32451

DECADE LICENSE AND SUPPORT AGREEMENT

This Agreement is made and entered, in duplicate, as of November 21, 2011, for reference purposes only, pursuant to a minute order adopted by the City Council of the City of Long Beach at its meeting on November 8, 2011, by and between the CITY OF LONG BEACH, acting through its Department of Health and Human Services, (hereinafter "Client") with address at 2525 Grand Avenue, Long Beach, California 90815, and DECADE SOFTWARE COMPANY, LLC (hereinafter "Decade") with principal place of business at 1195 West Shaw Avenue, Fresno, California 93711.

WHEREAS, Client requires specialized services requiring unique skills to be performed in connection with the development, implementation, support, and maintenance of a data management system to be used to automate, manage, and report environmental health inspection activities;

WHEREAS Decade is the developer and owner of a certain set of software products marketed using the trade name EnvisionConnect;

Whereas eCompliance of San Francisco, California, has developed a software product used to manage the creation, completion, management, authentication and submittal of electronic forms ("Product"). eCompliance provides technical, operational, and training support services to best implement and use the Product ("Services"). Decade has acquired the rights to distribute the Product and Services in the United States. Client wishes to adapt the Product to work with the EnvisionConnect application used to manage activities of the client; to use Services to develop and implement a Product-based Portal; and to have Decade train Client staff and other stakeholders in the use of the Portal;

WHEREAS, Client has selected Decade in accordance with Client's administrative procedures using a Request for Proposals ("RFP") and Decade's proposal submitted in response to RFP dated July 15, 2010 for such project and related service and maintenance, all attached hereto as Appendix D and incorporated by this reference, and Client has determined that Decade and its employees are qualified, licensed, if so required, and experienced in performing these specialized services;

WHEREAS Client desires to have Decade perform these specialized services and to obtain from Decade a license, as described herein, to use Decade's Licensed Programs and services, and Decade is willing and able to do so on the terms and conditions in this Agreement;

WHEREAS, Decade has represented and does hereby represent to the Client, subject to the terms and conditions hereof, that the software and services to be supplied to the Client pursuant hereof, shall satisfy the requirements of the Client as set forth hereunder;

AND WHEREAS Client desires to obtain from Decade a revocable, non-transferable, non-sub licensable, and non-exclusive license to use Decade's Licensed Programs and services;

NOW THEREFORE this Agreement witnesses that for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, and the mutual promises herein, the parties agree as follows:

Appendices

The following appendices are attached to form part of these terms and conditions:

Appendix	Description
Appendix A	Volumes, Prices, and Payment Schedule for License Fees
Appendix B	Professional Services Rates
Appendix C	Third-Party Software
Appendix D	Decade's Response to Request for Proposals
Appendix E	Statement of Work
Appendix F	Support Services

In the event of a conflict between the main body of this Agreement and an Appendix to this Agreement, the terms of the Appendix shall prevail.

Definitions

1.1. Agreement. The Agreement set forth in this document.

1.2. Licensed Materials. The term "Licensed Materials" shall mean computer programs, in object form, and all related documentation and materials provided to Client under the terms of this Agreement. Licensed Materials shall not include Decade Source Code.

1.3. Licensed Programs. The term "Licensed Programs" shall mean the object code version of the software, as well as all updates, enhancements and releases. Licensed Programs are a sub-set of the Licensed Materials.

1.4. Decade Source Code. The term "Decade Source Code" shall mean a full source language statement of the programs owned by Decade used to prepare the Licensed Programs, including any updates, enhancements, revisions and modifications thereto that are provided to Client under this Agreement. Decade Source Code shall not include any source language statements for any portion of the Licensed Programs owned by or sublicensed from third parties.

1.5. Effective Date. The term "Effective Date" shall mean a specific mutually agreed upon date as defined in Appendix A.8, Dates and Term.

1.6. Anniversary Date. The term "Anniversary Date" shall mean a specific mutually agreed upon date as defined in Appendix A.8, Dates and Term.

1.7. Version. The term "Version" shall mean an issue of Licensed Programs, which has been made available to the Client.

1.8. Professional Service Request (PSR). The term "PSR" shall mean the document and process required to authorize professional services which are outside of those agreed to in Appendix E, Statement of Work.

1.9. EnvisionConnect. The term EnvisionConnect shall mean the trade name for the Licensed Programs provided under this Agreement as described in Appendix A.

1.10 EnvisionConnect Portal. The term EnvisionConnect Portal shall mean the trade name for the public portal provided by eCompliance and licensed through Decade Software Company, LLC. eCompliance Portal is an electronic transaction system developed, maintained and owned by third party eCompliance, Inc. The EnvisionConnect software utilizes this system to provide electronic authentication and compliance features with respect to its transactions. However, Decade is unaffiliated with eCompliance, Inc. and does not assume any liability for the operation of said system.

1.11. Inspector. The term "Inspector" shall mean a Client staff member whose job function requires fifty percent (50%) or more time spent conducting field activities such as inspections or investigations.

License

1.12. Decade hereby grants to Client, and Client hereby accepts from Decade, subject to the terms and conditions of this Agreement, a revocable, non-transferable, non-sub licensable, and non-exclusive license ("License") to use the Licensed Materials solely for its own use. The License shall be restricted for use with one (1) production server database with a single set of master code tables.

1.13. The License also authorizes Client to maintain back-up copies of the Licensed Programs for use with databases for back up and testing purposes only. Client agrees to maintain appropriate records on the quantity and location of all such copies, and produce same on demand by Decade. Client agrees to include the Decade copyright notice on all copies, in whole or in part, of any form. Client agrees to receive prior written approval from Decade before copying any portion of the Licensed Programs for any other purpose, which Decade may, at its sole and unfettered discretion, grant or not grant.

1.14. Client may not assign, sublicense or otherwise transfer, in whole or in part, the License, the Licensed Materials, this Agreement or any of its rights or obligations hereunder, whether voluntarily, by operation of law or otherwise, without the prior written consent of Decade.

1.15. Client agrees to not allow access to the Licensed Programs to any third party without written permission from Decade.

Ownership

1.16. Decade is the lawful owner or licensee of all proprietary rights whatsoever in the Licensed Materials including any changes, additions, and enhancements in the form of new or partial programs or documentation, but not as to limit the generality thereof, all copyright interests in the Licensed Materials. All copies of the Licensed Materials provided to, or reproduced by, the Client pursuant to this Agreement are, and remain the property of Decade. No rights in the Licensed Materials are granted to anyone other than those set forth in this Agreement. The Client shall use its commercially reasonable best efforts to prevent any violations of Decade's property rights in the Licensed Materials and shall, under no circumstances, sell, lease, sublease, sublicense, assign, barter, encumber or otherwise transfer the Licensed Materials or use the Licensed Materials for the processing of data for others, except as provided in this Agreement and herein.

1.17. The Client shall have no right to modify, enhance or otherwise change the Licensed Materials in any way without the prior written consent of Decade, however the Client may merge the Licensed Materials into other materials to form a system, provided that upon termination of the License granted by this Agreement, the Licensed Materials will be completely removed from the system and treated as though permission to merge had never been granted. Use of the Licensed Materials in a system shall remain subject to all other terms and conditions of this Agreement.

1.18. The Licensed Materials and all other data or materials supplied by Decade to Client are confidential and proprietary to Decade, protected by law and of substantial value to Decade, and their use and disclosure must be carefully and continuously controlled.

1.19. The Licensed Materials and the Decade Source Code are protected by the Copyright Laws of the United States.

1.20. All logos, trademarks and trade names of Decade are proprietary to Decade and may only be used as authorized in writing by Decade.

1.21. Client shall keep all property of Decade free and clear of all claims, liens and encumbrances.

1.22. Client shall notify Decade immediately of the unauthorized possession, use or knowledge of any item supplied to Client pursuant to this Agreement.

1.23. Except for claims or actions governed by the Government Tort Claims Act, codified in California Government Code section 900 *et seq.*, if Client breaches or attempts to breach any of the provisions of this Agreement, Decade shall have the right, in addition to such other remedies which may be available to it, to injunctive relief enjoining such breach or attempt to breach, it being acknowledged that legal remedies are inadequate. The provisions of this Section 1.23 shall survive termination of this Agreement.

Prices, Adjustments, and Taxes

1.24. Prices for license fees and professional services are contained in Appendixes A and B. The original license and annual fees are based on the number of Inspectors specified in Appendix A. Annual prices are not-to-exceed the stated amounts.

The price for the period beginning January 1, 2012 and ending December 31, 2012 is $147,576.58.

The price for the period beginning January 1, 2013 and ending December 31, 2013 is $74,466.56.

The price for the period beginning January 1, 2014 and ending December 31, 2014 is $74,466.56.

1.25. By each Anniversary Date, Client will submit to Decade the then current number of inspectors. Decade will determine the annual license and maintenance fee for the next full year at Decade's then prevailing license and maintenance fee schedule, not to exceed rates set forth in this Agreement. Client may obtain additional licenses prior to an Anniversary Date by submitting a written request to Decade, and paying the pro rata license and maintenance fees based upon the rates then in effect.

1.26. Prices and rates are fixed for the initial one-year term and two (2) additional one-year terms per Appendix A unless there is a change in the number of inspectors. After the initial three (3) year term, rates in Appendix A may be increased up to three-percent (3%) per year for successive renewal years, when substantiated by a recognized economic indicator and approved by the Client. Rates for Professional Services in Appendix B are fixed for the initial one-year term and may be increased up to three-percent (3%) per year for successive renewal years, when substantiated by a recognized economic indicator and approved by the Client.

1.27. Client shall not pay charges for taxes, transportation, boxing, packaging, crating or returnable containers unless separately stated hereon. All sales, use, excise or similar taxes to be paid by Client must be itemized separately hereon and on invoices. Client is exempt from payment of Federal Excise Tax under Certificate Number 95-730502K and Client shall not be charged this tax. Any tax, such as sales and use taxes, exclusive of property and income taxes, that Decade is required to collect or pay based upon the sale or delivery of products or services under this Agreement shall be paid by Client and shall be included in the prices specified in this Agreement.

If Client is using the Licensed Programs in California, and receives the Licensed Programs on tangible personal property (for example floppy disks, magnetic tape, Zip disk, CD-ROM, or any other medium by which the Licensed Programs are temporarily stored to effect transfer to Client's computer) then the full license and support fee, as well as training and conversion fees, are subject to California sales and use tax. The definition of transfer is the leaving behind of such tangible personal property. However, if the Licensed Programs are received by Client over communication lines, via the Internet, a bulletin board service or through a direct connection between Client and Decade computers, the license and support, training, and conversion fees are not subject to sales and use tax. Client shall be responsible for all applicable federal and state sales and use taxes, including, but not limited to, sales and use taxes on parts, supplies and services. If Client is using the Licensed Programs in a state other than California then

Client is responsible for knowing the sales and use tax rules of that state. Decade shall cooperate with Client with respect to the self-accrual of use tax.

1.28. Section 1.29 lists products and services that are not included in the license and support fee. Client shall pay Decade in due course of payments, not to exceed sixty (60) days, following receipt from Decade and approval by City of invoices showing the services or task performed and the time expended. Decade shall certify on the invoices that Decade has performed the services in full conformance with this Agreement and is entitled to receive payment. Decade reserves the right to withhold services for fees that are past sixty (60) days due.

Items Not Covered by this License and Support Fee

1.29. Appendix A contains prices for license fees and all services included in Appendix E "Statement of Work" that are agreed upon as a condition of this Agreement. Services not specifically included in Appendix E can be obtained from Decade after completion and approval of a Professional Service Request (PSR) at the rates identified in Appendix B. Fees for Professional Services are waived if these services are required due to Decade's negligence or willful misconduct.

The following services will be provided on a fee basis. Appendix A contains prices for license fees, and all services included in Appendix E Statement of Work that are agreed upon as a condition of this Agreement. Services not specifically included in Appendix E can be obtained from Decade after completion and approval of a Professional Service Request (PSR) at the rates identified in Appendix B.

Support Initiated Outside Normal Working Hours	Decade's normal working hours are 6:00 A.M. to 5:00 P.M., Pacific Time, Monday through Friday, with Federal and State holidays excluded. If Client requires or initiates service outside these hours, Client will pay for such support at Decade's prevailing rates. <u>Holidays Include:</u> 1) New Year's Day; 2) Martin Luther King Jr.'s Birthday; 3) Presidents' Day ; 4)Memorial Day; 5) Independence Day; 6) Labor Day; 7) Thanksgiving Day; 8) The Friday after Thanksgiving; 9) Christmas Eve; and, 10) Christmas Day
Data Conversion	
Data Correction or Restoration	Unless caused by Decade's negligence while working on Client's system.
Custom Programming	
Software Implementation	
Initial and New Staff	
Training	

HIPAA and HITECH Act Compliance

1.30 Decade, its employees, officers, and members shall comply with the law to protect the privacy of Customer's clients under the federal Health Insurance Portability and Accountability Act ("HIPAA") and the Health Information Technology for Economic and Clinical Health Act ("HITECH Act") and shall indemnify, hold harmless and defend Customer with respect to all claims, demands, loss, liability, damage, causes of action, costs and expenses incurred by Customer relating to the failure of Decade, its employees, members and officers to comply with HIPAA and the HITECH Act, and relating to Decade's disclosure to any person or entity outside of Decade of any client information provided to Decade by the City.

Insurance

1.31 If Decade performs any work on Client property, then Decade agrees to and shall provide the following insurance which shall supersede anything to the contrary in this Agreement or any Appendix:

A. Decade shall procure and maintain, at Decade's expense for the duration of this Agreement, from insurance companies that are admitted to write insurance in California and have ratings of or equivalent to A:V by A.M. Best Company or from authorized non-admitted insurance companies subject to Section 1763 of the California Insurance Code and that have ratings of or equivalent to A:VIII by A.M. Best Company, the following insurance:

(a) Commercial general liability insurance (equivalent in scope to ISO form CG 00 01 11 85 or CG 00 01 10 93) in an amount not less than $1,000,000 per each occurrence and $2,000,000 general aggregate. This coverage shall include but not be limited to broad form contractual liability, cross liability, independent contractors liability, and products and completed operations liability. The City of Long Beach, its boards and commissions, and their officials, employees and agents shall be named as additional insureds by endorsement (on City of Long Beach's endorsement form or on an endorsement equivalent in scope to ISO form CG 20 10 11 85 or CG 20 26 11 85), and this insurance shall contain no special limitations on the scope of protection given to City of Long Beach, its boards and commissions, and their officials, employees and agents. This policy shall be endorsed to state that the insurer waives its right of subrogation against City of Long Beach, its boards and commissions, and their officials, employees and agents.

(b) Workers' Compensation insurance as required by the California Labor Code and employer's liability insurance in an amount not less than $1,000,000. This policy shall be endorsed to state that the insurer waives its right of subrogation against City of Long Beach, its boards and commissions, and their officials, employees and agents.

(c) Professional liability or errors and omissions insurance in an amount not less than $1,000,000 per claim.

(d) Commercial automobile liability insurance (equivalent in scope to ISO form CA 00 01 06 92), covering Auto Symbol 1 (Any Auto) in an amount not less than $500,000 combined single limit per accident.

B. Any self-insurance program, self-insured retention, or deductible must be separately approved in writing by City of Long Beach's Risk Manager or designee and shall protect City of Long Beach, its officials, employees and agents in the same manner and to the same extent as they would have been protected had the policy or policies not contained retention or deductible provisions.

C. Each insurance policy shall be endorsed to state that coverage shall not be reduced, non-renewed or canceled except after thirty (30) days prior written notice to City of Long Beach, shall be primary and not contributing to any other insurance or self-insurance maintained by City of Long Beach, and shall be endorsed to state that coverage maintained by City of Long Beach shall be excess to and shall not contribute to insurance or self-insurance maintained by Decade. Decade shall notify City of Long Beach in writing within five (5) days after any insurance has been voided by the insurer or cancelled by the insured.

D. If this coverage is written on a "claims made" basis, it must provide for an extended reporting period of not less than one hundred eighty (180) days, commencing on the date this Agreement expires or is terminated, unless Decade guarantees that Decade will provide to City of Long Beach evidence of uninterrupted, continuing coverage for a period of not less than three (3) years, commencing on the date this Agreement expires or is terminated.

E. Decade shall require that all sub-vendors or contractors that Decade uses in the performance of these services maintain insurance in compliance with this Section unless otherwise agreed in writing by City of Long Beach's Risk Manager or designee.

F. Prior to the start of performance, Decade shall deliver to City of Long Beach certificates of insurance and the endorsements for approval as to sufficiency and form. In addition, Decade shall, within thirty (30) days prior to expiration of the insurance, furnish to City of Long Beach certificates of insurance and endorsements evidencing renewal of the insurance. City of Long Beach reserves the right to require complete certified copies of all policies of Decade and Decade's sub-vendors and contractors, at any time. Decade shall make available to City of Long Beach's Risk Manager or designee all books, records and other information relating to this insurance, during normal business hours.

G. Any modification or waiver of these insurance requirements shall only be made with the approval of City of Long Beach's Risk Manager or designee. Not more frequently than once a year, City of Long Beach's Risk Manager or designee may require that Decade, Decade's sub-vendors and contractors change the amount, scope or types of coverages required in this Section if, in his or her sole opinion, the amount, scope or types of coverages are not adequate.

H. The procuring or existence of insurance shall not be construed or deemed as a limitation on liability relating to Decade's performance or as full performance of or compliance with the indemnification provisions of this Agreement.

Indemnification

1.32. Decade shall indemnify, protect and hold harmless Client, the City of Long Beach, its Boards, Commissions, and their officials, employees and agents ("Indemnified Parties"), from and against any and all liability, claims, demands, damage, loss, obligations, causes of action, proceedings, awards, fines, judgments, penalties, costs and expenses, including attorneys' fees, court costs, expert and witness fees, and other costs and fees of litigation, arising or alleged to have arisen, in whole or in part, out of or in connection with (1) Decade's breach or failure to comply with any of its obligations contained in this Agreement, or (2) negligent or willful acts, errors, omissions or misrepresentations committed by Decade, its officers, employees, agents, subcontractors, or anyone under Decade's control, in the performance of work or services under this Agreement (collectively "Claims" or individually "Claim").

1.33. In addition to Decade's duty to indemnify, Decade shall have a separate and wholly independent duty to defend Indemnified Parties at Decade's expense by legal counsel approved by Client, from and against all Claims, and shall continue this defense until the Claims are resolved, whether by settlement, judgment or otherwise. No finding or judgment of negligence, fault, breach, or the like on the part of Decade shall be required for the duty to defend to arise.

1.34. Client agrees to act in good faith to: (i) notify Decade of any Claim, and tender the defense of the Claim to Decade, within a reasonable period of time, such that Client and Decade do not suffer any prejudice to their respective rights; (ii) give Decade the right to control the defense, and if appropriate, the settlement of the Claim; (iii) make no compromise, settlement or admission of liability; and (iv) assist Decade, as may be reasonably requested, in the defense. The parties agree that Decade shall bear no responsibility for the settlement of any claim, suit or proceeding made by the Client without Decade's prior written approval.

1.35. If a court of competent jurisdiction determines that a Claim was caused by the acts, negligence, willful misconduct, error, omission or misrepresentation of Indemnified Parties, or anyone acting under the direction of the Indemnified Parties, Decade's costs of defense and indemnity shall be (1) reimbursed in full if the court determines that the Indemnified Parties, or persons acting thereunder, were solely responsible for the acts, negligence, willful misconduct, errors, omissions or misrepresentations giving rise to the Claim, or (2) reduced by the percentage of the Indemnified Parties' responsibility, or the responsibility of persons acting thereunder, for the acts, negligence, willful misconduct, errors, omissions or misrepresentations giving rise to the Claim. Client shall reimburse Decade within sixty (60) calendar days for any excess amounts paid by Decade toward the cost of defending or indemnifying Client.

1.36. Client acknowledges that the Licensed Materials are not designed, made or intended for any use in hazardous environments requiring fail-safe performance, such as in the operation of nuclear facilities or applications, aircraft control, communications or navigation, air traffic control, medical devices, missile and defense systems that could lead to death, personal injury, or physical or environmental damage.

Warranty and Intellectual Property Infringement

1.37. Decade shall deliver products and equipment using reasonable care to a secure and safe location designated by Client. Decade shall provide, at no cost to Client, standard shipping and standard transportation insurance. The insurance will cover the risk of loss to the products and equipment being shipped by Decade to Client until the later of either (i) the delivery date of the products and equipment to Client's designated location, or (ii) the installation date of the products and equipment.

1.38. Decade warrants that the products and equipment sold to Client are eligible for all warranties and indemnities provided by the manufacturer of those products and equipment. Decade hereby transfers those warranties and indemnities to Client.

1.39 Decade warrants that the media used to deliver the Licensed Materials to Client is free from mechanical or recording defects, and if such defects are found, Decade will immediately replace the defective media.

1.40. Decade warrants that it is the owner or licensee of the Licensed Materials, and that it has the right to grant the License to the Client. Decade agrees to defend, indemnify, and save the Client free and harmless from and against any and all liabilities, claims, demands, suits, costs, expenses, or judgments now existing, or which may hereafter arise, in any connection whatsoever with any infringement or alleged infringement of any patent, copyright, trademark, trade secret, or other intellectual property of any nature relating to the Licensed Materials. Client agrees to act in good faith to: (1) promptly notify Decade, in writing, of any claim against the Client; (2) give Decade the sole right to control and direct the defense and settlement of the action; (3) make no compromise, settlement or admission of liability; and (4) provide reasonable assistance and cooperation in the defense of that action. The parties agree that Decade shall bear no responsibility for the settlement of any claim, suit or proceeding made by the Client without Decade's prior written approval. If the Licensed Materials are held to infringe, and the use thereof is enjoined, Client may terminate this Agreement and if so terminated, Decade shall return the initial license fee actually paid by the Client to Decade under this Agreement, and upon such return, any licenses for the Licensed Materials shall terminate immediately. This Section 1.40 sets forth the entire obligation of Decade, and Client's exclusive remedy, for the actual or alleged infringement of any software provided by Decade of any patent, copyright, trademark, trade secret or other intellectual property right of any person or entity.

1.41. Decade warrants that the Licensed Programs will perform substantially in accordance with its respective documentation, at no additional cost to Client, provided that: (a) the Licensed Programs have not been modified, changed or altered by anyone other than Decade or as authorized by Decade in writing; (b) Client's computer system is in good operating order and is installed in a suitable operating environment; (c) Client's computer system configuration used in the operation of the Licensed Programs meets Decade's approved specifications as contained in the Statement of Work, Appendix E; (d) the error or defect is not caused by Client or its agents, employees or contractors; (e) Client promptly notifies Decade of the error or defect when it is discovered; (f) all fees then due to Decade have been paid; and (g) Client is not otherwise in breach of its obligations under this Agreement. In such event, Decade shall use its commercially reasonable efforts to cause the Licensed Programs to perform substantially in accordance with its then-current Licensed Materials as soon as reasonably practicable under the circumstances.

1.42. Except as specifically set forth above, there are no other warranties of any kind, whether express or implied, with respect to the licensed programs, the licensed materials or any updates, enhancements or releases thereto, or any other services or goods provided by Decade to Client in connection with this Agreement, including without limitation any warranties of merchantability or fitness for a particular purpose.

1.43. Decade does not warrant that the functions contained in the licensed programs shall meet Client's requirements or shall operate in combination with other software or systems which Client selects for use, or that the operation of the licensed programs shall be uninterrupted or error free, or that all errors and defects have been identified and corrected by Decade.

1.44. Neither Decade nor Client shall be liable for any indirect, incidental, punitive, exemplary, special or consequential damages of any kind whatsoever suffered or incurred by the other party arising out of or related to its performance under this Agreement or as a consequence of the use or performance of the licensed programs or otherwise, even if Decade or Client has been advised of the possibility of such damages. However, this paragraph shall not be construed or deemed as a limitation on liability relating to the indemnification provisions set forth in Sections 1.32 through 1.34, inclusive, of this Agreement, but this paragraph shall apply as a limitation of liability to the Warranty and Intellectual Property Infringement provisions set forth in Sections 1.37 through 1.41.

Client Responsibilities

Client is responsible for the following:

1.45. Payment to Decade in due course, not to exceed sixty (60) days, following receipt from Decade and approval by Client of invoices showing the services or task performed and the time expended. Decade shall certify on the invoices that Decade has performed the services in full conformance with this Agreement and is entitled to receive payment. Payment will not exceed 60 days.

1.46. Implement a test system and use said system to install and test new Versions of the Software prior to installation in a production environment.

1.47. Provision of appropriate operating environment for Client's computer system, Client employees, and Decade staff when at Client location.

1.48. Provision of knowledgeable, competent operators with an understanding of Client's operations.

1.49. Scheduled training to properly prepare Client's staff to use Licensed Programs.

1.50. Backing up files and Licensed Programs daily, or whenever they change, and keeping them in a secure place.

1.51. Notifying Decade of a problem as soon it appears.

Version and Module Upgrades

1.52. Decade will periodically make Licensed Programs upgrades and enhancements available to Client. Decade will provide the necessary instructions and software tools so Client can install the upgrades and modifications.

1.53. Client will test each new release level, and upgrade its production system to said new release level, within one hundred twenty (120) calendar days of being provided with said release. Decade will continue to provide support for the current version of the Licensed Programs only, however will provide support for the prior Version for at least one hundred twenty (120) calendar days after the release of the new Version. Decade will have the sole discretion to decide if new Licensed Programs are a no charge upgrade, a no charge enhancement, or a billable offering. Billable offerings are optional, and Client will not be required to purchase them to maintain the current release level. Decade will continue to provide maintenance and support services to Client on the current release level if Client chooses not to purchase a billable offering.

Termination

1.54. Either party may terminate this Agreement for any reason or no reason at any time by giving thirty (30) calendar days prior written notice to the other party. In the event of termination under this Section, Client shall pay Decade for services satisfactorily performed, and licensing and maintenance fees and costs incurred up to the effective date of termination for which Decade has not been previously paid. Such termination may be in addition to any other rights and remedies the terminating party may have at law or in equity.

Actions Upon Termination

1.55. Client will cease using Licensed Materials immediately upon termination.

1.56. Within thirty (30) days after termination for any reason, Client will furnish Decade an affidavit certifying that the original and all copies, in whole or in part, of the Licensed Materials have been returned to Decade or destroyed by Client.

Access to Client Systems

1.57. Client agrees, within the constraints of Client's policies and protocol (so long as said policies and protocols do not prevent Decade from performing its obligations herein), to allow remote access to

Client's computer system. This access will be used to provide technical support and problem resolution. Client shall install its own security measures to prevent unauthorized access. Decade shall provide Client with the appropriate communication software at no additional cost. In the event Decade must access the Client's system remotely, within the constraints of Client's policies and protocol, Decade is responsible for all expenses associated with obtaining and installing the infrastructure required to support Decade's remote access.

Notice

1.58. Any notice, request, demand, consent, or other communications provided or permitted hereunder shall be in writing and given by personal delivery, transmitted by facsimile, or sent by ordinary mail, postage paid, addressed to the party for which it is intended at its address as follows:

<u>For Decade:</u>
Attention: Kevin Delaney
1195 West Shaw Avenue
Fresno, CA 93711
Phone: 800-233-9847 ext 703
Fax: 559-222-1365
E-Mail: kevindelaney@decadesoftware.com

<u>For City of Long Beach (Client):</u>
Attention: City Manager
333 West Ocean Boulevard
Long Beach, CA 90802

With a copy to
City of Long Beach, Environmental Health Bureau
Attention: Nelson Kerr
2525 Grand Avenue, Suite 220
Long Beach, CA 90815
Phone: (562) 570-4170
Fax: (562) 570-4038
E-mail: Nelson.Kerr@longbeach.gov

General

1.59. Any clause of this Agreement found to be unenforceable shall be severed from this Agreement and the remainder of this Agreement shall remain in full force and effect.

1.60. Any waiver of any clause of this Agreement shall not constitute a subsequent waiver of that clause or any other clause. Failure or delay of either party to enforce compliance with any clause shall not constitute a waiver of such clause.

1.61. This Agreement shall be governed by California law, and the court of competent jurisdiction shall be in Los Angeles County, California.

1.62. In the event litigation is required to enforce performance of this Agreement, the prevailing party shall be reimbursed the costs of enforcement, including, but not limited to attorney fees and costs, witness fees and costs, and court costs.

1.63. This Agreement replaces all other prior agreements, orally or in writing, relating to the subject matter contained herein, including any made by other parties such as distributors, consultants, dealers or resellers. This Agreement can only be modified in writing as approved by authorized signatories of both parties.

1.64. This Agreement is binding upon and shall inure to the benefit of the legal successors and assigns of the parties.

Acceptance of Agreement

Decade and Client have caused this Agreement to be executed by their duly authorized representatives on the respective dates entered below:

Decade Software Company, LLC

Kevin Delaney, President 12-22-2011
Date Accepted

City of Long Beach

Assistant City Manager
Patrick H. West, City Manager
EXECUTED PURSUANT TO SECTION 301 OF THE CITY CHARTER.

12-16-11
Date Accepted

The persons signing this Agreement warrant that they have read and understand all the terms and conditions contained herein, are authorized to sign this Agreement.

APPROVED AS TO FORM
12/15, 2011
ROBERT E. SHANNON, City Attorney
By
LINDA TRANG
DEPUTY CITY ATTORNEY

Appendix A. Volumes, Prices, Payment Schedule, and Term for License Fees

EnvisionConnect is licensed and supported under a monthly subscription plan based on the Client's full-time equivalent (FTE) field inspection staff whose job function requires fifty percent (50%) or more time spent conducting field activities such as inspections or investigations.

A.1 Number of Inspectors and Workstations

Inspectors and Program Areas	Numbers
Number of Inspectors	25
Number of Inspectors Using EnvisionConnect Remote	25
Number of Workstations	Unlimited

A.2 Licensed Programs

EnvisionConnect –Licensed Programs Included in this Agreement:

- EnvisionConnect as described in Decade's response to RFP HE10-058
- EnvisionConnect Remote Use as described in Decade's response to RFP HE10-058
- EnvisionConnect Portal as described in Decade's response to RFP HE10-058

A.3 EnvisionConnect Rates and Fees

Fees are not to exceed the following amounts unless the number of inspectors increases.

A.3.1 Recurring Fees

Annual License and Support Fees	No. of Inspectors	At Monthly Rate	Monthly Cost	Annual Cost
EnvisionConnect	25	$ 105.00	$ 2,625.00	$31,500.00
EnvisionConnect Remote	25	$ 52.50	$ 1,312.50	$15,750.00
EnvisionConnect Portal	n/a		$ 1,250.00	$15,000.00
	Total Recurring Fees		**$ 5,187.50**	**$62,250.00**

A.3.2 One-Time Fees

The following Professional Services Fees cover all services outlined in Appendix E, Statement of Work.

Professional Service	Units	Rate	Type	One-Time Cost
Onsite Confirmation and Planning meeting	40	$ 126.00	Hour	$ 5,040.00
Onsite Training	5	$ 1,470.00	Day	$ 7,350.00
Web-Based Training	40	$ 105.00	Hour	$ 4,200.00
Onsite Training Per Diem (5 days plus travel)	1		Trip	$ 2,163.00
Onsite Confirmation and Planning meeting Per Diem (5 days plus travel)	1		Trip	$ 2,163.00
Data Conversion	200	$ 126.00	Hours	$ 25,200.00
Portal Setup	1	$15,000.00	One Time	$ 15,000.00
Total One-Time Professional Services Fees				**$ 61,116.00**

A.4 Payment Schedule

Professional Service	Year 1	Year 2	Year 3
EnvisionConnect	$ 31,500.00	$31,500.00	$31,500.00
EnvisionConnect Remote	$ 15,750.00	$15,750.00	$15,750.00
EnvisionConnect Portal	$ 15,000.00	$15,000.00	$15,000.00
Onsite Confirmation and Planning meeting	$ 5,040.00		
Onsite Training	$ 7,350.00		
Web-Based Training	$ 4,200.00		
Training Per Diem (5 days plus travel)	$ 2,163.00		
Onsite Confirmation and Planning meeting Per Diem (5 days plus travel)	$ 2,163.00		
Data Conversion	$ 25,200.00		
Portal Setup	$ 15,000.00		
10% Contingency	$ 12,336.60	$ 6,225.00	$ 6,225.00
Subtotal	**$135,702.60**	**$68,475.00**	**$68,475.00**
Sales tax @ 8.75%	$ 11,873.98	$ 5,991.56	$ 5,991.56
Total Payments (includes all sales tax)	**$147,576.58**	**$74,466.56**	**$74,466.56**

First Year License and Support Fees

Payment Percentage	Milestone
50 Percent	Agreement Signing
25 Percent	Secure Access to Hosted Database for Configuration
25 Percent	Delivery and Acceptance by Client of Notice of Project Completion

Client acceptance will be provided to Decade by a signed approval of the "Notice of Project Completion."

EnvisionConnect Portal Set-up and Configuration

Payment Percentage	Milestone
50 Percent	Agreement Signing
50 Percent	Upon Acceptance by Client

Data Conversion

Payment Percentage	Milestone
50 Percent	Agreement Signing
25 Percent	Delivery of Data Conversion Plan
25 Percent	Acceptance by Client of the Converted Data

Onsite Needs Analysis and Configuration

Payment Percentage	Milestone
100 Percent	At Completion of Onsite Event

Onsite Training and Travel Per Diem	
Payment Percentage	**Milestone**
100 Percent	At Completion of Each Onsite Training Event
Payment Percentage	**Milestone**
100 Percent	Invoiced Monthly Based on Hours Used

A.5 Payment Frequency

Second and successive annual License Renewal Fees will be paid monthly upon receipt of invoice.

A.6 Taxes

See Section 1.27 of the Additional Terms and Conditions

A.7 Client Contact for Billing Issues

Name:	Nelson Kerr, Manager Environmental Health Bureau
Phone:	570-4170
Email:	Nelson.Kerr@longbeach.gov

A.8 Dates and Term

This Agreement shall become effective on January 1, 2012. The month and day of the effective date shall determine the anniversary date (hereinafter "Anniversary Date"). This Agreement shall have an initial term of three (3) years, and Client shall have two options to renew this Agreement for a period of one-year each. Either party may terminate this Agreement in accordance with Section 1.54.

Appendix B. Professional Services Rates

Any services requested outside of those agreed to in Appendix E, Statement of Work will require authorization through a Professional Service Requests (PSR) signed by both parties. The following rates will apply for the listed professional services.

Item	Rate	Per Unit
Professional Services		
Custom Programming	$126.00	Hour
Consultation	$126.00	Hour
Report Development	$126.00	Hour
Training		
Training at Client Facility	$1,470.00	Day
Training at Decade Facility	$1,470.00	Day
Training Online Using WebEx	$105.00	Hour
Support		
Phone Support Outside Normal Service Hours	$189.00	Hour
Third Party Support	$126.00	Hour
Travel and Per Diem Expenses		
To be quoted upon receipt of PSR.		

These rates may be increased annually per Section 1.26. All rates are exclusive of any applicable taxes.

Appendix C. Third Party Software

C.1 Business Objects Crystal Reports

Crystal Reports is a database report designer and viewer owned by Business Objects. Decade utilizes Crystal Reports to design "canned" and custom reports that are later distributed with the Licensed Materials. The Licensed Materials includes a server-side report generation component. This is allowed under section 4.2.5 of the Crystal Reports Standard, Professional, and Developer License Agreement. Use of the server-side report generation component within the Licensed Materials is subject to the following terms.

C.1.1 Client agrees not to modify, disassemble, decompile, translate, adapt or reverse-engineer the Runtime Product or the report file (.RPT) format;

C.1.2 Client agrees not to distribute the Runtime Product to any third party;

C.1.3 Client agrees not to use the Runtime Product to create for distribution a product that is generally competitive with Business Objects product offerings;

C.1.4 Client agrees not to use the Runtime Product to create for distribution a product that converts the report file (.RPT) format to an alternative report file format used by any general-purpose report writing, data analysis or report delivery product that is not the property of Business Objects;

C.1.5 Client agrees not to use the Runtime Product on a rental or timesharing basis or to operate a service bureau facility for the benefit of third-parties;

C.1.6 BUSINESS OBJECTS AND ITS SUPPLIERS DISCLAIM ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NONINFRINGEMENT OF THIRD PARTY RIGHTS. BUSINESS OBJECTS AND ITS SUPPLIERS SHALL HAVE NO LIABILITY WHATSOEVER FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, INCIDENTAL, PUNITIVE, COVER OR OTHER DAMAGES ARISING UNDER THIS AGREEMENT OR IN CONNECTION WITH THE SOFTWARE.

C.2 eCompliance Portal

eCompliance Portal is an electronic transaction system developed, maintained and owned by third party eCompliance, Inc. The EnvisionConnect software utilizes this system to provide electronic authentication and compliance features with respect to its transactions. However, Decade is unaffiliated with eCompliance, Inc. and does not assume any liability for the operation of said system.

The Client's use of eCompliance Portal is also subject to the eCompliance licensing agreement. At the present time, the eCompliance licensing agreement generally reads as follows:

“Subject to the terms of this Agreement, Client is granted a single server license to use the Product for data management activities within Client Division only. Client may not sell, license, rent, or distribute the Product. The Client is entitled to make and keep backup copies of the Product for purposes of safekeeping and disaster recovery. Client shall not copy Source Code or any Source Code documentation without prior approval from eCompliance. Client shall not deliver or provide the Source Code to any third party in any form. Client may modify the Source Code, but only to the extent necessary to enable the execution of Client's application.”

The aforementioned licensing agreement is subject to change at any time, without notice, by eCompliance, Inc., and Client is responsible for its own compliance with the terms of said agreement. For a current copy of the eCompliance licensing agreement, or for any questions concerning the same, please contact eCompliance, Inc. directly at:

eCompliance, Inc.
1 Otis Street
San Francisco, California 94103
Tel: (415) 437-3977
E-Mail: info@eCompliance.net

eCompliance, Inc. also provides sample Terms of Use, which may be placed upon Client’s website, or incorporated into Client’s own Terms of Use, Acceptable Use Policy, or related documents. Said sample is located at: http://www.ecompliance.net/public/about/terms.jsp.

The Portal will be hosted on an existing server owned by the Long Beach Fire Dept and managed by Tait Environmental. Decade will not be responsible for the maintenance, performance or backup of the server The Tait contract will include something like:

Tait agrees to host the Decade Portal and assure performance, maintenance and backup of the Decade Portal equivalent to that of the CUPA Portal. The CUPA Portal will use the Decade "Portal to EC bridge" to exchange CUPA data with Envision Connect.

Appendix D. Decade Response to RFP HE10-058

The Decade Software Company, LLC response to RFP HE10-058 is an attachment and is included by reference herein.

Appendix E: Statement of Work

The Statement of Work is an attachment and is included by reference herein.

Appendix F: Support Services

The following services are included in the license and support fees:	
Telephone Support	Decade provides telephone support via a toll free number for Client's usability questions and/or problem resolution. Support is provided during Decade's regular business hours (6:00 A.M. to 5:00 P.M., Pacific Time, Monday through Friday, with Federal and State holidays excluded.) Issues can be reported 24-hours a day by RTI WebFirst, e-mail, fax or telephone. Decade supports both the applications developed in-house and the database backend on which these applications run.
Web-based Support	All clients have 24-hour access to our web resources. This includes all system documentation, EnvisionConnect upgrade files, and monthly "Did You Know?" newsletter of system workflows tips. Web resources allow clients to search Decade's Knowledge Base of known EnvisionConnect issues and suggestions and instantly send issues to Decade technical support staff via an online support form.
Licensed Programs Maintenance	Decade will provide Licensed Programs maintenance, which includes defect fixes, and any other required modifications to keep the Licensed Programs in conformance with the specifications contained in the then current Decade Licensed Materials. Decade will amend the specifications only to remove documentation errors, provide consistency of interpretation or describe improvements to the Licensed Programs. Decade will correct any error or malfunction in the Licensed Programs that prevents them from operating in conformance with the then current Licensed Materials, or Decade will provide a commercially reasonable alternative that will conform to the then current Licensed Materials. If Client's system is inoperable due to a reproducible error or malfunction, and Client is using the current release of the Licensed Programs, Decade will provide continuous effort to correct the error or malfunction.
User Group Meetings	User group meetings occur on a frequency determined by the user community. These meetings allow users to share ideas, workflows, etc. Client may send representatives to any user group meeting conducted by Decade clients.
Refresher Training	There will be no charge for refresher training conducted at Decade's office on mutually agreeable dates, if the material was covered and the attendee(s) was included in Client's initial training. Refresher training does not include training for new Licensed Programs or Client staff that have not been trained before, which are billable services.
List Server	Decade's clients use a list server to share information. Workflows for the Licensed Programs, environmental regulation workflows, user-customized reports, and general questions and answers are available.

Decade Exchange	Decade Exchange is a web-based file exchange solution that provides a secure area where clients can share files. Clients have the freedom to upload/download useful reports, scripts, and other files at times most convenient to them. Clients have a searchable archive of environmental regulation workflows, Licensed Programs workflows, user-customized reports, scripts, and general questions and answers that can be accessed through keyword searches. Users have the option of drilling down through categories or searching for files by using a search dialog box.
Client Relationship Management	RTI CustomerFirst is a Client Relationship Management (CRM) software application that enables Decade to manage every aspect of our relationship with the client. Client information acquired from sales, marketing, client service, and support is captured and stored in a centralized database to improve client satisfaction. Decade will not release any Client information without prior authorization from the Client.

DECADE™
software company

Narrative/Technical Proposal for Environmental Health Data Management System RFP: HE10-058

Revision: 1.0

Date: 08/06/10

Cover Page

Company Name Decade Software Company, LLC

Contact Person Darryl Booth

Address 4201 W. Shaw, Suite 102, Fresno CA 93722

Telephone 800-233-9847 x702 Fax 559-271-2892

Federal Tax ID No. [redacted]

Prices contained in this proposal are subject to acceptance within 90 calendar days.

I have read, understand, and agree to all terms and conditions herein.

Date August 6, 2010

Signed

Print Name & Title Kevin Delaney, Managing Member

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Introduction – Executive Summary

For more than twenty years, Decade has served agencies responsible for protecting public and environment health. We are confident that the City of Long Beach will benefit greatly from the proposed partnership with Decade Software Company. The anticipated benefit is a matter of selecting a firm with:

- Financial stability
- Proven track record
- Exemplary client retention rate due to a slow-growth philosophy
- Scalable, configurable solutions that eliminate a client's reliance on custom programming
- Superior approach to project management and implementation
- Knowledgeable, professional staff
- Advanced industry knowledge

More California agencies use Envision or EnvisionConnect than any other environmental health data management system. Decade understands the requirements and trends in California are different. Decade's long-time service to California health departments, extensive history in joint initiatives with the State of California, and relationship with the California Association of Environmental Health Administrators (CAEHA) is just another benefit to the City.

Decade keeps abreast of State regulatory changes early-on in order to shape the outcome and incorporate the features into our product line. In addition, we believe our close geographic proximity to the City's offices should be of considerable importance.

The EnvisionConnect Product Suite:

EnvisionConnect is a comprehensive, web-enabled environmental health data management system designed to manage all City health programs and processes in a single database. EnvisionConnect is designed on the Microsoft .NET Framework in a 'smart client' implementation. Smart client applications take advantage of the power of local processing but have the flexibility of browser-based applications. User interfaces provided by smart client applications are rich, full featured, and far exceed the capabilities of anything that can be provided by browser-based applications.

EnvisionConnect Remote is the remote component of EnvisionConnect and is designed to automate field inspections and provide up-to-date information to inspectors. EnvisionConnect Remote can operate in a wireless or disconnected state. Mobile users can take full advantage of Tablet PC software features such as using a stylus to capture electronic signatures to be printed on a printed inspection report.

EnvisionConnect Portal is a web-based data sharing framework for the City's regulated businesses, public constituents, and regional partner agencies. This browser-based front-end integrates seamlessly with the EnvisionConnect back-end data management system.

Decade's product suite offers unparalleled ease of use, a web-based interface, and total control over how data entry is done. Our solution utilizes an intuitive workflow-oriented interface in which users can perform functions according to their role(s). Decade's flexible design allows departments with licensing, inspection, billing, education, enforcement, and other processes to configure the system to achieve the greatest benefit.

Decade serves many of the most-respected health departments in California such as Sacramento County, San Bernardino County, Orange County, and Kings County.

As part of every implementation, Decade provides a knowledgeable project team, an online project management repository, progress reporting, communication tools, and project 'backlogs' which will outline all project tasks and assignments.

We have two tools that streamline configuration efforts for all regulated programs: the Configuration Wizard and the Page Layout Editor. These tools allow the City to tailor the system to meet specific (and changing) needs, with no requirement to come back to Decade for costly custom programming.

The Configuration Wizard takes a user through a series of 'Yes' and 'No' questions to determine the City's business rules as well as implementation requirements. Once complete, the Wizard generates a Needs Analysis Report that summarizes business rules in a manner that may be easily reviewed by all staff. Each wizard page also captures a narrative which should be used to record who configured the page and why. Finally, the system provides a listing of all the configuration decisions along with the narrative for long-term documentation.

The Page Layout Editor allows administrators to lay out workflows within the system. Using this tool, an administrator can position form fields and customize labels or instructions as desired by the City without any custom programming. In addition, the City can add user-defined forms and fields to the system as needed.

The Decade project team will include a Project Manager, Client Services Manager, Technical Support Manager, Development Manager, Data Center Coordinator (if hosted), Implementation Specialist, Implementation Specialist Assistants, Data Conversion Specialists, Training Coordinator, and Software Developers.

We place a high priority on developing meaningful and effective training resources. Decade will deliver a balance of onsite and live web-based training sessions and offer self-service tools such as the Learning Management System (LMS) for recurring/refresher training.

Decade has substantial experience migrating data from legacy systems into EnvisionConnect. Decade will provide the City with a customized Data Conversion Plan that will detail each step in the data conversion process, including assessment, data clean-up, and conversion.

Decade offers toll-free help desk support during business hours and 24x7 web-based support. We log, evaluate, and assign support calls to your Account Manager. Our escalation procedures ensure that we address priority calls quickly. Decade staff does more than refer you to a page in the manual; they will take the time to fully understand your issue and make recommendations that are meaningful and appropriate to your needs.

In summary, Decade provides a breadth of solutions that are the most comprehensive in the industry. Our expertise in implementing these solutions is evident in our client references and proposed professional services. Decade is a remarkable fit for this project.

Response to Section 6 - PROJECT SPECIFICATIONS (From RFP Attachment D)

In the tables below, Decade categorized each requirement according to the instructions. Comments were added to the REF column only where additional information or an exception was warranted.

For reference, we note that Priority 3 is the highest priority.

A response in column A indicates requirement currently exists and can be demonstrated, column B indicates requirement will be available prior to testing, column C indicates that the requirement is not currently available, but could be included as an enhancement, and column D indicates that the requirement is NOT included in this proposal.

Ref. #	Priority	Functional Requirements	Response				
			A	B	C	D	REF
1.1	3	Supports inspection and data management of the Environmental Health Programs listed in Attachment E, "Organizational Overview".	X				EnvisionConnect contains modules/features consistent with all of the business processes described in the RFP's Attachment E.
1.2	3	Allows a permitted facility to have multiple types of health permits.	X				
1.3	3	Allows inspections of non-permitted facilities.	X				
1.4	3	Allows for automatic scheduling of inspections based on user defined criteria (# per year, based on risk, etc.).	X				
1.5	3	Allows authorized users to cancel, reassign, reschedule, and schedule inspections.	X				
1.6	3	System tracks inspector activity to include time the inspection began, facility inspected, type of facility inspected, facility address, type of inspection service (routine, complaint, follow-up, etc.), time inspection concluded, and violations	X				

Ref. #	Priority	Functional Requirements	Response				
			A	B	C	D	REF
		and / or corrections.					
1.7	2	Allows data entry of inspection service when no address is available (e.g., spilled paint in street).	X				
1.8	3	System includes dictionaries that can be populated with standardized inspection statements (to include violations, comments, health code sections, etc.) that are available as drop-down or other types of lists and editable by authorized users once selected from the list.	X				
1.9	3	Comments can be added to inspection records, both in the field and at the office.	X				
1.10	2	Comment fields are available for forms and input screens throughout the system.	X				
1.11	3	System includes spelling and grammar check for comments and other user data entered as free text.			X		EnvisionConnect includes real-time ("red squiggly") spelling check. The system does not include a grammar checker. In our experience, grammar checker is not an effective tool for the complex text managed by health departments/inspectors.
1.12	3	Provides the ability to edit existing inspection record comments (example, a violation is noted, and upon re-inspection the violation has been partially corrected); ability to edit is configurable and based on user access or profile.	X				

Ref. #	Priority	Functional Requirements	Response				
			A	B	C	D	REF
1.13	3	System prohibits users from editing the date and the start / end times for all inspections.			X		The current version of EnvisionConnect (4.2) does not prevent edits by those who have edit permissions. This requirement would be considered an enhancement to the current system. See the Cost proposal for details.
1.14	2	Pictures, video, scanned documents, and other items are easily appended to a data record.			X		EnvisionConnect includes the ability to easily append pictures and scanned documents to a data record. The ability to add video and other binary objects (e.g., Word documents) will be added in a future release. The feature will be added at no additional cost.
1.15	2	Authorized users can custom-tailor and save views.	X				
1.16	3	System allows authorized users to search for existing data using a variety of criteria including date range, key word, parcel number, address, facility name, etc.	X				
1.17	3	Provides a module or ability to track a one-time service, such as response to a hazardous waste or sewage spill, temporary food event, or other service where there is no permanently licensed facility.	X				

Ref. #	Priority	Functional Requirements	Response				
			A	B	C	D	REF
1.18	3	Supports and conforms with California SB 180, "Retail Food Facilities Inspection Information", pertaining to standardized inspection results posted on the internet.	X				
1.19	3	Supports and conforms with California AB 2286 "Unified Hazardous Waste and Hazardous Materials", pertaining to accepting Hazardous Materials Business Plans electronically and reporting data to the State.			X		The Cal/EPA eReporting standards (i.e., data dictionary) and processes for data exchange have not yet been defined by Cal/EPA. Decade is committed to adding this capacity to EnvisionConnect as soon as Cal/EPA releases the specifications (anticipated 2011). The feature will be added at no additional cost.
1.20	3	Includes standard food facility inspection violation language conforming to CalCode (California Retail Food Code) and uses the correct CalCode language based on the type of facility being inspected.	X				EnvisionConnect includes a standard CalCode checklist based on the type of facility being inspected. The CalCode language/comments used by inspectors are a program-level decision. During implementation, Decade will work with the City to import its own CalCode comments OR edit

Ref. #	Priority	Functional Requirements	Response				
			A	B	C	D	REF
							and adopt the CalCode comments implemented by another California health department.
1.21	3	Requires completion of all required data entry prior to committing the transaction to the database.	X				
1.22	3	Warns the user if they have not completed all required data entry and allow them to exit the transaction without compromising data integrity.	X				
1.23	2	Includes a permitting and billing system.	X				
1.24	3	Authorized users can update a permits account status (active, inactive, exempt).	X				
1.25	2	Can track certified food managers.	X				
1.26	3	Includes a plan review and application module.	X				
1.27	3	System includes Food Inspection Data Fields Marking Guideline Language prepared by California Retail Food Safety Coalition (details when a violation is major, when to mark not observed, and not applicable.)	X				EnvisionConnect includes a standard CalCode checklist based on the type of facility being inspected. The CalCode Marking Guidelines text is not included by default, but may be added during implementation at no additional cost.
1.28	3	System can be customized to incorporate the violation categories and other data included in the Inspection Summary Report (ISR) for the Food Program (see Attachment F).	X				

Ref. #	Priority	Functional Requirements	Response				
			A	B	C	D	REF
1.29	2	System can automatically calculate a grade, score, or other defined result based on the noted violations.	X				

Ref. #	Priority	Reporting and Printing Requirements	Response				
			A	B	C	D	REF
2.1	3	Ability to generate reports using Crystal Reports or comparable third-party reporting tool.	X				
2.2	3	Includes a standard query tool that can be used for quick, simple, ad-hoc reports.	X				
2.3	3	Users can define and save for future use report queries (both using a 3rd party tool such as Crystal Reports and an internal query/report tool) defined by the users.	X				
2.4	3	Includes a data dictionary that defines available data field descriptions and data formats.	X				
2.5	1	The reporting tool has the ability to report from a user-defined environment (e.g., test, production, training, etc.).	X				
2.6	2	Allows the user to direct report output to the screen, a printer, electronic file such as a PDF format, or document management system.	X				Reports may be archived on-demand or automatically to PDF. Many agencies, for example, automatically generate a PDF of each inspection report, invoice, and permit as snapshots of what was delivered to the customer.

Ref. #	Priority	Reporting and Printing Requirements	Response				
			A	B	C	D	REF
							A document management system could be configured to monitor a "drop-box" such that archived PDF files are also automatically indexed by the DMS.
2.7	3	Users can define parameters (e.g., date ranges, customer types, Service Types) to be utilized for ad hoc reports.	X				
2.8	3	Provides standard parameter-driven reports which can be modified and saved as new reports.	X				
2.9	2	Print-screen capabilities are available throughout the System.		X			A link to "Print List" is currently available on every search page and Dispatch Center. A feature to print data-entry pages is anticipated shortly. The feature will be added at no additional cost.
2.10	3	System can print inspection reports.	X				
2.11	2	System can print bills and invoices.	X				
2.12	3	System can print permits.	X				

Ref. #	Priority	Mobile Computing Requirements	Response				
			A	B	C	D	REF
3.1	3	The ability to perform inspections in the field (mobile inspection) is integrated into the system.	X				

Ref. #	Priority	Mobile Computing Requirements	Response				
			A	B	C	D	REF
3.2	2	Wireless database access and update of records between mobile users and the main database is supported.	X				
3.3	3	Disconnected mobile computing (data collected in the field and uploaded / synched via a wired connection) is supported.	X				
3.4	3	For mobile computers, the System can load an entire database or an appended database (such as the inspector's district only) on the mobile unit.		X			The feature through which an inspector may bring her entire district (or the City's entire inventory) is anticipated Fall 2010. In the current version off EnvisionConnect (4.2), the inspector is urged to take 15-20 appointments offline.
3.5	3	Supports digital signature capture (on mobile, pen-based computers) and appends digital signature permanently to the inspection record.	X				
3.6	3	Has the ability to print reports in the field using portable printers.	X				
3.7	2	Supports the following mobile computers currently in use by CLB Environmental Health Inspectors: Toshiba M4, M200, M400 tablet computers, typical configuration is Windows XP SP 2 Tablet PC Edition, Explorer 6.0, Intel Centrino processor, 1gb RAM, 40gb Hard Drive, WiFi capable. Printers available for use are Pentax PJ3.	X				Decade recommends 2-4GB of RAM for best performance.

Ref. #	Priority	Web Capabilities / Requirements	Response				
			A	B	C	D	REF
4.1	3	External customers can access information from the database through the internet.	X				This feature is enabled through the City's licenses with Tait Environmental and the HazMAP Portal.
4.2	3	External customers can input information on forms and applications, print out or save a copy, and submit the form or application.	X				For CUPA-related transactions, this feature is enabled through the City's licenses with Tait Environmental and the HazMAP Portal. For other environmental health programs (restaurant inspections, service requests, and complaints), Decade proposes a dedicated Environmental Health Portal.
4.3	1	External customers can request services online.	X				Decade proposes a dedicated Environmental Health Portal to accept requests for services online.
4.4	2	External customers can pay for permits or services online.	X				Decade proposes a dedicated Environmental Health Portal to accept payments online.

Ref. #	Priority	Integration Requirements	Response				
			A	B	C	D	REF

5.1	3	The product can interface with Tait Environmental Management's "HazMAP" program for all CUPA programs to submit applications and reports electronically as per AB 2286.	X				This bridge will require configuration by Tait Environmental Management (or its designee) and by Decade. At minimum, a connection must be established between the HazMAP and EnvisionConnect servers. This may require an always-on VPN for a secure connection across domains.
5.2	2	Can interface and interact with a variety of existing data systems found in a typical medium-sized municipality.	X				
5.3	2	Integrates with CLB Standard GIS software, ESRI version 9.3.	X				ESRI's ArcGIS 9.3 has the capacity to draw real-time or snapshot data from EnvisionConnect's relational database. With optional ESRI Map Object licenses, EnvisionConnect users can geocode new records and automatically assign geographically-relevant data (e.g., census, district, etc.) based on GIS layers.
5.4	3	Ability to interface to other applications using Web Services.			X		SQL Server 2005/2008 provides for Native XML Web Services for incoming requests (i.e., reads).

							EnvisionConnect will support outgoing requests in a future release. The feature will be added at no additional cost.

Ref. #	Priority	Security Requirements	Response				
			A	B	C	D	REF
6.1	3	Establishes security for users by a user group.	X				
6.2	3	Allows System Administrators to define security access.	X				
6.3	2	A single user can be assigned to multiple user groups at the same time.	X				
6.4	3	Provides standard industry encryption of wireless and other data streams.	X				
6.5	2	Supports single sign-on (Active Directory).			X		Active Directory integration is anticipated in a future release. The feature will be added at no additional cost.
6.6	3	Authorized users can define user group and individual security throughout the system to include entire programs, input screens, data fields, processes, and views.	X				In the current version of EnvisionConnect (4.2), individual data fields cannot be secured by user group. This is scheduled for a future release. The feature will be added at no additional cost.

Ref. #	Priority	System Administration	Response				
			A	B	C	D	REF

7.1	2	Produces a historical data report concerning records (data elements) changed or deleted and by whom.	X				EnvisionConnect allows administrators to turn on/off record auditing on a table-by-table basis. When enabled, this feature mains a before and after snapshot of every record for inserts, updates, and deletes. The snapshot also captures the user, date, and time.
7.2	2	Can export data as a flat file in standard formats (e.g. csf., .txt, etc.).	X				
7.3	3	Provides the ability to configure input forms / data entry screens to include other data to capture without customization to the entire application, i.e. user defined data entry fields that maintain integrity through product updates.	X				
7.4	3	Provides functions for data updates and recovery (e.g., nightly backup, restoring data, downloads).	X				
7.5	2	System allows authorized users to choose sorting options for information displayed in menus, drop down lists, etc.	X				

Ref. #	Priority	Data Conversion Requirements	Response				
			A	B	C	D	REF
8.1	3	Can convert / upload Excel worksheet data into system.	X				Decade conversion staff assess the source data and to author a Data Conversion Plan. The plan will address data validation, cleanup, and migration to EnvisionConnect.

8.2	3	Can convert / upload Access database data into system.	X				Decade conversion staff assess the source data and to author a Data Conversion Plan. The plan will address data validation, cleanup, and migration to EnvisionConnect.

Ref. #	**Priority**	**Customer Support and Training**	**Response**				
			A	B	C	D	REF
9.1	1	Offers 24-hour toll free customer support.				X	Decade's regular customer support hours are M-F from 0600 to 1700 Pacific Time (excluding holidays). Decade's web-based help resources are available 24/7. On-call support can be arranged during non-business hours on a case-by-case basis according to standard rates.
9.2	3	Offers toll free support Monday through Friday during regular business hours (Pacific Standard Time).	X				
9.3	2	Provides web based training modules.	X				
9.4	2	Provides webinars for educating clients on various topics related to the software.	X				
9.5	2	Includes user manuals in print and pdf form.	X				EnvisionConnect features online help that can be

							quickly/easily referenced, annotated, etc. In addition, Decade staff and community members (e.g., other health departments) publish written procedures and processes to assist with specific functions (e.g., billing). Finally, Decade's online learning management system (LMS) delivers on-demand just-in-time (JIT) training on core features. Combined, the online help, web-based articles, and LMS provide a comprehensive resource for users.
9.6	3	Provides web-based customer support through use of WebEx or similar provider.	X				
9.7	3	Provides on-site training before go-live date.	X				
9.8	2	System provides specific help based on the function the user is performing.	X				
9.9	2	System provides specific help for error messages displayed to the user.	X				
9.10	2	Provides regional User Group meetings on a scheduled basis.	X				

Response to Section 7 - WARRANTY/MAINTENANCE AND SERVICE

7.1 - Length and Terms of the warranty/maintenance

Decade warranties its products for the term of the active License and Support Agreement (LSA).

7.2 – Subcontractors

For the proposed EnvisionConnect Environmental Health Portal product, Decade maintains a partnership with eCompliance. Under this arrangement, initial configuration, training, and escalated support tickets will be handled by eCompliance staff.

Note that eCompliance, Inc. also provides a core technology within the City's existing HazMAP system.

Response to Section 8 - COMPANY BACKGROUND AND REFERENCES

8.1 - Primary Contractor Information

Company ownership

Decade Software Company is a Limited Liability Company (LLC) with Kevin Delaney as the Owner and Managing Member.

Office Locations

Decade Software Company is located at 4201 W. Shaw, Suite 102, Fresno, CA 93722. This is the office that serves California accounts.

Number of Employees

Decade Software Company employs 36 people domestically. Decade Software Company does not have any international employees.

Locations from which Employees will be Assigned

4201 W. Shaw, Suite 102, Fresno, CA 93722

Point of Contact

The following individual is authorized to represent and bind Decade with respect to this proposal:

Kevin Delaney, Managing Member
Phone: (800) 233-9847 ext. 703
Fax: (559) 271-2892

E-Mail: kevindelaney@decadesoftware.com

The following individual is authorized to represent Decade with respect to this proposal:

Darryl Booth, CTO
Phone: (800) 233-9847 ext. 702
Fax: (559) 271-2892
E-Mail: darrylbooth@decadesoftware.com

Company Background

Decade was founded by our president, Kevin Delaney, in 1986. For over 20 years, Decade has been a leader in the development of data management systems for environmental health and regulatory community. Decade is headquartered in Fresno, CA and employs 36 full-time staff-members.

Microsoft Certified Partner

EnvisionConnect is built on the Microsoft .NET Framework and utilizes Microsoft SQL Server. As a Microsoft Certified Partner, Decade is kept abreast of changes in the latest Microsoft technologies.

ESRI Development Partner

As an ESRI development partner, Decade has designed EnvisionConnect to leverage your City's existing investment in GIS and specifically, ESRI's product suite.

SAP Crystal Solutions

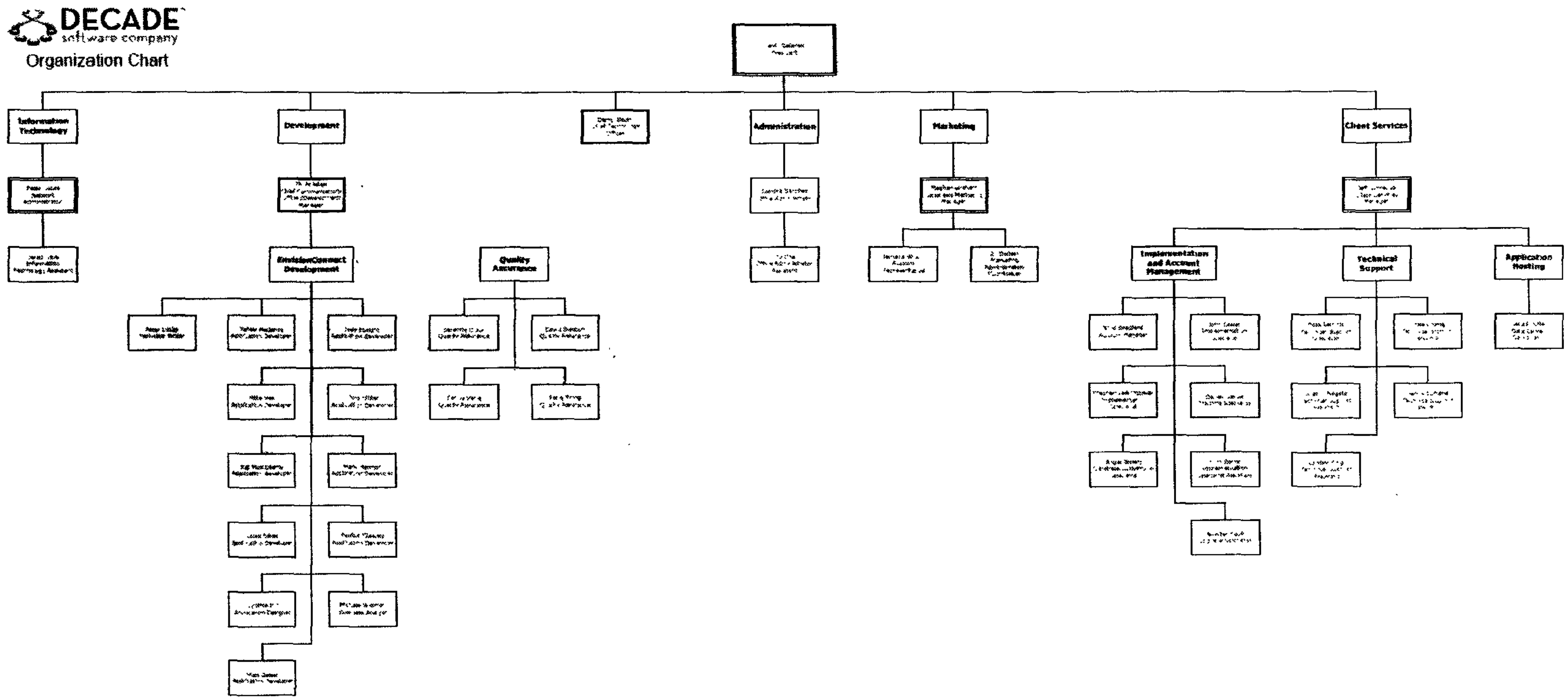
EnvisionConnect comes equipped with more than 250 canned system reports that have all been developed using Crystal Reports by SAP Crystal Solutions. Clients can leverage existing investments in Crystal to create customized reports and add them to the systems report catalog.

Rackspace Managed Hosting

Decade has partnered with Rackspace, an undisputed leader in Internet hosting, to offer optional application hosting services.

Organization

Decade Software Company is organized according to the chart below:


DECADE
software company
Organization Chart
Information Technology
Development
Administration
Marketing
Client Services
EnvisionConnect Development
Quality Assurance
Implementation and Account Management
Technical Support
Application Hosting

Length of Time Providing Services

Decade Software Company has provided software and services to the environmental health and regulatory communities for 24 years.

Resumes of Key Staff

See Attachment D – Resumes.

8.2 – Subcontractor Information

8.2.1 Does this proposal include the use of subcontractors?

Yes _X_ No _____ Initials ______

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

Subcontractor	Services
eCompliance, Inc.	EnvisionConnect Environmental Health Portal configuration, training, and escalated technical support tickets (Decade technical support handles initial support questions) Reference RFP requirements 4.1, 4.2, 4.3, and 4.4

8.2.1.2 Provide the same information for any subcontractors as is indicated in Section 8.1 for the for the vendor as primary contractor

Ownership	California Corporation
Office Location	1 Otis Street, San Francisco, CA 94103
Number of Employees	5
Location from which Employees Will be Assigned	1 Otis Street, San Francisco, CA 94103
Point of Contact	Bijan Fouladi, (415) 437-3977
Company Background	eCompliance, Inc. was incorporated in CA in 1999. eCompliance, Inc. uses advanced technologies to streamline the compliance process for government agencies and businesses. The company enables legally binding electronic compliance transactions through eCompliance.NET, a framework that combines a metadata registry, XML and PKI-based digital signature technology. The eCompliance.net framework supports a variety of tools and services that promote efficient communication and data transactions, including industry-specific electronic regulatory exchanges and collaborative enterprise applications.

8.2.1.3 References as specified in Section 8.3 below must also be provided for any proposed subcontractors.

County of Orange Health Care Agency Environmental Health

Project Description	Regional Portal, Integration with EnvisionConnect
Project Dates	April 2008 to Date
Technical Environment	Hosted internally
Staff assigned	Bijan Fouladi, Sharon Nagata
Client project manager name and telephone number	Ms. Pearl Boelter, Supervising Hazardous Waste Specialist - (714) 433-6010

Seattle & King County Public Health

Project Description	Environmental Health Portal, Integration with EnvisionConnect
Project Dates	May 2009 to Date
Technical Environment	Portal hosted by Decade Software Company
Staff assigned	Bijan Fouladi, Sharon Nagata
Client project manager name and telephone number	Ms. Azeb Aberra, Master IT Systems Specialist- (206) 263-8424

Fresno County

Project Description	Environmental Health Portal, Integration with Envision
Project Dates	September 2008 to Date
Technical Environment	Hosted internally
Staff assigned	Bijan Fouladi, Sharon Nagata
Client project manager name and telephone number	Vincent Mendes, Supervisor EHS, (559) 445-3271

8.2.1.4 The City requires that the awarded vendor provide proof of payment of any subcontractors used for this project. Proposals shall include a plan by which the City will be notified of such payments.

Decade proposes to develop a process by which:

- The City identifies and communicates to Decade Software Company the contact who will receive notifications.
- Decade flags relevant payments to the subcontractor for special handling.
- Payments to the subcontractor generate a notice to the City contact

8.2.1.5 Primary contractor shall not allow any subcontractor to commence work until all insurance required of subcontractor is obtained.

Decade Software Company agrees to require insurance of subcontractor.

8.3 – References

County of San Bernardino – Department of Public Health - Environmental Health Services

Project Description	Environmental Health, Permitting, Invoicing, Field Inspection.
Project Dates	December 2002 to Date
Technical Environment	Internally hosted, remote inspectors working disconnected.
Staff assigned	Kevin Delaney, Nicki Bradford, Trish Orth
Client project manager name and telephone number	Ms. Terri Williams, Chief of Environmental Health & Code Enforcement - (909) 387-4688

County of Orange Health Care Agency Environmental Health

Project Description	Environmental Health, Permitting, Invoicing, Field Inspection.
Project Dates	August 2000 to Date
Technical Environment	Internally hosted, remote inspectors working disconnected.
Staff assigned	Kevin Delaney, Dave Pomaville
Client project manager name and telephone number	Ms. Pearl Boelter, Supervising Hazardous Waste Specialist - (714) 433-6010

Seattle & King County Public Health

Project Description	Environmental Health, Permitting, Invoicing, Field Inspection.
Project Dates	July 1999 to Date
Technical Environment	Internally hosted, remote inspectors working disconnected.
Staff assigned	Kevin Delaney, Darryl Booth, Nicki Bradford
Client project manager name and telephone number	Ms. Azeb Aberra, Master IT Systems Specialist - (206) 263-8424

8.4 – Business License

Decade Software Company has completed the City of Long Beach Business License Application and will comply with the requirement to pay a business license tax.

Response to Section 9 – COST

See enclosed Cost Proposal titled, *Cost Proposal for Environmental Health Data Management System RFP: HE10-058.*

Response to Section 10 – ADDITIONAL REQUIREMENTS

10.1 Please describe the features and benefits of your solution as they apply to the business requirements and environment described in this RFP.

EnvisionConnect is incredibly well-suited to City of Long Beach Environmental Health Bureau's data management needs. This is due to the long-standing partnership enjoyed by Decade Software Company, California health departments, and the State of California.

Intuitive User Interface

EnvisionConnect features a task-oriented user interface from which users perform functions based on their role(s). The approach organizes application activities in an intuitive and relevant way, providing a user-friendly interface that's easy to learn. Instructions, online help text, and warnings are all provided in easy-to-understand terms, not technical jargon.

Agency-Controlled Page Design

EnvisionConnect provides administrators the ability to lay out workflows within the system. Using our Page Layout Editor tool, an administrator can reposition fields, re-label fields, remove fields, add instruction text, and define required fields without any costly custom programming.

Configuration Wizard

To provide long-term flexibility, the Configuration Wizard allows agency administrators to easily configure the business rules that standardize data entry and influence processing. Agency administrators can easily add program areas, change fee schedules, and modify regulatory text without custom programming charges. Like EnvisionConnect, the Configuration Wizard breaks down the configuration process into tasks that are relevant to the client's needs.

Consolidated Data Management

EnvisionConnect is a comprehensive and fully-integrated system designed to streamline data management for all agency functional areas and regulated programs:

- Time and Activity Tracking
- Cost and Revenue Analysis
- Inspections and Investigations
- Enforcement Activities
- Permitting and Licensing
- Certified Professionals Management
- Complaint Management
- Sampling Collection and Scheduling
- Plan Reviews
- Financials
- Real-Time Reporting

Mirroring the typical environmental health department's domain, each facility owner may be configured with one or more facilities (an owner may own more than one facility). Each facility may be configured with one or more permits/regulated programs. Each program may have one or more inspections, violations, enforcement actions and so forth.

The following program areas are part of EnvisionConnect's consolidated data management:

- General Environmental Health Programs (e.g., Retail Food, Pools, Spas, Housing, Temporary Events, Farmers Markets, Body Art, Mobile Food, and more, based on your configuration)
- Backflow Prevention/Cross Connection
- CUPA (HW, UST, APST, HMD, DEP, and CalARP)
- Onsite Septic
- Public Water Systems
- Site Remediation (LOP)
- Vector Control
- Water Wells

Compliance Tracking

You can easily log violations, track inspection results, and document compliance efforts for all environmental health program areas with EnvisionConnect. Inspectors record inspection activities, results, and violations using a single workflow that speeds the data entry process. As you record inspections, EnvisionConnect automates the scheduling of the next inspection based on facility risk factors, compliance outcomes, and mandated inspection frequencies.

Inspection activities are automatically added to the inspector's timesheet for time-tracking and fee studies.

Permitting and Licensing

EnvisionConnect offers a complete permitting and licensing solution. You define the rules associated with your permit processing. Typically, our clients process both annual and one-time permits. You can customize permits to include agency emblems, signatures, and standard language.

Financial Management

The integrated financial system provides a single interface for all financial transactions. From the batch generation of annual permit fees to the manual creation of over-the-counter invoices, complete financial transactions are completed easily and accurately.

EnvisionConnect manages accounts receivables, manual and batch invoicing, payment posting, aging and penalization, and daily balance reporting. The system tracks transactions to the program and sub-program level to allow for detailed auditing of program finances.

For agencies with an external billing component, EnvisionConnect can export fee detail (or net transactions) to be posted "upstream" according to agency requirements.

Complaint Management and Surveillance

EnvisionConnect collects data on all types of complaints including suspected food-borne, water-borne, or vector-borne illness cases, as well as illegal dumping, nuisance, and other general complaints. Complaints can be linked to a regulated facility or site, or can exist as an independent record. EnvisionConnect facilitates the quick collection of complaint details and allows for staff assignment based on program area. You can design complaint surveys to aid in the collection of important symptoms, species, and other critical data upon receipt of the complaint call. This information can immediately be transferred to field staff investigating the case.

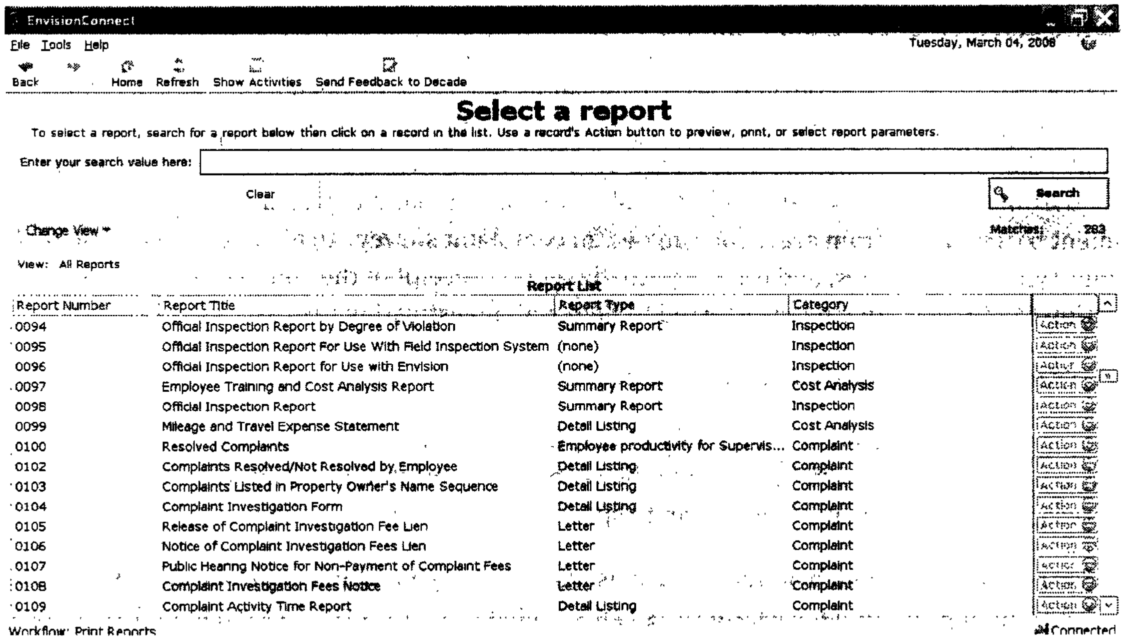
Activity Tracking and Workload Assignment

EnvisionConnect offers a complete and fully integrated time and activity tracking system. Your agency can track inspection activity and all other services. From staff meetings to grant writing, all activity records are entered at a single form to speed data entry.

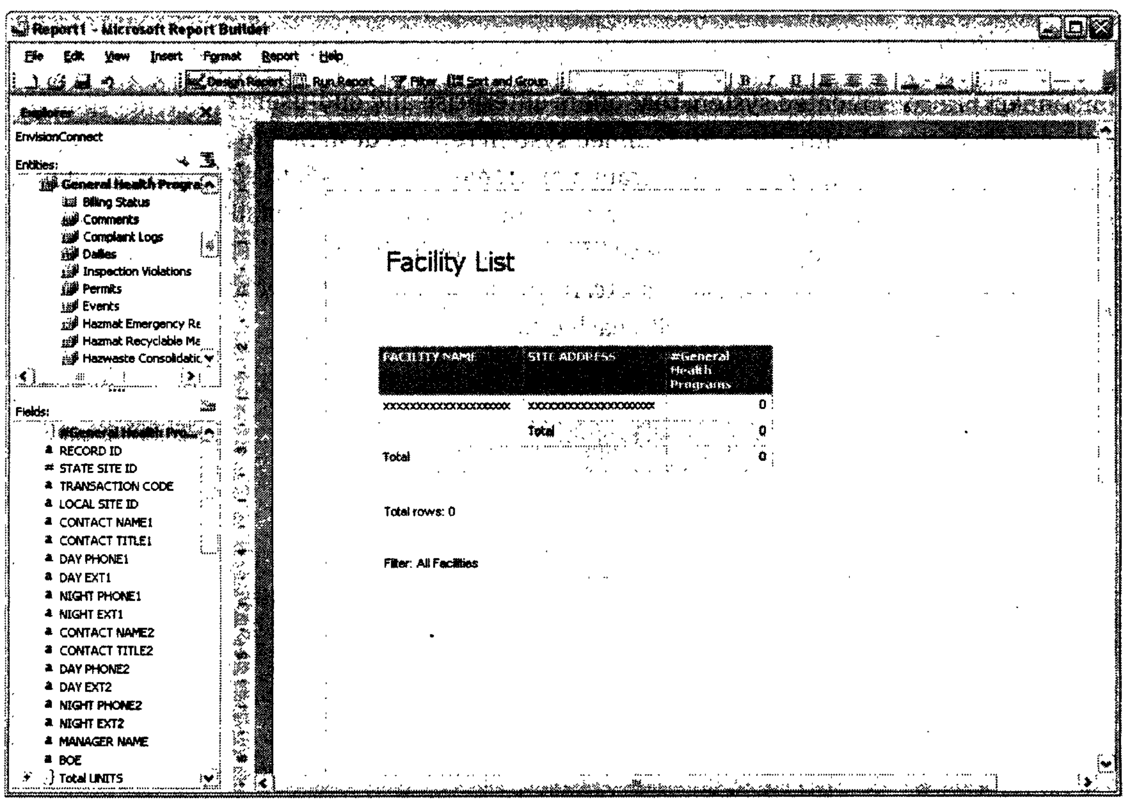
- For routinely scheduled activities such as inspections, your agency can set-up business rules for recurring assignment. These rules can automate the routine assignment of inspections on a monthly, quarterly, biannual, or annual basis.
- Follow-up inspections can be scheduled based on inspection outcomes or at the discretion of the inspector. Agencies can use one of Decade's many standard reports or GIS queries to analyze workloads for more appropriate assignment.

Reporting and Querying

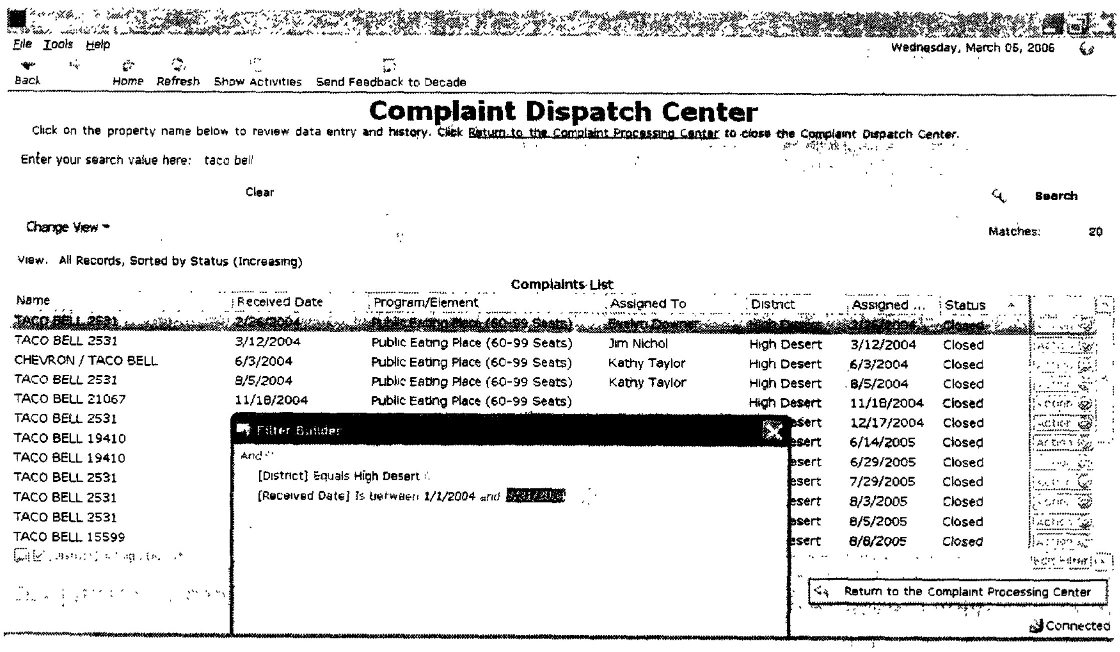
EnvisionConnect is a consolidated system that offers enterprise and end-user reporting capabilities. EnvisionConnect ships with more than 200 canned system reports designed to manage facility compliance, employee time and activity, program management, revenue and costs analysis, and much more. Through direct integration with Crystal Reports, professional quality reports can be designed by your agency as needed and generated by any user in the system. This includes form letters, statistical reports, applications, labels, etc. It should be noted that Decade clients from across the nation routinely share reports with each other.



Ad-hoc reporting is supported through MS SQL Server's Report Builder. Any data tracked in EnvisionConnect can be extracted and incorporated into a Report Builder report and routed to appropriate staff by e-mail attachment or web page.



Searches are conducted at Dispatch Centers, a central place for searching that uses "Google-like" search terms OR more complex filters (e.g., District is High Desert and Received Date is between 01/01/04 and 03/31/04).



GIS Enabled

As an ESRI Development Partner, Decade has designed optional EnvisionConnect to support GIS integration to validate and geocode locations including addresses, against external GIS themes. As a spatially-enabled system, EnvisionConnect allows the agency to build GIS queries from EnvisionConnect data for the creation of map layers for analysis among program areas.

Digital Document Management

EnvisionConnect supports files and documents embedded as part of free-form comments. This approach is preferred for small documents tied to a specified facility, property, or permit. EnvisionConnect also supports links to network-based document management systems. Documents remain in their original location and EnvisionConnect tracks a reference to it. This method is preferred for very large documents, documents shared by many users, and documents that change often.

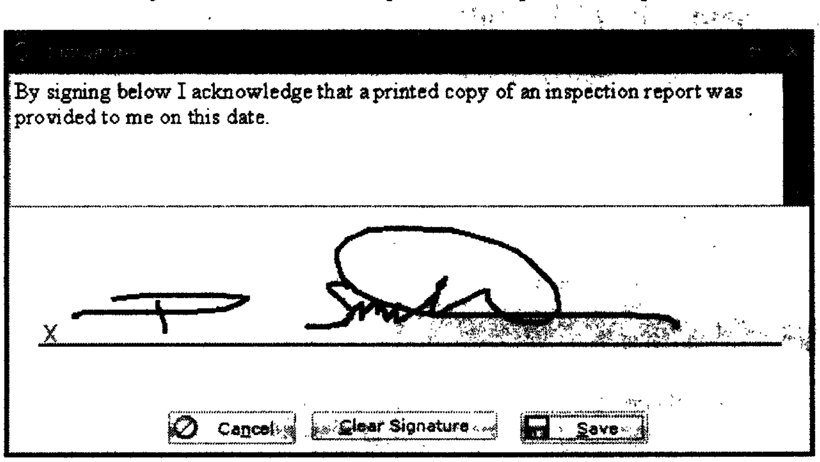
Integration with External Systems

EnvisionConnect offers a consistent methodology for accessing external system data regardless of how the data structure is provided. Decade can publish a complement of Web services that may be consumed by any well-authenticated application as a means to query EnvisionConnect data.

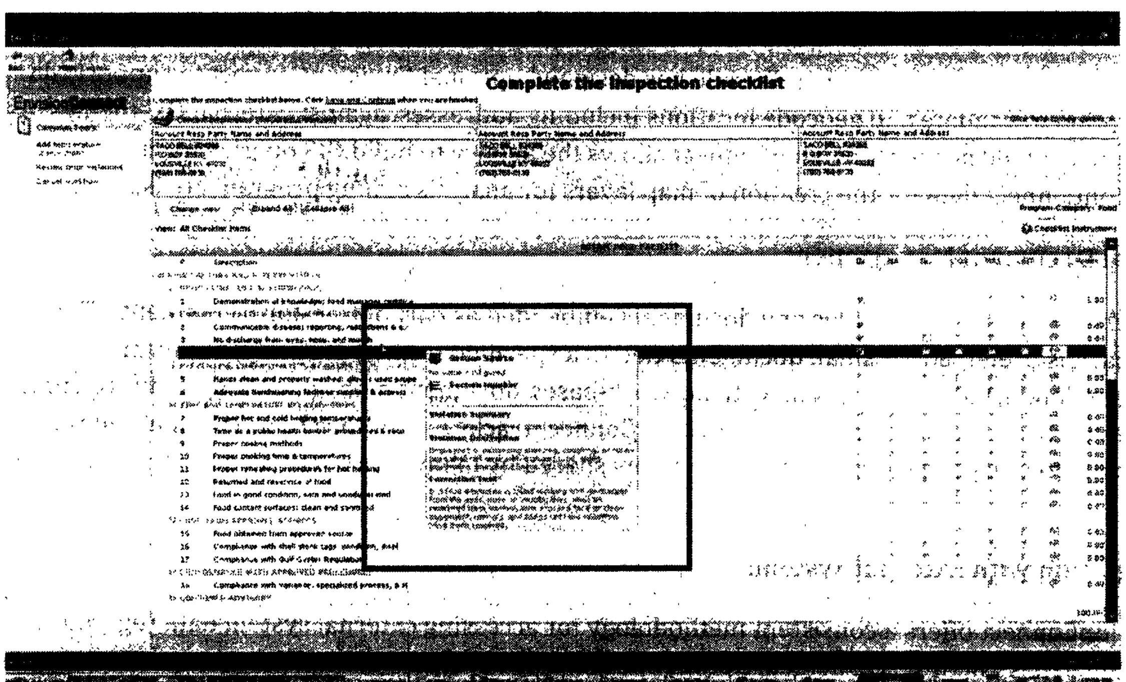
EnvisionConnect Remote

EnvisionConnect Remote automates field data collection and provides up-to-date information to field inspection staff in either a wireless or temporarily disconnected state.

Mobile users have complete site compliance histories at their fingertips and can capture signatures electronically for inclusion on a printed inspection report.



In addition to having the entire ordinance text available for reference, the field inspector can pick from a set of most commonly used favorite comments.



When used remotely, EnvisionConnect gives inspection staff the right information at the right time.

- View a "to-do" list of all scheduled activities

- Easily log inspections and violations or deficiencies according to the program area (e.g., Housing violations include fields for building, floor, and room)
- Log complaints or inspections for un-permitted facilities on-the-fly
- Update core records (e.g., manager name, contact phone, etc.) as part of the inspection flow
- View all historical activities performed at the facility you are inspecting
- Print legible and professional inspection reports in the field

10.2 Please describe your approach to implementing your application.

Decade Software Company has fine-tuned the implementation process by adopting a methodology that increases communication and holds project team members accountable for specified tasks. We have also developed a tool that makes configuration meaningful, the Configuration Wizard. A configurable approach will allow the City to tailor the system to meet specific needs, while changes are made easy with no need to come back to Decade for custom programming.

Team Basic Training

Decade strongly recommends a one-day EnvisionConnect overview training session for subject matter experts. In this session, the trainer will guide students through the EnvisionConnect functions, establish some common terms, and otherwise prepare the class to contribute to configuration.

We know from experience, that subject matter experts will be better able to contribute to the configuration process when they have a basic understanding of what it is they are configuring.

Onsite Planning and Needs Analysis

Decade strongly recommends a thorough gap analysis, establishing current functionality and business practices as compared to EnvisionConnect. This study helps all the project team members align themselves to the targets and the work that needs to be done.

Data Conversion

Decade has extensive experience migrating data from a Client's existing data management system(s) to EnvisionConnect. Decade will work with City staff to convert the City's legacy data to EnvisionConnect's MS SQL Server database.

Data conversion is typically the most difficult and time-consuming aspect of the project. Decade will provide the City with a detailed specifications document, the Data Conversion Plan, which outlines each step in the data conversion process and includes a data mapping spreadsheet.

Data conversion tasks are typically shared among the Decade and Client project teams. The City must prepare the identified conversion data so that Decade can correctly convert the data. Decade is responsible for mapping the City-provided clean, consolidated data to the correct location in EnvisionConnect as outlined in the Conversion Plan.

Conversion data will be limited to data which the City needs to continue in effective operation using the System. Due to the varying states of reliability of legacy systems, no financial transactional or historical data will be migrated to the System.

The following list outlines standard data conversion delivery and acceptance milestones:

- City delivers data to Decade
- City works with Decade to map data to EnvisionConnect fields
- Decade delivers Data Conversion Plan to City
- City provides written acceptance of Data Conversion Plan
- Decade delivers data validation test plan to City
- Decade delivers data to City for validation testing
- City performs data validation testing and reports errors
- Decade delivers second pass of data to City
- City performs validation testing
- Decade delivers conversion processing log
- City provides written acceptance via Conversion Sign-off Form.

Configuration Wizard

Decade, using its breadth of industry experience, has developed an implementation tool called the Configuration Wizard.

This software wizard will allow the City to quickly and easily respond to a Need Analysis questionnaire and define all business rules for each managed program by walking the project team through a series of data management policy questions. Configuration is led by the Decade Implementation Specialist that is assigned to the City's project.

The City will be more than adequately trained to add managed programs and make necessary configuration changes using this tool.

Page Layout Editor

The Page Layout Editor provides administrators the ability to design data-entry workflows within the system. Using this tool, an administrator can position form fields and custom labels or instructions in any order desired by the City without any custom programming required. The City can easily add user defined fields and forms to the system as needed. The system also gives administrators the ability to define which fields are required and an intuitive graphical interface for assigning field-level security.

10.3 Please provide a proposed implementation timeline.

The implementation process is divided into 30-day "sprints." Each sprint constitutes a body of work to which the implementation team (including City personnel) commit. Since sprint planning requires the commitments of several parties, Decade prefers to must the agency to establish resources, priorities, etc. Below is a generic implementation schedule spanning eight sprints.

1	Implementation Start Up
1	Learning Management System (LMS) Training
2	Orientation Meeting
2	Configuration Wizard/Support Code Setup Needs Analysis - Daily Time and Activity
2	WebEx Training (EnvisionConnect as Designed)
2	Prepare Data For Conversion Documentation
3	Configuration Wizard/Support Code Setup - Through Completion
3	Data Mapping Spreadsheet
4	Conversion Plan (Document)
4	Validation Test Plan (Document)
5	Onsite Confirmation Meeting
5	Data Conversion Hand-Off Meeting
5	Data Conversion Programming First Pass (1st Half)
5	Custom Report Requirements (CRR) Documentation
6	Data Conversion Programming First Pass (2nd Half)
6	Conversion Pass 1 Handoff to Implementation Specialist
6	Data Conversion Validation
6	Validation Test Plan Received from Client (1st Pass)
6	Invoice Report Development
6	Permit Report Development
6	Inspection Report Development
7	Conversion Documentation Second Pass (Revision)
7	Invoice Report Testing
7	Permit Report Testing
7	Inspection Report Testing
7	Data Conversion Second Pass
7	Conversion Pass 2 Handoff to Implementation Specialist
7	Data Validation Second Pass
7	Validation Test Plan Received from Client (2nd Pass)
7	Conversion Documentation Third Pass (Revision)
7	Relocation of Server Service to [Client]
7	Portal configuration
7	Review LMS Test Scores With Team
7	Schedule On-Site training and Go-live
8	Onsite Training
8	Data Conversion Go-Live
8	Conversion Pass Go-live Handoff to Implementation Specialist
8	Data Validation Go-Live and Delivery to client
8	Obtain Sign-Off
8	Post Go-Live Support through Hand-off to Tech Support

10.4 Please provide sample resumes or experience of staff that would be working on this project.

See Attachment D - Resumes

10.5 Please provide estimated duration to implement your product.
A generic implementation plan spans eight months. This requires a fully-engaged City implementation team, available training dates, clean data, etc.

10.6 Please specify hardware and system requirements for your application (both server and client). If your application includes mobile, field inspecting capabilities, be sure to indicate hardware and system requirements for this as well.

Minimum Server Requirements

For an agency with fewer than fifty users, Decade recommends combining the Application and Database Server on one physical (or virtualized) server as follows:

Processor	Intel Pentium III (or compatible) at 1Ghz (or faster)
RAM	2 GB RAM (4GB recommended)
Hard Disk	250 MB (or more) in a redundant (fail-over) configuration
Operating System	Windows Server 2003 or Windows Server 2008 (32 bit)
Database	SQL Server 2005 (Enterprise or Standard) SQL Server 2008 (Enterprise or Standard)

Minimum Workstation Requirements (including mobile/field units)

Processor	Intel Pentium III (or compatible)
RAM	1GB Required (2-4GB Recommended)
Hard Disk	100 MB
Operating System	Windows XP, Windows Vista, or Windows 7

10.7 What type of Database can your application run on? What version(s)?
EnvisionConnect uses SQL Server 2005 or SQL Server 2008, Enterprise or Standard Editions.

For City of Long Beach, Decade recommends SQL Server 2008 Standard Edition (if database server software must be procured).

10.8 Can your application database run in a clustered environment (Oracle Rack or SQL Cluster)?
Yes, EnvisionConnect's database may be part of a clustered environment.

10.9 Can your application run in a VM environment?
Yes, the EnvisionConnect application and database servers may run in a virtualized environment.

A virtualized server is particularly useful when hosting a test environment.

10.10 Do you provide database hosting? Please provide details about access and rights to the server, operating system, and database administrative functions to include but not limited to: (1) Database administration rights – who has rights; (2) Server / Operating System rights – who has rights; and (3) General accessibility and security considerations and rights – who and how.

For agencies that require it, Decade provides application and database server hosting. Hardware and network services are provided by Rackspace Hosting, Inc.

Physical Access

Physical access is granted only to technicians authorized by Rackspace Hosting.

Keycard protocols, biometric scanning protocols and round-the-clock interior and exterior surveillance monitor access to Rackspace data centers.

Only authorized data center personnel are granted access credentials to data centers. No one else can enter the production area of the datacenter without prior clearance and an appropriate escort.

Every data center employee undergoes multiple and thorough background security checks before they're hired.

Operating System Access

Decade's Data Center Coordinator and his staff manage admin-level access (via remote access) to the operating system.

Rackspace technicians also retain admin-level access.

Database Access

Only Decade's Data Center Coordinator and his staff maintain admin-level access to the database in order to administer backups, apply updates, and monitor/tune.

10.11 For mobile computing / remote operations, do you support both real-time, remote database access using a cellular card and local database synchronization? Can your product support an entire database and/or specific dataset only on mobile computing units? Please explain.

Remote users may operate under three possible modes:

- Connected – In this configuration, the user has an always-on wireless connection. Transactions are posted in real-time.
- Disconnected – A disconnected user has a snapshot of his/her inventory. Transactions are posted upon synchronization (e.g., after docking in the office).
- Mixed Mode – This mode exists for inspectors who begin working in a connected state but may switch to a disconnected state. Transactions in this mode may be real-time (if connected) or posted upon synchronization.

Under today's EnvisionConnect (version 4.2), disconnected users select a subset of their inventory before disconnecting.

Under the next generation of EnvisionConnect Remote (anticipated Fall 2010), disconnected users will have access to their full inventory while offline.

10.12 Please describe the maintenance and technical support that will be provided after implementation.

Maintenance Releases

Decade provides maintenance releases several times each year. Maintenance releases include primarily bug fixes. Each release will be preceded by release notes. Best practices require installing to a test environment to confirm the City's critical business functions are never impacted.

One or more maintenance Releases may be "skipped" according to the agency's goals.

Version Releases

Decade provides version releases approximately twice each year. Version releases include new functionality and bug fixes. Each release will be preceded by release notes and online training events. Best practices require installing to a test environment to confirm the City's critical business functions are never compromised.

Technical Support Options

Technical support is included in your License and Service Agreement (LSA). There are no per-incident fees. Decade requires a primary contact, however, through which all incidents should be routed. This helps disseminate institutional knowledge, builds confidence in you "power user," and prevents two or more people from working on the same incident (without knowledge of the other).

E-mail your Issue to Technical Support Directly

Send an e-mail to support@decadesoftware.com with your issue description, steps/process to reproduce, screenshots (if available), error message(s), and any helpful attachments. The system will automatically create a new incident.

You will receive an automated e-mail when the incident is assigned and again as notes are added and the status is updated. You can hit "Reply" on any automated incident e-mail to add a comment or additional information.

E-mail messages are monitored 8AM-5PM Pacific, M-F, holidays excluded.

Call Technical Support at 800-233-9232

Contact Technical Support at (800) 233-9232 and our triage team will create an incident for you and assign it to your account manager for resolution.

You will receive an automated e-mail when the incident is assigned and again as notes are added and the status is updated. You can hit "Reply" on any automated incident e-mail to add a comment or additional information.

This approach is appropriate for high-priority issues that demand immediate attention.

Phone lines are monitored 7AM-5PM Pacific, M-F, holidays excluded.

Ask Your Question Online

Navigate to http://www.decadesoftware.com and login. Go to Support and click Ask a question.

This approach is appropriate when you have a question that is best answered by other users in the user community (e.g., which barcode scanner do you use)?

Your online community is available 24/7.

10.13 Please include a list and brief description of all pre-defined reports included in the proposed System.
See Attachment E – Report Catalog

10.14 Describe any other software not licensed by you but required by you for the operation of the core software solution(s) (list each item separately) and the version(s) supported. Be sure to include the operating system(s) and version(s) currently supported.

Windows Server 2003 or Windows Server 2008

EnvisionConnect requires the Windows Operating System for its Application Server software. The Microsoft .Net Framework 3.5 SP2 must also be installed.

Microsoft SQL Server 2005 or 2008, Standard or Enterprise Edition

The Microsoft SQL Server software provides the database tier of the EnvisionConnect application. Agencies hosted by Decade Software Company do not need to license this software.

Crystal Reports 10.5 (or later)

One copy off Crystal Reports is required to fulfill the licensing terms for the enterprise reporting component of EnvisionConnect. Most agencies use Crystal Reports to modify (customize) EnvisionConnect reports.

Decade also delivers a free Crystal Reports Runtime engine to be installed as a workstation prerequisite.

10.15 Is your Product compatible with IE 7 / IE8 and Windows 7?
EnvisionConnect is compatible with IE7 and IE8.

10.16 Is your Product compatible with XP?
Yes

10.17 Is your Product compatible with Office 2000?
Yes

10.18 Is your Product compatible with ESRI version 9.3 or higher?
Yes

10.19 Is your Product a Web based application or Client Server?
EnvisionConnect represents a hybrid between web-based and client/server. The technology is known as "Smart Client."

Smart Client is a term describing an application environment which:

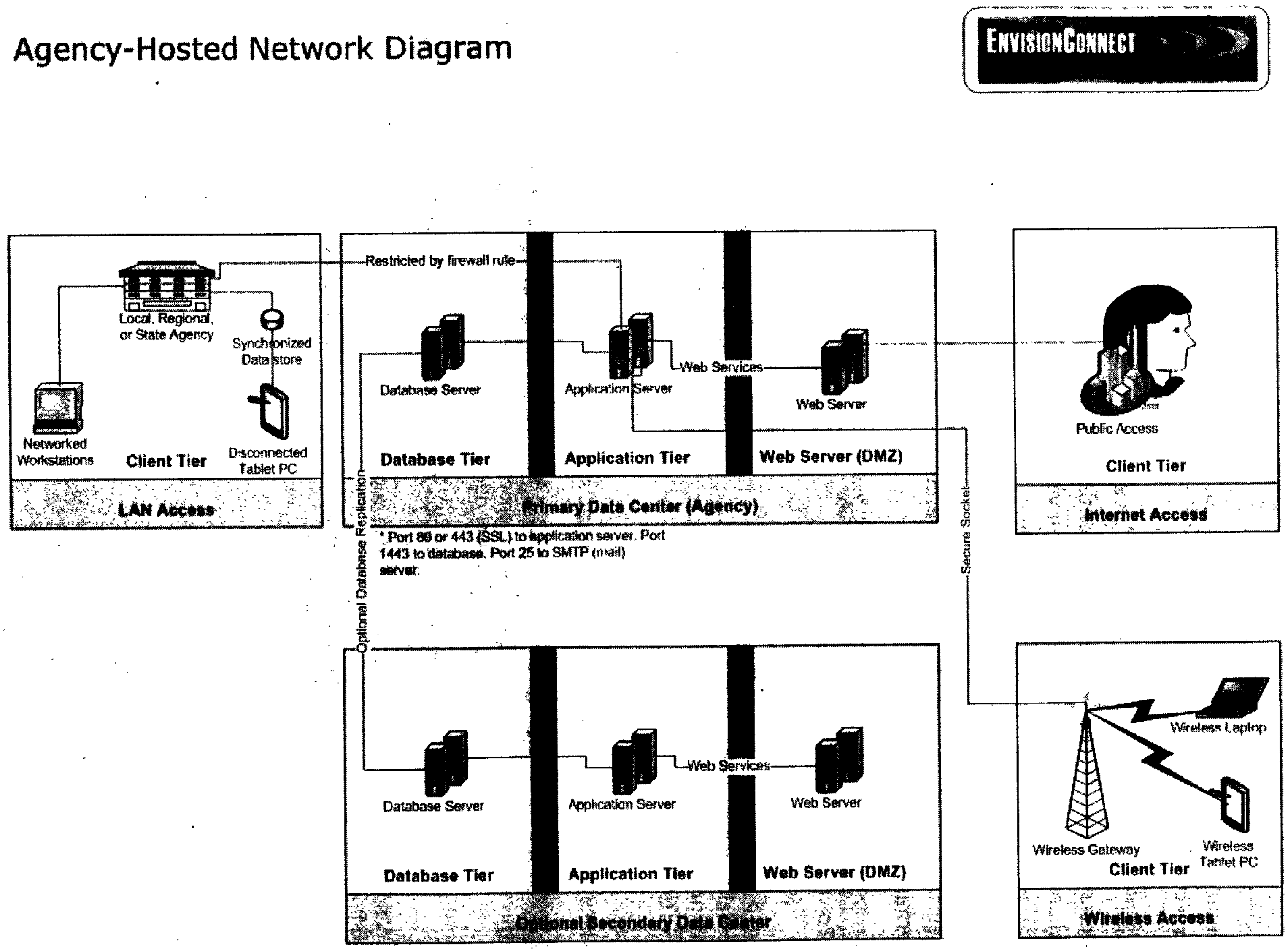
- Delivers applications over a web http connection
- Does not require installation (or provide automated installation and updates)
- Automatically updates without user action
- Has the look and feel of desktop applications

Source: http://en.wikipedia.org/wiki/Smart_client

10.20 Please include an infrastructure diagram of your product in a production environment; include all application and database servers.
The diagram below shows a "built-out" architecture in which the EnvisionConnect Application and Database Servers are hosted by the agency. The public accesses EnvisionConnect resources through a firewalled web server while inspectors utilize SSL and commercial wireless to send/receive data while in the field.

In addition, this configuration showcases an optional offsite fail-over location.

Agency-Hosted Network Diagram



Response to Section 11 – TERMS, CONDITIONS and EXCEPTIONS

Decade Software Company acknowledges and accepts the terms, conditions, and exceptions outline in section 11.

11.20 – Disclosure of Contract Failures

Decade Software Company hereby declares that there exist no significant prior or ongoing contract failures, any civil or criminal litigation, or investigation pending which involves the vendor in which the vendor has been judged guilty or liable.

Terminated Contracts

Below is a list of contracts that have been terminated in the last three (3) years with a reason for termination.

Agency/Jurisdiction	Contact	Reason for Termination
Town of Vail	Mr. Bill Carlson	The State's Consumer Protection Division required contract counties to use a free, State-supplied system.
El Paso County Health Department	Mr. John James	Executive Sponsors retired. Internal shift in data management strategy.
Hennepin County Environmental	Mr. Phil Eckhart	Dissatisfied with Decade's legacy client/server version.

Recovered Contracts

The following previously-terminated contracts were enthusiastically reinstated.

Agency/Jurisdiction	Circumstances
Nevada County CDA	The Executive Sponsor retired before implementation started and the new Executive Sponsor decided to use a package with which he was familiar. Agency re-contracted with Decade and deployed EnvisionConnect in December, 2006
Weld County Environmental Health Department	Agency decided to engage Garrison Enterprises. Agency re-contracted with Decade and deployed EnvisionConnect in November 2008.

Attachments

See subsequent pages for attachments A-F

Attachment A – CERTIFICATION OF COMPLIANCE WITH TERMS AND CONDITIONS OF RFP

I have read, understand and agree to comply with the terms and conditions specified in this Request for Proposal. Any exceptions MUST be documented.

YES X NO __

____

AUTHORIZED SIGNATURE AND DATE

Kevin Delany, Managing Member

PRINTED NAME AND TITLE EXCEPTIONS:

RFP SECTION NUMBER	RFP PAGE NUMBER	EXCEPTION (PROVIDE A DETAILED EXPLANATION)
3 – Scope of Project	4	**Decade Software Company proposal does not include "all hardware" in its proposal as indicated in the second paragraph. Specifically, this proposal does not include Server Hardware, Workstation Hardware, or Field/Mobile Hardware (or accessories).** **Decade did *specify* hardware requirements and recommends that the agency procure hardware (or provision virtualized environments) according to provided recommendations.** **Alternately, Decade has provided a "hosted" option by which the server hardware/software is provisioned by Decade and made available to users on a fee basis.**

Attachment B – STATEMENT OF NON-COLLUSION

The proposal is submitted as a firm and fixed request valid and open for 90 days from the submission deadline.

This proposal is genuine, and not sham or collusive, nor made in the interest or in behalf of any person not herein named; the proposer has not directly or indirectly induced or solicited any other proposer to put in a sham proposal and the proposer has not in any manner sought by collusion to secure for himself or herself an advantage over any other proposer.

In addition, this organization and its members are not now and will not in the future be engaged in any activity resulting in a conflict of interest, real or apparent, in the selection, award, or administration of a subcontract.

____

AUTHORIZED SIGNATURE AND DATE

Kevin Delany, Managing Member

PRINTED NAME AND TITLE

Attachment C – PRO-FORMA (SAMPLE) AGREEMENT

DECADE
software company
trusted to do more.

Decade License and Support Agreement

Sample Agency Name

Agreement Number:

Revision 1.0

6/16/2009

Signed contract must be returned, to Decade by Client, within 30 days of receipt. In the event signed contract is not received by Decade within 30 days of Client receipt, prices and terms contained herein are subject to increase.

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LICENSE AND SUPPORT AGREEMENT

THIS AGREEMENT made this ______ day of______________, ___________.

BETWEEN:

DECADE SOFTWARE COMPANY, LLC. ("Decade") with principal place of business at 4201 West Shaw Avenue, Suite #102, Fresno, California 93722, and the Sample Agency Environmental Health Division (hereinafter "Client) with principal place of business at Street Address, City Name, State Zip Code.

WHEREAS Decade is the developer and owner of a certain set of software products marketed using the trade name EnvisionConnect;

AND WHEREAS Client desires to obtain from Decade a revocable, non-transferable, non-sub licensable, and non-exclusive license to use Decade's Licensed Programs and services;

NOW THEREFORE this Agreement witnesses that for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, and the mutual promises herein, the parties agree as follows:

Appendices

The following appendices are attached to form part of this License and Support Agreement:

Appendix	**Description**
Appendix A	Volumes, Prices, and Payment Schedule for License Fees
Appendix B	Dates and Term
Appendix C	Professional Services Rates
Appendix D	Third-Party Software
Appendix E	Statement of Work

In the event of a conflict between the main body of this Agreement and an Appendix to this Agreement, the terms of the Appendix shall prevail.

Definitions

1.1. Agreement. The agreement set forth in this document

1.2. Licensed Materials. The term "Licensed Materials" shall mean computer programs, in object form, and all related documentation and materials provided to Client under the terms of this Agreement. Licensed Materials shall not include Decade Source Code.

1.3. Licensed Programs. The term "Licensed Programs" shall mean the object code version of the software, as well as all updates, enhancements and releases. Licensed Programs are a sub-set of the Licensed Materials.

1.4. Decade Source Code. The term "Decade Source Code" shall mean a full source language statement of the programs owned by Decade used to prepare the Licensed Programs, including any updates, enhancements, revisions and modifications thereto that are provided to Client under this Agreement. Decade Source Code shall not include any source language statements for any portion of the Licensed Programs owned by or sublicensed from third parties.

1.5. Effective Date. The term "Effective Date" shall mean a specific mutually agreed upon date as defined in Appendix B, Dates and Term.

1.6. Anniversary Date. The term "Anniversary Date" shall mean a specific mutually agreed upon date as defined in Appendix B, Dates and Term.

1.7. Version. The term "Version" shall mean an issue of Licensed Programs, which has been made available to the Client.

1.8. Professional Service Request (PSR). The term "PSR" shall mean the document and process required to authorize professional services which are outside of those agreed to in Appendix E, Statement of Work.

1.9. EnvisionConnect. The term EnvisionConnect shall mean the trade name for the Licensed Programs provided under this Agreement as described in Appendix A.

1.10. Inspector. The term "Inspector" shall mean a Client staff member whose job function requires fifty percent (50%) or more time spent conducting field activities such as inspections or investigations.

License

1.11. Decade hereby grants to Client, and Client hereby accepts from Decade, subject to the terms and conditions of this Agreement, a revocable, non-transferable, non-sub licensable, and non-exclusive license ("License") to use the Licensed Materials solely for its own use. The License shall be restricted for use with one (1) production server database with a single set of master code tables.

1.12. The License also authorizes Client to maintain a back up copy of the Licensed Programs for use with databases for back up and testing purposes only. Client agrees to maintain appropriate records on the quantity and location of all such copies, and produce same on demand by Decade. Client agrees to include the Decade copyright notice on all copies, in whole or in part, of any form. Client agrees to receive prior written approval from Decade before copying any portion of the Licensed Programs for any other purpose, which Decade may, at its sole and unfettered discretion, grant or not grant.

1.13. Client may not assign, sublicense or otherwise transfer, in whole or in part, the License, the Licensed Materials, this Agreement or any of its rights or obligations hereunder, whether voluntarily, by operation of law or otherwise, without the prior written consent of Decade.

1.14. Client agrees to not allow access to the Licensed Programs to any third party without written permission from Decade.

Ownership

1.15. Decade is the lawful owner or licensee of all proprietary rights whatsoever in the Licensed Materials including any changes, additions, and enhancements in the form of new or partial programs or documentation, but not as to limit the generality thereof, all copyright interests in the Licensed Materials. All copies of the Licensed Materials provided to, or reproduced by, the Client pursuant to this Agreement are, and remain the property of Decade. No rights in the Licensed Materials are granted to anyone other than those set forth in this Agreement. The Client shall use its commercially reasonable best efforts to prevent any violations of Decade's property rights in the Licensed Materials and shall, under no circumstances, sell, lease, sublease, sublicense, assign, barter, encumber or otherwise transfer the Licensed Materials or use the Licensed Materials for the processing of data for others, except as provided herein.

1.16. The Client shall have no right to modify, enhance or otherwise change the Licensed Materials in any way without the prior written consent of Decade, however the Client may merge the Licensed Materials into other materials to form a system, provided that upon termination of the License granted by this Agreement, the Licensed Materials will be completely removed from the system and treated as though permission to merge had never been granted. Use of the Licensed Materials in a system shall remain subject to all other terms of this Agreement.

1.17. The Licensed Materials and all other data or materials supplied by Decade to Client are confidential and proprietary to Decade, protected by law and of substantial value to Decade, and their use and disclosure must be carefully and continuously controlled;

1.18. The Licensed Materials and the Decade Source Code are protected by the Copyright Laws of the United States.

1.19. All logos, trademarks and trade names of Decade are proprietary to Decade and may only be used as authorized in writing by Decade.

1.20. Client shall keep all property of Decade free and clear of all claims, liens and encumbrances.

1.21. Client shall notify Decade immediately of the unauthorized possession, use or knowledge of any item supplied to Client pursuant of this Agreement.

1.22. In the event Client breaches or attempts to breach any of the provisions of this Section 3, Decade shall have the right, in addition to such other remedies which may be available to it, to injunctive relief enjoining such breach or attempt to breach, it being acknowledged that legal remedies are inadequate. The provisions of this Section 3 shall survive termination of this Agreement.

Prices, Adjustments, and Taxes

1.23. Prices for license fees and professional services are contained in Appendixes A and C. The original license and annual fees are based on the number of Inspectors specified in Appendix A.

1.24. Client agrees to pay for additional Inspectors as they are added at Decade's then prevailing license and maintenance fees.

1.25. After the initial term and for successive terms thereafter, Decade will notify Client at least sixty (60) days prior to the end of the then current term of Decade's intent to increase prices for the successive term.

1.26. Any tax, such as sales and use taxes, exclusive of property and income taxes, that Decade is required to collect or pay based upon the sale or delivery of products or services under this Agreement shall be paid by Client to Decade, or Client shall pay directly to the taxing agency with proof of payment provided to Decade. This obligation extends retroactively if so assessed by a taxing agency.

If Client is using the Licensed Programs in California, and receives the Licensed Programs on tangible personal property (for example floppy disks, magnetic tape, Zip disk, CD-ROM, or any other medium by which the Licensed Programs are temporarily stored to effect transfer to Client's computer) then the full license and support fee, as well as training and conversion fees, are subject to California sales and use tax. The definition of transfer is the leaving behind of such tangible personal property. However, if the Licensed Programs are received by Client over communication lines, via the Internet, a bulletin board service or through a direct connection between Client and Decade computers, the license and support, training, and conversion fees are not subject to sales and use tax. Client shall be responsible for all applicable federal and state sales and use taxes, including, but not limited to, sales and use taxes on parts, supplies and services.

If Client is using the Licensed Programs in a state other than California then Client is responsible for knowing the sales and use tax rules of that state.

1.27. Decade will assess and Client agrees to pay a late charge of 1 ½ % per month, or the highest amount allowed by law, for each month a payment is 30 days past due.

1.28. Decade reserves the right to withhold services for non-payment of fees.

1.29. Section 6 lists products and services that are not included in the license and support fee. Fees for Client's use of these items are due and payable when invoiced.

Support Services

The following services are included in the license and support fees:

1.30. Telephone Support

Decade provides telephone support via a toll free number for Client's usability questions and/or problem resolution. Support is provided during Decade's regular business hours (6:00 A.M. to 6:00 P.M., Pacific Time, Monday through Friday, with Federal and California State holidays excluded.)

Issues can be reported 24-hours a day by Decade Client Portal, e-mail, fax or telephone. Decade supports both the applications developed in-house and the database backend on which these applications run.

California Holidays Include:

- New Year's Day
- Martin Luther King Jr.'s Birthday
- Presidents' Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- The Friday after Thanksgiving
- Christmas Eve
- Christmas Day

1.31. Web-based Support

All clients have 24-hour access to our web resources. This includes all system documentation, EnvisionConnect upgrade files, and quarterly "Did You Know?" newsletter of system workflows tips. Web resources allow clients to search Decade's Knowledge Base of known EnvisionConnect issues and suggestions and instantly send issues to Decade technical support staff via an online support form.

1.32. Licensed Programs Maintenance

Decade will provide Licensed Programs maintenance, which includes defect fixes, and any other required modifications to keep the Licensed Programs in conformance with the specifications contained in the then current Decade Licensed Materials. Decade will amend the specifications only to remove documentation errors, provide consistency of interpretation or describe improvements to the Licensed Programs. Decade will correct any error or malfunction in the Licensed Programs that prevents them from operating in conformance with the then current Licensed Materials, or Decade will provide a commercially reasonable alternative that will conform to the then current Licensed Materials.

If Client's system is inoperable due to a reproducible error or malfunction, and Client is using the current release of the Licensed Programs, Decade will provide continuous effort to correct the error or malfunction.

1.33. User Group Meetings	User group meetings occur on a frequency determined by the user community. These meetings allow users to share ideas, workflows, etc. Client may send representatives to any user group meeting conducted by Decade clients.
1.34. Refresher Training	There will be no charge for refresher training conducted at Decade's office on mutually agreeable dates, if the material was covered and the attendee(s) was included in Client's initial training. Refresher training does not include training for new Licensed Programs or Client staff that have not been trained before, which are billable services.
1.35. List Server	Decade's clients use a list server to share information. Workflows for the Licensed Programs, environmental regulation workflows, user-customized reports, and general questions and answers are available.
1.36. Decade Web Site	Decade's web site provides a file exchange solution that provides a secure area where clients can share files. Clients have the freedom to upload/download useful reports, scripts, and other files at times most convenient to them. Clients have a searchable archive of environmental regulation workflows, Licensed Programs workflows, user-customized reports, scripts, and general questions and answers that can be accessed through keyword searches. Users have the option of drilling down through categories or searching for files by using a search dialog box.
1.37. Client Relationship Management	OnTime is a software application that enables Decade to manage every aspect of our relationship with the client. Client information acquired from client service and support is captured and stored in a centralized database to improve client satisfaction. Decade will not release any Client information without prior authorization from the Client.
1.38.	Decade may add to, or modify the services of sections 5.6 through 5.8.

Items Not Covered by this License and Support Fee

1.39. The following services will be provided on a fee basis. Appendix A contains prices for license fees, and all services included in Appendix E Statement of Work that are agreed upon as a condition of this Agreement. Services not specifically included in Appendix E can be obtained from Decade after completion and approval of a Professional Service Request (PSR) at the rates identified in Appendix D.

1.40. Support Initiated Outside Normal Working Hours	Decade's normal working hours are 6:00 A.M. to 6:00 P.M., Pacific Time, Monday through Friday, with Federal and California State holidays excluded. If Client requires or initiates service outside these hours, Client will pay for such support at Decade's prevailing rates.
1.41. Data Conversion	

1.42. Data Correction or Restoration	Unless caused by Decade's negligence while working on Client's system.
1.43. Custom Programming	
1.44. Software Implementation	
1.45. Initial and New Staff Training	

1.46. Client will reimburse Decade for out-of-pocket costs expended on Client's behalf, unless such costs are caused by Decade's negligence. These can include travel and per diem, parts and supplies, media and reproduction, and long distance calls initiated from Decade to Client's system. Decade will obtain Client's prior approval before expending more than $100.00 per incident.

Warranty and Limitation of Decade's Liability

1.47. Decade warrants that the media used to deliver the Licensed Materials to Client is free from mechanical or recording defects, and if such defects are found, Decade will immediately replace the defective media.

1.48. Decade warrants that it is the owner or licensee of the Licensed Materials, and that it has the right to grant the License to the Client. Decade agrees to defend and indemnify the Client against any third party claim that the Licensed Materials infringe any patent or copyright, provided that the Client: (1) promptly notifies Decade, in writing, of any claim against the Client, such that Decade suffers no prejudice to its rights; (2) gives Decade the sole right to control and direct the defense and settlement of the action; (3) makes no compromise, settlement or admission of liability; and (4) provides reasonable assistance and cooperation in the defense of that action. The parties agree that Decade shall bear no responsibility for the settlement of any claim, suit or proceeding made by the Client without Decade's prior written approval.

If the Licensed Materials are held to infringe, and the use thereof is enjoined, Decade shall, at its own sole and unfettered discretion: (1) procure for the Client the right to continue using the Licensed Materials; (2) modify the Licensed Materials so that they become non-infringing; or (3) replace the Licensed Materials with non-infringing Materials. If Decade determines that none of the foregoing remedies are commercially feasible, Decade shall return the initial license fee actually paid by the Client to Decade under this Agreement, and upon such return, any licenses for the Licensed Materials shall terminate immediately.

This section 7.2 sets forth the entire obligation on the part of Decade, and the exclusive remedies available to the Client, for the actual or alleged infringement of the Licensed Materials of any patent, copyright, trademark, trade secret, or other intellectual property right of any person or entity.

1.49. Decade warrants that the Licensed Programs will perform substantially in accordance with its then-current Licensed Materials, at no additional cost to Client, provided that: (a) the Licensed Programs have not been modified, changed or altered by anyone other than Decade or as authorized by Decade in writing; (b) Client is operating the then-current version of the Licensed Programs; (c) Client's computer system is in good operating order and is installed in a suitable operating environment; (d) Client's computer system configuration used in the operation of the Licensed Programs meets Decade's approved specifications as contained in the Statement of Work, Appendix E; (e) the error or defect is not caused by Client or its agents, employees or contractors; (f) Client promptly notifies Decade of the error or defect when it is discovered; (g) all fees then due to Decade have been paid; and (h) Client is not otherwise in breach of its obligations under this Agreement. In such event, Decade shall use its commercially reasonable efforts to cause the Licensed Programs to perform substantially in accordance with its then-current Licensed Materials as soon as reasonably practicable under the circumstances.

1.50. If Client notifies Decade of such error or defect and, after investigation by Decade, Decade determines that such error or defect occurred as a result of Client not being in compliance with one or more of the reasons listed in Section 7.3 above, then Client shall reimburse Decade at Decade's then prevailing rates for all costs incurred in investigating such error or defect.

1.51. EXCEPT AS SPECIFICALLY SET FORTH ABOVE, THERE ARE NO OTHER WARRANTIES OF ANY KIND, WHETHER EXPRESS OR IMPLIED, WITH RESPECT TO THE LICENSED PROGRAMS, THE LICENSED MATERIALS OR ANY UPDATES, ENHANCEMENTS OR RELEASES THERETO, OR ANY OTHER SERVICES OR GOODS PROVIDED BY DECADE TO CLIENT IN CONNECTION WITH THIS AGREEMENT, INCLUDING WITHOUT LIMITATION ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. CLIENT'S SOLE AND EXCLUSIVE REMEDIES AND DECADE'S ONLY OBLIGATIONS UNDER THE WARRANTY SET FORTH ABOVE AND THIS AGREEMENT IS TO CAUSE THE LICENSED PROGRAMS TO OPERATE SUBSTANTIALLY IN ACCORDANCE WITH DECADE'S THEN-CURRENT LICENSED MATERIALS OR TO CORRECT THE THEN-CURRENT LICENSED MATERIALS.

1.52. DECADE DOES NOT WARRANT THAT THE FUNCTIONS CONTAINED IN THE LICENSED PROGRAMS SHALL MEET CLIENT'S REQUIREMENTS OR SHALL OPERATE IN COMBINATION WITH OTHER SOFTWARE OR SYSTEMS WHICH CLIENT SELECTS FOR USE, OR THAT THE OPERATION OF THE LICENSED PROGRAMS SHALL BE UNINTERRUPTED OR ERROR FREE, OR THAT ALL ERRORS AND DEFECTS HAVE BEEN IDENTIFIED AND CORRECTED BY DECADE.

1.53. DECADE SHALL NOT BE LIABLE FOR ANY INDIRECT, INCIDENTAL, PUNITIVE, EXEMPLARY, SPECIAL OR CONSEQUENTIAL DAMAGES OF ANY KIND WHATSOEVER SUFFERED OR INCURRED BY CLIENT AS A CONSEQUENCE OF THE USE OR PERFORMANCE OF THE LICENSED PROGRAMS OR OTHERWISE, EVEN IF DECADE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN ANY EVENT, UNDER NO CIRCUMSTANCES SHALL DECADE BE LIABLE FOR ANY LOSS, COST, EXPENSE OR DAMAGE TO CLIENT IN AN AMOUNT EXCEEDING THE SUM OF THE INITIAL LICENSE FEE ACTUALLY PAID BY CLIENT TO DECADE UNDER THIS AGREEMENT, WHETHER ARISING AS A RESULT OF: (A) ANY BREACH OF THIS AGREEMENT BY DECADE; (B) ANY ACT OR FAILURE TO ACT OF DECADE; OR (C) ANY CLAIM MADE AGAINST CLIENT BY ANY OTHER PARTY, EVEN IF DECADE HAS BEEN ADVISED OF THE CLAIM OR POTENTIAL CLAIM. CLIENT AGREES THAT IT SHALL NOT ASSERT ANY CLAIMS AGAINST DECADE BASED ON ANY THEORY OF STRICT LIABILITY.

Binding Dispute Resolution

The parties shall use reasonable efforts to amicably settle all disputes, controversies, or differences, which may arise between them ("Dispute"). If no resolution is reached, the parties shall submit the Dispute to a mutually acceptable mediator, initiated by written demand of one party served on the other, and if the mediator determines that the Dispute cannot be resolved by mediation, then the Dispute shall be submitted to binding arbitration in accordance with the rules and regulations of the American Arbitration Association. Arbitration shall take place in Fresno, California. The arbitration award shall be supported by written conclusions of law and fact. Punitive damages shall not be permitted under any circumstances. The existence of the dispute, the dispute resolution process and the arbitrators' award shall be maintained confidential, provided that the arbitrators' award may be entered as a final judgment in any court in Fresno County, California having jurisdiction. The provisions of this Section 8 shall not apply to those instances in which either party is entitled to seek injunctive relief pursuant to the terms of this Agreement and desires to do so.

Client Responsibilities

Client is responsible for the following:

1.54. Timely payment of Decade invoices.

1.55. Implement a test system and use to install new Versions of the Software prior to installing in a production environment.

1.56. Provision of appropriate operating environment for Client's computer system, Client employees, and Decade staff when at Client location.

1.57. Provision of knowledgeable, competent operators with an understanding of Client's operations.

1.58. Scheduled training to properly prepare Client's staff to use Licensed Programs.

1.59. Backing up files and Licensed Programs daily, or whenever they change, and keeping them in a secure place.

1.60. Notifying Decade of a problem as soon it appears.

Version and Module Upgrades

1.61. Decade will periodically make Licensed Programs upgrades and enhancements available to Client. Decade will provide the necessary instructions and software tools so Client can install the upgrades and modifications.

1.62. Client will maintain its system at the current release level of the Licensed Programs. Ninety (90) days after the release of a new Licensed Programs Version, Decade will not be obligated to maintain prior Versions. Decade will have the sole discretion to decide if new Licensed Programs are a no charge upgrade, a no charge enhancement, or a billable offering. Billable offerings are optional, and Client will not be required to purchase them to maintain the current release level.

Early Termination

1.63. Either party may terminate this Agreement for a material breach of this Agreement, provided that the party in default has not cured or corrected such breach within thirty (30) days of receiving notice of such breach from the non-breaching party. Such termination may be in addition to any other rights and remedies the terminating party may have at law or in equity.

Actions Upon Termination

1.64. Client will cease using Licensed Materials immediately upon termination.

1.65. Within thirty (30) days after termination for any reason, Client will furnish Decade an affidavit certifying that the original and all copies, in whole or in part, of the Licensed Materials have been returned to Decade or destroyed by Client.

1.66. Client will pay all amounts due Decade, subject to Binding Dispute Resolution as specified in Section 8 above.

Decade Staff

1.67. Client shall not attempt to hire any current or former Decade staff member without prior written consent from Decade.

Access to Client Systems

1.68. Client agrees, within the constraints of Client's IT policies and protocol, to allow remote access to Client's computer system. This access will be used to provide technical support and problem resolution. Client shall install its own security measures to prevent unauthorized access. Decade shall provide Client with the appropriate communication software at no additional cost. In the event Decade must access the Client's system remotely, within the constraints of Client's IT policies and protocol, Client is responsible for all expenses associated with obtaining and installing the infrastructure required to support Decade's remote access.

Notice

1.69. Any notice, request, demand, consent, or other communications provided or permitted hereunder shall be in writing and given by personal delivery, transmitted by facsimile, or sent by ordinary mail, postage paid, addressed to the party for which it is intended at its address as follows:

For Decade:
Attention: Kevin Delaney
4201 West Shaw Avenue Suite, 102
Fresno, CA 93722

Phone: 800-233-9847 ext 703
Fax: 559-271-2892
E-mail: kevindelaney@decadesoftware.com

For Client:
Attention: Responsible Party's Name
Responsible Party's Address

Phone:
Fax:
E-mail:

General

1.70. Any clause of this Agreement found to be unenforceable shall be severed from this Agreement and the remainder of the Agreement shall remain in full force and effect.

1.71. Any waiver of any clause of this Agreement shall not constitute a subsequent waiver of that clause or any other clause. Failure or delay of either party to enforce compliance with any clause shall not constitute a waiver of such clause.

1.72. This Agreement shall be governed by California law, and the court of competent jurisdiction shall be in Fresno, California.

1.73. In the event litigation is required to enforce performance of this Agreement, the prevailing party shall be reimbursed the costs of enforcement, including, but not limited to attorney fees and costs, witness fees and costs, and court costs.

1.74. This Agreement replaces all other prior agreements, orally or in writing, relating to the subject matter contained herein, including any made by other parties such as distributors, consultants, dealers or resellers. This Agreement can only be modified in writing as approved by authorized signatories of both parties.

1.75. This Agreement is binding upon and shall inure to the benefit of the legal successors and assigns of the parties.

Acceptance of Agreement

Decade and Client have caused this Agreement to be executed by their duly authorized representatives on the respective dates entered below:

Client

- Signature

Date Accepted

Chair, Sample Agency Board of Supervisors

For: Sample Agency Public Health Department, Division of

Phone:

E-mail:

The person signing this Agreement on behalf of the Client warrants that they have read and understand all the terms and conditions contained herein, are authorized to sign on behalf of the Client and accept personal responsibility for damages if they are not so authorized.

Decade Software Company, LLC

Kevin Delaney, Managing Member

Date Agreed

Appendix A. Volumes, Prices, and Payment Schedule for License Fees

A.1 Number of Inspectors

Inspectors and Program Areas	Numbers
Number of Inspectors	0
Number of Inspectors Using EnvisionConnect Remote	0

A.2 Licensed Programs

EnvisionConnect –Licensed Programs Included in this Agreement:

- ☒ EnvisionConnect
- ☒ EnvisionConnect Remote Use
- ☐ EnvisionConnect Portal
- ☐ Press Agent
- ☐ Extender
- ☐ Batch Payments Import Tool (BPI)
- ☐ Mobile Vector Control Management

A.3 EnvisionConnect Prices

A.3.1 Prices

Ck	Annual License and Support Fees	No. of Inspectors	At Monthly Rate	Monthly Cost	Annual Cost
☒	EnvisionConnect	0	$ 105.00		
☒	EnvisionConnect Remote	0	$ 52.50		
☒	Press Agent	0	$ 26.25		
	Subtotal				
Total Recurring Fees					

The following Professional Services Fees cover all services outlined in Appendix E, Statement of Work.

Ck	One Time Professional Service Fees	Amount
☒	Remote and Onsite Needs Analysis and Configuration	
☒	Press Agent Set-up and Configuration	
☒	Training Package	
☒	Data Conversion from Legacy System	
☒	Project Travel and Per Diem	
Total Professional Service Fees		

A.4 Payment Schedule

First Year License and Support Fees

Payment Percentage		Milestone
50	Percent	Contract Signing
25	Percent	Secure Access to Hosted Database for Configuration
25	Percent	Delivery of Notice of Project Completion and Acceptance

Press Agent Set-up and Configuration

Payment Percentage		Milestone
50	Percent	Contract Signing
50	Percent	Upon Acceptance

Data Conversion

Payment Percentage		Milestone
50	Percent	Contract Signing
25	Percent	Delivery of Data Conversion Plan
25	Percent	Acceptance of the Converted Data

Onsite Needs Analysis and Configuration

Payment Percentage		Milestone
100	Percent	At Completion of Onsite Event

Onsite Training and Travel Per Diem

Payment Percentage		Milestone
100	Percent	At Completion of Each Onsite Training Event

Web Based Training

Payment Percentage		Milestone
100	Percent	Invoiced Monthly Based on Hours Used

All invoices are payable net thirty (30) days.

A.5 Payment Frequency

Second and successive annual License Renewal Fees will be paid in advance annually.

Ck	Payment Frequency
☐	Annually
☒	Monthly

A.6 Client Taxes

Tax	Rate	Exempt	Exemption Number
N/A		☐	
		☐	

A.7 Client Contact for Billing Issues

Client Contact Person for Billing Issues

Phone:
Fax:
E-mail:

Appendix B. Dates and Term

This Agreement shall become effective as specified below ("Effective Date") or when Decade provides the Licensed Programs or services hereunder, whichever is earlier.

The month and day of the Effective Date shall determine the anniversary date (hereinafter "Anniversary Date").

This Agreement shall have a term of three (3) years, 10/01/10 to 10/30/13.

Either party may terminate this Agreement at the end of the initial or any successive term by giving the other party at least sixty (60) days prior written notice.

Milestone Summary

Milestone	Date
Effective Date:	Date entered on page one of this Agreement.
Anniversary Date	10/01/13
Agreement Term Begins	10/01/10
Agreement Term Ends	09/30/13
Implementation Start Date:	Within 45 days of contract execution.

Appendix C. Professional Services Rates

Any services requested outside of those agreed to in Appendix E, Statement of Work will require authorization through a Professional Service Requests (PSR) signed by both parties.

The following rates will apply for the listed professional services.

Item	Rate	Per Unit
Professional Services		
• Custom Programming	$126.00	Hour
• Consultation	$126.00	Hour
• Report Development	$126.00	Hour
Training		
• Training at Client Facility	$1,470.00	Day
• Training at Decade Facility	$1,470.00	Day
• Training Online Using WebEx	$105.00	Hour
Support		
• Phone Support Outside Normal Service Hours	$189.00	Hour
• Third Party Support	$126.00	Hour
Travel and Per Diem Expenses		
• To be quoted upon receipt of PSR.		

These prices may be increased annually on the Anniversary Date, upon at least sixty (60) days prior notice to client.

All prices are exclusive of any applicable taxes.

Appendix D. Third Party Software

D.1 Business Objects Crystal Reports

Crystal Reports is a database report designer and viewer owned by Business Objects. Decade utilizes Crystal Reports to design "canned" and custom reports that are later distributed with the Licensed Materials. The Licensed Materials includes a server-side report generation component. This is allowed under section 4.2.5 of the Crystal Reports Standard, Professional, and Developer License Agreement. Use of the server-side report generation component within the Licensed Materials is subject to the following terms.

D.1.1 Client agrees not to modify, disassemble, decompile, translate, adapt or reverse-engineer the Runtime Product or the report file (.RPT) format;

D.1.2 Client agrees not to distribute the Runtime Product to any third party;

D.1.3 Client agrees not to use the Runtime Product to create for distribution a product that is generally competitive with Business Objects product offerings;

D.1.4 Client agrees not to use the Runtime Product to create for distribution a product that converts the report file (.RPT) format to an alternative report file format used by any general-purpose report writing, data analysis or report delivery product that is not the property of Business Objects;

D.1.5 Client agrees not to use the Runtime Product on a rental or timesharing basis or to operate a service bureau facility for the benefit of third-parties;

D.1.6 BUSINESS OBJECTS AND ITS SUPPLIERS DISCLAIM ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NONINFRINGEMENT OF THIRD PARTY RIGHTS. BUSINESS OBJECTS AND ITS SUPPLIERS SHALL HAVE NO LIABILITY WHATSOEVER FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, INCIDENTAL, PUNITIVE, COVER OR OTHER DAMAGES ARISING UNDER THIS AGREEMENT OR IN CONNECTION WITH THE SOFTWARE.

Statement of Work

The accompanying Statement of Work is incorporated herein by reference.

Attachment D - RESUMES

Kevin Delaney

Qualifications

More than 20 years experience in the data management and computer services industry providing direct client consultation and counseling, high-level management of a professional services organization, and the direct application of broadly based technical expertise. Activities have resulted in personal involvement with a wide variety of client environments in the financial, governmental, and commercial sectors.

Owned and operated Decade Software Company, LLC since 1986. Broad experience in the business and government communities from the formation of a start-up firm to the overseeing of large, multi-site, WAN, and LAN installations. Demonstrated skill set in implementing core application solutions, in defining risk management solutions, and tailoring software systems for clients. Planned and managed the entire implementation of city, county, and state government compliant systems. Performs key management activities for Decade Software Company and is responsible for the management of revenue attainment, expense control, contract negotiations, personnel, business development, and client satisfaction.

An effective communicator who has frequently developed and presented seminars and training classes to a broad range of professionals. Equally capable in presentations of technical and non-technical topics.

Demonstrates strengths in the following areas:

- Defining Risk Management Solutions
- Client Needs Assessment
- Core Application Solutions
- Project Management
- Problem Resolution
- Workflow Procedures

Professional Experience

Decade Software Company, LLC • Fresno, California 06/1985 to Present
Owner
From 1981 until the formation of Decade Software, LLC, served as a consultant to business and governmental agencies developing data processing applications. In 1986 formed the current company to focus on environmental health and health care database software solutions. Responsibilities include all aspects of forming, developing, maintaining, and growing a business from its inception. Initially performed all programming, documentation, sales, and marketing. Currently responsible for company direction, focus, and policy. Meet regularly with clients in user group meetings, training, sales, and focus groups, and the Annual User Group Training and Conference to ensure Decade's services are on target and applicable.

Fiserv (GESCO) • Fresno, California 05/1986 to 01/1990
Analyst, Administrator
Fiserv Fresno is a data processing center for numerous Savings and Loan Associations. At the time, most applications were written for the IBM mainframe in Assembler and COBOL. GESCO was the name of the company before it was acquired by Fiserv, Inc. in June, 1998.

Project Administrator (1/90 to 5/90) Supervised staff programmers and analysts on various batch and online systems for the real estate lending application. Designed interface to the state of Hawaii's Tax Disbursement system.

Senior Systems Analyst (2/88 to 12/89) Designed, developed, and lead an online loan accounting system with batch, G/L, and terminal systems implications. Responsibilities included supervision of programming staff, correspondence with clients, coordination of product specialists, production scheduling, and providing progress reports to upper management.

Systems Analyst II (5/86 to 11/89) Project leader for the conversion of two major and complex systems from VSAM to IDMS/R.

Donald G. Watson & Associates • Fresno, California 09/1984 to 05/1986
Consultant
Hired to help purchase a software package to replace the manual processing of financial aid requests; promoted to manager of data processing. Researched, designed, and directed the conversion from a manual operation to a networked PC database system. Duties included supervising programming and operations staff, interfacing with users, scheduling system operations, and reviewing software and hardware for potential use.

GESCO Corporation • Fresno, California 01/1983 to 05/1986
Programmer Analyst
Senior Programmer Analyst (2/85 to 5/86) Responsible for the administration of large-scale inter-departmental projects. Trained users and staff on various departmental systems. Established standards and procedures for the maintenance of the department's core programs.

Programmer Analyst II (8/84 to 2/85) Designed and implemented major enhancements to the nightly interest accrual system, analyzed program performance, assisted with year-end processing, and coordinated the establishment of new systems within various departments.

Programmer Analyst I (1/83 to 8/84) Reduced problem backlog, improved the performance of various systems and programs within the department.

Education and Training

California State University, Fresno — Fresno, California
BS – Business Administration with Quantitative Methods and Computer Applications Emphasis — 1981

Darryl R. Booth

Qualifications

Over 20 years experience in managing teams of professionals, ranging in size from five to 30 individuals, in several fields. Administration and management expertise includes development of strategic plans for technology competency and market positions. Maintenance of executive-level dialog with customers, vendors, prospects, and partners such as legislative and regulatory entities. Establishment and maintenance of organizational lines of responsibility for Application Development, Technical Writing, Internal IT Support, and Quality Assurance groups. Performance of accounting functions such as accounts receivable, accounts payable, and payroll including the management of a detailed accounting system designed to meet strict federal standards. Production and presentation of marketing materials, and the management of sub-contractor relationships.

More than 20 years experience in software design and implementation.

Demonstrates strengths in the following areas:

- Professional Team Management
- Client Needs Assessment
- Strategic and Operational Planning
- Project Management
- Problem Resolution
- Workflow Procedures

Professional Experience

Decade Software Company, LLC • Fresno, California 03/1997 to Present
Chief Technology Officer/Client Services Manager

Dedicated to substantially seeking and managing technical and industrial opportunities beyond the company's current technical and industrial horizons. The duties and responsibilities of the CTO focus on technology, industry, operations, and management. A technology advocate and industry resource, the CTO identifies critical technologies that the company must implement to be successful in the future.

Previous to the CTO position, as Development Manager, managed a team of IS professionals programming a Windows data management systems using Borland's Delphi and Sybase. Managed Microsoft Windows NT networks. Provided technical support to in-office staff and clients in Windows 98, 2000, XP, Windows NT, NetWare, and telecommunications. Presented and demonstrated Envision and Epitome to current and prospective clients. Continues to provide training to clients and staff.

Project Accomplishments:

- Managed team conducting EnvisionConnect upgrades including data validation, hardware sizing, etc.
- Led team responsible for authoring prototypes and requirements documents for EnvisionConnect. Conducted bi-weekly online users forums through which requirements were validated. Prioritized requirements for iterative development.
- Managed data conversion of Envision for DOS to Envision for Windows for 40+ sites.

Donald G. Watson & Associates, Inc. • Fresno, California 1987 to 1997
General Manager/Vice President
Managed a staff of 30 professionals engaged in evaluating and processing federal financial aid applications based upon frequently changing federal and state regulations and laws. Administrated in-house computer systems designed to facilitate the application processing. This system was rewritten each year to adhere to updated regulations and laws. Managed Electronic Data Interchange (EDI) with US Department of Education updating student applications, awards, and disbursements. Managed detailed accounting system designed to meet strict federal standards. Interacted with independent and federal auditors tasked with reviewing operations each year. Administered NetWare network with over 30 nodes. Produced marketing materials and made presentations to over 75 prospective clients.

F.A.S.T., Inc. • Fresno, California 1995 to 1997
President
Designed, marketed, and supported FASTAID and FASTCASH. These products were designed to facilitate federal financial aid processing at the institutional level. Performed all accounting functions for this company including accounts receivable, accounts payable, and payroll.

Contract Programmer • Fresno, California 1985 to 1997
Programmer
Designed, wrote, and implemented an Apple computer system that evaluated children's learning abilities based on activities administered by the system. Designed, wrote, and implemented a system on the PC to monitor the status of shut-ins by automated telephone contact. Designed, wrote, and implemented a utility to statistically analyze student test scores.

Education and Training

California State University, Fresno — Fresno, California
MBA - Information Systems with Distinction — 1998 to 2000

California State University, Fresno — Fresno, California
BA - Business Administration - Information Systems — 1985 to 1998

Jeff Cornelius

Qualifications

I am an accomplished technology professional with over 15 years of experience across multiple industries. I have a proven track record of delivering enhanced productivity, streamlined operations, and continuous process improvements. Over my career, I have built a strong record of successfully managing major system implementations, on time and on budget. I have a strong background in database development, in both Oracle and SQL Server. I have an aptitude for helping non-technical individuals come to understand complex technical topics. I possess strong business instincts and a talent for transitioning strategy into action and achievement.

Demonstrates strengths in the following areas:

- Project and Team Management
- Service Level Management
- Change Management
- Business Analysis
- Strategic Management
- SQL Server and Oracle Development
- Development Life Cycle
- Quality Assurance

Professional Experience

Decade Software Company, LLC • Fresno, California 2009 to Present
Technical Support Manager
My duties include leading the efforts of the technical support team, with a focus on reducing incident response times and improving customer productivity. I am dedicated to ensuring the success of the company and our customers by making sure that I and my team provide the most reliable and efficient support possible. I am also responsible for leading the effort to help our clients successfully upgrade to EnvisionConnect. I bring with me over a decade of enterprise-level project management experience to help me in this endeavor. I am an unending advocate for quality. To that end, I am always seeking ways to implement process improvements to help the company and our customers.

Gottschalks, Inc. • Fresno, California 2001 to 2009
Manager of Information Systems
I was recruited to upgrade and replace obsolete technologies for a regional department store chain with 65 stores across 5 western states and reported annual sales of $650 million. I directed the development and implementation of strategic information systems and infrastructure projects designed to modernize the enterprise. I developed and fostered strong partnerships with internal business units, outside vendors, and consultants. I was responsible for managing vendor engagements/contracts, service level agreements, and regulatory compliance.

Jeff Cornelius

Priority Health Services • Fresno, California 1996 to 2001

Technical Support Manager

I was responsible for implementing the first formal call center/service desk at Priority Health Services. I partnered directly with internal stakeholders to identify required business rules and service level requirements. I worked closely with management, customers, and vendors to design and implement a helpdesk system to meet day to day business needs. Over an 18 month period, our technical support team increased internal customer satisfaction by 75%.

Education and Training

Craig School of Business, California State University, Fresno — Fresno, California
Master of Business Administration — 2007 – 2009
Emphasis in Information Systems Management

University of Phoenix — Phoenix, Arizona
Bachelor of Science, Business Administration — 2005 – 2009
Emphasis in Information Systems Management

HL Arledge

Qualifications

Experienced working with Scrum, Six Sigma, Rational Unified Processes, Microsoft Project, and other Project Control Plans in various formats, agile development philosophies, most common programming languages and design patterns, Microsoft SQL Server, InstallShield, most web-design tools, Text-to-Speech Engines, Artificial Intelligence Patterns, Microsoft Office, and the Adobe Creative Suite.

Demonstrated strengths in the following areas:

- Management and Organization
- Design, Development, Implementation
- Client Needs Assessment
- Timely Completion of Assignments
- Project Management
- Problem Resolution
- Workflow Procedures
- Strong Communication Skills

Technical Team Experience

- A certified Scrum Master with more than 10 years experience in managing Software Developers and Business Analysts through more than 80 customization projects.
- 10 years experience in the Environmental Health industry, with over 23 years experience in software analysis and development, including 10 years self-employment in networking, multimedia, and e-commerce database development.
- Highly effective in communicating with project stakeholders, analyzing business needs, and writing process and development documentation.

For additional technical team experience descriptions, please see the following Professional Experience section.

Professional Experience

Decade Software Company, LLC • Fresno, California 2009 to Present
Chief Communications Officer
The chief communications officer (CCO) is head of communications, public relations, and/or public affairs within the organization. He reports to the chief executive officer (CEO) and is a member of the executive board. The CCO is the officer primarily responsible for managing the communications risks and opportunities of a business, both internally and externally, responsible for communications to a wide range of stakeholders, including but not limited to employees, customers, media, business influentials, the press, the community, and the public.

Decade Software Company, LLC • Fresno, California 2004 to Present
Software Development Manager
As Software Development Manager for a seasoned, high performing, high profile Scrum team building a new product from the ground up, HL Arledge has the following responsibilities:

- Developing, maintaining, and enhancing an information management system in use by over 80 Environmental Health agencies world-wide.
- Guiding the product and over 100 customization projects through all phases of development, from early specifications and definition to release.
- Reviewing and providing feedback on feature definitions, architecture, detailed designs, task estimates, and test strategies.
- Managing resources, prioritizing tasks, scheduling, monitoring progress, managing risk.
- Reviewing, triaging, assigning, and managing reported defects to resolution.
- Hiring, coaching, goal-setting, performance reviews.
- Inspiring and encouraging the team. Ensuring that team dynamics continue to be healthy and that team cohesion is high.
- Developing and evolving processes to optimize team efficiency.
- Closely cooperating with other teams and functions (Quality Assurance, Design, Administration, Marketing, etc.) to achieve common goals.

Decade Software Company, LLC • Fresno, California 1999 to 2004
Software Developer/Process Engineer/Deployment Manager
Responsible for the software development process itself, including configuring the process before project startup and continuously improving the process during the development effort. Excellent communication skills. Designs applications using Borland Delphi and SQL databases. Using InstallShield Developer, builds software installations for each product version release, and as Deployment Manager plans products' transition to the user community. Analyzes end users' data needs and develops user-oriented solutions that interface with existing applications. Designs systems, and programs and coordinates the review of specification and user sign-off process. Recommends improved operational procedures to maximize systems efficiency and provides guidance to solving complex operations malfunctions. Works to monitor and improve the Decade Software Company development process, creating the team's Development Case and Configuration Management documents and procedures. Holds online training sessions with customers and attends user group meetings to demonstrate product revisions.

Project Accomplishments:

- Inspection Software
- Database Software
- Software Process Consulting
- User-Defined Forms and Fields (UDF) Editor
- Worked with state officials and customers to redesign and develop Envision's Site Remediation System, streamlining user workflow to reduce case maintenance time
- Enhanced installations to interact with Envision database during installation
- Created customized graphics for Decade Software Company installations

Sherlock Software • Denham Springs, Louisiana 1989 to 1999
Program Analyst/CEO
Served as project manager at several software marketing firms worldwide. Developed a Web-based voice mail system for the Canadian firm PCRoaR; developed a voice dictation and data warehousing system for YDC Digital in Korea; developed Big Brother, an Internet-based security camera system; and developed several e-commerce systems and data-driven websites for companies across the United States. Worked with neural networks and genetic algorithms developing an artificial intelligence library for computer-based games.

Airweb, Inc. • Hammond, Louisiana 1987 to 1990
Software Developer
Developed *Snitch* 1.0, a SQL-based data collecting system for radio news, and *Mr. Music Director*, an airplay scheduling package for radio broadcasters. These DOS-based systems are still in use today by several Louisiana radio stations.

Airweb, Inc. • Hammond, Louisiana 1979 to 1989
Broadcaster/Promotions Director
Planned station promotions and contests for both rock and country radio stations. Activities included concert scheduling and coordination, building relations with concert promoters and artists across the country. Created and hosted "The Dedication Party," "New Orleans Unsolved Mysteries," and "Creole Country," all Louisiana-based syndicated radio shows that continued to air long-term. "New Orleans Unsolved Mysteries" was based on a state syndicated newspaper column authored by Mr. Arledge for over ten years.

Published short stories have appeared in *Alfred Hitchcock Mystery Magazine, Ellery Queen Mystery Magazine*, and the science fiction publications *Starlog* and *Twilight Zone Magazine.*

Education and Training

Danube Technologies Scrum Master Certification	Cupertino, California 2007
Southeastern Louisiana University BS, Computer Science	Hammond, Louisiana 1986

Angie Brown

Qualifications

I have over 20 years experience as a programmer and database designer. I managed projects and project teams for governmental agencies and the private sector including historical conversions from legacy applications into SQL and Oracle tables in mainstream applications. My experience also includes writing proposals and RFPs (Request for Proposals), training technical and non-technical staff, and business process review and improvement. I have a proven track record in time estimations and maintaining the project budget, which was accomplished by being able to visualize requirements and being able to estimate the skill level of the support staff.

I have more than 15 years experience in software design and implementation.

Demonstrates strengths in the following areas:

- Client Needs Assessment
- Data Conversion
- SQL and Oracle Programming
- Timely Completion of Assignments
- Project and Team Management
- Problem Resolution
- Quality Assurance
- Business Analysis

Professional Experience

Decade Software Company, LLC • Fresno, California 2007 to Present
Data Conversion Specialist
My duties include creating SQL scripts to export and import data from legacy tables into the company's proprietary databases. I am the liaison between clients and technical staff. I am also responsible for ensuring the success of the company through time management and successful project completion. I am dedicated to quality. I also identify and propose process improvements to help the company and me succeed.

IT Contractor 1999 to 2007
I introduced and implemented processes and procedures to turn small development departments into more mainstream development organizations for companies who are in a state of transition such as mergers, outsourcing, and bringing IT processes in-house for the following companies:

- Diesel Pump & Injector, Visalia, CA
- Tulare County IT Department, Visalia, CA
- Weir Floway, Fresno, CA
- Pacific Pipeline, Long Beach and Bakersfield, CA
- PacifiCare, Cypress, CA
- Great Plains/Solomon Software, Torrance, CA

My responsibilities also included interfacing with local officials and department heads to meet IT requirements and create positive relationships with community and civic leaders. I developed and implemented support software, which included managing projects and process documentation. I performed business analysis functions to ensure client needs were understood and met. I also created programs to import and export data from proprietary databases. I created design documentation and requirements/specifications.

Accela, Inc. • Visalia, California 2004 to 2006
Database Conversion Manager
I created programs to import and export data from a proprietary database. I evaluated and documented database conversion algorithms. I was the liaison between the Project Manager, technical staff, and the client. I also performed business analysis to ensure client needs were understood and met. I performed project management functions on tasks including effective estimations and resource planning. I managed technical staff including contractors.

HNC Insurance Solution, Inc. • Irvine, California 1995 to 1999
Implementation/EDI Development Director
Responsible for management and development direction of three versions of automated medical bill review systems. Managed the Implementation and Training staff. Responsible for complete implementation of software by writing proposals, meeting with perspective clients, determining needs, writing specifications, managing deliverables, and integrating outside data such as PPO and Utilization Review data. Created Operations and Strategic plans. Also implemented training programs for Microsoft products as well as Insurance application training.

Paidos Healthcare • Santa Fe Springs, California 1992 to 1995
Project Manager/Senior Software Systems Engineer
I was Project Manager and primary developer on a patient care-management software package. I was the sole contributor to an in-house reimbursement software package. I was also primary contributor to all design phases and implementation of a patient tracking system. I managed development as well as technical support and training staff for all three systems.

Education and Training

California State University, Fullerton — Fullerton, California
BS – Computer Science with Minor in Mathematics — 1981 to 1985

California State University, Los Angeles — Los Angeles, California
Database Design — 1990 to 1992

Cisco Training — Fontana, California

Nicki Bradford

Qualifications

More than 28 years experience in account management and financial processes. Proven ability to gain client confidence and trust through interpersonal skills. Ability to assess client business requirements and initiate creative solutions. Effective in developing programs and accomplishing project goals. Sharp eye for detail while maintaining the project overview. Self-starter, highly motivated and goal oriented. Adept in organizing and integrating workflow, ideas, materials, and people.

Demonstrates strengths in the following areas:

- Project Management
- Client Needs Assessment
- Training and Curriculum
- Problem Resolution
- Workflow Procedure Documents
- Team/Contract Management

Professional Experience

Decade Software Company, LLC • Fresno, California 08/1997 to Present
Account Manager
Coordinates and maintains communication between Decade Software Company, LLC and Decade's clients. Provides enterprise wide support for Decade applications, specifically related to facilitating and educating clients and staff on their effective use. Possesses a diverse knowledge of Decade's applications, and is able to assess client needs and communicate solutions effectively.

Provides internal support to the various areas within Decade including project level activities, (such as Decade's Annual User Group Training and Conference or special meetings with clients), planning and coordinating, analysis, communication, problem resolution, and internal training. Plans and coordinates project level external projects (such as monthly User Group Meetings) on an on-going basis and ensures that all activities are performed at a high level of quality.

Project Accomplishments:
Annual Group User Training and Conference Organizer and Coordinator
Contra Costa County Department of Environmental Health
Hennepin County Environmental Health Department
Long Beach City Environmental Health Department
Santa Barbara County Public Health Department
Santa Cruz County Environmental Health Department
San Luis Obispo County Environmental Health Department
Will County Environmental Health Department
Project Champion/Advocate on many Decade Software Company projects
Tracked Public Water System changes mandated by DHS, documenting Envision changes clients must have to comply with those changes

Assisted in converting the following clients to Envision:
*Bear River Environmental Health
City of San Francisco Environmental Health
*City of Lubbock
Fresno County Environmental Health
El Paso County Department of Environmental Health
*Hennepin County Environmental Health
Kern County Environmental Health
Kings County Environmental Health
*Long Beach City Environmental Health
Madera County Environmental Health
Merced County Environmental Health
Mono County Public Health Department
*Monterey County Environmental Health
Northeast Colorado Environmental Health
*Pima County Environmental Health
Placer County Environmental Health
*Plumas County Environmental Health
Sacramento County Environmental Health
Salt Lake Valley Health Department
*San Luis Obispo County Environmental Health
San Mateo County Environmental Health
Santa Barbara County Public Health
Santa Clara County Environmental Health
Santa Cruz County Environmental Health
Tulare County Environmental Health
*Will County Environmental Health
Yolo County Environmental Health

* New Clients
(Others were converted from Envision for DOS to Envision for Windows, and trained on Envision for Windows)

Fiserv, Inc. • Fresno, California 12/1986 to 07/1997
Senior Product Analyst/Account Executive
Analyzed client business requirements and initiated creative solutions. Analyzed company products to assure they conformed to the best needs of the clients.

Coast Federal Bank • Castroville, California 11/1985 to 12/1986
Branch Manager/Assistant Vice President
Managed the daily operations of a savings branch. Responsible for developing new business, promoting community relations, maintaining quality customer service, and protecting the Association assets. Exceeded year-to-date fee income and savings goals by 14 percent. Responsible for software installation, testing, and staff training necessary to convert from the Gesco system to the Data Line system.

Wells Fargo Bank, NA • San Francisco, California 02/1982 to 03/1984
Senior EDP Auditor
Planned, developed, and performed audits of the Data Processing Department. Audit areas included physical and logical security, operations, systems development, computer applications, and service contracts. Interacted with users and Data Processing personnel in the capacity of project monitor during large systems development projects. Communicated audit results and recommendations to senior management and the Board of Directors. In addition, participated with Peat, Marwick, Mitchell & Co. in the annual financial audit.

Monterey Savings and Loan • Monterey, California 10/1975 to 10/1981
Internal Audit Manager/Programmer Analyst
Originally hired as a program analyst responsible for converting the financial records of a $250M savings institution from an NCR service bureau to MSL's on-line financial system. Received substantial bonus for work performance. Designed, developed, and documented an on-line loan commitment system, and trained users in the use and monitoring of the system. Responsibilities were increased to include system programming. Installed system modifications, including a new line control and an on-line spooling feature. Analyzed and selected new options for our EDOS operating system and performed a system generation. Promoted to Manager of Internal Audit in 1978. Responsible for the development and supervision of operational audits for the association's major departments and twenty-three branches. Performed audits that resulted in the discovery and recovery of $10K in embezzled funds. Reviewed the operational controls for the loan department and made recommendations that increased income by $18K per year. Developed and performed the EDP audit program for MSL's on-line financial systems. Reduced external audit costs by performing the Computer Controls Evaluation review used by Ernst & Whinney. Identified on-line system problems and made recommendations that prevented a loss of $240K, decreased expenses by $17K per year, and increased 1981 income by $13.5K. Reviewed audit results with members of senior management and presented audit reports to the Board of Directors.

Education and Training

California State University, Chico | Chico, California
B.A. - Employee Relations; Business Presentations; Disaster Recovery.
(Coursework - EDOS, Systems Programming, Computer Controls Evaluation, Data Communications)

Attachment E – Report Catalog

Below is a list of pre-configured EnvisionConnect reports organized by Category.

Number	Category	Title	Description
3500	CUPA state Report	CUPA - Surcharge Transmittal Report	The Surcharge Transmittal Report is to be submitted to the Secretary in care of the DTSC as a cover document each time surcharge revenues are remitted. This report lists the total surcharge fees for CUPA Oversight, Underground Storage Tanks, and CalARP, and gives a combined grand total.
3501	CUPA state Report	CUPA - Annual Single Fee Summary Report	For each reporting State fiscal year an updated copy of this report needs to be submitted to the Secretary in care of the DTSC with a copy of every Surcharge Transmittal Report submitted for the same fiscal year. This report gives totals for Single Fee, Participating Agencies, Surcharge (including CUPA Oversight), CalARP, and UST, and includes Counts. Portions of the report that cannot be determined are: Total Amount of Single Fee Remitted for Participating Agencies Total Amount of Single Fee Still Owed Participating Agencies Total Collections Remitted to State Total Amount Owed to State
3502	CUPA state Report	CUPA - Annual Inspection Summary Report	Using General Health Program and Daily Activity Logging records, this report is designed to determine whether violations were resolved within the timeframes specified by the State of California and is to be submitted to the Secretary in care of the DTSC.
3503	CUPA state Report	CUPA - Annual Enforcement Summary Report	This report makes use of the Daily Activity Logging, Violation, Enforcement, and Invoice line Item records to determine the number of CUPA-regulated facilities that had at least one violation in the category of Class 1, Class 2, or Minor in the time frame specified.
3504	CUPA state Report	CUPA - Biennial Tiered Permitting Report	This report is to be submitted to the Secretary in care of the DTSC every other year starting with the year 2000, for the previous two fiscal years. This report is a brief summary of all releases within a given time period. It includes the EPA ID, facility name and address, highest tier, date of release, description of release, and corrective action fields.
3505	CUPA state Report	CUPA - Quarterly Underground Storage Tank	This quarterly report is submitted to the State Water Resources Control Board (SWRCB) and is due within 60 days of the end of the fiscal quarter. The report

Number	Category	Title	Description
		Program Report	summarizes various tank information such as the number of regulated facilities, active facilities, closed facilities, approved facilities, and inspected facilities.
3510	CUPA state Report	UPCF - Business Activities Report	The Business Activities report is required to be submitted when a business initially submits, modifies, or annually resubmits any information pertaining to a facility's Hazardous Materials, Underground Storage Tanks (USTs), Above Ground Petroleum Storage Tanks (ASTs), and/or Hazardous Waste. This report identifies a facility by Facility ID, EPA ID Number, and Business Name and indicates what activities the business is submitting information for. The Business Activities report must accompany the Business Owner/Operator Report for each submission.
3511	CUPA state Report	UPCF - Business Owner/Operator Report	The Business Owner/Operator Report is required to be submitted when a business initially submits, modifies, or annually resubmits any information pertaining to a facility's Hazardous Materials, Underground Storage Tanks (USTs), Above Ground Petroleum Storage Tanks (ASTs), and/or Hazardous Waste. This report identifies a facility by Facility ID and Business Name. The date range covering the information being submitted, the business and business owner information and contact information are given. The Business Owner/Operator Page must be submitted with the Business Activities Report.
3512	CUPA state Report	UPCF - Hazardous Materials Inventory	The Business Activities report is required to be submitted when a business initially submits, modifies, or annually resubmits any information pertaining to a facility's Hazardous Materials, Underground Storage Tanks (USTs), Above Ground Petroleum Storage Tanks (ASTs), and/or Hazardous Waste. This report identifies a facility by Facility ID, EPA ID Number, and Business Name and indicates what activities the business is submitting information for. The Business Activities report must accompany the Business Owner/Operator Report for each submission.
3513	CUPA state Report	UPCF - Underground Storage Tanks Report	This report includes: Underground Storage Tanks - Facility Page Underground Storage Tanks - Tank Page 1 Underground Storage Tanks - Tank Page 2

Number	Category	Title	Description
			Underground Storage Tanks - Installation The Business Owner/Operator Report is required to be submitted when a business initially submits, modifies, or annually resubmits any information pertaining to a facility's Hazardous Materials, Underground Storage Tanks (USTs), Above Ground Petroleum Storage Tanks (ASTs), and/or Hazardous Waste. This report identifies a facility by Facility ID and Business Name. The date range covering the information being submitted, the business and business owner information and contact information are given. The Business Owner/Operator Page must be submitted with the Business Activities Report.
3514	CUPA state Report	UPCF - Recyclable Materials Report	This report includes: Recyclable Materials - Page 1 Recyclable Materials - Page 2 Recyclable Materials - Pages 1 and 2 are required to be submitted for recycling that has taken place during the prior two calendar years, ending with an odd-numbered year. The form must be submitted to the CUPA by July 1 of the following year. A separate Recyclable Materials - Page 2 must be submitted for each recyclable material. The Recyclable Materials - Page 1 and 2 must be submitted with a copy of the Business Activities and Business Owner/Operator pages. Both onsite and offsite recycling facilities should submit these reports. The Recyclable Materials Page 1 and 2 provide information on a facility's recycling activities and the materials that are recycled.
3515	CUPA state Report	UPCF - Onsite Hazardous Waste Treatment Notification Report	This report includes: Onsite Hazardous Waste Treatment Notification - Facility Page Onsite Hazardous Waste Treatment Notification - Unit Page Waste and Treatment Process Combinations Page (Based on the facility's unit type/tier a page is needed for each unit type/tier of CESQT, CESW, CA, PBR, CEL)

Number	Category	Title	Description
			The Onsite Hazardous Waste Treatment Notification report is required to be submitted when a business initially submits, modifies, or annually resubmits (PBR only) any information pertaining to a facility's Hazardous Waste Treatment. One Onsite Hazardous Waste Treatment Notification - Facility page must be submitted regardless of the number of treatment units located at the site. The Onsite Hazardous Waste Treatment Notification - Unit and the Waste and Treatment Process Combinations pages must be submitted for each treatment unit at this location except CE-CL units. In addition a Business Activities and Business Owner/Operator page must be submitted. If this is a new facility, the Certification of Financial Assurance must also be submitted.
3516	CUPA state Report	UPCF - Certification of Financial Assurance Report	The Certification of Financial Assurance Report is required to be submitted when a business initially submits, modifies, or annually resubmits any information pertaining to a facility's financial assurance and closure costs. This report is used by the owner or operator of a Fixed Treatment Unit operating under Permit by Rule (PBR), or a generator operating pursuant to a grant of Conditional Authorization (CA). If this is a new facility, this certification should be attached to the Onsite Hazardous Waste Treatment Notification - Facility page. If this is an existing facility and you have previously submitted a Notification, the certification and the financial assurance mechanism may be submitted without another notification. This report is used to provide financial assurance and closure cost information. The facility is identified by the Facility ID, EPA ID #, and Business Name. This report is needed even if you are qualified for an exemption. In addition to this report, the Business Activities and Business Owner/Operator report must be submitted. If this is a new facility, the Onsite Hazardous Waste Treatment Notification report is also required.
3517	CUPA state Report	UPCF - Remote Waste Consolidation Site Annual Notification Report	The Remote Waste Consolidation Site Annual Notification report is required to be submitted when a business initially submits, modifies, or annually resubmits any information pertaining to a facility that generates and collects RCRA or non-RCRA regulated hazardous waste. The hazardous waste is generated from a remote site and subsequently transported to a consolidation site that the facility also

Number	Category	Title	Description
			operates. A page is required for each consolidation site and must be submitted with the Business Activities and Business Owner/Operator report.
3518	CUPA state Report	UPCF - Hazardous Waste Tank Closure Certification Report	The Hazardous Waste Tank Closure Certification report must be submitted prior to initiating any cleaning, cutting, dismantling, or excavation of a tank system that meets the CUPA Hazardous Material or Hazardous Waste tank conditions. This report identifies the facility by Facility ID and Business Name and provides tank owner, tank closure, and certification information. In addition, the Business Activities and Business Owner/Operator report must be submitted.
3521	CUPA state Report	Participating Agency Failed Data Validation Report	This report can only be used with the PA to CUPATransfer Process. This report will be generated after the PA to CUPA import process, but before any records are created/updated. The purpose of this report is to extract information regarding which records failed stage 1 validation. This report will only display those records failing the validation process.
3522	CUPA state Report	PA to CUPA Transfer Process - Participating Agency Data Matching	This report can only be used with the PA to CUPA Transfer Process. This report will be generated after the PA to CUPA Transfer Process has completed Data Matching and Support Code verification. The report is run from the PA to CUPA Transfer Import Wizard. The purpose of this report is to list all PA Import records that were either matched or not matched in Envision. Those records that failed due to an error in the data will be included in an exception report. Those records that are matched to Envision data will display both the Import data and the corresponding Envision data. This report, Report 3522, is the main report and is used to house four subreports: 1) Records that have been accepted and matched based on an address match, 2) Records that have been accepted and matched based on an ID match, 3) Records that have been accepted but have no match, and 4) Records that have not been accepted whether there was a match or not.
0002	Detail Listing	Facility Information	This report creates a form which lists current owner, facility, and accounts receivable information for specified facilities. Space is provided to document changes or corrections to information or ownership. Program/Elements currently monitored at the facility are listed along with their Record ID, Designated Employee, Current Status, and space to indicate whether they are to be transferred to a new owner and if they will be active, inactive, or deleted. In addition, the last activity date and service description are displayed for each

Number	Category	Title	Description
			Program record when the associated Service Code has "Inspection Activity" checked on the Service Code form. There is a Billing and Compliance Acknowledgement for the applicant to sign at the end of the form.
0003	Detail Listing	District Inventory Report	This report lists General Health Program records assigned to specified employees. The report is sorted by Facility Street Number so it can be used as a facility inventory. Facility and Owner Information is shown along with a listing of Daily Time and Activity records for the past year. For each facility, Prior and Current Inspection Dates, and Current Program, Financial, and Permit Status are shown, among other things.
0004	Detail Listing	District Inventory Summary Listing	This summary report lists General Health Program records assigned to specified employees. The name, address, and Facility ID of each facility are listed, along with the Account Balance, Program/Elements, Program Contact Name, Current Status, and Discount Code. In addition, the last activity date and service description are displayed for each Program record when the associated Service Code has "Inspection Activity" checked on the Service Code form. The total number of General Health Program records for each employee and overall is shown.
0005	Detail Listing	Listing of General Health Programs Sorted Variously	This report lists owner and facility information of facilities actively monitored for the specified Program/Elements. The list is sorted by Facility Name or ID, Owner Name or ID, or General Health Program Record ID according to user specification. Addresses, emergency notification, telephone numbers, and mailing codes are shown. In addition, the last activity date and service description are displayed for each Program record when the associated Service Code has "Inspection Activity" checked on the Service Code form.
0006	Detail Listing	Program Records Assigned to Wrong Staff	To review General Health Program record assignments, this report lists program records where the Designated Employee and Employee Census Area Employee IDs do not match. Records are listed by the Designated Employee and show Facility Name and Address, Census Tract, Facility and General Health Program Record IDs, Program/Elements, Current Program Status, and the Census Area Employee ID.
0009	Detail Listing	Report Catalog Describing Functions of Individual Reports	For a user-specified range of Envision report numbers, a cover report describing the functions of the Envision report is created. For each report specified, a general description of what the report was designed to do, its sorting order,

Number	Category	Title	Description
			selection criteria parameters and narrative, questions the report should help answer, and additional notes and clarifications are discussed. Page two presents an image of the Envision report with call-out numbers describing the formulas behind the information listed.
0013	Detail Listing	Listing of Potential Duplicate Facilities	This report displays a list of Facility IDs with the facility name and legal address that have the potential of being a duplicate facility. The linked Owner ID and owner name are included for each facility. For a CUPA-related agency, the option to include the facility Contributor is given. The user may also select facilities based on address only.
0014	Detail Listing	Listing of Potential Duplicate Owners	This report displays a list of Owner IDs with the owner name and legal address that have the potential of being a duplicate owner. The user has the option to include all linked facilities for an owner. For a CUPA-related agency, the option to include the owner Contributor is given. The user may also select owners based on address only.
0018	Detail Listing	Orphaned Comment Records	The purpose of this report is to show orphaned Comment records that have been created at the Comments Search form in Envision. This report displays all Comment records having an invalid Comments Record ID. Because the Facility ID on the Comments Search form is not a required field and can be null, the report indicates "Facility ID Not Specified" when no Facility ID has been assigned to the record. If the Facility ID is invalid, the report displays the invalid Facility ID value and "Not a Valid Facility ID." For all valid Facility IDs, the Facility ID, facility name, and site address are displayed. In addition, the report displays the invalid Comment Record ID, a description of the type of comment, the comment text, date the comment was entered, and the name of the Envision user who made the entry. A count of the total number of invalid Comment Record IDs is given, as well as the number of invalid Comment records having either no Facility ID or an invalid Facility ID. If the report returns no records, text is displayed indicating that the report found no Comment records having an invalid Comments Record ID in Envision.
0019	Detail Listing	Comment Records Linked to an Invalid Facility ID	The purpose of this report is to show Comment records that have been linked to an invalid Facility ID from the Comments Search form in Envision. Because the Facility ID is not a required field, this report shows valid Comment records that are linked to an invalid Facility ID. The invalid Facility ID number is displayed with

Number	Category	Title	Description
			"Not a Valid Facility ID." The report also displays the valid Comments Record ID, a description of the type of comment, the comment text, date the comment was entered, and the name of the Envision user who made the entry. A total indicating the number of valid Comment Record IDs having an invalid Facility ID is displayed. If the report returns no records, text is displayed indicating that the report found no valid Comment records having an invalid Facility ID.
0032	Detail Listing	Fee Schedule Sorted Variously	A fee schedule is sorted by either Program/Element, Fee Description, Fixed Fee Amount, or Fee Type. Information presented includes Program/Element, description, billing frequency indicator, type of transaction, and fixed fee amount.
0033	Detail Listing	Active/Inactive Service Codes Fee Schedule	This report lists Service Codes, descriptions, and the associated fees from the Service Code table. They are sorted by Service Code Description or Code.
0039	Detail Listing	Activity Processing Control Record Listing	Processing Control records are listed for Activity Codes specified by the user. This serves as a support code list and quick check of the processing outcomes of activities. The Activity Code and Description are listed along with Terms, Days, and Dates.
0041	Detail Listing	Violation Codes Listing	This report lists Violation Codes and descriptions from the Violations Support Codes table. They are sorted by Program/Element and then Violation Code.
0042	Detail Listing	Violations Grouped by Facility ID or Activity Date	This report is helpful as a quick review of the type and number of violations occurring at facilities during a specified period. For each facility specified, inspection violations are listed including the Inspection Date, Violation Code and Description, Points for each violation, and Total Violation Points accumulated by the facility. A count of all the violations cited during the specified period is also shown.
0044	Detail Listing	Listing of Violations by Address	A detail of violations that have occurred at each specified address is listed. This report is useful any time a violation history is applicable such as when researching the history of a facility during permit approval. Facility and Owner information is shown along with specifics for each violation such as the date, Inspection Violation Code and description, number of occurrences, Points, Degree, Compliance dates, and the employee citing the violation. Total number of violations is shown for each date and address, and for all selected addresses.
0045	Detail Listing	Listing of Violations by Owner or Assessor's Parcel Number	Violations associated with a specific owner or Assessor's Parcel Number (APN) are listed. This report is useful as a background check of an owner or property to ensure all past violations are in compliance. If a listing by Owner ID is selected,

Number	Category	Title	Description
			violations cited at facilities owned by this person at the time of occurrence, whether or not the owner still owns the facilities, will be printed. Facility and Owner information is shown along with specifics for each violation such as the Inspection Violation Code and description, Points, Degree, and Compliance dates. The total number of violations is given for each facility and owner or APN, with a Grand Total for all facilities selected.
0051	Detail Listing	Inspection Deadline Dates for Monitored General Health Programs	Facilities and their inspection deadline dates for a user specified period and Program/Elements are listed.
0052	Detail Listing	Facility Inventory by Employee	This inventory report lists facilities within each specified Program/Element by employee. The user indicates the program status by which to select programs for the facility listing. Facility names and addresses and census area are shown. In addition, the last activity date and service description are displayed for each Program record when the associated Service Code has "Inspection Activity" checked on the Service Code form. A facility count for each specified Program/Element and employee is given, as well as the total number of facilities selected. This report applies to General Health Program records only.
0053	Detail Listing	Facility Inspection Deadline Dates by Employee and Program/Element	Lists for each selected employee, the General Health Program facilities due for an inspection. The list is grouped first by employee, then Program/Element, and lastly, Record ID.
0055	Detail Listing	Facility Inventory Sorted Variously	This report lists General Health Program facility records with a user-selected program status and within specified ranges of Inspection Dates, Employee IDs, and Program/Elements. It is a useful tool in identifying facilities assigned to a specific employee with upcoming inspections due. Facility ID, name, and address are listed along with Program Record ID, Program/Element, and Permit number. In addition, the last activity date and service description are displayed for each Program record when the associated Service Code has "Inspection Activity" checked on the Service Code form. Selected records can be sorted by facility name, Facility ID, Record ID, Program/Element, or Permit number. This inventory is for General Health Programs only.
0059	Detail Listing	Last Inspection List Sorted Variously	Current and prior inspection deadline dates are listed by facility for specified General Health Program/Elements. Facility Name, General Health Program ID, Program/Element and Description, Current Inspection Date and Prior Inspection

Number	Category	Title	Description
			Dates are listed.
0064	Detail Listing	Daily Activity Logging Record Listing	Daily Activity Logging records are listed for a specified time period. Information shown includes date when services were performed, Employee ID, Facility ID, Record ID, Program/Element and description, Service Code, Activity Minutes, and Travel Minutes. A sum of total hours worked during the specified period is also shown.
0070	Detail Listing	Employee Listing by Department Number	Using all records, a list of employees by department is created. Social Security Numbers and Dates of Hire are included.
0076	Detail Listing	Inspection Violations by Program/Element	This report helps identify problem areas within Programs due to many violations, or to evaluate the number and type of violations inspectors are logging. For a user specified period, inspections where violations were logged are listed by Activity Date. Violation Codes and Descriptions are shown with a separate listing for each occurrence. Totals are given for the number of violations by Program/Element and for all specified Program/Elements.
0099	Detail Listing	Mileage and Travel Expense Statement	Using information entered in Envision Travel Expense Log, this report produces an Expense Statement for each employee and a System Wide Total of all employees' travel expenses for a specified period of Departed Dates. A quick review of travel expenses, such as vehicle mileage, meals and lodging is shown. If the detail option is specified, for each date with travel expenses and for each specified employee, Beginning and Ending Mileage, Total Miles, and Trip Purpose are listed, along with expenses associated with Staff Meetings and Training, Meals, Lodging, Mileage, and Trip Total. The user can also select a summary option which prints just the System Wide Total for the period, without each individual employee's statement.
0100	Detail Listing	Resolved Complaints	For a user specified time period, resolved complaints are listed. Each page presents a summary of complaint information including names and addresses. If the user desires, a list of the Daily Activity Logging records for the complaint can be shown.
0102	Detail Listing	Complaints Resolved/Not Resolved by Employee	This report lists resolved or unresolved complaints or both, depending upon the user's specifications. Complaints are listed by the employee assigned to the complaint and show the Date Received, Complaint ID, Facility ID (if applicable), site name and address, employee resolving the complaint, and Resolved date.
0103	Detail Listing	Complaints Listed in	To quickly determine all complaints lodged against the properties owned by a

Number	Category	Title	Description
		Property Owner's Name Sequence	single entity, this report sorts and groups complaints by the property owner's name. It provides summary information regarding the properties, as well as the nature of the complaint.
0104	Detail Listing	Complaint Investigation Form	This form assists inspectors when making investigations by eliminating the need for a pre-printed investigation form. Once the complaint is logged into Envision, there is no need to hand write the complaint information on an investigation form before going into the field. Complaint record information is transferred to the form including Complaint ID, address, and phone numbers of Complainant and Owner, nature of the complaint, and actions taken toward its resolution.
0109	Detail Listing	Complaint Activity Time Report	This report presents Complaint record information followed by linked Daily Activity Logging records. Owner's name, property address, District, Location, Census Code, date received, nature of complaint, and the party making the complaint are shown. An employee time and cost summary completes the report.
0111	Detail Listing	Service Requests Listing - Project Time Report	Service Request and linked Daily Activity Logging records are detailed providing information on the type and cost of services provided during a specified period. Service Requests received during the time frame are listed with Owner and Facility information; dates the request was received, assigned, and completed; employees involved; Amount Paid; Comments; and an Activity Summary of Daily Activity Logging records. Totals for time and costs are provided for each selected request.
0112	Detail Listing	Complaint Investigation Form - Includes Prior Comments	This form is designed to facilitate complaint investigations. The Owner/Operator, Complainant, nature of complaint, actions taken to resolve complaint, and previous inspection comments are printed on the form. Lined space is provided to summarize actions taken.
0113	Detail Listing	List of Complaints and Linked Daily Activity Records and Comments	This report lists Complaint ID's and associated Daily Activity records which are sorted by Activity date. Inspection Comment records are printed and sorted by Comment number if they are linked to a Daily Activity record.
0150	Detail Listing	Facility Last Activity Date by Employee and Program/Element	Facilities where General Health Programs are monitored are listed along with the most recent Activity Date from the Daily Activity Logging record with the user specified Service Code for each monitored Program/Element. Since service dates are listed in descending order with oldest dates first, this listing is useful to staff as a log of facilities in need of a visit. Typically, this report is used as a log of

Number	Category	Title	Description
			inspections with the Service Code set to the value for "Routine Inspections". Each specified employee's facilities are listed separately.
0213	Detail Listing	Discount Schedule	This schedule lists the available Discount Codes, descriptions, types, and amounts from the Discount Schedule table. The report is sorted by discount code or description.
0214	Detail Listing	Daily Time and Activity Trial Billing Report	This report allows the user to view the trial results after the Daily Time and Activity Billing Batch Process has been run and before the actual invoice is created. Invoices based on Daily Time and Activity records are created in much the same way as invoices for Scheduled Invoice Items records, except charges are based on the actual services performed instead of annual permit fees. By reviewing the trial results, such problems as duplicate charges and incorrect Program/Elements can be identified. Adjustments can be made to the records responsible for the invoice's creation and the batch process started again based on the correct data. This report lists Facility and Owner names and addresses, Service Code and Description, Employee ID and Name, Bill Date, Minutes, Amounts, totals for each facility, a Grand Total amount to be invoiced, and a trial billing exceptions lists with error messages for identifying incorrect or missing information.
0227	Detail Listing	Scheduled Invoice Items To Be Included in the Next Billing	This report allows viewing of the trial results of fees to be charged by Program/Element at each facility after the Scheduled Invoice Billing Batch Process has been run and before the actual invoice is created. Scheduled Invoice Items records are created when General Health Program, Underground Storage Tank, and Water System Inventory records are created. By reviewing the trial results, such problems as duplicate charges, incorrect fee amounts, and incorrect number of units and associated charges can be identified. Adjustments can be made and the batch process started again based on the correct data. This report lists Facility and Owner names and addresses, Anniversary Dates, totals by Program/Element, and a Grand Total of the amount to be invoiced. An Exceptions List with error messages identifying incorrect or missing information is also shown.
0237	Detail Listing	Payments Received by Program/Element	This report summarizes payment transactions by Program Category and Program/Element during a specified period. Invoice Line Items identified as Payments, Payment Corrections, or Refunds are summed providing a total of period receivables. A count of Program/Elements with payment transactions

Number	Category	Title	Description
			during the period is also shown.
0238	Detail Listing	Transactions with Outstanding Balances	To prevent the accidental accrual of penalties, this report is designed to show the user all accounts, that although their Total Due may be zero, they could still be subject to delinquency penalties due to Invoice Line Items with Outstanding Balances greater than zero. In other words, payments have been received but not applied to an Invoice Line Item charge. The report lists the Account ID, the bill-to name, and all invoices linked to the account that have an Outstanding Balance greater than zero. The Line Items are grouped by Debits and Credits. See the Selection Criteria Narrative and Additional Note/Clarifications for more detail.
0242	Detail Listing	Site Remediation Trial Billing Report	A preview of the invoices to be created (or updated) by the Site Remediation Billing Batch process is shown. The batch process generates invoices and invoice line items in a temporary holding table for subsequent review. If approved, they are posted to their accounts. To enable review, the batch prompts the user to generate a report like this one (the user may customize this report and run it instead). Invoice Line Items are created using the unbilled Supply and Equipment and Daily Time and Activity records linked to a Site Remediation record. Reviewing this report provides the user an opportunity to validate the charges, the facilities billed, and the addresses used. Although the report will identify records with data errors such as missing Program/Elements, Account Status indicates the account is inactive, etc.; it is up to the user to carefully screen it for invalid addresses, incorrect fees, duplicate charges and so on. If corrections need to be made to the data, the batch process can be started over. For each site with charges pending, the report lists the Facility Name and Address, Owner's Name, Service Code and Description, Remediation Record ID, Daily Time and Activity Serial Number, Hour or Unit Amounts and Rates, Charges, and an Exceptions List with error messages. The total number of Invoice Line Items to be created and a Grand Total of the Amount to be invoiced are listed at the report's end.
0271	Detail Listing	Employee Inventory Report - Provides A Routing Book for Inspectors	General Health Program facilities are listed with inspections due during a specified period and with past activity for a specified service. This report is useful in identifying other services that could be performed during an upcoming inspection, or simply noting when the last inspection was done. The list is sorted by Employee, District, and address. Site ID, address, Owner, Program/Elements, Program Status, date of last service, and date of next inspection are shown.

Number	Category	Title	Description
0272	Detail Listing	District Inventory Report Sorted by Assessor's Parcel Number	General Health Program facilities are listed with past activity for a specified service. This report is useful in identifying other services that could be performed during an upcoming service visit or inspection. Facilities that have received the specified service in the past are listed along with their ID and addresses, owner information, General Health Program record ID, monitored Program/Elements, program status, and date of last service. The report is sorted by assessor's parcel number.
0279	Detail Listing	Agency Program Activity by Employee	This report assists in evaluation of employee activities and as a tool for managing the focus and direction of work activities. An employee activity summary is created from Daily Activity Logging records for user specified ranges of Activity Dates, Program/Elements, Services Codes, and Employees. The Number of Services, Hours, Percent of Total Time, and Hours per Service by Program/Element are listed. Two bar graphs illustrate the amount of time spent on each Program/Element and the total number of hours worked by employee.
0281	Detail Listing	Summation of Employee Time by Program/Element	This report assists in evaluating employee activity time, invoicing in relation to employee time, and managing the focus and direction of activities. The user specifies employees, Activity Dates, Program/Elements, and Service Codes, and Daily Activity Logging records are summed with totals by Program/Element and a period total for the employee. Details include hours spent by Service Code within each Program/Element. A separate summary is printed for each employee, one per page.
0500	Detail Listing	Self-Audit Program Class Roster	Many agencies use Self Audit Program classes to promote health education by encouraging employees of inventoried facilities to audit and improve their methods of doing business. This report helps to organize these efforts by providing a class roster of students representing inventoried facilities. Class information is listed and whether each student has been confirmed, attended, been certified for training, been certified for the program, and is eligible for this training.
0601	Detail Listing	EnvisionConnect Needs Analysis Report	The EnvisionConnect Needs Analysis Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. These reports help the System Administrator or project manager perform tasks such as determining the status of the overall configuration. This report displays the EnvisionConnect Needs Analysis questions and the answers provided by the user.

Number	Category	Title	Description
0602	Detail Listing	EnvisionConnect Support Code Import Status Report	The EnvisionConnect Support Code Import Status Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. These reports help the System Administrator or project manager perform various tasks. If you use the Support Code Import Wizard to import support codes, the EnvisionConnect Support Code Import Status Report can be used to view information about the import process such as number of records imported, the date of the import, any error messages, etc.
0603	Detail Listing	EnvisionConnect Configuration Statistics Report	The EnvisionConnect Configuration Statistics Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. These reports help the System Administrator or project manager perform various tasks. This EnvisionConnect Configuration Statistics Report provides information about the data stored in the support code tables. It does not report the actual codes or their values. For actual support codes and their values, please run the EnvisionConnect Support Code Records Status Report (Report 0604).
0604	Detail Listing	EnvisionConnect Support Code Records Status Report	The EnvisionConnect Support Code Records Status Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. These reports help the System Administrator or project manager perform tasks such as determining the status of the overall configuration. This report lists the actual records within the support code tables included in the modules selected by the user.
0605	Detail Listing	Program/Element Code Audit Trail Report	The Program/Element Code Audit Trail Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. For specific configuration options and support codes, the EnvisionConnect Configuration Wizard stores a copy of the original record in a history table as users change or delete records. The Program/Element Code Audit Trail Report uses these records to show you the state of the records at any point in time. That is, you can run this report and determine the state of your Program/Element codes from a prior period. This is very useful during troubleshooting, business policy verification, etc.
0606	Detail Listing	Program Category Code Audit Trail Report	The Program Category Code Audit Trail Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. For specific configuration options and support codes, the EnvisionConnect Configuration Wizard stores a copy of the original record in a history table as

Number	Category	Title	Description
			users change or delete records. The Program Category Code Audit Trail Report uses these records to show you the state of the records at any point in time. That is, you can run this report and determine the state of your Program Category codes from a prior period. This is very useful during troubleshooting, business policy verification, etc.
0607	Detail Listing	Penalty Schedule Audit Trail Report	The Penalty Schedule Audit Trail Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. For specific configuration options and support codes, the EnvisionConnect Configuration Wizard stores a copy of the original record in a history table as users change or delete records. The Penalty Schedule Audit Trail Report uses these records to show you the state of the records at any point in time. That is, you can run this report and determine the state of your Penalty Schedule from a prior period. This is very useful during troubleshooting, business policy verification, etc.
0608	Detail Listing	Discount Schedule Audit Trail Report	The Discount Schedule Audit Trail Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. For specific configuration options and support codes, the EnvisionConnect Configuration Wizard stores a copy of the original record in a history table as users change or delete records. The Discount Schedule Audit Trail Report uses these records to show you the state of the records at any point in time. That is, you can run this report and determine the state of your Discount Schedule from a prior period. This is very useful during troubleshooting, business policy verification, etc.
0609	Detail Listing	Service Code Audit Trail Report	The Service Code Audit Trail Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. For specific configuration options and support codes, the EnvisionConnect Configuration Wizard stores a copy of the original record in a history table as users change or delete records. The Service Code Audit Trail Report uses these records to show you the state of the records at any point in time. That is, you can run this report and determine the state of your Service codes from a prior period. This is very useful during troubleshooting, business policy verification, etc.
0610	Detail Listing	Result Code Audit Trail Report	The Result Code Audit Trail Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. For specific configuration options and support codes, the EnvisionConnect Configuration Wizard stores a copy of the original record in a history table as users change or delete records.

Number	Category	Title	Description
			The Result Code Audit Trail Report uses these records to show you the state of the records at any point in time. That is, you can run this report and determine the state of your Result codes from a prior period. This is very useful during troubleshooting, business policy verification, etc.
0611	Detail Listing	Accounts Receivable Configuration Audit Trail Report	The Accounts Receivable Configuration Audit Trail Report is one of several pre-defined reports that are run through the EnvisionConnect Configuration Wizard. For specific configuration options and support codes, the EnvisionConnect Configuration Wizard stores copies of the original records in history tables as users change or delete records. The Accounts Receivable Configuration Audit Trail Report uses these records to show you the state of the records at any point in time. That is, you can run this report and determine the state of your Accounts Receivable and Fees and Programs configuration from a prior period. This is very useful during troubleshooting, business policy verification, etc.
0612	Detail Listing	EnvisionConnect Configuration WIzard XML Audit Report	This report lists all the modules (nodes) in the EnvisionConnect Configuration Wizard and any module dependencies. Additionally, important supporting information is included. This report is used by Decade Software Company Technical Support to troubleshoot issues with the EnvisionConnect Configuration Wizards XML data files and should only be used when working with Decade Software Company Technical Support. For each EnvisionConnect Configuration Wizard node, the following information is displayed: The Node ID, Node Name, Dependent Name, Dependent Message, Question Text, Support Text, Soft Error, and Warning Message.
0613	Detail Listing	EnvisionConnect Configuration Wizard Module Dependency Report	This report lists all the modules (nodes) in the EnvisionConnect Configuration Wizard and any module dependencies. This report is used by Decade Software Company Technical Support to troubleshoot issues with the EnvisionConnect Configuration Wizards XML data files and should only be used when working with Decade Software Company Technical Support. For each EnvisionConnect Configuration Wizard node, the following information is displayed: The Node ID, Node Name, Dependent Name, and Dependent Node ID.
0651	Detail Listing	EnvisionConnect Additional Requirements Report	This report lists all the additional requirements associated with the support codes in the EnvisionConnect Configuration Wizard. An additional requirement could be best described this way. Many of the support codes in EnvisionConnect serve more than one purpose in the system, but sometimes it's not apparent from

Number	Category	Title	Description
			simply reading the help information at the support code's data entry page. A good example of this is the Program/Element code. It is well-known that the Program/Element code describes the health programs your agency monitors along with defining the fees associated with those programs. But several Program/Element code fields are used by other features in EnvisionConnect such as surcharge billing, Daily Activity Start/Stop Time Tracking, California CUPA-to-State Reporting, and many more.
1020	Detail Listing	Annual EDS Area Source Report	Annual EDS Area Source Report.
1022	Detail Listing	List of Permits That Were Used to Update Scheduled Invoice Items	This report can be used to generate a list of permits that were used to update scheduled invoice items during the period of time specified by the user. The Permit Is Valid From and Permit Is Valid To dates are shown. The Program/Element on the permit record is indicated, along with its description.
2302	Detail Listing	Quick List of Underground Storage Tanks	This report lists all recorded underground storage tanks. The report shows the Program/Element with which each tank record is associated. The user defines whether the tank records are sorted by tank ID, facility name, tank status, tank capacity, or tank product.
2305	Detail Listing	Facilities with Underground Storage Tanks (Pre-CUPA Surcharge)	For selected General Health Program records, Owner, Facility, Billing, and Contact Information is listed, along with the Program/Element and Description, Program Current Status, and Accounts Receivable Total Due. Specifics on the underground storage tanks at the facilities are given including Tank Number, Type, Description, Product Type, Capacity, Leak Detection Number, Tank Status, LEA ID, Surcharge Year, and INVGEN number.
2310	Detail Listing	Underground Storage Tanks - Inventory Reconciliation Results Due	This report creates a list of Underground Storage Tank Records by Program/Element where the Current Inventory Reconciliation Dates fall within a user-specified range. For each tank selected, Underground Storage Tank IDs, Facility Names, Tank Capacity and Product Type, and Current Inventory Reconciliation Date are shown. Totals for the number of tanks selected within each Program/Element and overall are shown.
2320	Detail Listing	Underground Storage Tanks with Integrity Tank Testing Results Due	This report creates a list of Underground Storage Tank Records by Program/Element where the Current Integrity Tank Testing Dates fall within a user-specified range. For each tank selected, Underground Storage Tank IDs, Facility Names, Tank Capacity and Product Type, and Current Integrity Tank

Number	Category	Title	Description
			Testing Date are shown. Totals for the number of tanks selected within each Program/Element and overall are shown.
2328	Detail Listing	List of Underground Storage Tank Integrity Tests by Service Code	Integrity Tank Test results are stored within the Daily Time and Activity table. Users create a specific Service Code to identify tank tests. This report lists the Daily Time and Activity records that represent Integrity Tank Test results. It identifies the facility as well as the specific tank at the facility that had been tested. For each tank selected, Underground Storage Tank IDs, Facility Names, Tank Capacity and Product Type, and Current Integrity Testing Date are shown, along with a list of all integrity tests with the specified Service Codes and their corresponding Result Codes.
2370	Detail Listing	Permit Status Codes Listing	This report lists the permit status codes and their descriptions. The list may be sorted by Permit Code or Description.
2523	Detail Listing	Site Remediation Invoice	Formerly one of four reports which together created an invoice for agency-provided Site Remediation activities, report 2523 combines those four reports and creates this invoice with the use of subreports. The invoice appears the same as before, with a cover page, and separate pages for Site Specific, Program Management, Service and Supplies, and Equipment Charges. The cover page lists hours and charges, Total Amount of the Invoice, Advance Fund amounts, and Final Settlement costs. Labor and supply charges are listed with Dates, Employee, Action Code or Budget Code, Hours Worked and Rate, Indirect Cost, and Total Cost with subtotals for each page. The resulting invoice meets the standards used to bill the California State Water Resources Control Board. This report prints the results from the Site Remediation Billing batch process (for further information, see Additional Notes/Clarification below).
2600	Detail Listing	Hazardous Materials Facility Inventory/Emerg. Contact Information	This report lists hazardous materials inventory records for each facility that has those records linked to it. It also lists the emergency contact information stored on the Facility Emergency Response Plan form.
2704	Detail Listing	Multiple Responsible Parties Data Sheet	This report displays the information about the responsible parties for a site remediation case as required by California law. This report is sent to the primary and secondary responsible parties by mail.
2715	Detail Listing	List of Closed Sites	The report displays sequentially by Enforcement Issue Date a list of closed sites for a specified enforcement date range. The report separates the list of closed sites by type of funding for regulatory oversight. For a list of new sites, please see

Number	Category	Title	Description
			report #2716.
2716	Detail Listing	List of New Sites	The report displays sequentially by Enforcement Issue Date a list of new sites for a specified enforcement date range. The report separates the list of new sites by type of funding for regulatory oversight. For a list of closed sites, please see report #2715.
3001	Detail Listing	Onsite Septic System Installations for the Period	For septic systems with approval dates within a user-specified range, this report lists onsite septic system Record IDs, owners' names and addresses, subdivision name, lot and block numbers, and type of dwelling serviced. The total number of onsite septic systems approved during this period is also shown.
3002	Detail Listing	Listing of Onsite Systems and the Comments Made During Inspection	For Onsite septic systems, the installer, owner name and address, date of inspection, and comments made during inspection are listed. Records can be selected by their Status Code (e.g., Satisfactory, Pending Inspection, Failed Inspection, etc.).
3003	Detail Listing	Onsite Sewage Disposal System Installation Permit	For specified Onsite septic system records, the report prints a permit to install or repair an onsite sewage disposal system. Owner, facility, contractor, and installer information is shown along with system specifications including minimum tank capacity, water supply, type of dwelling to be serviced, use of pumps, and length, diameter and use of lines.
3523	Detail Listing	PA to CUPA Transfer Process Participating Agency UST Data Matching	This report can only be used with the PA to CUPA Transfer Process. This report will be generated after the PA to CUPA Transfer Process has completed Data Matching and Support Code verification for Underground Storage Tank records. The report is run from the PA to CUPA Transfer Import Wizard. The purpose of this report is to list all PA UST Import records that were either matched or failed due to an error in the data. Those records that are matched to Envision data will display both the import data and the corresponding Envision data. This report, Report 3523, is the main report and is used to house two subreports: 1) Records that have been accepted and matched based on a PA Cross Reference, PA Tank ID or a Program ID, and 2) Records that have not been accepted whether there was a match or not.
3524	Detail Listing	PA to CUPA Transfer Process - Envision Records Created or Updated	This report can only be used with the PA to CUPA Transfer Process. This report is generated after the PA to CUPA Transfer Process has created new Envision records and/or updated existing Envision records. The report is run from the PA to CUPA Transfer Import Wizard. The purpose of this report is to list all PA Import

Number	Category	Title	Description
			records that were either newly created in Envision or that updated existing Envision records. Records failing to be either created or updated will be displayed with the occurring error message.
3525	Detail Listing	PA to CUPA Transfer Process - Envision UST Records Created/Updated	This report can only be used with the PA to CUPA Transfer Process. This report is generated after the PA to CUPA Transfer Process has created new Envision UST records and/or updated existing Envision records. The report is run from the PA to CUPA Transfer Import Wizard. The purpose of this report is to list all PA UST Import records that were either newly created in Envision or that updated existing Envision UST records. Tank records failing to be either created or updated will be displayed with the occurring error message.
3526	Detail Listing	PA to CUPA Transfer Process Participating Agency Remittance Report	This report can only be used with the PA to CUPA Transfer Process. This report will be used by the agency serving as the CUPA and will indicate the dollar amount to be remitted to a Participating Agency. This remittance report can be generated for either an individual Participating Agency or a range of Participating Agencies. Only the dollar amount paid for each Participating Agency's CUPA-related programs will be included. The report will display only those Invoice Line Items where the Related Program/Element equals the Program record's Program/Element, and where the SR1 value from the Related Program/Element Fee Schedule matches the Contributor support code value. These payment transactions include all payments and payment adjustments. The total amount paid for each invoice is included, as well as the grand total of all payment transactions for the Participating Agency. The report will also display a summary for each PA showing the amount paid for each program and a summary page showing the amount paid for each PA with a grand total.
3540	Detail Listing	PA to CUPA Transfer Process - Participating Agency Export File	This report is to be used with the PA to CUPA Transfer Import Wizard and allows the CUPA to generate an export file containing the data submitted by a Participating Agency.
3541	Detail Listing	PA to CUPA Transfer Process - Participating Agency Export File UST	This report is to be used with the PA to CUPA Transfer Import Wizard and allows the CUPA to generate an export file containing the UST (Underground Storage Tank) data submitted by a Participating Agency.
4501	Detail Listing	Mosquito Source Treatment Report	This report gives statistics about mosquito treatments for a given date range. Treatment statistics include types of treatment, the number of applications (treatments), the amount of treatment chemicals, and the treatment area

Number	Category	Title	Description
			covered.
4601	Detail Listing	List of Water Systems Sorted Variously	This report creates a list of Water Systems by Program/Element. For each active Water System, the following is shown: Water System, Facility and Owner IDs, Facility and Owner Name and Address, Emergency Notification Phone Numbers, Permit Number, Number of Service Connections, and Population Served. Totals of the number of Water Systems within each Program/Element and overall are shown.
4605	Detail Listing	Summary of Water System Billing Status by Program/Element	Using all Water System records, the number of water systems for each Billing Status is shown by Program/Element. The overall total number of water systems is displayed as well as a breakdown by Program/Element.
4611	Detail Listing	Water Sample Results	A summary of water sample results is shown for user-specified dates, Program/Elements, and Result Codes. Water sample results will be shown if the user has specified Result Codes which correspond to water samples only. The water system name, sample date, and type of result are listed. A total of the number of water samples meeting the selection criteria is also shown.
4632	Detail Listing	Water Systems Which Failed to Submit Bacteriological Sample Result	For selected Water Systems and Program/Elements, this report lists systems which failed to submit bacteriological sample results. The user also specifies a range of sample dates and whether to sort the report by Water Record ID, Facility Name, or Deadline Dates.
4635	Detail Listing	List of Water Systems with Bad Bacteriological Sample Results	For selected Water Systems and Program/Elements, this report lists systems with bad bacteriological sample results. The user also specifies a range of awareness dates which is the date the system manager became aware of the failing water sample result.
4643	Detail Listing	Water System Inspection Deadline Dates by Employee and Program	This report lists active water systems due for an inspection during a specified period. Water systems are listed by employee and Program/Element and show the Water System Inventory Record ID, Facility Name and Address, and the Current Inspection Date. The total number of records are listed for each employee and Program/Element, as well as a grand total.
4652	Detail Listing	Water Systems and Their Current Sample Deadline Dates	For a user specified period, deadline dates for public water systems are listed. The user selects Storet Codes and ranges for Water Systems and Program/Elements.
4653	Detail Listing	Water System Bacteriological Deadline	For user-specified Water System Record IDs and Program/Elements, this report lists deadline dates for bacteriological sample results. The user selects whether to

Number	Category	Title	Description
		Dates by Program/Element	show upcoming deadline dates for systems with current sample results on file, past deadline dates for systems which have failed to submit results, or both. The results are grouped by Program/Element and show Water System Record ID, Facility Name, and Bacteriological Deadline Date. Totals are shown for the number of facilities by Program/Element and all that meet selection criteria.
4654	Detail Listing	Water System Information	This report lists comprehensive water system information including Owner and Facility name and address, Sampling Deadline Dates, Emergency Notification, and System and Source Information. Examples of System Information shown include Location, Designated Employee, Billing Status, Next Inspection Date, LEA ID, Program/Element, and Water System Status. Some examples of the Source Information listed include Water Site ID and Name, Location, Treatment Number and Process, and Objective.
4660	Detail Listing	Public Water Systems' Scheduled Water Sampling Deadlines	Water systems' sample deadline dates within a user-specified range are listed. The report lists Facility ID, Name, and Address; Water Record ID; Current Inspection Date; Sampling Location; Scheduled Analysis Dates; Storet Code; and Chemical Description. The total number of scheduled sampling dates for each facility is shown, along with a distinct count of the number of facilities meeting selection criteria.
4670	Detail Listing	Water Data Transfer Report	Report 4670 is a predictive report of water data records which will be sent to the State electronically. Only water records which are new or have been changed are included. Eight subreports are included based upon user specification: Water Inventory, Permit, Source, Source Treatment, Inspection, Violation, Enforcement Action, and Associated Violations Data Transfer Reports.
4901	Detail Listing	Event Appointment Schedule	This report prints event scheduling appointment information within a range of event dates and event Site IDs. The report groups appointments by event site.
0201	Financial Detail	Payments Posted	This report lists account activity records, grouped by Transaction Date and sorted by Invoice Number and Invoice Line Item. Net dollar totals and total number of records per Transaction Date group are shown. The Program/Element, Related Program/Element, Transaction Amount, Check Number (if applicable), and name of the Employee entering the transaction are shown for each record.
0202	Financial Detail	Listing of Transfers Between Accounts	This report lists invoice line item records grouped by Program/Element and sorted by Date Entered and Invoice Number. If existing, payment comments entered at the Debit/Credit Calculator are shown.

Number	Category	Title	Description
0205	Financial Detail	Inactive Accounts with Active General Health Programs	This report prints a list of all active General Health Program records that have an Account Status of anything other than Active. The report includes business name, last billing date, Program/Element, employee code, and any discounting.
0221	Financial Detail	Aging of Outstanding Balances by Program/Element	The purpose of this report is to show the actual aging of outstanding balances by Program/Element within Program Category as shown on the Invoice Line Item, based on the current date. This report will show the total amount by Program/Element within a Program Category for all Invoice Line Item transactions having an outstanding balance. Invoice Line Items that are a credit and have an outstanding balance will be shown as a negative amount (-). In addition, these totals are separated into categories of 1-30 days, 31-60 days, 61-90 days, 90-120 days, and 120+ days. The report will display the total outstanding dollar amount for each Program/Element within its Program Category for the various time frames. A grand total for each PE will be displayed as well as grand totals for each Program Category. The report will also display grand totals for all Categories.
0230	Financial Detail	Payment and Correction Register	For a specified period, payments, corrections, and refunds are listed by Fee Category. Balances can be compared to deposits to ensure payments have been recorded. The report lists Invoice number, Facility ID, Account ID, Facility or Owner name, Facility or Owner address, and Transaction type, service Applied Against, and amount.
0235	Financial Detail	Payments Posted Report by Transaction Date	Payments received and posted to various accounts during the specified period are shown along with daily and period total dollar amounts. This report can be set up to run on a daily basis to reflect what occurred the previous day, or it can be run to cover a range of days.
0257	Financial Detail	List of Delinquent Accounts by Geographic Area Selected by Account	This report helps identify accounts to send to collections, rebill, or make adjustments. Accounts overdue by the number of specified days are listed with last payment dates and amounts, current and prior month's balances, and balances by aging period. Inactive and exempt accounts, or those with invoices sent to collections, can be bypassed. Accounts are grouped by geographic area.
0260	Financial Detail	Audit of Accounts With General Health Program Records	The purpose of this report is to aid in identifying lost revenue due to unapplied fees because certain General Health Program records were excluded when generating new Permit fee based invoices. For selected accounts, the report lists account balance and payment information along with linked Program records, their corresponding billing status, Fixed Fee Amount, and Unit Rate.

Number	Category	Title	Description
0261	Financial Detail	Audit of Accounts With Public Water System Records	The purpose of this report is to assist in identifying lost revenue due to unapplied fees because certain Water System records were excluded when generating new Permit fee based invoices. For selected accounts, the report lists account balance and payment information along with linked Water records, their corresponding billing status, Fixed Fee Amount, and Unit Rate.
0262	Financial Detail	Audit of Accounts With Underground Storage Tank Records	The purpose of this report is to assist in identifying lost revenue due to unapplied fees because certain Tank records were excluded when generating new Permit fee based invoices. For selected accounts, the report lists account balance and payment information along with linked Tank records, their corresponding billing status, Fixed Fee Amount, and Unit Rate.
0270	Financial Detail	Departmental Balance Reconciliation Statement	Running this single page report at the end of an accounting period produces a certificate of financial standing. Daily Transaction Balance records are summed by record Type (Charges versus Payments, for example). The sums are added to the previous period's corresponding record type's ending balance. Those totals are then compared to like totals on the end-of-period 'invoice line item outstanding balances' record. If there is a difference between what is calculated by the report and the totals found on the end-of-period Daily Transaction Balances record, an error message is printed.
0293	Financial Detail	Notice of Uncollected Invoice Transferred to Small Claims Court	This letter notifies an account owner that an overdue invoice is being referred to Small Claims court. Invoice records which meet parameter specifications are selected and letters are created which reference Invoice Date and Number, Account's Receivable Number, and the amount past due. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report.
1013	Financial Detail	Transactions Applied Towards Permits by Facility	Permits that have had Invoice Line Items entered during the specified period will be listed. Specifically, the Facility ID and Address, Permit ID, Type of Transaction, Applied Date, Permit Total Fee Amount, Invoice Line Item Amount, and Permit Total Due are listed. This report is a helpful review of permit financial activity for a specified period.
1015	Financial Detail	Permits with Unpaid Balances	For a quick review of unpaid permit fees by facility, this report lists permits and their unpaid Permit Fee Amounts. To calculate a permit balance, the report begins with the Permit Total Fee Amount and processes any Debit/Credit Invoice Line Items entered during the user specified time period. For permits with unpaid

Number	Category	Title	Description
			balances, the report lists Permit Expiration Date, Number, and Total Due by Program/Element and Description. All permits for a selected facility with unpaid balances are grouped together. The total Amount Due by facility and for all selected facilities are shown.
1021	Financial Detail	Full-page, 2-section Permit for 8.5" x 11" Pre-printed Stock	This is a full-page permit with two sections. One section is kept by the recipient, the other is kept at the department's office as record of the permit. Permits will only print for entities that have paid their associated permit fees in full. See page three of this record to learn how Permit records are updated.
2800	Financial Detail	Batch Payments Import Process Error Report	This report can be used by agencies using a Lock Box program for their payments. The report is designed to display any errors from the Batch Payments Import process and/or the Batch Payments process.
2801	Financial Detail	Batch Payments Import Process Import/Validation Report	This report can be used by agencies using a Lock Box program for their payments. The report is designed to display the file name, batch number, dollar amount contained in the Batch Payments Import file, and the dollar amount deposited from the bank. This report can be compared to report 2800 for errors in the Batch Payments Import process and with report 2802 for payments posted to an account from the Batch Payments process.
2802	Financial Detail	Batch Payments Import Process Payments Posted by Transaction Date	This report can be used by agencies using a Lock Box program for their payments. The report is designed to display the payments that have been posted against a specified invoice in the Batch Payments Import process. This report can be compared to report 2800 for errors in the Batch Payments Import process and with report 2801 for records validated/imported in the Batch Payments process.
0211	Financial Summary	Total Amount Received for the Period	The total amount received by a department for a specified time period is shown which is helpful as a quick reference against bank deposits to ensure payments have not been missed. The total payments, corrections, and amount received is given along with the number of payments, corrections and records.
0505	Form	Self Audit Training Certificate 1	This certificate gives the student's name, her or his associated facility address, the level of training, and the date the training session was held.
0506	Form	Self-Audit Training Certificate 2	This certificate gives the student's name, his or her associated facility address, and the year he or she started in the Self Audit Program.
0507	Form	Self-Audit Training Program Sign Up Sheet	This report generates a sign in/out sheet for those in attendance at a training session. Date, time, instructor, and location of the training session are given with the attendees grouped by facility.

Number	Category	Title	Description
2700	Form	Site Data Sheet	This report provides details concerning a site and its site remediation case information. The report allows reviewers to quickly see case details such as the business name and address associated with the site, its enforcement history, and site management requirements. In a separate section, the names and contact information for the primary and secondary contacts for the case are listed.
2705	Form	Notice of Responsibility	This report is a Notice of Responsibility to be sent as required by California law to the contacts associated with a site that has been placed in the Local Oversight Program. This report notifies the recipients that they have been identified as the parties responsible for investigation and cleanup of the specified site. Site-specific information shown at the beginning of this notice includes the site Name and Address, Substance Released, Funding for Regulatory Oversight source, Reported Date, and Responsible Party information.
3550	Form	Consolidated UPC Forms Report (Uses Temporary Tables)	This is a consolidated report comprised of the individual reports that represent each of the UPC forms. The option for printing all or part of this report is accessed through CUPASoft. This report uses the data stored in the temporary tables in the Envision database.
3551	Form	Consolidated UPC Forms Report (Uses Permanent Tables)	This is a consolidated report comprised of the individual reports that represent each of the UPC forms. The option for printing all or part of this report is accessed through CUPASoft. This report uses the data stored in the permanent tables in the Envision database.
4002	Form	Tester Certificate	This report prints a certificate for approved backflow prevention device testers.
4908	Form	Plan Check Detail	This report provides detailed information regarding plans submitted for review in ascending submittal date sequence. The report allows reviewers to quickly see the plans assigned to them to determine their status and whether they are overdue for renewal.
0046	Inspection	HACCP Report	The purpose of the HACCP report is to fulfill the mandatory requirement to review food establishment HACCP plans during dietary inspections. Critical control points for potentially hazardous menu items are observed and reported as satisfactory or as violations.
0047	Inspection	FIS HACCP Report	The purpose of the FIS HACCP report is to fulfill the mandatory requirement to review food establishment HACCP plans during dietary inspections. Critical control points for potentially hazardous menu items are observed and reported as satisfactory or as violations.

Number	Category	Title	Description
0090	Inspection	SB 180 Compliant Official Inspection Report	This report can be used by environmental health agencies in California to comply with state requirements for SB 180 regulations pertaining to food inspections and is suitable for mailing to the inspected facilities. Specific violations observed during the inspection are listed including serial numbers, description, inspector's comments, and required correction. Violations are listed according to the degree of violation. Report 0090 is used for inspections that have been applied in Envision. To print an Official Inspection Report for a current inspection, users of the Envision Field Inspection System must use report 0091.
0091	Inspection	SB 180 Compliant Official Field Inspection Report	This report can be used by environmental health agencies in California to comply with state requirements for SB 180 regulations pertaining to food inspections and produces an inspection report suitable for leaving at the facility currently being inspected. Specific violations observed during the inspection are listed including serial numbers, description, inspector's comments, and required correction. Violations are listed according to the degree of violation. The look of this report is similar to report 0090, except that this report is used with the Envision Field Inspection System for the current inspection. The report can be used on site, and is generated using the Field Inspection Serial Number of the current inspection.
0095	Inspection	Official Inspection Report For Use With Field Inspection System	This report produces an inspection report suitable for leaving at the facility currently being inspected. The inspection date and facility information such as name, address, business type, and owner's name are shown. Specific violations observed during the inspection are listed including serial numbers, description, inspector's comments, and required correction. Violations are listed according to the degree of violation. The look of this report is similar to report 0094, except that this report is used with the Envision Field Inspection System for the current inspection. The report can be used on site, and is generated using the Field Inspection Serial Number of the current inspection.
0096	Inspection	Official Inspection Report for Use with Envision	This report mimics report 0095. Specific violations observed during an inspection are listed including serial numbers, description, inspector's comments, and required correction. Violations are listed according to the degree of violation. Whereas report 0094 allows for a range of inspection reports, report 0096 is used to produce a single particular inspection report by using the Daily Serial Number of the applied inspection.
0190	Inspection	EnvisionConnect Official	This report can be used by environmental health agencies in California to comply

Number	Category	Title	Description
		Inspection Report	with state requirements pertaining to food inspections and is suitable for mailing to the inspected facility. Specific violations observed during the inspection are listed including the violation description, inspector's comments, and required correction. Violations are listed according to the degree of violation.
3528	INVENTORY LIST	Detail of Scheduled Invoice Items by Facility - CUPA	This report allows viewing of the trial results of fees to be charged for a Participating Agency following the PA to CUPA Data Transfer Process after the Scheduled Invoice Billing Batch Process has been run. This report lists Facility and Owner names and address, totals by Program/Element, and a Grand Total of the amount to be invoiced. An exception list with error messages identifying incorrect or missing information is also shown. The user has the option of running this report as either a Detail or Summary report. NOTE: This report functions in the same way as reports 0208 and 0227 for the Scheduled Invoice Billing Process trial run, and can be used in place of these two reports for invoice billing not related to CUPA.
0200	Invoice	Invoice-Prints Single Invoices for an Account	This report prints individual invoices within a range of Invoice IDs and where the invoice's Total Due is equal to or greater than the minimum amount specified by the user. The user has the option of printing the original invoice date or the current date and can choose to exclude inactive or exempt accounts and accounts sent to collections. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report.
0203	Invoice	Invoice With Bar Coded Return Remittance	This report prints individual invoices within a range of Invoice IDs and where the invoice's Total Due is equal to or greater than the minimum amount specified by the user. The user has the option of printing the original invoice date or the current date and updating the invoice record's Print Date and Number of Notices Printed when generating this report. This report will also print Invoices in the specified range for non-inventoried facilities. This Invoice is similar to report 0200.
0204	Invoice	Invoice Dunning Notices	This report is a letter to the Account Owner. The user specifies a range of beginning and ending amounts due for invoices which have not been paid in full. These invoices are listed along with a total due. Letters are generated in order of Invoice Number.
0212	Invoice	Invoice-Prints Single Invoices Summarizing by	This billing invoice summarizes transactions by Program/Element, thus eliminating multiple listings of the same item. Individual invoices are printed

Number	Category	Title	Description
		Program/Element	separately and show the count of Invoice Line Items and amounts due by Program/Element. The account amount due by aging period is also listed. Invoice records with balances greater than zero are selected by Invoice Number. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report.
0215	Invoice	Delinquent Accounts Sorted Variously	For a specified number of days outstanding, delinquent accounts are listed grouped by geographical area. The total amount due is shown by account, area, and period.
0216	Invoice	List of Accounts with a Credit Balance Sorted Variously	Accounts with credit balances are listed according to the user's specification for geographical grouping of accounts. The user can specify the sort order for the accounts, choosing from Account ID, Facility ID, Owner name, or Facility name. A total balance for all businesses is printed at the end of the report.
0217	Invoice	Delinquent Accounts with Invoices to Be Sent to Collections	Invoices with balances meeting delinquency period and minimum balance requirements for collections are listed for each specified geographical grouping. The list includes delinquent accounts through the current date.
0218	Invoice	Delinquent Accounts with Invoices with Insignificant Balances	Invoices with minimum balances meeting the criteria for delinquency are listed. The Accounts Receivable Configuration Record's fields for Minimum Balance to Send to Collections and Period Before Collections are compared to each invoice to determine which invoices are selected for inclusion in this report. This report is helpful in identifying invoices to write off.
0220	Invoice	Month-end Close - Accounts Qualified for Penalty Assessment	This report previews the trial results of the Month-End Close Batch process which conducts tasks typically performed at the end of an accounting period, including determining the age of outstanding balances, applying outstanding payments to the oldest charges, flagging invoices to send to collections, and calculating appropriate penalties. Reviewing the trial results identifies penalties which are about to be applied to an account. Discrepancies can be corrected and the batch process started again based on the correct data. This report lists Owner Name, Facility Name and Address, Account and Facility ID, Last Payment Date and Amount, Current Balance, Fees Outstanding, Penalty Amount, Account Status, Number of Days Outstanding, and Billing Comments. Facility totals are listed for Total Payment, Current Balances, Fees Outstanding, and Penalty Amounts. An Exceptions List with error messages identifying incorrect information is also shown.

Number	Category	Title	Description
0222	Invoice	Daily Transaction Register Sorted Variously	This report provides not only a list of financial transactions (invoice line items) for a specified period, it cross checks their totals against the record for the same period found in the Daily Balances table. Any discrepancy between the sum of the line items and the corresponding record in the Daily Balances table is quickly identified. The report usually is at the end of each processing day. Also, the specified date range should be within the same month.
0223	Invoice	YTD Revenue Analysis Report - Detail by Program/Element	This report lists month-to-date and year-to-date financial transactions by Program categories and within that, by Program/Element. In addition, it provides summaries and counts by Debits, Credits, and Adjustments. An invaluable tool to determine financial health in all areas. Since it is a year-to-date report, it must review all transactions for the year; therefore, report generation may be quite time consuming. This report includes information from the Fee Schedule to provide the user with the Fixed Fee, Unit Rate and Time Rate associated with each Program/Element included in the report.
0224	Invoice	Revenue Analysis Report - Summary by Program/Element	This report shows accounting and statistical reports at month-end. Similar to report 0223, this report lists month-to-date and year-to-date financial transactions, except that this report summarizes the totals sorted by Program category without any detail for each element. In addition, it provides summaries and counts by Credits and Debits, and Adjustments for both. An invaluable tool to determine financial health in all areas. Since it is a year-to-date report, it must review all transactions for the year go therefore, report generation may be quite time-consuming.
0225	Invoice	Aged Trial Balance	For the period specified, accounts and totals of their transactions are listed. Transactions summed include Charges, Payments, Charge Corrections, and Payment Corrections (which include refunds). Balances listed and summed include Last Payment Amount/Date, Previous Month Balances and Aged Balances 1-30, 31-60, 61-90, 91-120, and 121 plus.
0226	Invoice	Facility Financial Status Inquiry by Facility or Owner	Financial and facility details are listed for selected records. Information shown includes facility name and address, owner name and address, and balances. The user specifies a summary or detailed report. If the detail option is specified, debit and credit amounts from the Invoice Line Item table are shown.
0234	Invoice	Accounts Receivable Control Report	This report summarizes accounts receivable transactions for a user specified period. Month-to-Date and Year-to-Date dollar amounts and number of

Number	Category	Title	Description
			transactions by Program/Element are listed. Only Program/Elements identified as being credits or adjustments will be shown.
0236	Invoice	List of Records Added to the Payment File	Payments, refunds, and corrections to both entered during a user specified time period are summarized. Dollar amount totals and transaction counts are created for each day specified. Also, the total number of each type of transaction is counted and the dollar amount summarized at the end of report.
0240	Invoice	Invoice Phase Summary Report	This report is an active report. The purpose of the report is to calculate the phase of the invoice depending on the as_of_date and beginning dates.
0251	Invoice	Multi-Account Billing Statements-Consolidates Accounts Multi-Account	This statement consolidates onto one form accounts linked to a single paying party, thus eliminating mailing various statements to the same address. The user specifies the responsible party for the statement, ranges of account balances and transaction dates, and whether or not to show exempt or inactive invoices or those sent to collections. Previous and current amounts due for all linked accounts, and invoice line items entered during the specified period by individual account, are listed. Individual invoice totals are not shown (report 0200 prints invoices listing all line items and a total). The statement is mailed to the primary account address.
0253	Invoice	Consolidated Account Statement: Multi Invoices on One Statement	For accounts with amounts due, this consolidated statement lists invoice line items within a specified date range, previous account balance, and balances by aging period. Invoice totals are not shown (report 0200 lists line items and totals by Invoice ID). Using this statement eliminates mailing multiple invoices for a single account. The user selects a payment due date and whether to show invoices sent to collections, or inactive or exempt accounts. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report.
0254	Invoice	Consolidated Statement: Primary Selection Account ID	The user can reprint an account statement with this report by specifying the Account ID. Invoice ID, line items entered during the specified period, previous account balance, and account balances by aging period are listed. Individual invoice totals are not shown (report 0200 lists line items and totals by Invoice ID). The report uses the Account ID as the key field to quickly find the account specified. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report.
0256	Invoice	Consolidated Account	For accounts with amounts due, this consolidated statement lists invoice line

Number	Category	Title	Description
		Statement - Multi-invoices with Bar Code	items within a specified date range, previous account balance, and balances by aging period, along with a bar code. Invoice totals are not shown (report 0203 lists line items and totals by Invoice ID). Using this statement eliminates mailing multiple invoices for a single account. The user selects a payment due date and whether to show invoices sent to collections, or inactive or exempt accounts. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report. This invoice is similar to report 0253. This invoice, however, is designed specifically to print a bar code on the remittance slip that is returned with payment, although it can be printed and used without the bar code.
0259	Invoice	List of Invoices with an Outstanding Debit Balance	This report identifies possible invoices to send to collections by listing invoices with balances due greater than a user-specified number of days. Invoice balances also must meet the Minimum Collection Balance field found on the Accounts Receivable Configuration record. Aging accounts is not required since each invoice's Total Due is compared to this minimum amount. Invoice, owner, facility, and account information is shown along with Invoice Line Items and Amounts, and invoice balances. The total amount due from all invoices eligible to be sent to collections is also listed.
0273	Invoice	Collection Change Report for Accounts	Based on the user-specified number of days past due, a summary of accounts is created listing total changes to the account (it does not show individual invoices), and the date of last activity. Either the Facility name and address or, if not linked to a Facility, the Account name and address, are shown. The Last Billing Date, Account Status, Total Adjustments, Charges, Payments, and Total Due of all the linked invoices are displayed.
2524	Invoice	LOP Site Remediation Invoice	This invoice contains a cover page and separate pages for Site Specific, Program Management, Service and Supplies, and Equipment Charges. The cover page lists hours and charges, Total Amount of the Invoice, Advance Fund amounts, and Final Settlement costs. Labor and supply charges are listed with Dates, Employee, Action Code or Budget Code, Hours Worked and Rate, Indirect Cost, and Total Cost with subtotals for each page. The resulting invoice meets the standards used to bill the California State Water Resources Control Board. This report prints the results from the Site Remediation Billing batch process (for further information, see Additional Notes/Clarification below).

Number	Category	Title	Description
0010	Labels	General Health Program Mailing Labels	This report prints mailing labels for General Health Programs specified by the user. Labels print two across with five lines of text each and are printed in order by facility name.
0503	Labels	Self-Audit Mailing Labels	This report generates mailing labels for all students attending a Self Audit Training session with their associated facility address.
1012	Labels	Permit Mailing Labels	Mailing labels for permit records with the user-specified Program Status are printed with this report. The user specifies whether to print the Owner or Facility Mailing Address. The labels print two across with nine lines of printing from the start of one label to the next. One of these lines is available for printing messages which are input at a user prompt.
4607	Labels	Water System Labels - Two Columns	This report prints Water System Inventory mailing labels for the Program/Elements specified by the user. Labels print two across with five lines of text each and are printed in order by Facility Name.
4608	Labels	Water System Mailing Labels - Three Columns	This report prints Water System Inventory mailing labels for the Program/Elements specified by the user. Labels print three across with five lines of text each and are printed in order by Facility Name.
0093	Letter	Pretreatment Cover Letter/Fact Sheet	Pretreatment sites must meet state and local environmental requirements. The Health Department has the regulatory authority to conduct inspections of these facilities. Inspections are made of permitted sites to ensure compliance with both state and county laws. Inspectors generate this report in the office using Envision's Report Generator (not by using FIS). This report consists of site-related chemical inventory details and previous inspection history. It also sequentially lists the details of the inspection activity at a site such as inspection date, compliance status, and the nature of violations/comments observed/discussed during the course of previous and current inspections.
0105	Letter	Release of Complaint Investigation Fee Lien	A letter is generated to owners of property against which a lien had been placed for non-payment of complaint investigation fees. The letter states the lien has been removed for one of three reasons, depending upon the Complaint Disposition Code specified by the user. The letter references specific Complaint information such as Investigation Number and lien amount. This report will update the Number of Notices Printed on the Complaint Records.
0106	Letter	Notice of Complaint Investigation Fees Lien	This letter notifies an owner(s) that a lien has been placed against his or her property for non-payment of Complaint investigation fees and associated

Number	Category	Title	Description
			penalties. This is an official notice, generated after two prior payment requests have been sent. The recipient should respond to this notice to avoid a "special assessment" through the Tax Rolls. The field Payment Lien Print Date on the Complaint Records will be updated when this report is printed.
0107	Letter	Public Hearing Notice for Non-Payment of Complaint Fees	This notice informs a property owner who has abated problems specified in a complaint, that a Public Hearing has been scheduled for Non-Payment of fees associated with the investigation of that complaint. In order for a notice to be printed, a Complaint record must have one of two user defined Status Codes indicating the problem has been abated and is billable or has been billed. The notice lists date, time, and location of the Hearing, Property Name and Address, Total Due, Abatement Date, Investigation Dates, and Dates of First and Second Notices. When this report is printed, the Complaint record's Number of Notices Printed and Billing Hearing Date will be updated with who updated the record and the date it was updated.
0108	Letter	Complaint Investigation Fees Notice	This notice informs a property owner who has abated problems specified in a complaint, that there are costs due for investigation fees. Complaint records are selected where the Status Code indicates an abated problem with billed or billable fees. The notice lists the Property Owner, Property Address and Lot/Block Numbers, Complaint Number, Abatement Date, Activity Dates, and Total Cost Due. When this report is printed, the Complaint record's Number of Notices Printed and First and Second Notice print dates will be updated with who updated the record and the date it was updated.
0290	Letter	Bad Debt Warning Letter	This letter notifies an owner/operator of a business that an Invoice payment is overdue. Invoices are selected by age and minimum amount specified by the user. Invoices meeting these requirements will generate a letter which lists the Invoice Number, the date by which payment must be received, and the Agency Contact, and includes a payment coupon showing the Balance Due. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report.
0291	Letter	Notice of Transfer Letter	This letter notifies an owner/operator of a business with an outstanding invoice balance that the invoice has been transferred to the collections department. Past due invoices are selected by ID, age and amounts specified by the user. Invoices meeting these requirements will generate a letter which lists the Invoice Number,

Number	Category	Title	Description
			Account Number, Total Due, and Owner's Name. A payment coupon is also included. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report.
0292	Letter	Notice of Right to a Hearing	This letter informs an owner/operator of a business with a past due invoice that a hearing has been scheduled to show cause why legal action should not be taken to collect the unpaid fees. Past due invoices are selected by Invoice ID and a Status Code for Overdue Payment Hearings. Invoices meeting these requirements will generate a letter which lists the Invoice Number, Account Number, Total Due, and Owner or Responsible Party's Name. The user has the option of updating the invoice record's Print Date and Number of Notices Printed when generating this report.
0501	Letter	Self-Audit Invitation for Training Letter	Many agencies use Self-Audit Program classes to promote health education by encouraging employees of inventoried facilities to audit and improve their methods of doing business. This report generates a letter which offers Self-Audit Training at various training levels, and states the date and time of the class being offered.
0502	Letter	Self Audit Training Cancellation Letter	This report generates a letter indicating the cancellation of a previously scheduled training session.
0504	Letter	Self Audit Training Confirmation Letter	This report will generate a letter confirming class registration for a Self Audit Training session. The class level, date, and class time are indicated in the letter.
2311	Letter	Reminder Letter - To Submit Inv/Gauging Quarterly Summary Reports	This is a reminder letter to tank owners who failed to submit their inventory reconciliation/tank gauging quarterly summary report forms by the required deadline date.
2312	Letter	Notice and Order to Submit Inv/Gauging Quarterly Summary Reports	This report is a Notice and Order to tank owners who failed to submit their inventory/tank gauging quarterly summary report forms by the required deadline date.
2323	Letter	Reminder Letter to Have Product Lines Precision Tested	This report produces a letter to remind tank owners that they are due to have their product lines tested on their underground storage tanks by a specific deadline date.
2324	Letter	Notice and Order to Submit Precision Tank Test Results	This report generates a Notice and Order to tank owners who failed to submit the results of their precision tank tests by the required deadline date.
3000	Letter	Inspection of Onsite Sewage	Using Onsite septic system records, this report displays comprehensive

Number	Category	Title	Description
		System and/or Installer's Certificate	information on individual septic systems including the system's owner's name and address; linked subdivision name; section, lot, and block numbers; and type of dwelling serviced. Septic system details are shown such as tank capacity, manufacturer number, make and model number, distribution system type, pipe diameters, effluent line depth, and size and location of separate lines. An Installer's Certificate is printed at the bottom along with signature lines for the installer and inspector.
4000	Letter	Notice of Required Testing	This report is part of the Cross Connection module. It is printed from the Notice of Required Testing batch process. These are the notices that are sent to facilities with backflow prevention devices that are scheduled for testing. The report also includes test results for the backflow prevention device if the device has been tested.
4001	Letter	Tester Notification	This report prints a notice to be sent to the backflow prevention device tester to let them know that their testing certificate will expire soon.
4621	Letter	Notification Letter of a Good Bacteriological Water Sample	This report is a letter to water system owners notifying them of a good bacteriological sample result.
4622	Letter	Notification Letter of a Bad Bacteriological Water Sample	This report is a letter to water system owners notifying them of a bad bacteriological water sample result.
4631	Letter	Reminder Letter - Monthly Bacteriological Sampling	This report produces a letter to water system owners reminding them to submit the results of their monthly bacteriological sampling for a specified deadline date.
4650	Letter	Water System Bacteriological Sampling Reminder Letter	This report prepares a letter reminding water system owners to submit the results of monthly or quarterly bacteriological samples. Depending upon whether the user-specified deadline date is in the past or future, the letter's text will change to reflect whether results have not been received or are still due. The letter lists the facility name and address go and water system information including Legal Class, Population Served, Number of Service Connections, and Last Scheduled Analysis Date are shown.
4900	Letter	Event Scheduling Confirmation and Survey	This report prints scheduled event appointment confirmation letters within a range of event dates and event Site IDs. The report also includes driving instructions for the event site.
1011	Permits	Equipment Operating	This report prints Equipment Operating Permits for facilities specified by the user.

Number	Category	Title	Description
		Permits for Specified Facilities	The permit is suitable for posting on equipment, if feasible, or it should be made readily available anytime the equipment is operating. The permit lists the following: Facility ID and Address, Owner Name and Address, Equipment Description, Issuing Employee, Permit Valid Dates, Permit Conditions, and Special Conditions, if any.
1014	Permits	Permits Selected by Permit ID (8" X 3.5")	General Health Program, Underground Storage Tank, or Water System permits are printed based on user specified Permit ID. The permits print three to a page and show Permit ID, Permit Fee Amount, Valid Dates, monitored Program Description, and Facility Site and Mailing Addresses. If the permit pertains to specific equipment, that is shown as well. This is usually printed on card stock, perforated for easy separation.
1016	Permits	Permits with Balances Paid in Full (8" X 3.5")	General Health Program, Underground Storage Tank, or Water System permits with no outstanding balances are printed based on user specified Permit ID. Both permit and service fees associated with a program must be paid in order for the permit to print. The permits print three to a page and show Permit ID, Permit Fee Amount, Valid Dates, monitored Program Description, and Facility Site and Mailing Addresses. If the permit pertains to specific equipment, that is shown as well.
1017	Permits	Multi-permit Form for Facilities with One or More Program/Elements	This report produces a two-part form with a displayable permit listing information on each permitted General Health Program at a facility with the same permit anniversary date. For each program, the Permit ID, Program/Element and Valid Dates are listed. This report updates each permit record linked to the monitored programs at the facility.
1018	Permits	Water System Permit	Water System permits are printed based on user-specified Permit Facility IDs. Permits show the Utility Name and Address, Water System Number, Permit ID, Valid Dates, and Permit Conditions. There is space for an authorizing signature and date.
1019	Permits	List of Permits Expiring Soon	Permits that will be expiring soon are identified by listing permits with Valid To Dates that fall within a user-specified period. For each specified Program/Element, Permit ID, Number, Type, and Valid To Date are shown along with the corresponding Facility Name and Location. The total number of permits nearing expiration is shown with subtotals by Program/Element. General Health Program, Underground Storage Tank, and Water System records are used.

Number	Category	Title	Description
1024	Permits	General Permit to Operate (Printed in Landscape Orientation)	This report is a general permit that may be used for underground storage tanks or other programs. It was designed for use with a pre-printed border such as those on a certificate.
1026	Permits	Multi-permit Form for Facilities with One or More Programs	This is a two-part report that allows detachment of a displayable form that includes information on each permitted health program at a facility. This report relies on each permitted health program having the same permit anniversary date. This report updates Permit records. Report 1026 is specific to California.
0001	Summary Report	Envision Report Catalog Sorted Variously	As a quick reference of Envision reports, this report creates a catalog of user-specified reports sorted by Report Number, Title, or Location. For each report the Number, Title, Location, and Description are shown. If the detail option is selected, Special Instructions and Selection Criteria will also print. This report combines and offers all of the options of the former Envision for DOS reports 0001, 0002, and 0004.
0007	Summary Report	Program Category and Census Tract Mapped to Employee ID	This report lists the Employee ID assigned to a program within a census tract. This list is useful in reviewing the default Designated Employee assignments for new records stored at General Health Program, Complaint, Site Remediation, Water System Inventory, and Service Request.
0015	Summary Report	Owner Record Change Report	This report lists each Owner record that has had changes made to it during the specified period. Information shown includes Account ID, Owner ID, Owner name, Phone number, Transaction date, and Operator name.
0016	Summary Report	Facilities That Did Not Receive a Specified Service	Facilities that did not receive a specified service during a period are listed. Facility ID, Name and Address are shown along with the date the facility last received the specified service. The results are grouped by geographical boundary per the user's specification. Totals are shown for the number of facilities that received and did not receive the service by geographical boundary. These totals are also shown for all geographical boundaries.
0017	Summary Report	List of Work Performed by a Specified Employee	This report generates a list of work done by selected employees for user specified facilities, time periods, Program/Elements, and Service Codes.
0020	Summary Report	Facilities That Did Not Receive an Inspection	Facilities that did not receive an inspection during a given period are listed. Facility ID, Name, and Address are shown along with the date the facility last received an inspection. The results are grouped by geographical boundary per the user's specification. Totals are shown for the number of facilities that did not receive an inspection by specific geographical boundary and for all geographical

Number	Category	Title	Description
			boundaries.
0060	Summary Report	Summation of Daily Time by Employee	To help evaluate employee time activities, this report summarizes Daily Activity Logging records by Employee for user specified Service Codes, Program/Elements, and Activity Dates. Daily totals of time spent are listed for each Program/Element and employee. Period totals are also shown for each employee and as a group.
0061	Summary Report	Workload Analysis by Geographical Area and Employee	For user-specified geographical areas, a count of monitored Programs by status and Program/Element is listed. In accordance with the General Health Program table, monitored Programs are classified as: 01-Active, billable 02-Inactive, non-billable 03-Temporarily inactive, non-billable 04-Active, exempt from billing
0062	Summary Report	Activity Log by Facility	For a user-specified time period, a facility's Daily Activity Logging records are listed by Employee ID. Facility ID and address are shown then by Employee ID, each record's Program/Element, Description, Activity hours, and Travel hours. Total time spent at the facility is summarized at the end.
0063	Summary Report	General Health Program Cost Analysis	This report provides the basis for evaluating an agency's costs per Program/Element and facility by listing employee time and expenses from Daily Activity Logging records. Costs are first grouped by Program category and then Program/Element.
0065	Summary Report	Summary of Services Performed within a Program/Element	With this report, a summary of time spent on user specified services is created by Program/Element. The number of times a service is performed is included. Daily Activity Logging records with no Activity minutes specified are excluded.
0066	Summary Report	Facility Activity Summary	This summarizes time spent performing services at department monitored facilities from Daily Activity Logging records. The user specifies ranges of facilities, activity dates, Program/Elements, and employees. Owner and Facility IDs and addresses are shown along with service dates, codes, and descriptions, and the associated employee ID and name, and time spent. Activities performed for complaints, service requests, public water systems, site remediation, etc., are included.
0068	Summary Report	Activity Analysis by Supervisor	Services performed by a supervisor and the time spent on each are summarized from Daily Activity Logging records. Employee records where the Employee ID does not equal a Supervisor ID are excluded.

Number	Category	Title	Description
0069	Summary Report	Employee Activity at Inventoried Facilities Summary	For each employee specified, services performed and time spent are summarized. Daily Activity Logging records with no entries in the Minutes and Facility ID fields are excluded.
0071	Summary Report	Count of Programs by Geographic Area, Program/Element and Status	For user specified geographical areas, a count of monitored Programs by status and Program/Element is listed. In accordance with the General Health Program table, monitored Programs are classified as: 01-Active, billable 02-Inactive, non-billable 03-Temporarily inactive, non-billable 04-Active, exempt from billing
0072	Summary Report	Summary of Program Activity by Service Code	This report summarizes service activity within specified Program Categories for a given time period. For each Service Code specified, the Number of Service Visits, Activity and Travel Hours, Percent of Total Time, Hours/Service, and Employee Salary Cost is given. Program totals are also shown. Daily Activity Logging records linked to all types of Programs can be used.
0073	Summary Report	Count of Monitored Facilities Within Geographic Boundaries	This simplified list shows the number of monitored facilities within each geographical boundary chosen by the user.
0074	Summary Report	Count of Facilities Where Specified Activities Were Conducted	For a specified period of time, the number of facilities where an employee performed services within each Program/Element is listed. The user can specify service codes to list activities such as inspections. Total Activity and Travel time per Program/Element and average time spent per facility is also shown.
0075	Summary Report	Facility Activity Time by Employee	For a specified period and employee, this report lists type and count of services performed, count of facilities where activities were conducted, total Activity and Travel minutes, and average minutes per facility go and totals summary of services, facilities, Activity minutes, and Travel minutes from Daily Activity Logging records.
0077	Summary Report	Count of Services Performed at Monitored Facilities	For a specified period, a count of services performed at monitored facilities is shown by Program/Element and Employee from Daily Activity Logging records. Total and Average Activity and Travel Minutes by Service is listed.
0078	Summary Report	Summary of Activity Time Within a Program/Element	For specified time period, this report lists the total time performing services within a Program/Element. Daily Activity Logging records without a Facility ID are included.
0079	Summary Report	Service Summary of Inventoried Facilities by Geographical Boundary	For facilities monitored under the Tank, Water System, or General Health Programs, this report inventories the number of facilities and those serviced during a specified period by geographical boundary. The number of Inventoried

Number	Category	Title	Description
			Facilities, Facilities Serviced, Services Performed, and the Percent of Facilities Serviced for each individual area is listed along with totals for all areas.
0080	Summary Report	Inspection Violations by Employee	As a quick reference of an employee's inspection violation activity, this report summarizes violations by Employee, Activity Date, and Facility with totals listed by Activity Date and Employee.
0085	Summary Report	Crosstab Report of Violations Cited by Employee	A crosstab comparison of the number of each type of violations cited by employee is created with this report. A separate crosstab is shown for employees of each specified supervisor. Employee names and IDs are listed along with violation totals by type and employee. A summary of total violations cited, total inspections performed and an average of violations cited per inspection by employee is also shown.
0089	Summary Report	Summation of Employee's Daily Time by Program/Element	A summary of employee Daily Time and Activity records grouped by Program/Element for a designated period is created. Total hours logged by employee for each month specified are given along with grand totals of all employees' hours by month and the entire period.
0092	Summary Report	Summary of Dates Employees Did Not Submit Daily Activity Records	This managerial reporting tool identifies employees who have not had Daily Time and Activity records logged during a specified time period. For each department, Employee Names and IDs are listed along with specific dates where no activity logging was recorded. The report's format is similar to a calendar with the dates arranged in columns under the days of the week. With a quick review, a manager can identify days where an employee's time sheets were not recorded in Envision.
0094	Summary Report	Official Inspection Report by Degree of Violation	This report produces inspection reports suitable for mailing to the inspected facilities. The inspection date and facility information such as name, address, business type, and owner's name are shown. Specific violations observed during the inspection are listed including serial numbers, description, inspector's comments, and required correction. Violations are listed according to the degree of violation. Report 0094 is used for inspections that have been applied in Envision. To print an Official Inspection Report by Degree of Violation for a current inspection, users of the Envision Field Inspection System must use report 0095.
0097	Summary Report	Employee Training and Cost Analysis Report	To track employee training needs and costs, this report lists the Class Number and Dates and employee expenses associated with classes taken during a user

Number	Category	Title	Description
			specified time period. The report provides a list and cost analysis of employee training received by Employee Name and ID. Only expenses for classes specified by the user are shown.
0098	Summary Report	Official Inspection Report	This report produces a sophisticated inspection report suitable for mailing to the inspected facility. The inspection date and facility information such as name, address, business type, and owner's name are shown. Specific violations observed during the inspection are listed including description, inspector's comments, and required correction(s). Violations are listed according to the dates corrections are required.
0206	Summary Report	Total Amount Invoiced Within Each Program/Element	For invoices issued during a user specified period, amounts are totaled by Program/Element and presented in this summary.
0208	Summary Report	Scheduled Invoice Items To Be Invoiced Grouped by Program/Element	This preview summarizes Scheduled Invoice Items to be invoiced by Program/Element. Scheduled Invoice Items records are created when General Health Program, Underground Storage Tank, and Water System Inventory records are created. This report allows the user to view the trial results of fees to be charged after the Scheduled Invoice Billing Batch Process has been run and before the actual invoice is created. By reviewing the results and exceptions noted in the trial billing, adjustments can be made and the batch process started again based on the correct data. This report lists totals by Program/Element and a Grand Total of the amount to be invoiced. An Exceptions List for identifying incorrect or missing information is also shown.
0209	Summary Report	Total Amount Owed by Aging Period	This report produces a summary table and pie chart illustration of the total owed from all accounts by aging period. Individual amounts owed by accounts are not shown.
0210	Summary Report	Accounts and Amounts Owed by Aging Period	For accounts with amounts owed, this report lists the individual amounts due by aging period by corresponding facility name and address.
0274	Summary Report	List of Accounts Without an Invoice	This report assists new clients to Envision in their conversion process by listing converted accounts without invoices to make certain they are the same accounts as before the conversion process.
2301	Summary Report	Summary of the Current Status of Underground Storage Tanks	This report summarizes the number of underground storage tanks by Current Status within a Program/Element. The total number of tanks meeting selection criteria and within each specified Progam/Element are shown.

Number	Category	Title	Description
2342	Summary Report	Underground Storage Tank Comprehensive Report by Facility	This report lists comprehensive information regarding individual tanks entered on the Underground Storage Tank form. Facility, Tank and Property Owner, and Emergency information is shown, along with most relevant tank information such as status, contents, capacity, date installed, and tank and pipe construction.
2702	Summary Report	LOP Quarterly Summary Report	This site remediation report is designed to be used by California agencies that are Local Oversight Program (LOP) agencies. The total number of Local Oversight Program cases are shown, broken out by case type. This report is used by lead agencies to get the number of cases for each case type, and the overall number of cases. This report lists only cases that are not closed.
3004	Summary Report	Onsite Septic System - Approved Lots by Subdivision	Subdivisions with final applications approved during a user-specified period are listed by Subdivision Name and show approval dates along with the number of lots submitted and approved. The total number of subdivisions approved during the period is also shown.
4902	Summary Report	Scheduled Event Totals	Within a range of event dates, this report prints the total number of appointments made for each site.
4907	Summary Report	Plan Check Log by Employee	This report is either a summary or detail listing of Service Request records created for the tracking of plans submitted to the department for approval. Grouping by Employee to whom the plan is assigned is possible. The report identifies the Facility Name, Program/Element, and Plan Status.

Attachment F – ADDENDUM RECEIPT ACKNOWLEDGEMENT

This document confirms that Decade Software Company received the addendum to RFP No.HE10-058 – Addendum No. 1.

____

AUTHORIZED SIGNATURE AND DATE

Kevin Delany, Managing Member______________________

PRINTED NAME AND TITLE

Cost Proposal for Environmental Health Data Management System RFP: HE10-058

Revision: 1.0

Date: 08/06/10

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Introduction – Executive Summary

Pricing Structure

EnvisionConnect is licensed and supported under a monthly subscription plan called the License and Support Agreement (LSA). The LSA fees are based on your agency's full-time equivalent (FTE) field inspection staff. We do not assess fees based on system users, rather your trained, billable field personnel. We license in this manner because our solutions are proven to automate agency process allowing these trained field staff to be in the field conducting inspections rather than in the office shuffling paperwork. As a consolidated system, your entire agency is expected to experience increased productivity levels. This contract structure provides your agency a continuously appreciating asset by guaranteeing the continual evolution of the data management technology used by your agency. More importantly, it provides your agency with a consistent and predictable annual budget item.

Hosting Services

As the future of business software licensing moves toward hosted environments, Decade has added hosting to its solution repertoire. A hosted environment is one in which Decade will act as an Application Service Provider (ASP). We can manage and distribute software-based services and solutions to your agency from our central data center. In essence, a hosted model is a way for your agency to outsource some, or almost all, aspects of your information technology needs. Should you choose to have the EnvisionConnect database physically reside on your network; the agency will provide all application, database, and network services associated with it. You have a choice when partnering with Decade.

Pricing Assumptions

The following assumptions were used as inputs to this proposal.

Number of FTE Inspectors: 25

Number of FTE Inspectors Utilizing EnvisionConnect Remote: 25

Managed Program Areas:

- Food Facility Inspection Program
- Hazardous Materials Program
- Emergency Response Program
- General Sanitation Program
- Water Backflow Device "Cross Connection" Program
- Recreational Water Quality
- Other Water Programs
- Vector Control Program
- Noise Monitoring
- Housing Inspection Program (excluded from this project)

Training:

Decade will provide all application training including:

- 40 hours web-based training
- 5 days on-site kick-off and needs analysis
- 5 days on-site training

Data Conversion:

Decade will convert data from the City of Long Beach's Access and Excel databases into EnvisionConnect according to an agreed-upon Data Conversion Plan.

Decade anticipates that the data conversion will require significant effort. The assumptions behind this conclusion are as follows:

- Excel does not enforce data validation. Therefore data will require significant "clean-up."
- Excel is not multi-user. Therefore multiple data sources will require consolidation (e.g., based on name, address, parcel, ID, etc.).
- The City's existing Excel and Access data stores are not integrated into a single data management system. Therefore, the effort to isolate and enforce EnvisionConnect business rules to existing will be considerable.
- The City's existing data stores are not centrally managed. Therefore, the there will be many subject matter experts to interview.

Report Development

Decade will tailor four (4) existing reports for the City at no charge providing the hours spent do not exceed ten (10) hours per report for analysis, design, creation and testing. Changes will be limited to the modification of the outward appearance of the labels, logos, comments and instructions on each report.

The table below identifies the reports that will be tailored by Decade:

Reports Included at No Charge			
Report Description	**Estimated Development Hours**	**Billable**	**Cross-Reference Report**
Consolidated Invoice Report	10	No	# 0251
Consolidated Permit Report	10	No	# 1017
Observation Style Inspection Report	10	No	# 0190
Compliance Style Inspection Report	10	No	# 0191

If the professional service hours exceed ten (10) per report, the additional hours spent on these custom reports will be billable at the professional service hourly.

Project Management:

Decade will provide an Implementation Specialist resource to the City of Long Beach. This resource will assist your agency in configuration and detailed needs analysis both on-site and remotely.

Optional Application Hosting

City of Long Beach will have the *option* to engage Decade Software Company to host EnvisionConnect. Under this option, Decade will provide and maintain hardware and network connections.

Health Department Portal

The City's HazMAP application will be used to accept and process all CUPA submissions (e.g., Title 27) and will be configured to post those changes to EnvisionConnect under the terms of the existing agreement with Tait Environmental Management.

Decade will configure, deploy, and maintain a separate Environmental Health Portal to be used for posting restaurant inspections, accepting complaints, accepting service requests, and accepting online payments.

Proposed Investment

The table below describes the recurring fees associated with the License and Service Agreement (LSA). These are recurring fees.

Recurring Fees

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
EnvisionConnect in the Office	25	$ 105.00	$ 2,625.00	$31,500.00
EnvisionConnect Remote (Field Use)	25	$ 52.50	$ 1,312.50	$15,750.00
EnvisionConnect Portal			$ 1,250.00	$15,000.00
Total Recurring Fees			$ 5,187.50	$62,250.00

The table below describes the one-time professional services necessary to deploy, configure, train, and convert existing data.

One Time Professional Services Fees

Onsite Needs Analysis and Configuratio	40	$ 126.00	Hour	$ 5,040.00
Training Package				
Onsite Training	5	$ 1,470.00	Day	$ 7,350.00
Web-Based Training	40	$ 105.00	Hour	$ 4,200.00
Project Travel & Per Diem				
Training Per Diem (5 days plus travel)	1		Trip	$ 2,163.00
Onsite Needs Analysis Per Diem (5 days plus travel)	1		Trip	$ 2,163.00
Data Conversion				
Data Conversion	200	$ 126.00	Hours	$ 25,200.00
EnvisionConnect Portal				
Portal Setup	1	$ 15,000.00	One Time	$ 15,000.00
Total One-Time Professional Services Fees				**$ 61,116.00**

The table below shows the three-year investment with Decade Software Company. This table does not include hardware or software to be procured outside of this proposal.

Decade Fees Years 1-3

Year 1 (excludes third-party expenses)	$ 123,366.00
Year 2	$ 62,250.00
Year 3	$ 62,250.00

Required Third-Party Costs

The table below shows the approximate costs for required components that must be procedure elsewhere. These are listed separately due to the variety of methods by which these requirements may be met.

Required Third-Party Costs

Business Objects Crystal Reports 2008 Full Product* *Must be licensed independently	$ 396.00
SQL Server 2008 Standard Edition *Not required if hosted by Decade. May be able to use existing City licenses.	$ 5,999.00
EnvisionConnect Server Hardware *Approximate if purchased at retail. Not required if hosted by Decade or virtualized	$ 2,000.00
Total Recurring Fees	**$ 8,395.00**

Optional Fees

System Enhancements

Per functional requirement 1.13, the agency requires, "System prohibits users from editing the date and the start / end times for all inspections."

Decade agrees to add this enhancement to our product backlog (a list of pending features/suggestions) to be prioritized and scheduled.

However, if the feature is critical to the agency, the optional system enhancement fees below will apply and Decade will make the enhancement prior to go-live.

Optional Service Fees - System Enhancements

Enhancement to prevent modifying Inspection Start Time, Stop Time, or Date	40	$ 126.00	$ 5,040.00
Total Optional Service Fees - System Enhancements			$ 5,040.00

Application Hosting Fees

The fees associated with hosting only apply if the agency selects to have Decade Software Company host their EnvisionConnect server. This option should be selected only after confirming office connectivity bandwidth.

Optional Service Fees - Hosting

ASP Hosting Base Fee	1	$ 209.75	$ 209.75	$ 2,517.00
ASP Hosting Fee (Per Inspector)	25	$ 26.25	$ 656.25	$ 7,875.00
Total Optional Service Fees - Hosting			$ 866.00	$ 10,392.00

ESRI Map Objects

ESRI Map Objects allows the agency to geocode EnvisionConnect records by address and to establish and maintain ESRI-compatible shape files. The license is ONLY required for workstations that will conduct this function.

Optional Third-Party Licenses - ESRI Map Objects

ESRI Map Objects 2.4 Windows Edition ($100 per workstation – 19 workstations)	6	$ 100.00	$ 600.00
Total Optional Third-Party Licenses - ESRI Map Objects			$ 600.00

Decade Professional Service Rates

Decade Professional Service Rates

Professional Services		
Custom Programming	$ 126.00	Hour
Consultation	$ 126.00	Hour
Report Development	$ 126.00	Hour
Training		
Training at Client Facility	$ 1,470.00	Day
Training at Decade Facility	$ 1,470.00	Day
Training Online Using WebEx	$ 105.00	Hour
Support		
Phone Support Outside Normal Service Hours	$ 189.00	Hour
Third Party Support	$ 126.00	Hour
Travel Expense		
Travel Per Diem	Calculated per Event	
Travel	Calculated per Event	

DECADE™
software company

Appendix E - Statement of Work

Reference Agreement Number: 0000-00

Revision [1.2]

Thursday, September 1, 2011

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This document, Appendix E of the License and Support Agreement (Agreement), represents a Statement of Work (SOW) that outlines all of the work involved in a successful EnvisionConnect (System) implementation. Implementation is defined as the process of software installation, application configuration, project management, training and acceptance. All pricing, maintenance, support services, and related terms and conditions are found in the associated Agreement.

1. Project Background

Client has acquired Web-enabled, consolidated System to automate:

- Permit and Service Billing, including
  - Permit printing
  - Invoice printing
- Inspections and professional inspection reports
- Complaint tracking
- Service Request tracking
- Canned Reporting
- Adhoc Reporting

for the following environmental health programs:

- Food Facility Inspection Program
- Hazardous Materials Program
- Emergency Response Program
- General Sanitation Program
- Water Backflow Device "Cross Connection" Program
- Recreational Water Quality
- Other Water Programs
- Vector Control Program
- Noise Monitoring

2. Project Deliverables

2.1. Decade Project Deliverables

The following will be delivered to Client within the scope of this Agreement:

System Deliverables
☒ EnvisionConnect
☒ EnvisionConnect Remote
☐ EnvisionConnect Extender
☒ Integration of the EnvisionConnect Portal with EnvisionConnect
☒ EnvisionConnect Environmental Health Department forms (complaint, Service Request)
☐ EnvisionConnect Batch Payment Import
☐ EnvisionConnect Press Agent

Service Deliverables
Project Management Team
Project and Sprint Backlogs
Needs Analysis and Configuration
Data Conversion from MS Excel and Access Legacy Databases

Report Development
Onsite and Remote System Training
EnvisionConnect Portal configuration
Acceptance Sign-Off Documents

All project deliverables are described in detail in Section 4.0, Implementation Methodology. Maintenance and Technical Support is part of the Agreement, and is explained in Agreement, Section 5.

2.2. Client Project Deliverables

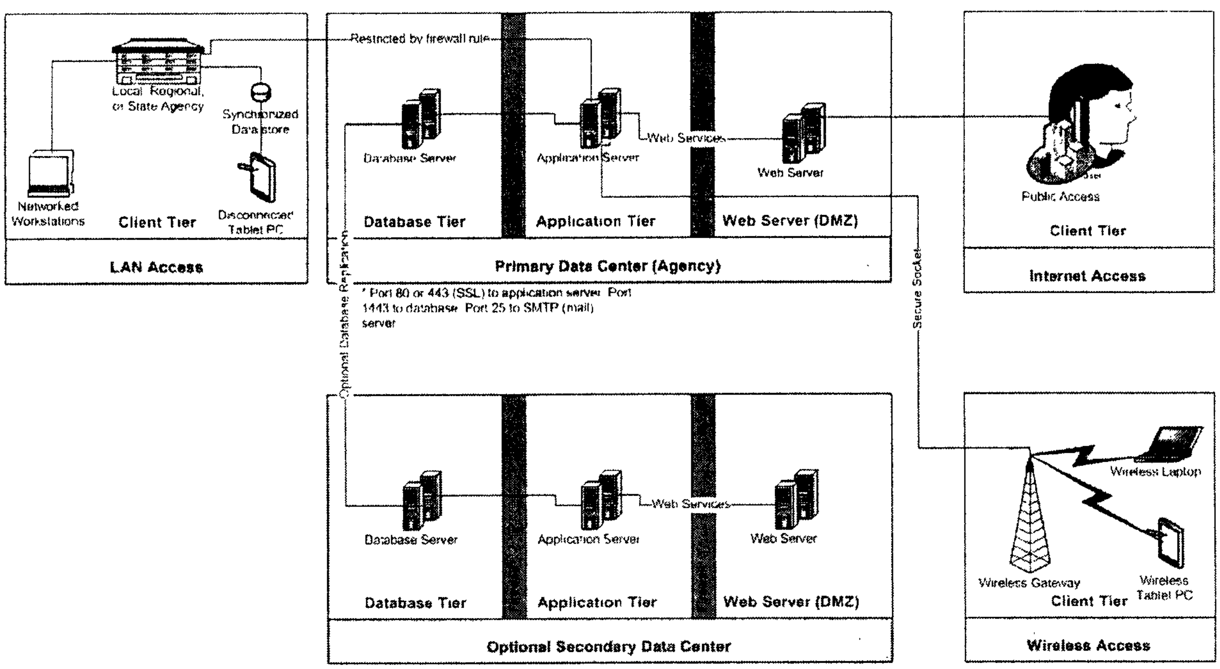
Client Deliverables
Project Team
Training Facility
Onsite Workspace for Decade Project Team
Required Hardware and Network Infrastructure
Legacy System Data/Information: • All Legacy System exported data conversion file(s) in .txt, ASCII, MS Access, or MS Excel Format • Data Dictionary • Data Entity Relationship Diagram
Current Data Entry Forms: • Inspection Reports/Checklists • Applications for Permit/Plan Review • Program/Element codes and descriptions

3. System Deployment

3.1.1. Agency-Hosted

EnvisionConnect will be deployed at Client site utilizing Client hardware and software necessary for the System. The EnvisionConnect database will physically resides at Client facility and Client IT Staff will provide all application, database, and network services associated with it. The following diagram is a visual representation of this model.

Agency-Hosted Network Diagram



4. Implementation Methodology

Decade utilizes an implementation methodology called Scrum. Scrum enables the creation of self-organizing project teams by encouraging verbal communication across all team members that are involved in the implementation project. The Scrum implementation methodology is designed to increase communication and efficiency related to all tasks; therefore, decreases the duration of the project. Scrum characteristics and processes are as follows:

Project Backlog

A backlog is a list of prioritized tasks to be performed during the EnvisionConnect implementation and is maintained by the "Project Owner".

Sprint

An iterative time period during which a fixed set of backlog tasks are completed.

Sprint Planning Session

Session in which the backlog items for the sprint will be defined.

Sprint Backlog

The sprint backlog breaks down the high-level project backlog tasks due for completion in the next sprint.

Daily Scrum Meetings

A brief daily meeting at which time each team's progress is explained, upcoming work is described and impediments are raised. Scrum meetings will last no longer than twenty (20) minutes. All designated project team members *must* be present.

Sprint Retrospective

Brief meeting in which all team members reflect about the past sprint.

4.1. Baseline Project Backlog

The table below outlines the high-level tasks involved in a successful EnvisionConnect implementation. This serves as a starting point and will be refined as the project commences and delivered to the Client as a formal project backlog. The project's sprint backlog will be updated during daily Scrum meetings and serve as a project management repository for analysis, specifications, tasks and resource assignments. Both the Client and Decade must sign off on the fully completed project backlog prior to final acceptance.

Task	Estimated Duration
Remote Project Kick-Off	1 Day
Client Receives and Installs Required Hardware/Software	5 Days
Configure EnvisionConnect	25 Days
Configure EnvisionConnect Portal	5 Days
Onsite Confirmation and Planning Meeting	5 Days
Data Conversion from Excel and Access Legacy System	65 Days
Custom Report Development	20 Days
Onsite System Training	5 Days
Remote System Training	40 Hours
System Testing	5 Days
Go Live	

5. Project Scope

This section details the high-level tasks outlined in the baseline project backlog above.

5.1. Remote Project Kick-Off Meeting

The implementation project will commence with a remote Project Kick-off Meeting. During this introductory conference call the following will occur:

- Introduce Project Team Members
- Introduce to Web-Based User Tools
- Review Technical Support Services and Procedures
- Deliver Client Login Credentials
- Introduce Configuration Wizard
- Deliver Sample Needs Analysis Report
- Set Date for First Scrum Sprint Planning Meeting

5.2. Daily Configuration and Conversion Sessions

Following the remote Project Kick-Off Meeting, the Implementation Specialist will begin conducting daily meetings with designated members of the Client project team for the duration of the configuration and conversion efforts. The frequency of these meetings will decrease to weekly once configuration is complete. These meetings last approximately two (2) hours, require subject matter experts, and cover:

- Business needs analysis.
- Configuration Wizard training.
- Client legacy data analysis.
- EnvisionConnect configuration.

The Configuration Wizard will generate a Needs Analysis Report, as provided in **Exhibit B**, that documents the data management policies and business processes that have been defined.

5.3. Onsite Confirmation Meeting

Decade implementation and/or data conversion specialists will lead a five (5) day onsite meeting to confirm the configuration and conversion plan. Decade and Client Project Teams should leave this onsite session having accomplished the following:

- Reviewed the completed Needs Analysis Report.
- Confirmed data conversion requirements.
- Confirmed data validation test plan.
- Completed data mapping and specifications.
- Installed System.

5.4. Data Conversion

Data conversion is needed to convert Client's legacy system(s) data to the System's Microsoft SQL Server 2005 database. This section of the Project Scope will give you systematic instructions for the conversion process. This process is typically the most difficult and time-consuming aspect of the project.

Conversion data will be limited to data which the Client needs to continue in effective operation using the System. Due to the varying states of reliability of legacy systems, no financial transactional or historical data will be migrated to the System. This includes financial balance forward data.

For example, a balance will be created in EnvisionConnect for any account with an outstanding balance in Legacy System. This will be shown in the new system as an invoice, with either a sum of outstanding credits (payments) or outstanding debit (charges) line items.

A program element, or fee schedule code, will be created for conversion for Balance Forward Debit (sum of all debit transactions). A second program element, or fee schedule code, will be created and labeled as Balance Forward Credit (sum of all credit transactions). However, only one line item will be created to reflect the amount due the agency or the credit owed to the facility.

This will allow the Client to collect on open balances in the new system while eliminating the need to bring over each invoice line item. The line item history will however be available through an ad hoc query of a designated archive table.

It is Decade's experience that legacy system(s) contain duplicate data. For example, if multiple legacy system(s) have required a user to input a facility name and address, these systems contain duplicate data that only needs to be converted one time from one source.

Decade will be responsible for providing the Client a written Conversion Plan, as provided in **Exhibit D**. The Conversion Plan constitutes the final and exclusive expression of the parties' conversion project, and it supersedes all proposals and communications between the project parties.

The Conversion Plan, once finally accepted via the Conversion Sign-off Form, as provided in **Exhibit A**, cannot be modified except by written Agreement. Any changes after acceptance of the Conversion Plan will impact the milestone dates scheduled in the project backlog and may be addressed with a cost estimate.

5.4.1. Identification of Legacy System(s)

The following table identifies Client's legacy system(s). Legacy system is defined as a computer system currently in use by Client. Data to be converted into EnvisionConnect will be extracted from the system(s) listed below and sent to Decade.

The Client has stated in an e-mail dated 2/27/2011 from Robert Campbell:

> The highest priority to convert would be the CUPA and Food licensed, permitted facilities and associated activities. We should probably prioritize these after you and your staff have reviewed the data in each one and go from there.

	Legacy System Name	**Legacy System Purpose**	**Department Used By**	**Expert Name and Title**
1.	MS Excel	There are eight (8) spreadsheets, some with multiple tabs that cover CUPA, Food and backflow devices.	Food CUPA Backflow	
2.	MS Access	There are two Access databases concerning mobile food vehicles and unlicensed vendors.	Food	
3.	Portal	There are data elements within the Portal that will be moved/converted into EnvisionConnect.	CUPA	

5.4.2. Identification of Legacy System(s) Files

The table below lists the names of the exported database files created from Client's legacy system(s) specifically for this conversion effort.

Legacy System #1 – MS Excel spreadsheets		
File Name		**Description**
1	*APSA Inspections.xls*	Aboveground Petroleum Storage Tanks list.
2	*HMBP Inspections.xls*	Hazardous Materials Business Plans list.

Legacy System #1 – MS Excel spreadsheets		
File Name		**Description**
3	*HWG Inspections.xls*	Hazardous Waste Generators list.
4	*UST List*	List of Underground Storage Tanks, multi-tabbed.
5	*District 1 2011.xls*	Food district 1, multi-tabbed. 12 total districts files. Will combine all 12 districts into 1 .xls worksheet before submitting to Decade for final conversion.
6	*Complete Restaurant Closures.xls*:	List of restaurant closures since 2003.
7	*FBI 2002-2010.xls*	List of Food Borne Illness investigations since 2002.
8	*Internal BF Devices 1.xls*	List of internal backflow devices

Legacy System #2 – Access database		
File Name		**Description**
1	*MobileFood*	Mobile food vehicles.
2	*UnlicensedVendors*	The Client has stated in an e-mail dated 2/27/2011 from Robert Campbell: (Note: take a look at this one, if you think it would make sense to convert some or all of this data lets go for it. I would prioritize the licensed facilities first, unlicensed history lower priority).

Legacy System #3 – Portal database	
File Name	**Description**

Legacy System #3 – Portal database		
File Name		**Description**
1	*Unknown*	The fields are typical CUPA fields. However, Decade will have to assign EnvisionConnect Record IDs then re-integrate those IDs into the portal metadata for the facility. Determine whether to match portal records to facility records from another source.

5.4.3. Client Data Conversion Deliverables

Client must prepare the identified conversion data so that Decade can correctly convert the data. Specifically, the Client will:

- Identify conversion data from existing legacy system(s), and document these data files using the Data Mapping Spreadsheet, as provided in **Exhibit E**, and found within the Conversion Plan.
- Clean conversion data:
  - Perform data scrubbing to eliminate idiosyncrasies in conversion data. All numbers, names, et cetera should be identical and share one common field used consistently across all databases. This will have to include the data found in the Fire Department's database.
- Extract conversion data.
- Engage in joint data mapping sessions with Decade.
- Provide data element definitions to Decade.
- Deliver clean, consolidated data file(s) to Decade in .txt, MS Access, SQL or ASCII file(s) format for migration to System.
- Identify a set of key accounts; approximately 50 records (Owner, Facility, Program and Permit Structure) with a varied degree of complexity. These accounts will be used throughout the conversion project as a basis for repeated validation after each pass of converted data.
- Identify the current workflows for the key accounts mentioned above and identify the current outcome of these workflows.
- Submit in writing, the total number of records in all files that have been sent to Decade based on the methods described in the Conversion Plan.
- Conduct Data Validation Testing.
- Provide subject matter expert.
- Review the consolidation report delivered by Decade. Key in changes and submit back to Decade.

5.4.4. Decade Data Conversion Deliverables

Decade is responsible for mapping the Client-provided clean, consolidated data to the correct location in the System as outlined in the Conversion Plan. Specifically, Decade will:

- Deliver written Conversion Plan to Client.
- Deliver written 'Preparing Data for Conversion' document to Client.
- Conduct joint data mapping sessions with Client.
- Manage data mapping spreadsheet.
- Migrate Client records from delivered file into the System, including:
  - Migrate/convert existing Tait/Portal data to EnvisionConnect.
    - Assign EC Record IDs then re-integrate those IDs into the portal metadata for the facility.
    - Determine whether to match portal records to facility records from another source.
    - Configure EnvisionConnect codes to be consistent with existing portal data because the Fire Department's portal was developed without an EnvisionConnect influence. Will require changes to the portal implementation AND EnvisionConnect configuration.

   - Move/configure portal/EnvisionConnect servers (including secure communications between servers) and implement/test data transformation (syncing).
- Deliver data validation test plan.
- Deliver data for validation testing.
- Correct errors found during validation testing.
- Deliver final pass of converted data for use in testing and production.

5.4.5. Conversion Issue Resolution

If conversion issues arise, the Client must respond within twenty-four (24) hours. If no response is received from Client within this time frame, Decade will suspend conversion efforts related to this issue and attempt to reschedule.

5.4.6. Data Validation Testing

Upon receipt of converted data from Decade, the Client is responsible for validating the data. The Client is responsible for verifying the data was accurately converted as agreed in the Conversion Plan and can be searched and edited in the System.

Decade will assist the Client in performing quality assurance on the results in the System database. Such validation will focus on the key accounts identified by the Client and the outcomes expected of such accounts after migration into System.

If data was converted incorrectly due to Client error, Decade will convert the data again. After three (3) conversion attempts: initial pass, second pass for review and modifications if necessary, and final pass, each subsequent conversion is billable at the professional service hours rate specified in, Agreement, Appendix B.

At the completion of Data Validation Testing Decade will provide Client with the Conversion Sign-Off Form. Client must return the Conversion Sign-off Form, or a list of deficiencies, within five (5) business days of receipt. If the Conversion Sign-off Form is not signed, data conversion programming efforts will not commence.

5.4.7. Data Conversion Delivery and Acceptance Milestones

- Decade delivers Conversion Plan to Client.
- Client will provide written acceptance of Conversion Plan.
- Decade delivers data validation test plan to Client.
- Decade delivers data to Client for validation testing.
- Client performs data validation testing and reports errors.
- Decade delivers second pass of data to Client.
- Client performs validation testing.
- Decade delivers conversion processing log.
- Client provides written acceptance via Conversion Sign-off Form.

5.5. Custom Report Development

Decade will provide report customization services for Client. Decade will provide Client with a Custom Report Request (CRR), as provided in **Exhibit F**, to detail the requirements for each report. Client will approve the CRR specification prior to creation of the report. Changes made after the CRR has been signed and accepted, will be billable at the professional service hourly rates outlined in Agreement, Appendix B. Customization is defined as designing, creating, documenting, testing and delivering a report that is not included in the System Report Catalog.

5.5.1. Included Custom Reports

Decade will deliver three (3) custom reports at no charge providing development hours do not exceed forty (40) total hours for analysis, design, creation and testing. Development will be limited to the modification of the outward appearance of the labels, logos, comments and instructions on each report. If the professional service hours exceed forty (40) total hours, the additional hours spent on these custom reports will be billable. The following table identifies the custom reports provided by Decade:

Custom Reports Included at No Charge			
Report Description	**Estimated Development Hours**	**Billable**	**Cross-Reference Report**
Consolidated Permit Report	13.3	No	# 1017
Official Inspection Report	13.3	No	# 0190
Compliance Style Inspection Report	13.4	No	# 0191

The reports listed above cannot be substituted. For any additional custom report requests, Client must complete a CRR. These hours will be billable at Decade's hourly professional service rate as outlined in Agreement, **Appendix B**. The Client is responsible for verifying contracted custom reports. Reports will be tested using the specifications stated in the Custom Report Request (CRR) accepted criteria.

Sample Report #1017:

Notify Environmental Health of any change of ownership, type of business activity, business name or billing address by calling 209-675-7823. Failure to notify Environmental Health may result in late penalties, Permit denial or revocation, and business closure. PERMITS TO OPERATE AND ANNUAL FEE PAYMENTS ARE NOT TRANSFERABLE. Permits become void on change of ownership. New owners must apply and pay for a new Permit(s) prior to beginning operation or penalties will be assessed at 10% per month or fraction thereof.

ATTN JEFFREY CURTIN SR
CERTAINTEED
17775 AVENUE 23 1/2
17775 AVENUE 23 1/2
CHOWCHILLA, CA 93610

DETACH FORM HERE AND DISPLAY CONSPICUOUSLY ON THE PREMISES

MADERA COUNTY ENVIRONMENTAL HEALTH
216 W 6TH ST
MADERA, CA 93637
209-675-7823

REGULATED FACILITY : CERTAINTEED
17775 AVENUE 23 1/2
CHOWCHILLA, CA 93610

Facility ID: FA0100066
Account ID: AR0000045
Issued: 02/06/2001

OWNER NAME : CERTAINTEED

PT0000003
Non-Retail Underground Storage Tank-Fee
Valid From 02/01/2001 to 01/31/2002

1

PT0000002
Non-Retail Underground Storage Tank-Fee
Valid From 01/01/2001 to 12/31/2001

Permits to operate and Annual Fee Payments are NOT TRANSFERABLE. Those referenced above are valid ONLY for this owner, CERTAINTEED. Permits become VOID on change of ownership. New owners must apply and pay for a new Permit(s) PRIOR to beginning operation or penalties will be assessed.

THIS FORM MUST BE DISPLAYED CONSPICUOUSLY ON THE PREMISES 2

1017.rpt 1.0 1.03.00

Sample Report #0190:

Page 1 of 1

OFFICIAL INSPECTION REPORT

MADERA COUNTY ENVIRONMENTAL HEALTH
216 W 6TH ST
MADERA, CA 93637
209-675-7823

Estab Name:	PG & E MADERA SERVICE CENTER		
Site Address:	2871 AIRPORT DR FRESNO, CA 93760-0001	Inspection Date:	05/11/98
		Facility ID:	FA0101621
		Inspector:	EE0000012-SUSAN GREENWOOD
Owner:	PACIFIC GAS & ELECTRIC COMPANY 77 BEALE STREET PO BOX 770000 SAN FRANCISCO, CA 94177	Service:	004 - Consultation
		Result:	01 - Meets Standards
		Program/Element:	2100 - Hazardous Material General Business Plans
		Action Taken:	01 - No Action Reqired
		Business Type:	01 - CORPORATION
		Revisit:	Not Specified
Telephone:	800-345-2345	Inspection Number:	DA0101101

1

The following violations of the Long Beach Municipal Code were noted during the inspection conducted on the above date. We are requesting that necessary action be taken to correct the violations listed below. Please be advised that failure to correct the violations by the reinspection date may result in a $60 reinspection fee. The Long Beach Department of Health and Human Services appreciates your effort and cooperation in this matter.

Overall Inspection Comment

2 Plans to be reviewed by certified professional prior to next inspection.

Inspection Violations

Correct the following violations by 05/11/1998 3

Waste Water Prevention - STR - 48 480015

Description

4 *Inspector Comments*

Certified professional to review plans prior to next inspection.

Required Correction

SUSAN GREENWOOD

Received By

SUSAN GREENWOOD
Environmental Health Specialist

0098.rpt 1.0.1.03.00

Sample Report = [illegible]

Inspection Report

Page 1 of 9

County of San Bernardino [illegible]
385 N. Arrowhead Avenue
[illegible]
San Bernardino, CA [illegible]
[illegible]

No. of Risk Factor/Intervention Violations [illegible]

No. of Repeat Risk Factor/Intervention Violations [illegible]

Score (optional) [illegible]

Date [illegible]
Time In [illegible]
Time Out [illegible]

Establishment	Address	City/State	Zip Code	Telephone
[illegible]	[illegible]	BIG BEAR LAKE, CA	[illegible]	[illegible]

License/Permit #	Permit Holder	Purpose of Inspection	Est. Type	Risk Category
[illegible]		Inspection - [illegible]		

RISK FACTORS AND INTERVENTIONS

1 [illegible] 0.00

■ IN [illegible]

Violation Description:

[illegible]

EMPLOYEE HEALTH & HYGIENIC PRACTICES

[illegible] 0.00

■ IN [illegible]

Violation Description:

[illegible]

[illegible] 0.00

■ IN [illegible]

Violation Description:

[illegible]

[illegible] 0.00

■ IN [illegible]

Violation Description:

[illegible]

PREVENTING CONTAMINATION BY HANDS

[illegible] 0.00

[illegible]

Violation Description:

Employees are required to wash their hands [illegible] before handling food [illegible] during food preparation [illegible] when switching from working with raw [illegible] [illegible]

Violation Comments:

specific to this violation
Handwashing signage must be [illegible]
Thursday, February [illegible]

[illegible] Adequate handwashing facilities supplied & accessible 0.00

■ IN [illegible]

Violation Description:

Handwashing soap and towels [illegible] shall be provided in dispensers. Dispensers shall be maintained [illegible]
Adequate facilities shall be provided for hand washing, food preparation and the washing of utensils and equipment [illegible]
114067(f)

Person in Charge (Signature) [illegible] Date

Inspector (Signature) Follow-up: Yes No (Circle one) Follow-up Date:

5.5.2. Report Development Delivery and Acceptance Milestones

Milestones are for each report.

- Decade will deliver CRR to Client.
- Client will provide written acceptance of CRR within ten (10) days of receipt.
- Decade delivers completed report to Client for testing.
- Client tests report to validate functionality within fifteen (15) days of receipt of completed report.
- Client will provide written acceptance within two (2) days of receipt.

5.6. Training

The System is designed to minimize the need for extensive training, training materials and end-user documentation. To accomplish this, the System utilizes a workflow-oriented user interface from which users can perform several functions pertaining to a specific user role.

Training is delivered onsite and remotely. Remote training is conducted over the Internet using Web conferencing tools and telephone services.

Prior to each training session, Decade will deliver a training agenda to Client.

Training content will be delivered as follows:

Type	Delivery Method	Training Goal
EnvisionConnect's Design and Purpose	Remotely	To familiarize the student with EnvisionConnect and its design. This prepares the agency for EnvisionConnect configuration.
Configuration Wizard	Remotely	To build upon 'EnvisionConnect's Design and Purpose' (above) to prepare the agency for configuration of business rules and support codes.
EnvisionConnect Training	Onsite	To apply the knowledge and data to the agency's specific workflows after the client's data is converted and the business rules and support codes are configured.

5.6.1. Training Facility

The Client will provide an adequate facility for all onsite training events.

5.6.2. Training Courses

On-site training should succeed the delivery of Client's initial pass of converted data.

The following tables list all Web-based and onsite system training courses. Client will work with the Decade Implementation Specialist during the Remote Kick Off and subsequent meetings to determine which courses will comprise the Client's forty (40) hours of Web-based training and five (5) days of onsite training.

Remote WebEx Training Sessions		
Course Title	**Maximum Attendees**	**Duration**
EnvisionConnect Design and Purpose – Managing Common Environmental Health Data	6	2 hours
EnvisionConnect Design and Purpose – Managing Hazardous Materials	6	2 hours
EnvisionConnect Design and Purpose – Managing Daily Time and Activity Logging	6	2 hours
EnvisionConnect Design and Purpose – Managing EnvisionConnect Tools	6	2 hours
EnvisionConnect Design and Purpose – Prepare System for Offline Use	6	2 hours
Configuration Wizard – Configuring Common Areas	6	1 hours
Configuration Wizard – Daily Time and Activity and Inspections	6	2 hours
Configuration Wizard – Facilities and Facility Owners	6	2 hours
Configuration Wizard – Complaint Tracking	6	2 hours
Configuration Wizard – Service Request Tracking	6	2 hours
Configuration Wizard – General Permits	6	2 hours
Configuration Wizard – Site Remediation	6	2 hours
Configuration Wizard – Hazardous Waste	6	2 hours
Configuration Wizard – Onsite Septic System	6	2 hours
Configuration Wizard – Event Tracking System	6	2 hours
Configuration Wizard – Comments	6	2 hours
Configuration Wizard – Involved People/Certified Professionals	6	2 hours
Configuration Wizard – Field Inspection System	6	2 hours

On-Site Training Sessions			
Course Title	**Application Focus**	**Maximum Attendees**	**Duration**
EnvisionConnect Basics	Basic system usage. Not specific to program areas.	6	1 Days
Managing Common Agency Data	Understand the type of data managed.	6	½ Day
Managing Hazardous Materials	Hazardous Material inventory as it relates to a facility.	6	½ Day
Manage Daily Time and Activity Logging	Time and expense tracking. Inspection and Non-inspection activities.	6	1 Day
EnvisionConnect System Tools	Walk through workflows to manage system tools.	6	½ Day
EnvisionConnect Remote Training	Preparing System for Offline Use	6	½ Day
EnvisionConnect Public Portal- English and Spanish	Business owners and staff will be trained to submit forms online.	6	½ Day

5.6.3. Training Delivery and Acceptance Milestones

- Decade will deliver a Training Agenda to Client.
- Client will provide written acceptance of Training Agenda.
- Decade will travel to Client's site to complete onsite Training.
- Decade will deliver Certificates of Training Completion.
- Client representatives will complete training evaluation forms.

5.7. EnvisionConnect Portal integration

5.7.1. Decade will configure EnvisionConnect to post CUPA submissions (e.g. Title 27) entered into the Client Fire Department's HazMAP application.

5.7.2. Client staff will work with Decade and Tait Environmental Management to assist with securing a connection between EnvisionConnect and HazMap.

5.7.3. Tait is responsible for the development and deployment of the following CUPA forms within the Portal:

- The additional forms of the Underground Storage Tank Program
- Hazardous Waste Generator (Tiered Permitting) Program
- California Accidental Risk Prevention (CalARP) Program
- Above Ground Storage Tank Spill Prevention

5.7.4. Decade will configure Environmental Health forms within the Portal to be used for posting restaurant inspections, accepting complaints, and accepting service requests.

5.7.4.1. Decade will provide Client with a Portal Configuration Plan

5.7.4.2. Client will review and accept Portal Configuration Plan

5.7.4.3. Decade will configure and test Portal

5.7.4.4. Client will ensure its firewall and security allows for EnvisionConnect data to post to the Portal

5.7.4.5. Client will review and test Portal

5.7.4.6. Client will request any changes to the way the Portal presents inspection data and other information to Decade, if needed

5.8. System Testing

5.8.1. Final Acceptance Testing

Upon Decade's notification to Client that the System is ready for final acceptance testing for the current implementation deliverables, the Client will perform a variety of System functions and verify their completion without error. These thorough tests will ensure all users, the environment, and data are ready for use in a production. Decade will provide Client with a formal Test Plan that will address how data is selected, who should be involved, specific tests to be performed, and how successful completion is defined.

Decade's role in final acceptance testing is to ensure the tests are thorough, complete, valid and have been properly executed. Any issues or defects found will be documented as items requiring a fix prior to final acceptance and documented in the Issues Log. Client is responsible for fixing issues or defects associated with the Client's network, desktop computers, and all related components. Decade will be responsible for fixing issues or defects resulting from the System.

Final acceptance testing highlights and verifies System functionality in the following three areas:

- Integration Testing
- User Testing

5.8.1.1. Integration Testing

Integration testing proves the System performs according to the functional requirements and specifications. It will demonstrate cohesion between all System modules, interfaces, and any custom modifications.

5.8.1.2. User Testing

User testing evaluates the preparation of the users and their familiarity with the procedures and workflows established. User testing may be accomplished simultaneously with Integration Testing. This test also uncovers potential problem areas in procedures and end-user training prior to go live. This testing can be useful in encouraging users and operations personnel to accept and own the new System.

5.9. Go Live

Upon completion of System validation and acceptance testing, the Client will be ready to 'go live' with the System in a production environment. 'Go live' is defined as the point in time when the Client data is used for production purposes. Decade will consider the Client in a state of 'go live', or when the System is functioning uninterrupted in production for ten (10) consecutive business days, before transitioning to support status.

'Go live'/installation is reached when 1) the data is living information that represents factual records and 2) this information is going to continue to be used for business purposes (not deleted and later re-entered).

Upon to the completion of the 'go live' period, Decade will deliver to Client a Notice of Project Completion and Acceptance. Client must return the signed acceptance form within five (5) business days of receipt.

'Go Live' Delivery and Acceptance Milestones

- Decade will deliver Notice of Project Completion and Acceptance for final acceptance.
- Client will provide written acceptance of final System within five (5) business days of receipt.

6. Project Teams

Successful completion of this project will require ongoing communication and coordination between Decade and Client Project Teams. The following tables list a high-level description of the roles and responsibilities of the key staff from both teams that will be working together on the completion of the System implementation.

6.1. Decade Resources

Decade Software Company, LLC (DECADE) Project Team		
Role	**Name**	**Responsibilities**
Client Services Manager	Stephen Lee-Thomas	▪ Oversee Decade project team and deliverables ▪ Develop Project Backlog
Development Manager	HL Arledge	▪ Analyze and design all custom development requirements if applicable.
Implementation Specialist	Clint Barry	▪ Manage project resources and deliverables. ▪ Schedule and attend all on-site activities. ▪ Directly coordinate with Client Project Manager. ▪ Oversee System setup and configuration. ▪ Attend kick-off meeting and needs analysis session to identify conversion needs. ▪ Develop and deliver training. ▪ Schedule and attend status meetings.

Data Conversion Specialist	Angie Brown	▪ Attend kick-off meeting and needs analysis session to identify conversion needs. ▪ Develop and deliver Conversion Plan ▪ Develop and deliver conversion validation and acceptance test plan. ▪ Attend status meetings. ▪ Convert data from legacy System(s)

Decade personnel will be onsite at Client facility for the following:

- Onsite Confirmation and Planning Meeting
- Onsite Training

6.2. Client Resources

Client Required Project Team		
Role	**Name**	**Responsibilities**
Executive Sponsor- Part-time	Nelson Kerr, Manager Environmental Health	▪ Understand agency goals and objectives. ▪ Responsible for all issue resolution ▪ Oversees Project Manager activities.
		▪
Project Manager - Part-full time	To Be Hired, Project Manager	▪ Available for all Decade on-site activities. ▪ Have a thorough understanding of Client operations and workflows. ▪ Communicate directly with Decade and Client Project Managers. ▪ Assist Decade Project Manager with training support materials. ▪ Participate in all activities outlined in project backlog. ▪ Obtain approval and signature on all required sign-off documents. ▪ Coordinate Client subject matter experts.
Department/Program Subject Matter Experts	Food Program: Jackie Hampton, REHS IV; Brad Thomas, REHS III CUPA / HazMat: Mitch Yamada, HazMat Spec. II; Linda Kolinski, HMS I Water Program: Steve Nakauchi, REHS IV Clerical: Caron Lowe, Secretary	▪ Have thorough knowledge of business practices, agency policies, and department workflow. ▪ Define setup requirements. ▪ Participate in testing. ▪ Final acceptance review. ▪ Train-the-trainer(s).

	Fire Dept. Liaison: Saki Boatright	
DBA	TBD (Most likely will be a staff DBA from Client's Technology Services Department)	▪ Have thorough knowledge of MS SQL Server 2005. ▪ Assist with System setup. ▪ Assist with interface development. ▪ Assist with data conversion requests. ▪ Fulfill on-going role of System DBA.
EnvisionConnect Administrator	To be hired Business Analyst consultant	▪ Support on-going operations of the System ▪ Assist with System setup and administration ▪ Act as lead trainer

Client resources will participate in all on-site activities.

7. Progress Reporting and Communications

The completion of this project will require continual communication between Decade and City staff. The Scrum implementation methodology ensures successful communication with daily Scrum meetings and sprint planning sessions. Decade shall track, document, and communicate project status to the City on a regular basis.

7.1. Status Meetings and Status Reports

Daily Scrum meetings will be lead by the 'Scrum Master'. These are brief daily meetings during which each team's progress for the current Sprint backlog is explained, upcoming work is described, and impediments are raised. Scrum meetings will last no longer than twenty (20) minutes. All designated project team members *must* be present.

Decade will track any impediments raised in the Sprint Backlog.

7.2. Project Delays

In the event of project delays, Decade or Client shall provide written notice through the Change Control Log, as provided in **Exhibit G**. Project delays are defined as any circumstance or lack of action from either party that would cause a delay in the project of more than one (1) week.

7.3. Additional Service Requests

Project changes that impact the cost or the method of implementation will be managed through documented Professional Service Requests (PSR), as provided in **Exhibit H**. A PSR will be delivered to Client when there is a request for additional project services that will potentially result in additional fees.

PSRs can be initiated by Decade or by the Client. The initiator of the PSR will document the relevant information on the PSR. The following PSR processes will occur:

- Decade delivers PSR to client
- Client accepts with written approval within ten (10) days of receipt
- Decade delivers price proposal upon acceptance

8. Exhibits

The following list of exhibits reference documents that are included in this Statement of Work by reference herein.

Exhibit A Notice of Project Completion and Acceptance

Exhibit B EnvisionConnect Needs Analysis Report

Exhibit C Software Requirements Specification (SRS)

Exhibit D Conversion Plan

Exhibit E Data Mapping Spreadsheet

Exhibit F Custom Report Request (CRR)

Exhibit G Change Control Log

Exhibit H Professional Service Request (PSR)