their applications at the TA Office .Once the 90-day pilot test period has been sucessfully completed the public facing web portal will be enabled. The portal will also allow for the uploading of required TA documents and for the payment of the initial Taxicab Driver Permit Fee and Taxicab Permit Renewal Fee.
The Second Phase of the web portal will be a web portal for taxicab companies (Certificate Holders). After logging in using a unique ID by parent group (9) and password by User ID, there would be a main page for statistics, reference information, and various communications. Then there will be links to submit web forms, upload documents, establish and track status of taxicabs, inquire upon and modify status of TA permit # through submission of form via the web portal. Payment of Citations, viewing Citation history and court dates will also be a Phase 2 goal of the web portal. This web portal should be very user friendly and simple, and must secure information about one company from being seen by another company.
Prior to beginning or changing employment as a taxicab driver for a certificate holder, a taxicab driver must present a referral slip from his or her new employer for issuance of the permit. The vision is the certificate holders will have company log-ins providing for a web form for the submission of the referral, with the driver's license number of the applicant as the unique identifier.

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired	Vendor Response	Vendor Response Explanation
BR07.01	**New Applicant - Phase 1**	The system shall allow Taxicab Driver's and Taxicab Driver Permit applicants to register on the Taxicab Driver web portal. A new applicant will use his/her Nevada Drivers License # as his/her User ID and a strong password. An Active Taxicab Driver will use his TA # as his User ID with a strong password of his/her choice to create an account.	M	**S**	The Accela Civic Platform is providing permit registration abilities on hundreds of sites around the country. The solution will allow Driver and Permit applicants to register via the online web portal completing all fields, including those which are configured as "required". TA can also enforce all rules regarding strong passwords allowing registrants to create an account according to the terms and conditions set by the agency.
		The system shall verify that the entered Nevada driver's license number has not been used as the user ID in the New Applicant process to ensure duplicate accounts are not created.	M	**W**	System configuration can be conducted to support this requirement. The License would be the user ID
BR07.02		The system shall allow a registered user to logon to the Taxi Driver's portal to begin the Permit application process or the Permit Renewal process.	M	**S**	These abilities are native to the solution and can be performed for any type of permit or other application or case type that TA desires to make available on the portal, including those related to renewals.
BR07.03		The system shall allow for a User who signs with a Nevada Drivers License as the User ID to be presented with a New Applicant input screen. A TA # entered as a User ID will be presented with a Taxicab Driver Permit Renewal input screen.	M	**W**	Yes. Configuration established what screens and fields are made available to registrants/applicants. The system can also be configured to support presentation of a Permit Renewal upon the entering of a TA number.
BR07.04		The system shall present the signed-on applicant the standard fields from the current Taxicab Driver's Permit application form including the Criminal History Statement, Child Support Questionnaire, Authorization for Release of Information, and the Fingerprint Background Waiver form. A field for Communication Preference: with the following options E-Mail, Text, Cell Phone and Home Phone should be included as a mandatory field.	M	**W**	TA can configure all standard and user-defined fields it desires on the form to make it available for applicants to complete while on the web portal.
BR07.05		The system shall provide for an Electronic signature acceptance process on the web portal		**W**	The solution provides the ability for accepting electronic signatures at the web portal.
BR07.06		The system must allow for the uploading of scanned Taxicab Driver Permit required forms (Taxicab Company Referral, DOT Medical Form) prompting the applicant for each required form during the upload process.		**W**	Any scanned documents can be uploaded at the web portal at any one or more times demanded by business rules.
BR07.07		The system shall append the Nevada Drivers License # of the signed-on User to the uploaded Taxicab Driver Referral Form and the DOT Medical form along with the Document type. Ex: xxxxxxxxxx_Referral, xxxxxxxxxx_Medical	M	**W**	TA business rules can be configured to append any necessary data attributes to a document's title when submitted through the web portal.
BR07.08		The system shall upon submission of a completed application, assigning a "pending" status to the application and route the application to the 'Permit Input Queue' for review if the applicant selected 'No" to all Criminal Background Questions . A printable or e-mail confirmation of the successful submission will be available for the applicant.	M	**W**	System configuration provides for the support of this requirement in terms of status assignments, routing and for sending the required notification.
BR07.09		The system shall route any New Applicant request to the Administrative Office workflow queue if the applicant selected 'YES' to any Criminal History Background question.	M	**W**	Configuration of the solution supports the required routing alternatives.
BR07.10		The system shall follow all state security policies and procedures for website access and user password policies, including resetting passwords.	M	**S**	In every case involving hundreds of implementations, the solution has followed the prevailing local, county, state and/or federal policies and procedures of its clients.
BR07.11		The system shall provide a self-service password reset function.	M	**S**	The solution provides for web portal users to make use of the self-service password reset function. TA has the ability to govern rules regarding password strength and other applicable factors.

BR07.12	**Renewal Application - Phase 1**	The system shall allow User ID sign-on using a TA # and strong password will be presented with the Taxicab Driver's Permit Renewal Form option. If the Application date is outside of the 30 day renewal period the renewal applicant will be presented with a message indicating the date of the 30 day renewal period. If the application date is after the TA Permit Expiration date the renewal applicant will be presented with a message indicating the Permit is Expired and a New Taxicab Driver Application is required.	M	**W**	All listed functionality regarding password strength, renewal options and notifications are supported in the solution through system configuration.
BR07.13		The system shall present the signed-on applicant the standard fields from the current Taxicab Driver's Permit application form including the Criminal History Statement, Child Support Questionnaire, Authorization for Release of Information, and the Fingerprint Background Waiver form. A field for Communication Preference: with the following options E-Mail, Text, Cell Phone and Home Phone should be included as a mandatory field.	M	**W**	The solution can be configured to support the needed form fields (standard and user-defined) on any type of document TA makes available.
BR07.14		Once a TA Permit # is issued, the driver may use the TA # as the user ID in place of the driver's license number, maintaining the associated records.	M	**W**	The solution can be configured to support the change from before the permit is issued to after issuance as noted. All documents associated with the original record will remain available.
BR07.15		The system shall allow TA staff to review and modify the application packet, applying an audit trail.	M	**S**	Such reviews and/or modifications can be configured in Workflow on any submission made via the web portal. Modifications made to saved data will be seen as part of the System Audit Trail.
BR07.16		Upon entering the TA Permit #, the TA Permit # now becomes the primary key for all future transactions.	M	**S**	This is standard for behavior within the proposed solution.
BR07.17		All supplemental documents and actions noted during the application process follow the driver's TA Permit # for historical purposes	M	**S**	This business requirement is natively supported by the solution.
BR07.18	**Payment Processing - Phase 1**	The system shall allow a logged-in applicant or renewal driver to pay the oustanding fee for his/her application.	M	**S**	Applicants or other parties may be required to make payments on application fees, fines and other charges at any time business rules call for.
BR07.19	**Reporting - Phase 1**	The system shall allow reporting of: workflow process statistics, accepted & rejected applications, applications started but not completed, testing, etc.	M	**S**	Reports on system data may be generated by system users and saved for future reuse or retuning as necessary.
BR07.20	**Fine Payment History Processing - Phase 2**	The system shall allow a logged in driver to view all previously paid and outstanding fines, fees, etc.		**S**	The web portal allows for logged in individuals like applicants, drivers, permit holders, etc. to view all of their payment transactions involving fees, fines, etc.
BR07.21		The system shall allow a logged in driver to select an outstanding fine/fee and submit secure payment.		**S**	If dictated by business rules, drivers can select an individual fee or fine and make payment against this one item which may exist individually or among other payment due items. A real-time balance will be displayed at all times.
BR07.22		The system shall allow a logged in driver to view all active payment plans (those with outstanding balances) and submit secure payment.	M	**W**	Such plans can be displayed to applicable drivers on the web portal through system configuration.
BR07.23		All payments submitted online shall generate a confirmation and itemized receipt, both of which are able to be printed in PDF format or send to their requested communication method.	M	**W**	This requirement is supported out of the box and through system configuration.
BR07.24		The system shall allow a logged in driver to select a past, current, or outstanding citation to see all citation content including date and time of scheduled court date	M	**S**	Once configured and made available on the web portal, this ability may be extended to Drivers.
BR07.25	**Certificate Holder Web Portal - Phase 2**	The system shall provide a Certificate Holder web Portal to allow Certificate Holders to register and create individual user id's for access to their portal.	M	**S**	When a user logs into the Accela Citizen Access portal with their unique user id and password they're then able to manage only those records that they are either directly related to OR those that they have been granted delegate access to. The Accela's Citizen Access portal offers a "Delegate" feature that allows an online users (i.e. a Certificate Holder) the ability to invite other users to collaborate together through the online portal across all or a subset of their records within Accela. This can include designation of specific capabilities such as fee payment, renewal and amendments
BR07.26		The system shall allow each Certificate Holder portal to include their specific asset inventory such as Drivers, Taxicab Vehicles and Taxicab Medallions.	M	**S**	Accela's Delegate feature in the customer web portal allows the Certificate Holder to manage what their invited delegate users can do and against what types of records (i.e. Drivers, Permits, Medallions, Vehicles, etc.).

BR07.27		The system shall allow for Taxicab Driver Permit New Applicant and Taxicab Driver's Permit Renewal process to be available from their specific portal.	M	**W**	TA can configure and make the necessary new permit and renewal forms available on Citizen Access to allow access to taxicab driver applicants and those drivers desiring to renew their existing permits.
BR07.28		The system shall provide a company specific Taxicab Company Referral web form to be completed and attached to a New Taxicab Driver's Permit Application once the New Application and Referral apps have been rolled out to the Certificate Holders web portal. This process shall follow the already established application	M	**W**	The agency has the ability to make available any new applications, documents (e.g. referral apps), and others it desires applicants, registrants, permittees and others to view and/or make use of on the online web portal. Workflow configuration support any unique process workflows needed to review any successful submittal
BR07.29		The system shall provide online help functionality and content for the web portal functions.	M	**S**	The Accela Citizen Access portal allows for the definition of tool tips (field-specific) and Instructions (detailed help language on a section-by-section basis for an application). In addition to these out-of-the-box help functions the portal also allows for configuration of links to external help resources such as YouTube, Vimeo or any help documentation (i.e. PDF help docs, etc.) housed outside of Accela.
BR07.30		The system shall provide the ability to submit a "terminated driver" which must also update the status in licensing/permitting in real time, requiring explanation, with a error report sent to submitter if all field information does not agree to database record	M	**W**	A Driver Termination record can be configured and made available for submission as a related record against an existing record within Accela. Applicable business rules can result in a downstream affect on the related records. Because the Driver Termination record can be limited to ONLY being submitted directly against any existing record this may eliminate the need to have to match/agree to database records based on field-by-field comparison. However, such field-specific comparisons can be configured where necessary as well as the separation of the Driver Termination record from having to be a record explicitly submitted against another record.
BR07.31		The system must provide the ability to submit new cab to be inspected and repaired cab to be inspected to get added onto the "to be inspected" report	M	**W**	Whether defined as a new application/record (i.e. a new cab) or an inspection request against an existing cab (i.e. related to repairs) these can be configured and made available on the web portal. Information from these applications/requests can be generated into any type of needed report.
BR07.32		The system shall include web-based payment option for all citation/fine transactions; and payment option for annual medallion fees (web invoice)	M	**W**	Accela provides for online and back-office payments by credit card using the State's preferred payment gateway/third-party merchant service provider or Accela's own CivicPay, the built-on merchant service provider solution of the Accela Civic Platform. If the State prefers that an interface to a third-party merchant service provider be implemented to provide real-time processing then this would be treated as an integration and the "O" response code would also need to be checked here.
BR07.33		Train and provide technical support to Taxicab Authority staff on portal use and management.	M	**S**	Onsite Training is offered for all Accela Civic Platform implementations. For general staff users, formal training is provided in structured classes. For system administrators, both formal and informal (e.g. during implementation activities) training is offered. The reader is advised to consult the body of this proposal as well as the pricing section for training-related information and details
BR07.34		The system shall allow a logged in Certificate Holder to view all outstanding medallion invoices and submit secure payment.	M	**W**	Providing that TA has configured and made this available on the web portal, the solution will support this functionality for Certificate Holders to accomplish.
BR07.35	**Certificate Holder - Inspections - Phase 2**	The system shall allow a logged in certificate Holder to submit new taxicab record information	M	**W**	Providing that TA has configured and made this available on the web portal, the solution will support this functionality for Certificate Holders to accomplish.
BR07.36		The system shall allow a logged in certificate holder to schedule a new taxicab, wrapped taxicab, or propane converted taxicab for initial inspection	M	**W**	Providing that TA has configured and made this available on the web portal, the solution will support this functionality for Certificate Holders to accomplish.
BR07.37		The system shall allow a logged in certificate holder to schedule a re-inspection of any taxicab placed out of service or having a 24-hour notice	M	**W**	The ability to allow Certificate Holders to schedule inspections and re-inspections can be configured and made available on the web portal.
BR07.38	**Certificate Holder - Citations - Phase 2**	The system shall allow a logged in driver to select a past, current, or outstanding citation to see all citation content including date and time of scheduled court date	M	**W**	Providing that TA has configured and made this available on the web portal, the solution will support this functionality for online users to perform this research.

BR07.39		The system shall allow a logged in Certificate Holder to run a pre-set query of drivers adjudicated guilty of long route violation employed by that certificate holder at the time of violation (not adjudication).	M	**W**	This would be achieved through a configured report published to the Accela Citizen Access portal. The report can be designed to behave dynamically based on the logged in Certificate Holder so as to only show their related Drivers.
BR07.40		The system shall allow a logged in certificate holder to run a pre-set query of drivers adjudicated guilty of long route violation for all certificate holders, without providing the certificate holder name.	M	**W**	This would be achieved through a configured report published to the Accela Citizen Access portal. The report can be designed to behave dynamically based on the logged in Certificate Holder so as to only show their related Drivers.
BR07.41	**Miscellaneous**	The system shall provide a secure web portal page for the Taxicab Authority Board members to download confidential document downloads	M	**W**	Through registration procedures granting Board members rights, they will be able to access confidential documents to download from the web portal. This may also be achieved through the publication of secure data sets using Accela's open data portal (CivicData.com).

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR08 - REPORTS MANAGEMENT SYSTEM					
The TA currently has reports created by disparate systems and processes with no comprehensive report management system. Reports are created manually, systematically,					
In all cases, date and parameter queries are required for report generation.					
The current reports have limited search functionality; making research cumbersome. The Access reports are exported into Excel for data manipulation and are only compatible with a					
The TA is seeking a comprehensive reporting management system or engine that will allow reports to be generated from any data element available in the proposed system. The data					
System reporting shall consist of all data extracted from the system such as, but not limited to: reports, correspondence, function documentation, receipts, notices, exceptions, statistics,					
This RFP does not describe every report required to be created. The TA is looking for the vendor system to include a report management system that shall allow any report to be created as					
The reporting engine should provide all reporting functionality to all modules (i.e., licensing, driver training, inspections, investigations, dispatch, medallions, courts, performance					
The reporting engine shall include the generation of all current reports being generated through existing agency technologies					
Requirement ID					
BR08.01	Reporting Engine Capability	The system shall allow for the creation, inquiry, changes, and deletions of system generated reports.	M	**S**	Authorized have the ability to conduct these actions with both Ad Hoc and reports configured under the Reporting Engines.
BR08.02		The system shall allow the creation of reports of the lowest data element within the TA system. Such as any TA related data element.	M	**S**	Reports can be generated using any and all fields in the solution, including those that have been user-defined.
BR08.03		The system shall allow reporting roll-up to highest data level such as, but not limited to: Customer, function, transactions, etc.	M	**S**	Reports can be sorted and grouped by data as desired
BR08.04		The vendor shall provide User training on the systems reports engine to allow TA Staff to create any report based on available data elements.	M	**S**	Staff will be trained in the use of the easy-to-use Ad Hoc Report Writer. No training is offered, however, for the supported and seamlessly integrated Reporting Engines.
BR08.05		The system shall allow a simple user-defined report tool for creation of ad-hoc reports.	M	**S**	This tool is a native component of the Civic Platform.
BR08.06		The vendor shall provide user training to include creating Monthly Agency reports and ad-hoc reports both detail and summary formats with drill-down capabilities.	M	**S**	Authorized users have the ability to create all types of reports cited as well as having drill-down capabilities.
BR08.07		The system shall allow date range functionality as well as frequency reporting such as Monthly, Quarterly, semi-Annually, and Annually.	M	**S**	All of the listed attributes regarding reporting are supported in the solution.
BR08.08		The system shall allow reports to be scheduled to be run on specific days and specific times or as reoccurring tasks as defined by TA staff.	M	**S**	Batch scheduling is supported at agency defined times and intervals.
BR08.09		The system shall generate reports as "Read only" with drill down capability.	M	**S**	Read only reports include drill down capabilities.
BR08.10		The system shall generate system audit reports on each functional module, workflow process, and staff statistics .	M	**S**	There are some out-of-the-box system audit reports. The solution also allows for the configuration of an unlimited number of reports using the built-in Ad Hoc Report Writer.
BR08.11		The system shall allow report print and export destinations such as, but not limited to: Printer, screen, file, download, etc.	M	**N**	Each of the destinations cited allow for the export destinations of all reports excpet for etc.
BR08.12		The system shall provide report format such as, but not limited to: Standard reports, excel, Word, Adobe PDF, CSV, comma delimited, etc.	M	**N**	Each of the report formats are supported in the solution but can not quess what not limited to means.
BR08.13		The system shall allow for electronic delivery of reports.	M	**S**	Reports may be electronically delivered via email
BR08.14		The system shall allow reports to be available to various users such as, but not limited to: Internal staff, driver and taxicab company portal etc.	M	**S**	Report access can be controlled by the assignment of roles and privileges. Internal staff can access reports and those in the field have the same ultimate accessibility. Reports on the web portal may be configured for posting to Citizen Access.
BR08.15		The system shall include online reporting functionality and allow reports to be directed to specific web portals. (Certificate Holders portal)		**S**	There is a single portal where all types of users may be granted access to reports made available by TA. These reports can be targeted to specific web portal user groups as well as behave dynamically; using the logged in user as a parameter to control what data is drawn into and shown in the report.
BR08.16		The vendor shall train TA Staff to create statistical reports, pre-set and ad hoc.	M	**S**	Staff will be trained in the use of the easy-to-use Ad Hoc Report Writer. No training is offered, however, for the supported and seamlessly integrated Reporting Engines.
BR08.17		The system shall allow reports to be available in any internal file structure such as, but not limited to: TA Web portal	M	**S**	Reports can be available form the TA web portal.
BR08.18		The system shall allow data elements from separate multiple data field content to be generated into a single transaction reporting i.e., permitting with citations, court dates, events etc.	M	**S**	As a single database management system representing the needs of many types of departments and users, reports can be generated from all system data as required.
BR08.19		The system shall integrate data from multiple sources.	M	**S**	As a single database management system representing the needs of many types of departments and users, reports can be generated from all system data or in conjunction with other interfaced systems. Additional costs may be needed to interface with other systems.

BR08.20		The system shall integrate data for multiple uses. i.e. Warehouse reporting.	M	**S**	If the TA wishes to extract/replicate data from Accela and into an external data warehouse then we would recommend using Accela's open data portal (CivicData.com) and the medium with which the data sets are made available for transition to your data warehouse.
BR08.21		The system shall generate headers and footers on reports generated.	M	**S**	The incorporation of headers and footers can be generated from both reporting resources.
BR08.22		The system shall generate page numbers on reports generated.	M	**S**	The incorporation of page numbers can be generated from both reporting resources.
BR08.23		The system shall capture date and time stamp of reports generated.	M	**S**	Both date and time is captured at the time a report is generated.
BR08.24		The system shall generate a unique report identifier number.	M	**W**	If the TA is looking for Accela to generate a unique ID value that is visible somewhere on the report (likely in an inconspicuous area) then this could be achieved with appropriate report configuration. Otherwise, each report instance deployed (i.e. a new report is developed and deployed into the software for execution by end users) within the solution will have a unique identifier associated to it natively by the system.
BR08.25		The system shall allow reports creation in function such as, but not limited to: Batch, online, real-time, ad-hoc, etc.	M	**S**	The listed functions of reporting are supported by the solution and its reporting options but can't say yes to etc.
BR08.26		The system shall allow batched reports to be stored and remain static.	M	**S**	Both options cited are supported by the system.
BR08.27		The system shall generate employee statistical reports such as, but not limited to: work days, work time, work schedule calendar, employee leave information, number of processed transactions by employee, number of permit new/renewal applications received/ processed/abandoned, average processing times, actual processing times, tasks assigned, etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these actions can be generated by authorized system users.
BR08.28		The system shall generate customer account reports such as, but not limited to: customers based on permit status, number of expired/revoked/suspended permits, number of issued, appeared, settled, outstanding, failures to appear citations, number of all status types of medallions, number of all status types of taxicabs, etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these actions can be generated by authorized system users.
BR08.29		The system shall generate a report of any mass data element changes.	M	**N**	Not sure what the parameters are for this requirement
BR08.30		The system shall generate transaction statistical reports such as, but not limited to: Processed transactions, completed transactions, transactions with errors, number of records accessed by TA staff, etc.	M	**S**	If transactions are being categorized in the fashion to note these distinctions, then reports can be generated on these statistics. However, the system does not track the number of records access if no actions were taken other than viewing.
BR08.31		The system shall generate exemption reports.	M	**W**	A report of this kind could be produced given the correct parameters.
BR08.32		The system shall generate transmittal reports.	M	**W**	A report of this kind could be produced given the correct parameters.
BR08.33		The system shall generate complaint statistical reports from the dispatch to include, but not limited to: number actionable vs inactionable complaints, number of closed complaints, days to close complaints, etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.34		The system shall allow for the generation of renewal detail reports to include, but not limited to counts of renewals, method of renewal (online, website), other preset categories, etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.35		The system shall allow for the generation reports of TA permits surrendered.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around surrendered permits can be generated by authorized system users.
BR08.36		The system shall allow for the generation of customer driver history reports.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.37		The system shall allow for the generation of vehicle report to include, but not limited to: Number of gas vehicles, number of alternate fuel vehicles, etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.38		The system shall allow for the generation of case management/event reports.	M	**S**	Reports concerning case management and events that are logged in the system can be generated.
BR08.39		The system shall allow for the generation of inspector reports.	M	**S**	Inspection and inspector reports can be generated from system data.
BR08.40		The system shall allow the setting of pre-set reports to print to a specific printer as scheduled.	M	**W**	Printer definition is supported in the solution.
BR08.41		The system shall provide the ability to disable pre-set reports from running or printing or both (allowing for manual selection and printing)	M	**S**	This requirement is supported in the solution.

BR08.42		The system shall meet the State's report retention timelines for all stored reports within the system..	M	**W**	This could likely be a batch script to delete documents that are creater than x days old.
BR08.43	**Reporting Retention**	The system shall purge reports meeting retention end-dates after notification to agency Records Manager and approval.	M	**W**	This could likely be a batch script to delete documents that are creater than x days old.
BR08.44		The system shall backup all created reports to storage.	M	**S**	As an Accela Hosted customers back and disaster recovery procedures are included as a part of the services offering.
BR08.45		The system reporting and information that becomes obsolete and no longer used must be disposed of by appropriate procedures. The application and associated information must be either preserved, discarded or destroyed in accordance with Electronic Record and Record Management requirements defined in NRS and NAC 239, Records Management.	M	**W**	All aspects of this requirement can be configured and supported in the solution.
BR08.46		The system shall allow generation of multiple reports for all TA requirements in this RFP.	M	**S**	This requirement is supported providing that all such requirements are included under the TA Final Contract.
BR08.47		The system shall generate driver training class reports.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.48		The system shall allow for the creation, inquiry, changes, and deletions of customer correspondence templates.	M	**S**	Authorized users have the inherent ability to perform all listed functions regarding customer correspondence report templates.
BR08.49	**Customer Correspondence**	The system shall allow for the generation of customer correspondence from predefined templates.	M	**S**	This ability exists natively in the solution.
BR08.50		The system allow for the generation of customer correspondence for all TA requirements in this RFP.	M	**W**	This requirement is supported providing that all such requirements are included under the TA Final Contract.
BR08.51		The system shall allow for printing the unique TA # information on correspondence when available.	M	**W**	This requirement represent a function of report generation when configured as an attribute of the report.
BR08.52		The system shall allow for the creation, inquiry, changes, and voids of fiscal management reports.	M	**S**	Authorized users have the inherent ability to perform all listed functions regarding fiscal management report templates.
BR08.53	**Fiscal Management**	The system shall allow for reporting drill down to data element level such as, but not limited to: General ledger, State account codes, etc.	M	**S**	Fiscal data as given can exist in the system and/or be interfaced with third party financial systems. In both cases, reports can be generated for the one system or for all such systems interfaced together.
BR08.54		The system shall allow reporting roll-up to highest data level such as, but not limited to: Customer (TA #), product, financial transactions, , TA Staff, payment source, payment type, payment reason, etc.	M	**S**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.55		The system shall allow for the generation all reconciliation reports.	M	**S**	Reconciliation reports can be generated by authorized users from system data.
BR08.56		The system shall allow for the generation of all general ledger balancing reports.	M	**S**	General ledger balancing reports can be generated from system data capturing debits and credits.
BR08.57		The system shall for the generation of reports to include, but not limited to: Transactions, definition, GL links, counts, amounts, etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.58		The system shall allow for the generation of reports to include but not limited to: outstanding fines with due dates; paid fines; outstanding and paid medallion invoices; payment plans - paid, scheduled, and outstanding; etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.59		The system shall allow for the generation of KPI fiscal year collection reports.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.60		The system shall allow for the generation of fiscal forecasting and trend analysis reports.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.61		The system shall allow for the generation of reports to include, but not limited to: actions taken, payment plan reporting, outstanding fines, etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.62		The system shall allow for the generation of revenue recovery account reports such as, but not limited to: Delinquent payments, number of accounts, amount, revenue collected, account fees, collections, etc.	M	**W**	Providing the system is capturing and saving all of the information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.63		The system shall allow for the generation of a statistical cash bond report to include, but not limited to: license number, license status, bond cancellation date, bond amount, region, etc.	M	**W**	Providing the system is capturing and saving all of the bond information needed to compile a report, reports around these parameters can be generated by authorized system users.
BR08.64		The system must allow for the ability to report the % of written complaints resolved within 30 days	M	**W**	Providing the system is capturing and saving all of the bond information needed to compile a report, reports around these parameters can be generated by authorized system users.

BR08.65		The system shall provide the ability to assign standard reports to user groups or individual users, based on role or job function	M	**W**	Such assignments are supported in the solution.

Nevada Taxicab Authority Records Management System Modernization RFP # 3422
BR09 - Interfaces
The TA will be required to interface with external business partners to fulfill the statutory requirements of a computerized real-time tracking system. The solution for this Records Management System Modernization RFP is necessary to support the future requirements defined here:
The use of hand-held devices for e-citation and vehicle inspection functions will require data from the Records Management System to the hand-held platform selected by the TA. The Records Management System must provide a bi-directional interface or Interfaces and open API's for any hand-held platform solution choosen by the TA.
Additional interfaces may be required, based on legislative action, during the implementation of the vendor's proposed system.
The TA will be required to work with each business partner for interface testing.
Some interfaces are currently being developed and are included. However, the definition of these interfaces has not been completed. The TA expects that these interfaces will be included and supported by the vendor's application.
The TA expects the Records Management vendor to provide the hand-held solution vendor with all interface and open API documentation required for the hand-held solution provider to sussessfully exchange inquery data and update data with the Records Management System by the RMS vendor.

Requirement ID	Function	Requirements	Project Priority (M)mandatory (D)desired (F)future	Vendor Response	Vendor Response Explanation
BR09.01	**Interfaces**	The system shall interface with future business partners using the prescribed transport modes.	F	**S**	With over 400 web services, more than 200 documented APIs and SDKs for iOS, Android and Windows mobile platforms Accela has made a concerted effort to ensure that our customers and partners can integrate and extend the capabilities of the Accela Civic Platform to meet and exceed current and future requirements within their greater agency ecosystems. These tools as well as documentation, sample code, collaborative user community and much more have been made publicly accessible here: https://developer.accela.com and we welcome members of your organization to dig into this content and compare it against those that are offered by the competition.
BR09.02		The system shall support various transport protocols such as, but not limited to: Web Services, Secure File Transport Protocol (SFTP), File Transport Protocol (FTP), UNI, etc.	F	**S**	These transport protocols are supported by the Accela Civic Platform.
BR09.03		The system shall support secure transport protocols such as, but not limited to: HTTPS, SFTP, Certificates, Password access, Access ID protocols, etc.	F	**S**	These secure transport protocols are supported by the Accela Civic Platform.
BR09.04		The system shall support real-time interface processing.	F	**S**	Real time interfaces abound among Accela Civic Platform client sites. There are no interfaces currently defined in this RFP.
BR09.05		The system shall support batch file interface processing.	F	**S**	Batch file interfaces are supported by the solution.
BR09.06		The system shall support web-services interface processing.	F	**S**	Web services interfaces represent the most common interface method. There are no interfaces currently defined in this RFP.
BR09.07		The TA currently has no existing file layouts for interfaces.	F	**S**	This requirement is acknowledged.
BR09.08		The system shall be upgraded to latest interface releases if applicable.	F	**S**	As a hosted customer you will always be on the latest release of the API.
BR09.09		The system shall interface with future business partner interfaces for required verifications.	F	**S**	Accela has performed hundreds of interfaces to a myriad of third party systems as part of its implementation and post-implementation services.
BR09.10		The system shall create all interfaces required by the TA in Development, test, user acceptance testing, training, and production.	F	**S**	All interfaces noted as part of this Proposal will be completed as indicated and priced.
BR09.11		The vendor shall ensure seamless integration of future TA interfaces.	F	**S**	All integrations performed have achieved seamless integration with the Accela Civic Platform; however, there cannot be a commitment to unknown integrations
BR09.12		The system shall be sufficiently flexible to easily add, modify or delete interface fields such as but not limited to: data elements, display messages, payment architecture etc.	F	**W**	This can be achieved through applicable system or integration configuration.
BR09.13		The system shall include testing with the TA business partners in the interface implementation plan.	F	**S**	All testing of interfaces will be accomplished as indicated in this Proposal and as given in the pricing section.
BR09.14		The system shall generate all required interface responses.	F	**S**	All interfaces noted as part of this Proposal will be completed as indicated and priced.
BR09.15		The system shall apply all required edits prior to processing any business partner interface.	F	**S**	All interfaces noted as part of this Proposal will be completed as indicated and priced.
BR09.16		The system shall interface with new business partners to fulfill future requirements in support of the Real-Time Tracking System as defined in NRS 706.88183, NRS 706.8825, etc.	F	**S**	If/when those integrations are defined an applicable change order/SOW will be required in order to secure the resources necessary to produce and implement any future integration.
BR09.17		The data exchange between the vendor's proposed system and TA's business partners must ensure secure and encrypted protocols where applicable.	F	**S**	As a best practice all integration between the Accela Civic Platform and other third-party solutions are done so via secure and encrypted protocols.

BR09.18		The vendor shall provide specification documentation for all interfaces incorporated into the vendor's proposed system.	F	**S**	This type of documentation is included with each integration/interface.
BR09.19		The interface documentation must provide instructions for connectivity and communication with the vendor's proposed system.	F	**S**	This type of documentation is included with each integration/interface.
BR09.20		The vendor shall test all required network connections of proposed interfaces that become active.	F	**S**	All testing of interfaces will be accomplished as indicated in this Proposal and as given in the pricing section.
BR09.21		The vendor shall describe what interfaces exists in the proposed system that would be used to meet the requirements of this RFP.	F	**S**	No, specific interfaces are defined but the Accela product has a robust API that can be used for future requirements.
BR09.22		The vendor shall describe what types of interfaces are possible with the proposed system such as, but not limited to: Real-Time, Batch, Web-service, centralized messaging, etc.	F	**S**	All described are possible.
BR09.23		The system shall generate "trip numbers" or similar tracking identifier to all trips through the meter, and append those trip numbers to the associated TA Permit #, medallion #, taxicab #, citation #, event #, etc.	F	**S**	Assuming the applicable fields to capture this data have been defined within the Accela Civic Platform and the integrated third-party meter tool includes this data in its communications to Accela then this requirement can be made via a standard integration.
BR09.24		Open interface for future use - real time tracking, other state agencies, etc.	F	**S**	With over 400 web services, more than 200 documented APIs and SDKs for iOS, Android and Windows mobile platforms Accela has made a concerted effort to ensure that our customers and partners can integrate and extend the capabilities of the Accela Civic Platform to meet and exceed current and future requirements within their greater agency ecosystems. These tools as well as documentation, sample code, collaborative user community and much more have been made publicly accessible here: https://developer.accela.com and we welcome members of your organization to dig into this content and compare it against those that are offered by the competition.

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR10 - Technology					
The TA currently uses disparate tools for IT management. Lack of integration, slow response time, and unsupported software, are also features of the current TA environment.					
The TA is platform agnostic and therefore is looking for the best in class. All vendor solutions shall be reviewed and scored according to how well they meet the requirements of this RFP.					
The TA may continue to use the State's backbone for all network connectivity, however an increase in bandwidth may be required to meet response time metrics. The current network					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired**	**Vendor Response**	**Vendor Response Explanation**
BR10.01	**Vendor IT Requirements**	The vendor shall provide training and transfer of knowledge of all configurable and technical system components to TA resources.	M	**S**	System administrators will receive both formal and informal training on the solution to allow them familiarity with all configurable and technical aspects. Additional training documentation, eleanring and other resources are available through the Accela Community portal for continuing education, Q&A and general
BR10.02		The vendor shall provide documentation for all delivered functionality in this RFP.	M	**S**	All Accela standard user documentation that is available on Accela community will be made available.
BR10.03	**Applications**	The system shall include web enabled functionality for all business functions.	M	**S**	As a web-based and web-accessed solution, the Accela Civic Platform provides entirely web-enabled functionality for all business functions.
BR10.04		The system shall include standardized formats for all activities such as, but not limited to: Creation, change, updates, deletes, etc.	M	**S**	Standardized formats exist for the noted operations of this requirement.
BR10.05		The system shall allow for data element correction in all system modules such as, but not limited to: Development, test, user acceptance, training, production, etc.	M	**S**	Yes. The solution provides for all data correction in all modules including those that exist in the Environments that will be created as part of Delivery Services.
BR10.06	**Testing Tools**	The vendor shall provide testing tools for the proposed technology and be made available in all modules such as, but not limited to: Development, test, user acceptance, training, production, etc.	D	**N**	No. While testing tools are not provided as part of the solution, testing of all realized configuration is accomplished to achieve the desired end results. Furthermore, testing tools are used extenisivley within Accela's Engineering and Product Management development environments.
BR10.07	**Systems**	The system shall provide a unified technology base to include a solid framework.		**S**	As a continuously upgraded solution that has been in the public domain in successful operation for over 15 years, the Accela Civic Platform fully supports this requirement.
BR10.08		The system shall provide access to a database standardized query language reporting process with the ability for users to create report without vendor or query language knowledge.	M	**S**	The Ad Hoc Report Writer exists natively in the solution and provides users with an easy-to-use and flexible tool for creating simple reports. To further their knowledge and use of this solution, training is provided to staff as part of the Delivery Services of this implementation.
BR10.09		The system shall provide software configuration management tools for updating workflow processes and business rules without vendor intervention.	M	**S**	After receipt of both the informal and formal training that system administrators will receive, these specialized users will be able to configure and reconfigure the solution to meet present and future business needs. All such configuration can be performed with the intervention of the vendor or other third parties. Our continuing successes with this approach have supported
BR10.10		The system shall provide tools and documentation for all system backup and recovery processes.	M	**S**	For implementations under the Accela Cloud (which the TA proposal will be), Accela holds all responsibilities for providing the solution 24/7/365 to staff and to its internal and external users. However, if the TA opts to self-host their Accela implementation the agency has the responsibility for providing these tools and documentation. In this case the response code would change to "N"
BR10.11		The system shall provide a high ailability system to meet the demands and requirements of this RFP.	M	**S**	The system is able to meet availability factors of its agency clients, however, local conditions may impinge upon this availability.
BR10.12		The vendor shall estimate required storage requirements based on transaction projections.	M	**S**	Yes. For an On-premise installation, these figures will be provided to support the TA implementation.
BR10.13		The system shall support virtualization of required storage and system components.	M	**S**	The proposed solution does support virtualization for client and server-side elements where applicable.
BR10.14	**System Monitoring**	The system shall provide automated notification of all system functions such as, but not limited to: System failures, critical job alerts, outages, encountered errors, etc.	M	**S**	For Accela Hosted Customers (which we're proposing TA will be) we offer a monitoring site for those listed elements: http://status.accela.com

BR10.15		The system shall provide database monitoring tools.	M	**S**	For implementations under the Accela Cloud (which we're proposing for TA), Accela holds all responsibilities for providing the solution 24/7/365 to staff and to its internal and external users. However, if the TA opts to self-host their Accela implementation the agency has the responsibility for providing these tools and documentation. In this case the response code would change to "N".
BR10.16		The system shall provide real-time system review and monitoring.	M	**S**	Authorized users have the inherent ability to view all data in the system in real-time from wherever they may exist: at the back office, in the field, or on the online web portal.
BR10.17		The system shall provide error notification functionality for all applications or modules such as, but not limited to: Workflow Processing and Missed Scheduled jobs, etc.	M	**S**	This is available as part of the standard solution but may also be configured to meet unique TA business requirements.
BR10.18		The system shall capture, store, and log all system log events.	M	**S**	All system events are captured, stored and logged as indicated.
BR10.19		The system shall provide the log functionality such as, but not limited to: create, inquiry, reporting, etc.	M	**N**	While Accela does provide logging for creation and editing we do not log "view only" activities nor do we log each time a report is generated, except for those related to a specific record, at which point we can archive a copy of the report including the date/time and user to generated it.
BR10.20	**Workflow Control**	The system shall provide the ability to create, modify, test and remove workflow controls.	M	**S**	All of the listed aspects of this requirement can be achieved by authorized users.
BR10.21		The system shall provide an auditable, logged, and controlled data correction functionality.	M	**S**	The proposed solution includes spellcheck on all text area fields. Any corrections/edits made to any field on a record will be appended to the audit log for the record and able to be referenced by user with the appropriate role rights.
BR10.22		The system shall generate automated notification of workflow changes.	M	**W**	Configuration supports the automatic notification of workflow changes in the solution.
BR10.23		The system shall capture and execute actions based on workflow life cycle such as, but not limited to: Edits, updates, changes, etc.	M	**S**	Accela Workflow operates to support the ability to capture all life cycle events that have occurred for a given record.
BR10.24		The system shall provide for an individual TA staff dashboard, customizable based upon preferences, applications, job functions, etc., to be configured/assigned by system administrator	M	**S**	In actuality while the assignment of roles and privileges to individual and group users establish what end users can access and complete in the solution, end users themselves have the ability to configure their individual dashboard using a variety of graphical outputs, if given the rights to do so.
BR10.25		The system shall allow administrative management functionality such as, but not limited to: Creation, inquiry, changes, and deletions of users and role management.	M	**S**	Each of the elements of this requirement can be achieved by administrative management having the assigned roles/privileges.
BR10.26		The system must provide a configurable tool for agency personnel to create reports, dashboards, modify data tables, etc., without knowledge of SQL or other like technology.	M	**S**	The elements of this requirement are supported by the Accela Ad Hoc Report Writer.
BR10.27		For all records, permit only authorized users to view, add, or modify records depending on level of identified access provided, allowing management to grant specific access.	M	**S**	These types of business rules can be enforced by role/privilege assignments.
BR10.28		The system must provide a method to assign retention schedules, notify when retention periods have been met, and track the disposition of disposal/destruction.	M	**W**	The Accela Civic Platform natively supports a Logical Archiving methodology that allows an agency to flag records in mass (either automatically or manually, depending on the agency's requirements) with an "Archived" status based on applicable parameters in line with their records retention policy. This and other statuses can be configured such that they are no longer visible to users or drawn into reports. As such, the records are not physically deleted from the system but rather are logically removed from day-to-day operations. Users with the appropriate role rights could be able to search/see those Archived records and even return them into a visible state for others if they were archived in error or must be retrieved for other purposes. Furthermore, the Accela Civic Platform offers a range of solutions in support of an agency's records management policies and schedules including but not limited to the ability to publish data sets for data warehousing, archiving records based on retention schedules and communication of pending archival via summary reports, emails or SMS messages.

BR10.29		The system must provide the ability for system administrator to add fields, modify field options, etc.	M	**S**	System administrators have extensive abilities in the system, among them to add fields and modify field options.
BR10.30		The system shall interface with TA's existing desktop and all-in-one printers and scanners.	M	**S**	The solution has successfully interfaced with all existing desktops and printers/scanners at our client sites.
BR10.31		The system shall provide for a mobile environment interface for use with various hand-held devices and provide wireless printing support and forms conversion for investigators and inspectors in the field.	M	**S**	The system field component is Accela Mobile which brings the office to field activities on iOS, Android and Windows devices. Mobile operates on all three platforms and can be employed in both wireless and non-wireless supported environments. Printing is supported via WiFi or Bluetooth connected printers. Inspection checklist, investigation forms, etc. can be configured into the solution for use within the Accela Mobile app user interface
BR10.32		The system shall generate all output in softcopy such as, but not limited to: Emails, PDFs, HTML's, etc.	M	**S**	Supported output formats include those listed and more.
BR10.33	**Workflow Scheduler**	The system shall provide a visual dashboard representing workflow job queue status pending and completed as well as any error conditions which may exist.	M	**S**	Visual dashboards related to work queues, processing milestones, error conditions and more are offered both out-of-the-box as well as through applicable configuration where necessary to meet TA business requirements.
BR10.34		The system shall provide a flexible and user friendly workflow scheduler.	M	**S**	Workflow task scheduling and work queue management is user friendly and a standard element within the
BR10.35		The system shall provide automated tracking of workflow changes.	M	**S**	All workflow actions as well as changes, additions, deletions, etc. are tracked as part of the System Audit Trail.
BR10.36		The system shall provide scheduler functions such as, but not limited to: Dependency settings, rescheduling, reruns, pausing jobs, adds, changes, deletions, undo capability, confirmation dialogs, job failure codes, job tracking, etc.	M	**N**	These can all be supported through configuration in Accela's Workflow Designer tool as well as through the case-by-case management of workflows within the back-office TA solution.There is not Undo capability.
BR10.37		The system shall provide documentation associated with every workflow job.	M	**S**	The Accela Civic Platform includes a robust workflow design tool that presents users with a Microsoft Visio-esque user experience including drag and drop capability for the workflow milestones, status connecters that allow for linear, concurrent, skip and loopback functions and powerful automation capabilities including calls to GIS, nested workflows, automated status changes and automated email communication. These workflow design diagrams can also be color coded and printed as a source of documenation where necessary.
BR10.38		The system shall provide workflow information using a "hover" functionality.	M	**N**	While Accela does offer a summary and detailed view for the workflow user interface there does not exist "hover" functionality (i.e. hover over the summary view and it shows a detail view). Currently the user would click to expand/collapse the detail view for any workflow task.
BR10.39		The system shall provide scheduler dashboard functionality.		**S**	The Task Dashboard and Task Management sections within the solution offer the ability for user with the appropriate role rights to schedule and/or reschedule workflow tasks individualy and/or in bulk.
BR10.40		The system shall provide real-time notification of security violations.	M	**S**	The Accela Civic Platform offers unprecedented security granularity including field, form, function and report level administrative privilege grants. All of this and much more is maintained within the industry standard User Role model that allows for the definition of multiple roles per user. This security model creates an environment whereby capability, data, etc. that a user should not possess based on their designated security prviliges is entirely hidden from within the solution; thus virtually elminiating the ability for a user to attempt an action they're not permitted to undertake. However, if a user attempts to access a screen or function of the solution that they're not currently permitted to access they will be notified of their lack of priviliges and provided with a code that can be provided to an applicable subject matter expert that will indicate to them what must be enabled in order to grant that user
BR10.41		The system shall allow encryption of all data elements.	M	**S**	All system data is encrypted at rest and in transit.

BR10.42		The system shall provide the latest records to be available real-time.	M	**S**	All records are provided and available in real-time to authorized users.
BR10.43		The system shall provide archival configuration management.	M	**S**	Configuration management extends to setting the system to conform to retention requirements as described in requirement BR10.28.
BR10.44		The system shall provide seamless access to archived records.	M	**S**	Records are archived in the solution by system configuration; a seamless action performed by system administrators. Please refer to our response to requirement BR10.28 for more information.
BR10.45		The system shall provide a browser based platform for all functions in this RFP.	M	**S**	The entire Accela Civic Platform is accessed and made available to all users via a standard and supported web browser.
BR10.46		The system shall work with the latest version of browsers such as, but not limited to: IE, Edge, Mozilla, Chrome, etc.	M	**S**	For back office user workstations, we support Windows 7, Windows 8 and 8.1 Operating Systems and Windows10 with Internet Explorer version 11 for browsers. Public users who utilize Citizen Access, we support all major Operating Systems and the latest versions of all major web browsers (IE 11, Firefox 37, Safari 8 in Mac OS X 10.10, Google Chrome 42 and Opera 29).
BR10.47		The vendor proposed system shall be either hosted, cloud-based or EITS hosted.	M	**S**	Accela supports the application in many ways including those options mentioned. Please consult the pricing section for the specific option(s) presented for TA consideration.
BR10.48		The vendor shall provide minimum recommendations for the computer/workstation requirements.	M	**S**	This information has been provided in the body of this Proposal.
BR10.49	**Cloud Computing**	At deployment time, the vendor's proposed solution can include a cloud proposal.	M	**S**	Accela has provided for a Accela Cloud deployment as part of this Proposal. Please see the proposal body and pricing section for details.
BR10.50		The vendor can propose a cloud-ready, based technology to meet the requirements of the TA.	M	**S**	Accela has provided for a Accela Cloud deployment as part of this Proposal. Please see the proposal body and pricing section for details. Accela has over 100 such Accela-hosted deployments in successful operation and with uptimes exceeding 99.9%.
BR10.51		If proposing a cloud solution, the vendor shall provide a definition of the proposed cloud-ready technology to include, but not limited to: Storage, critical/non-critical components, Disaster/Recovery, Networks connectivity, vendor pipes used for data transport, etc.	M	**S**	Due to the extensive nature of the details required for reply, the user is referred to the body of this proposal for this information.
BR10.52		A proposed cloud-ready solution shall reside in the contiguous U.S.	M	**S**	All Accela Cloud deployments are hosted in secure primary and secondary centers located in the continental US.
BR10.53		A proposed cloud-ready solution shall encrypt all data transmission.	M	**S**	In the Accela Cloud, all data in transit is encrypted.
BR10.54		A proposed cloud-ready solution shall have encryption on all storage devices.	M	**S**	In the Accela Cloud, all data in storage devices is encrypted.
BR10.55		A proposed cloud-ready solution shall meet the State's IT security requirements defined in this RFP.	M	**S**	Accela has met the security requirements of every State in which it operates the solution.
BR10.56	**Miscellaneous**	The vendor will provide technical support after go-live of each phase of the project for at least two months.	M	**S**	Post go live support is quoted in the cost section
BR10.57		The vendor will provide a training plan.	M	**S**	A Training Plan is quoted in the cost section
BR10.58		The vendor shall provide training materials and scenarios.	M	**S**	Basic training materials and resources will be provided as part of both informal (system administrators) and formal (system administrators, staff users) training.
BR10.59		The system shall include a fully functional training environment with data	M	**S**	Accela Cloud Hosted customers are provided 3 envrionments (Production, Pre-Production and Training). The Pre-Production/Testing and Training environments will be clones of the Product Environment and can be refreshed periodically and/or upon request by the TA.
BR10.60		The vendor shall develop and provide a user manual	M	**S**	A User Manual is provided as part of every Accela Civic Platform implementation.
BR10.61		The vendor shall develop and provide a system administration/operations guide.	M	**S**	A Systems Administration Manual is provided as part of every Accela Civic Platform implementation.
BR10.62		The system shall include a test environment and fully functioning system, including test data.	M	**S**	Accela Cloud Hosted customers are provided 3 envrionments (Production, Pre-Production and Training). The Pre-Production/Testing and Training environments will be clones of the Product Environment and can be refreshed periodically and/or upon request by the TA.
BR10.63		The system shall be flexible enough to support the capability of adding another agency in the future or supporting the merger of another agency, including differences in operating procedures.	M	**S**	The Civic Platform is designed to support inter-agency operations and exists in many other sites under this protocol.

BR10.64		The system shall include tools that allow business users to design, author, and manage content.	M	**S**	The solution inherently provides System Administration Tools that are specifically designed to allow business users to conduct all manner of configuration to fulfill existing needs or those which occur in the future.
BR10.65		The system shall include electronic new permit and renewal permit application submissions, uploading of documents, individual user access, approximately 10,000 users per year, with multiple transactions per users per year.	M	**S**	The solution is designed to operate in large, multi-departmental departments with large staffs that conduct tens of thousands of transactions on a yearly basis.

Nevada Taxicab Authority Records Management System Modernization RFP # 3422					
BR11 - Conversion					
The core system of record for the current TA licensing application LicenseEase (COTS) resides in an Oracle database on a Windows based virtual machine in Carson City. The core					
The following data volume estimates by source type are:					
The TA will provide (Extract) the metadata that describes the data, relationships, access to the data source that may reside in a database and/or flat files, and record count statistical					
The TA Permit number field was originally defined as a four digit field but is now currently six digits. This should be expanded in the new system to nine digits, with zeros preceding					
Requirement ID	**Function**	**Requirements**	**Project Priority (M)mandatory (D)desired**	**Vendor Response**	**Vendor Response Explanation**
BR11.01	**TA System Data Conversion**	The vendor shall provide a proposed conversion plan (for a phased implementation) to include the following: Phase 1 (LicenceEase (COTS), Medallions), Phase 2 (Events, Vehicles and Hearing Access Databases).	M	**S**	A Phased Implementation Plan will be developed in conjunction with TA as part of Contract Negotiations.
BR11.02		The vendor shall clearly define roles and responsibility for participants in the conversion process.	M	**S**	Roles and responsibilities for both parties will be defined as part of Contract Negotiations for all parties involved with the proposed implementation.
BR11.03		The vendor shall validate record counts of data records converted/loaded into any Test environment.	M	**S**	The noted validation will be made prior to any data conversion effort being made and conducted with each data conversion iteration.
BR11.04		The vendor shall identify data integrity issues and propose a Resolution plan for resolving the data integrity issues.	M	**S**	Data integraty issues will be documented during the conversion proccess. The TA is responsible for data cleanup.
BR11.05		The vendor shall provide data mapping of existing TA data elements to corresponding vendor's system data elements.	M	**S**	This mapping activity will take place as part of the services rendered during the implementation process.
BR11.06		The vendor shall provide a data mapping business requirement document that will define the extraction, transformation, and data loads.	M	**S**	The noted document willl developed as part of the services rendered during the implementation process.
BR11.07		The vendor shall provide a data mapping technical requirement document that will define technical processes, systems, files, data elements, jobs, etc. for the extraction, transformation, and data loads.	M	**S**	A data mapping document will be created for each conversion
BR11.08		The vendor shall work with the TA to ensure all data elements are correctly mapped by field type, data element, and data element definitions during each conversion processes.	M	**S**	The implementation team expect to work with TA staff to assure the correct mapping is correct with respect to the data conversion process.
BR11.09		The vendor shall work with the TA to ensure all documented requirements are approved and signed by both the TA and vendor.	M	**S**	Standard procedures articulated in the Final Agreement will be followed to support this requirement
BR11.10		The vendor shall load the transformed data files into the correct database(s) and/or structure defined by the vendor's proposed system.	M	**S**	This activity is supported by the standard procedures involved with every Accela Civic Platform implementation.
BR11.11		The vendor shall provide various reports, statistics, and metrics during the data transformation processes.	M	**S**	Final conversion counts will be provided for TA review
BR11.12		The vendor shall provide various reports, statistics, and metrics during the data load processes.	M	**S**	Final conversion counts will be provided for TA review
BR11.13		The vendor shall validate all data loaded to ensure data integrity.	M	**S**	This action is performed as part of every Civic Platform conversion.
BR11.14		The vendor shall validate all data is loaded. All exceptions will be reported to TA project staff and corrected by vendor prior to reloading of data.	M	**S**	These actions are performed as part of every Civic Platform conversion.
BR11.15		The vendor shall provide an process to transfer/migrate data from proposed vendor's test system to the non-production environments for User Acceptance testing.	M	**S**	These actions are performed as part of every Civic Platform conversion.
BR11.16		The vendor shall validate data transferred/migrated from each enviroment defined.	M	**S**	This action is performed as part of every Civic Platform conversion.
BR11.17		The vendor will work with the TA project personnel to address all issues and exceptions encountered to ensure a successful data load into the vendor's proposed system.	M	**S**	Every implementation of the Accela Civic Platform is accomplished with the input and assistance of representatives of our clients to assure success.
BR11.18		The vendor shall provide project timelines for the conversion process to include dress rehearsals, extraction, loads, and proposed production execution.	M	**S**	A defined schedule for all data conversion activities is created as part of an overall implementation schedule.
BR11.19		The vendor shall work the TA to plan the conversion strategy and ensure the strategy meets the business needs for all TA business functions.	M	**S**	The success of an implementation is closely tied to the level of interaction and communication between the vendor and the agency.

BR11.20		The TA plans to use a phased implementation approach with each phase migration to production and go-live occuring once the Phase has passed User Acceeptance. The vendor shall provide a phased implementation plan that will include the above senerio.	M	**S**	An implementation plan will be created for each phase
BR11.21	**Data Cleansing**	For Taxicab/Inspection records, when there is an OSN or 24 Hour Notice Status, if the cab has been "removed from service", the OSN or 24 hour notice must show as cleared through removal from service - data cleansing	M	**W**	The noted if-then clause is supported by the configuration of the Business Rules Engine of the solution.
BR11.22		For TA permit records, those that are expired greater than three years will not need to be converted unless there is an outstanding fine.	M	**W**	This requirement is acknowledged and can be supported via system configuration.