Proposal for Laredo, Texas

RFP for Environmental Health Software Solution

April 22, 2025

Prepared by
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April 14, 2024

Ms. Maria F. Astrain
2600 Cedar Avenue
Laredo, TX 78040

Dear Ms. Astrain,

Online Solutions, LLC (Citizenserve) is pleased to submit this response to the City's Request for Proposal for Environmental Health Software Solution. Citizenserve has 22 years of experience solving the problems the City seeks help with. We have offered citizenserve® as a Software-as-a-Service solution with accompanying services for public sector customers from the beginning. We have over 300 customers, including multiple customers using our software solution to manage environmental health information, billing, permitting, licensing, enforcement, and inspections.

After reviewing the City's scope of work, we believe we offer a strong solution for your requirements and the best implementation methodology to ensure lasting success. Citizenserve is a low-code software and service solution that covers all aspects of application processing, permitting, licensing, inspections, and enforcement. The software encompasses internal functions and provides a user-friendly portal to enable electronic relationships with constituents. Citizenserve offers profound opportunities for efficiency gains, increased service for constituents, and cost savings.

Citizenserve's unique background provides proven experience and reliability for our customers:

- The software has been built organically for 22 years and continually improved based upon customer enhancement requests, changes in technology, and ongoing feedback from our customers. We have never acquired another company or product; all growth has been through thoughtful and continual improvement of the product.
- The names *Online Solutions* and *Citizenserve* have been used since the founding of the company. There have been no mergers, acquisitions, or changes in company leadership in the company's history.
- Citizenserve is debt free and has been profitable for over a decade. We are also investor free; our decisions are focused on what is best for our customers rather than making investors happy.

- We do not manage by change order. We offer fixed pricing for our projects and use an agile implementation methodology that encourages exploration and welcomes changes in requirements. We know from experience that knowledge gained through a project leads to new ideas, improvements, and oftentimes a whole new approach.
- We have never had a customer dispute or failed implementation or been the subject of litigation. We take the "service" concept of Software-as-Service literally and provide unlimited support and training with every subscription.
- We are constantly improving our software. We provide updates and enhancements to the software twice monthly.

Citizenserve is a turnkey solution that is already up and running with thousands of users in hundreds of municipalities. We process over 500,000 permits per year and over $500 million in permit and license payments. Contractors, citizens, and other constituents use our portal over 9 million times annually to submit and securely pay for applications, check on status, and other community development functions. Each portal session represents a trip that a constituent has not made to a customer's offices, saving staff time and increasing constituent satisfaction. We look forward to sharing how Citizenserve can help to meet the requirements of the City of Laredo.

The pricing in this proposal is valid until April 22, 2026.

Sincerely,

Kara McFall, Manager
Online Solutions, LLC (Citizenserve)
1101 E Warner Rd, Suite 160, Tempe, AZ 85284
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SECTION 1 – CITIZENSERVE BACKGROUND & EXPERIENCE

1.1   Citizenserve Experience

Citizenserve is located in Tempe, Arizona and was started as an internet software service in 2003. Citizenserve has 22 years of experience applying automation to address the challenges the City seeks help with, including the successful implementation of environmental health solutions for multiple customers. We will leverage this experience to ensure that the Citizenserve team fully understands the City's requirements and provides functionality that addresses the full spectrum of City users and needs. Community development software and services are the only software and services the company has ever offered, and we have focused exclusively on public sector customers. There have been no acquisitions in the company history; all growth has been organic under the same company leadership. The names *Online Solutions* and *Citizenserve* have been used since inception.

We have offered citizenserve as a Software-as-a-Service solution with accompanying services from the beginning. The citizenserve software is only provided as a cloud-based subscription. When Citizenserve was started as an internet software service in 2003, the model was uncommon; we were among the first to identify the benefit for community development customers of a cloud-based solution accompanied by unlimited support. Updates and enhancements to the software are provided once to twice monthly and are included in all subscriptions at no additional charge. A Citizenserve subscription also includes major upgrades, which occur every few years. Major upgrades and the associated change management and training are also offered at no additional charge.

There are over 300 jurisdictions and thousands of community development professionals using citizenserve. Each of these customers faced similar challenges to those facing the City, and with Citizenserve have completed successful projects. Most of our customers require integration to external systems such as GIS and payment processors and the tailoring of permits and licenses, workflows, fee schedules, certificates, enforcement codes, reports, user roles, and other attributes unique to each customer. We have extensive experience implementing the software, tailoring it through configurations to the specific needs of the customer, completing and testing system integrations, and thoroughly training users to ensure successful adoption.

We strive to be easy to work with, and new customers are often referred by existing customers. There have been no customer disputes, litigation, or failed implementations in the company's history. Our unlimited support model extends our relationships with our customers, ensuring

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that when they have a question or issue, we are available to provide timely assistance and problem resolution. We resolve over 85% of support requests on the same day the request is submitted. In addition to assisting with support requests, we also offer unlimited user training after launch for the full life of the subscription. Our unlimited support and training eliminate the stress of changing to a new system and ensure that all your stakeholders are supported when they require assistance.

Citizenserve has the solution to meet the requirements of the City, specific experience successfully implementing an environmental health solution, and the support model to ensure continuing success.

1.2   Citizenserve References

Citizenserve's existing client base consists of cities, towns, counties, and other municipalities throughout the United States that have community development functions. We have over 300 customers, some of whom have been using citizenserve since the inception of the company. We have included references below for environmental health projects that are similar in nature to the project requested by the City.

Reference 1: Coconino County, Arizona 2625 N. King Street Flagstaff, AZ 86004	
Contact Name: Eve Wolters	**Contact Title:** Division Manager, Environmental Health
Contact Phone: 928-679-8761	**Contact Email:** ewolters@coconino.az.gov
Citizenserve Modules: Environmental Permitting, Environmental Licensing, Code Enforcement, Online Portal.	**Additional Services:** Systems Integration and Data Migration/Conversion

Overall Project Scope:
- Provided a fully integrated environmental health solution:
    - Configured permits, licenses, and related reviews and workflows, inspections, and notifications for the Coconino County Health & Human Services Department.
    - Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.
    - Configured multiple integrations.
    - Migrated data from a legacy system.
    - Developed dozens of custom reports, custom metrics, and user dashboards.

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Reference 2: Cochise County, Arizona 1415 Melody Lane, Building D Bisbee, AZ 85603	
Contact Name: Daniel Coxworth	**Contact Title:** Development Services Director
Contact Phone: 520-432-9268	**Contact Email:** dcoxworth@cochise.az.gov
Citizenserve Modules: Environmental Health Licensing, Permitting, Planning & Zoning, Code Enforcement, Online Portal.	**Additional Services:** Data Conversion, Systems Integration, Integrated Voice Response

Overall Project Scope:

- In addition to providing modules for building, planning, and right-of-way permits, Citizenserve provided a fully integrated environmental health solution:
    - Configured permits, licenses, and related reviews and workflows, inspections, and notifications for the Cochise County Environmental Health Division.
    - Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.
    - Configured multiple integrations.
    - Migrated data from legacy system.
    - Configured integrated voice response (IVR) to enable the submission of building inspection requests via text.
    - Developed dozens of custom reports, custom metrics, and user dashboards.

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Reference 3: Yavapai County, Arizona
1120 Commerce Drive
Prescott, AZ 86305

Contact Name: Jeremy Dye	**Contact Title:** Development Services Director
Contact Phone: 928-639-8151	**Contact Email:** jeremy.dye@yavapaiaz.gov
Citizenserve Modules & Functionality: Environmental Health Permitting and Licensing; Building, Planning, and Zoning Permitting; Addressing; Code Enforcement, Online Portal.	**Additional Services:** Data Conversion, Systems Integration

Overall Project Scope:

- In addition to providing modules for permitting, planning and zoning, addressing, and code enforcement, Citizenserve provided a fully integrated environmental inspection solution:
  - o Configured permits, licenses, and related reviews and workflows, inspections, and notifications for the Yavapai County Environmental Services Unit.
  - o Configured a custom online portal for all functions, including a PCI-compliant integration to a payment processor for online payments.
  - o Configured multiple integrations.
  - o Migrated data from legacy system.
  - o Developed dozens of custom reports, custom metrics, and user dashboards.

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SECTION 2 – CITIZENSERVE SOLUTION & CAPABILITIES

2.1 Citizenserve Solution

Citizenserve is a highly configurable system with flexible configuration options to ensure applications, workflows, notifications, reports, and dashboards reflect your business processes. The Citizenserve team will configure citizenserve to meet the City's requirements during implementation, including providing recommendations for changes in processes based on best practices. After go live you can submit a support ticket to have Citizenserve make any required configuration changes, including custom reports, changes to workflows and notifications, and changes prompted by regulatory changes.

We have included references who are using citizenserve for similar functions to those recommended by the City. For each of these customers, we used configurations to tailor their applications, fees, inspections, forms, templates, notifications, emails, letters, etc. to meet their specific Environmental Health permitting and licensing needs. We encourage you to speak to our references about the flexibility of citizenserve, our implementation approach to ensure we address requirements, and our unlimited support post go live that includes unlimited configuration updates.

Configurable items in citizenserve include:

- **Roles**: with citizenserve's role-based security you can specify the rights and access for each of your users, departments, and sub-departments.
- **Forms** can be configured to include the graphics, text, fields, custom fields (no additional cost), and other elements you specify.
- **Workflows** can be configured to match your processes, routing, reviews, approvals, and notifications, and workflow activities can be configured to occur in sequence or parallel. You can set up different workflows for each permit and license type.
- **Fees** can be configured to include complex calculations and start and stop dates.
- **Portal**: you can control what appears on the portal, what actions can be taken from the portal (including document upload), and mandatory fields and documents through the portal configuration screen. We can place any report on the portal to enable constituents to view activity levels, search for permits and licenses by type and other criteria, etc.

- **Custom fields** can be created and used on your reports, forms, letters, emails, etc.; citizenserve supports 33 different types of custom fields. The creation of an unlimited number of custom fields is included in Citizenserve's unlimited support.
- **Notifications** are available in response to various actions in citizenserve and can be configured to send letters, emails, etc. Staff have the option to edit these types of notifications prior to sending.
- **Warnings** can be configured as mandatory (e.g., Prevent Permit Issuance) or informational.
- **Letters and emails** can be automatically generated and configured with text, graphics, and data contained within citizenserve. Staff always have the option to edit letters and emails prior to sending. All letters and emails are included in the Documents tab of the relevant permit, license, code case, etc.
- **Reports**: you can request an unlimited number of custom reports as part of Citizenserve's unlimited support. If you don't see the report you need in the list of standard citizenserve reports, just submit a support request; the turnaround time for the average custom report is one business day. You can also create your own reports with citizenserve's easy-to-use reporting wizard.
- **Dashboards** are easy to configure for each individual user to display only the metrics and information that is relevant, and you can request custom metrics at any time for no additional cost.
- **Integrations** to external systems can be configured as one-way, two-way, or flat file uploads. Citizenserve staff are responsible for developing the scripts for the integration points on the citizenserve side (development of code to export data from or accept data into citizenserve); if an API is not available, the City's technical resources will be responsible for developing the code to export data to citizenserve or accept data from citizenserve.

We have included some specific information on citizenserve's functionality below.

2.1.1 Permitting and Licensing Modules

Citizenserve has flexible permitting and licensing modules that accommodate any type of permit or license. The Citizenserve implementation manager will configure the City's permits and licenses and associated workflows, inspections, and documents during the project; the configuration of any new permits or licenses after go live is included as part of Citizenserve's unlimited support. Permits and licenses and their associated workflows can be quickly built. You can add an unlimited number of permit and license types and subtypes for an unlimited number of departments in citizenserve.

2.1.2 Online Portal

Citizenserve provides a configurable, customizable, PCI-compliant online portal that allows constituents to participate electronically in the processes of permitting, licensing, code enforcement, and inspections. The portal is available 24/7/365 and can be configured as a link off the City's website. The portal has been built into the solution from the beginning, so users are provided with a cohesive interface. The portal is easy to use, and Citizenserve will configure the portal with clear instructions on how to register as a new user, update account information, fill out and submit applications, required submittal documents, information on when a permit or license is required, etc. Configurable, context-sensitive help is available at the field level to provide guidance on the information required with each application.

The image below shows the configuration of the Citizenserve environmental health portal for the Coconino County, Arizona Health & Human Services department. Visitors can renew or view their license, view their permit, search permits or licenses, or change ownership. We can easily tailor the City's portal to only show your relevant information and services.
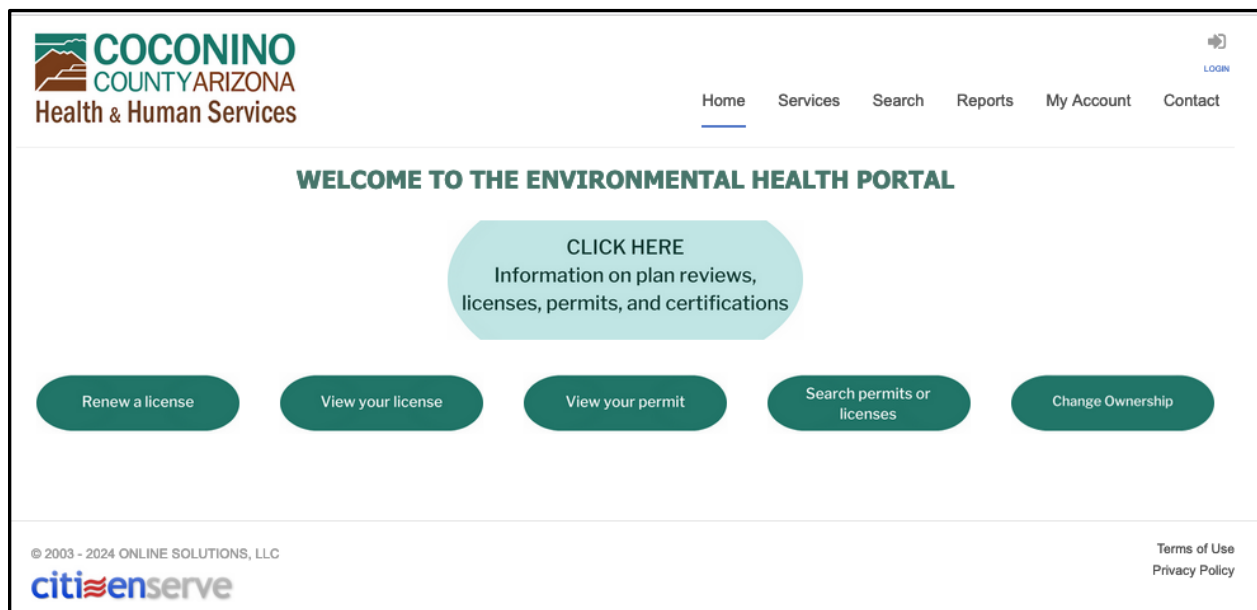
Coconino County, Arizona Environmental Health Portal

There is enormous flexibility in configuring applications to meet an individual customer's needs. We will work with the City during implementation to determine the requirements for each of your permit and license types; we can replicate existing applications or make improvements and changes as desired. Applications can be configured to include the required fields, all explanatory text, City-specific graphics and logos, all contacts related to an application, and any other data or information required. Applications can also be configured to indicate the required documents that must be uploaded and whether a digital signature is required. Custom fields can easily be added at any time; all custom fields are available for reporting and metrics.

All citizenserve forms can include dynamic fields, which means the application will adapt depending upon the answers provided by the applicant. Conditions can be configured for permit and license applications that prevent the submittal of an application from the online portal when the condition is triggered; for example, if a required certification has expired. Applicants can save in-process applications for completion later.

2.1.3   Calculation and Payment of Fees

Citizenserve enables flexibility in the setup of fees, and each permit or license (application) type can have different fee calculations. All fee schedules can be end dated to inactivate fees and ensure that the correct fees are applied. Citizenserve can accommodate two fee types: manual and automatic fees. Manual fees are assigned by staff with proper security during the workflow. Automatic fees can be set up for ranges or specific values of application fields and can calculate fixed fees or variable fees against application data. The two screenshots below show a fee structure for a Citizenserve customer's Environmental Health Permit.

FEE STRUCTURE EFFECTIVE

| | | | | Start Date | 04/06/2020 | | End Date | | | 1 to 20 of 37 |

ORDER	DESCRIPTION	ACCOUNT CODE	FEE GROUP	AUTO FEE	BASE ON	APPLY TO	RANGE	FEE	ON	
10	Accredited Training Certification Fee			On SubType ⌄ •••	None ⌄	Full Amount ⌄	Begin / End	Base 8.0000000000 / Secondary		PlanCheck / Copy / Delete
11	Accredited Training Certification Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 8.0000000000 / Secondary		PlanCheck / Copy / Delete
12	Credit - Accredited Training Certification Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 1.0000000000 / Secondary		PlanCheck / Copy / Delete
20	Back Country Training Fee			On SubType ⌄ •••	None ⌄	Full Amount ⌄	Begin / End	Base 20.0000000000 / Secondary		PlanCheck / Copy / Delete
21	Back Country Training Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 20.0000000000 / Secondary		PlanCheck / Copy / Delete
22	Credit - Back Country Training Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 1.0000000000 / Secondary		PlanCheck / Copy / Delete
30	Back Country/Food Manager Fee			On SubType ⌄ •••	None ⌄	Full Amount ⌄	Begin / End	Base 55.0000000000 / Secondary		PlanCheck / Copy / Delete
31	Back Country/Food Manager Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 55.0000000000 / Secondary		PlanCheck / Copy / Delete
32	Credit - Back Country/Food Manager Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 1.0000000000 / Secondary		PlanCheck / Copy / Delete
40	Body Art Training Fee			On SubType ⌄ •••	None ⌄	Full Amount ⌄	Begin / End	Base 31.0000000000 / Secondary		PlanCheck / Copy / Delete

Fee Setup Screen for an Environmental Health Permit (screen 1 of 4) – account codes have been obscured

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41	Body Art Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin End	Base 31.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
42	Credit - Body Art Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin End	Base 1.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
50	Food Handler Training Fee		On SubType ⌄ •••	None ⌄	Full Amount ⌄	Begin End	Base 20.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
51	Food Handler Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin End	Base 20.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
52	Credit - Food Handler Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin End	Base 1.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
60	Food Manager Recertification Training Fee		On SubType ⌄ •••	None ⌄	Full Amount ⌄	Begin End	Base 30.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
61	Food Manager Recertification Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin End	Base 30.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
62	Credit - Food Manager Recertification Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin End	Base 1.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
70	Food Manager Training Fee		On SubType ⌄ •••	None ⌄	Full Amount ⌄	Begin End	Base 55.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
71	Food Manager Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin End	Base 55.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete

Fee Setup Screen for an Environmental Health Permit (screen 2 of 4) – account codes have been obscured

FEE STRUCTURE EFFECTIVE

Start Date: 04/06/2020

End Date:

ORDER	DESCRIPTION	ACCOUNT CODE	FEE GROUP	AUTO FEE	BASE ON	APPLY TO	RANGE	FEE	ON	
72	Credit - Food Manager Training Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 1.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
80	Temporary Body Art Fee			On SubType ⌄ •••	None ⌄	Full Amount ⌄	Begin / End	Base 135.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
81	Temporary Body Art Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 135.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
82	Credit - Temporary Body Art Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 1.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
150	Credit Student Discount 50%			On Custom Field ⌄ •••	Other Fees ⌄ •••	Full Amount ⌄	Begin / End	Base 0.5000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
200	Re-Inspection Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 175.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
1000	Misc Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 1.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
1010	Credit			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 1.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete
2057	Accredited Training Certification Fee			Never ⌄	None ⌄	Full Amount ⌄	Begin / End	Base 1.0000000000 Secondary		☐ PlanCheck ☐ Copy ☐ Delete

Fee Setup Screen for an Environmental Health Permit (screen 3 of 4) – account codes have been obscured

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2058	Back Country Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin ___ End ___	Base 1.0000000000 ___ Secondary ___	☐ PlanCheck ☐ Copy ☐ Delete
2059	Back Country/Food Manager Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin ___ End ___	Base 1.0000000000 ___ Secondary ___	☐ PlanCheck ☐ Copy ☐ Delete
2060	Body Art Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin ___ End ___	Base 1.0000000000 ___ Secondary ___	☐ PlanCheck ☐ Copy ☐ Delete
2061	Food Handler Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin ___ End ___	Base 1.0000000000 ___ Secondary ___	☐ PlanCheck ☐ Copy ☐ Delete
2062	Food Manager Recertification Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin ___ End ___	Base 1.0000000000 ___ Secondary ___	☐ PlanCheck ☐ Copy ☐ Delete
2063	Food Manager Training Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin ___ End ___	Base 1.0000000000 ___ Secondary ___	☐ PlanCheck ☐ Copy ☐ Delete
2064	Temporary Body Art Fee		Never ⌄	None ⌄	Full Amount ⌄	Begin ___ End ___	Base 1.0000000000 ___ Secondary ___	☐ PlanCheck ☐ Copy ☐ Delete
2065	Credit Student Discount 50%		Never ⌄	None ⌄	Full Amount ⌄	Begin ___ End ___	Base 1.0000000000 ___ Secondary ___	☐ PlanCheck ☐ Copy ☐ Delete

Fee Setup Screen for an Environmental Health Permit (screen 4 of 4) – account codes have been obscured

Citizenserve will set up the City's fees and map them to the City's account codes during implementation, and maintenance of the City's fees (changes to current fees and the addition of new fees) is included as part of the subscription's unlimited support. Citizenserve enables fees to be calculated for applications and paid from the counter or, with integration to a payment processor, securely paid from the portal. The City determines when fees are displayed on the portal to the applicant.

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FEES

FEE	DESCRIPTION	QUANTITY	AMOUNT	TOTAL	
Type 2 Food Establishment Fee				280.00	
EH-FOOD SERVICE	FY18-19	1.0	280.0000	280.00	🗑
EH-FOOD SERVICE	FY19-20	1.0	280.0000	280.00	🗑
EH-PRE OPEN INSP LIC	FY18-19	1.0	125.0000	125.00	🗑
Type 2 Food Establishment Fee	FY20-21			280.00	
Type 2 Food Establishment Fee	FY21-22			280.00	
Type 2 Food Establishment Fee	FY22-23			280.00	
			Review Fees	0.00	
			License Fees	1,805.00	
			Total Fees	1,805.00	

PAYMENTS

DATE	TYPE	REFERENCE	NOTE	RECEIPT #	RECEIVED FROM	AMOUNT	
08/28/2018	CHECK	1002		21079		405.00	📄
08/22/2019	CHECK	9069		21080		280.00	📄
08/26/2020	Credit	7157465		40936		280.00	📄
08/13/2021	Check	2572		1199		280.00	📄
08/11/2022	Credit	8973595		2627		280.00	📄
08/21/2023	Check	10152		2113		280.00	📄
					Amount Paid	1,805.00	
					Balance Due	0.00	

Fees and Payments on the Permit Screen (identifying information is whited out)

We have included PCI-compliant integration to a payment processor in our bid to enable the payment of fees from the portal with a credit card. The system will reflect that a fee was paid, amount and type of payment, and date/time of payment. Payments can be applied across fees and the History will show when the fee(s) were paid. Staff can view permit and license fees and payments that have been applied on the Permit or License Screen. Fees can also be added to activities. If the activity has a fee structure defined, the activity will display fee, payment, and refund information. Fees can also be added to inspection activities.

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
2.1.4 Workflows

The workflows and associated reviews for permits and licenses can be quickly and easily built. The City can identify an unlimited number of unique permit and license types and associated workflow routes and due dates. Citizenserve will build the permits and licenses and associated workflows for the City during implementation. If permits or licenses are added or changed, Citizenserve support staff can make the changes under Citizenserve's unlimited support.

The submission of a permit or license application by an applicant from the portal (or by staff entering an application for a customer) kicks off a workflow. Workflows can be configured to determine the appropriate route based on a variety of criteria such as permit or license type and specific fields in the application. Permit and license reviews can be configured to dynamically route the application to different departments or individual users based on information entered during the review.

Citizenserve's role-based security enables you to decide who can view permit and license information and review feedback. Workflows can be easily configured and changed in citizenserve, and staff users can quickly identify the status of each of the steps in the workflows for permits and licenses. Workflows can be configured to notify one or more staff at key steps in the workflow, such as when a request is made for a review. Citizenserve maintains a complete, timestamped history of all actions taken on permit and license applications, including steps in a workflow such as application received, permit issued, and application complete.

The below example shows the Review steps in a workflow that has been set up for a commercial septic permit. The application has completed the Application Intake and has been reviewed and approved by the Development Services, Environmental Health, and Fire Departments and is awaiting review by the Engineering Management of the Engineering and Natural Resources Department. The ASSIGNED TO column has been whited out to mask the names of individual staff members.

NON-RESIDENT ACCESSORY STRUCTURE		CP23-000127		APPROVED		🗑
ACTIVITY TYPE ⌄	**DEPARTMENT** ⌄	**ASSIGNED TO** ⌄	**STATUS** ⌄	**DUE**	**COMPLETED**	
Permit Application Intake Checklist	Development Services		Approved	09/20/2023	09/26/2023	🗑
Permit Plan Review	Development Services		Approved	10/10/2023	11/16/2023	🗑
Department - Engineering and Natural Services	Engineering and Natural Services	Engineering Management		10/10/2023		🗑
Fire Department	Development Services		Approved	10/10/2023	10/05/2023	🗑
Environmental Health Plan Review	Environmental Health		Approved	10/10/2023	10/02/2023	🗑
Planner	Development Services		Approved	10/10/2023	10/02/2023	🗑
Final Review	Development Services		Approved	10/10/2023	11/16/2023	🗑

Staff View of a Commercial Septic Permit Workflow Route Display (identifying details whited out)

2.1.5 Applicant Notifications and Communication

There are a variety of ways staff can communicate with an applicant. The application workflow can be configured to send emails at designated points in a workflow; for example, a review activity can be completed and a template email generated to be sent to the applicant and any other people involved in the project. Emails can be edited prior to sending, if desired, and all emails sent from citizenserve will appear as if they were sent from the City's email system (the "From" information will show the associated City of Laredo email address) and will be stored as a document in the associated case file. Ad hoc emails can be written and sent anytime, with a copy of the email stored on the Documents tab.

Another means of communicating with applicants is through the portal. The portal can be configured so that constituents who submit permit and license applications or complaints have access to status information. From the My Requests screen a portal user can view all their applications, complaints, and requests. Below are screenshots that show a view of the View Permit screen that is accessible by a customer from the portal; the tabs for Permit, Review, Documents, and Inspections show the status information that is available to the applicant. It's easy for staff and customers to collaborate through the information, documents, and inspection requests on the online portal, or through staff emails and letters generated within citizenserve. Because the portal and citizenserve modules all use the same database, data entered and documents uploaded by staff are immediately available to the applicant on the portal, and applications, documents, and data entered by the applicant are immediately available to staff.

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Online Portal View Permit Screen, Documents Tab (Residential Septic Permit Application)
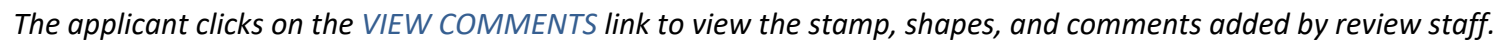

Online Portal View Permit Screen, Permit Tab for a Residential Septic Permit (top of application)

It's also easy for an applicant to identify and access review comments. The below screenshot shows the review comments that an applicant has accessed from the portal by clicking on the

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blue VIEW COMMENTS hyperlink from the Documents tab. The applicant can also click on the blue VIEW COMMENTS hyperlinks from the Reviews tab to access comments from individual reviewers (not shown).

The applicant clicks on the VIEW COMMENTS link to view the stamp, shapes, and comments added by review staff.

Town of Buena Vista

Home   Services   Search   Reports   My Account

☁ VIEW PERMIT

Home / Services / Permits / View Permit

📷 Make a payment

✅ Request an inspection

📄 Upload documents

💬 Leave message

Your permit is not issued until an issue date is displayed below.

Permit #: B22-000038
Project #: 22-000096
Status: Finaled
Balance Due: $0.00
Address: 921 BAKERSFIELD ST 📍
Description: New SFH - Georgia Tech

Permit | Reviews | Documents | Inspections

Task	Department	Start	Completion	Status
Application Intake	Building	04/01/22	04/01/2022	Approved VIEW COMMENTS →
Application Review	Building	04/01/22	04/01/2022	Resubmittal Required VIEW COMMENTS →
Required Inspections	Building	04/01/22	04/01/2022	Complete
Application Review	Engineering	04/01/22	04/01/2022	Pending

View Permit portal screen enables portal users to leave and retrieve messages

Another easy way for applicants to communicate from the portal is through the Message feature. The above screen shot shows both the Leave message link that enables portal users to send messages to staff and the Messages link that enables portal users to retrieve their messages from staff. When a portal user sends a message, the staff member who is the addressee will see an icon notification in their citizenserve dashboard that shows the number of unread messages they have. When a staff member sends a message, the portal user can click on a link from the portal to retrieve the message:

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💬 **MY MESSAGES**

Home / Messages

💬 **From in the Business Licensing Department**

Sent to kara@citizenserve.com; on 04/17/2025
License #:BL25-000009
Address: 941 BAKERSFIELD ST
Description: Lucky's Food Truck

Kara the business license file you included with your application is corrupted, can you please upload another?

REPLY →
MARK AS READ →

Example of a staff message sent to a portal user

One critical feature in citizenserve is the ability to set User Notifications and Assignments for each permit, license, and case type so staff and departments are notified when portal users take action on the portal. For example, if a staff member requests a revised plan document, the notification matrix will let the staff member know when the document is uploaded. Without notices of actions taken on the portal, the staff would have to keep checking the file for the uploaded document.

TYPE	RESPONSIBLE USER
Special Event Application	Do Not Assign
Environmental Health Permit	Do Not Assign
Special Event Coordinator Application	Do Not Assign

☰ CREATE ACTIVITIES

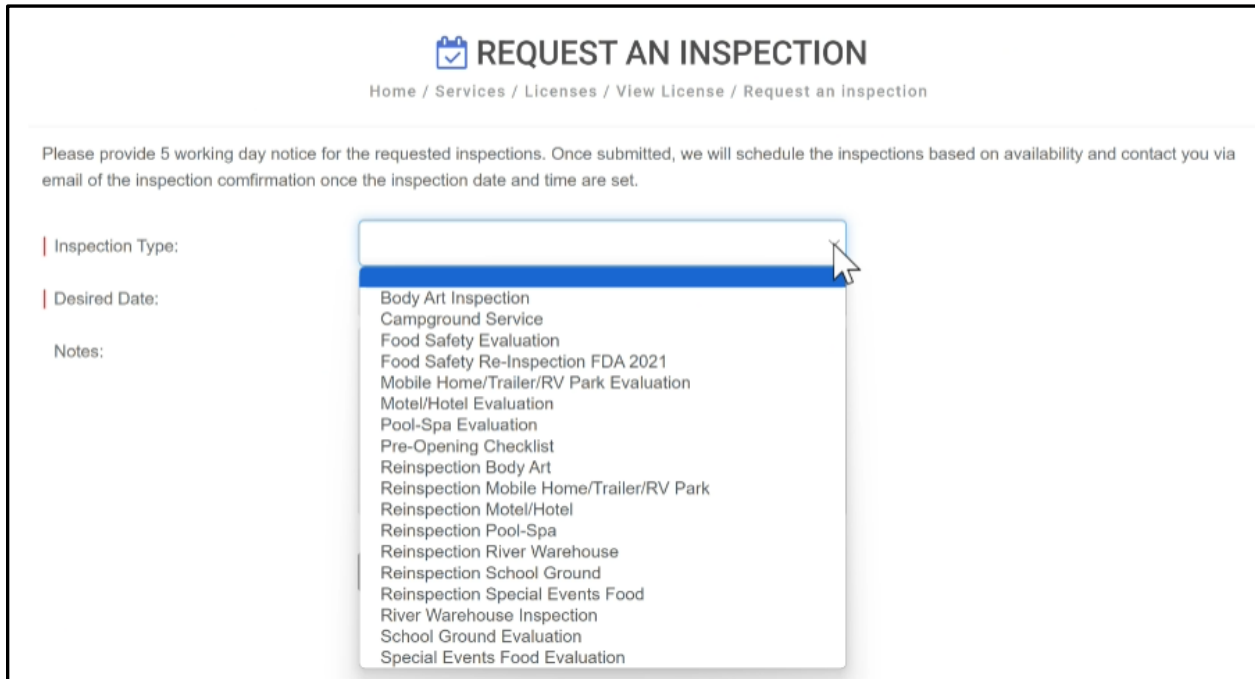| TYPE	ON NEW	ON MODIFY	ON PAYMENT	ON INSPECTION REQUEST	ON RESCHEDULE/CANCEL	ON LEAVE MESSAGE	ON DOCUMENT UPLOAD
Special Event Application	Respons...	Responsib...	Responsible	Add to Unassigned Activity	Do Not Notify	Add to Unassigned A...	Add to Unassigned Acti...
Environmental Health Permit	Do Not No...	Do Not Notif...	Do Not Notify	Add to Unassigned Activity	Do Not Notify	Add to Unassigned A...	Add to Unassigned Acti...
Special Event Coordinator Application	Respons...	Do Not Notif...	Responsible	Add to Unassigned Activity	Do Not Notify	Add to Unassigned A...	Add to Unassigned Acti...

✉ SEND EMAIL

TYPE	ON NEW	ON MODIFY	ON PAYMENT	ON INSPECTION REQUEST	ON RESCHEDULE/CANCEL	ON LEAVE MESSAGE	ON DOCUMENT UPLOAD
Special Event Application	Do Not No...	Do Not Notif...	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify
Environmental Health Permit	Do Not No...	Do Not Notif...	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify
Special Event Coordinator Application	Do Not No...	Do Not Notif...	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify	Do Not Notify

Sample Citizenserve User Notifications and Assignments Configuration Screen
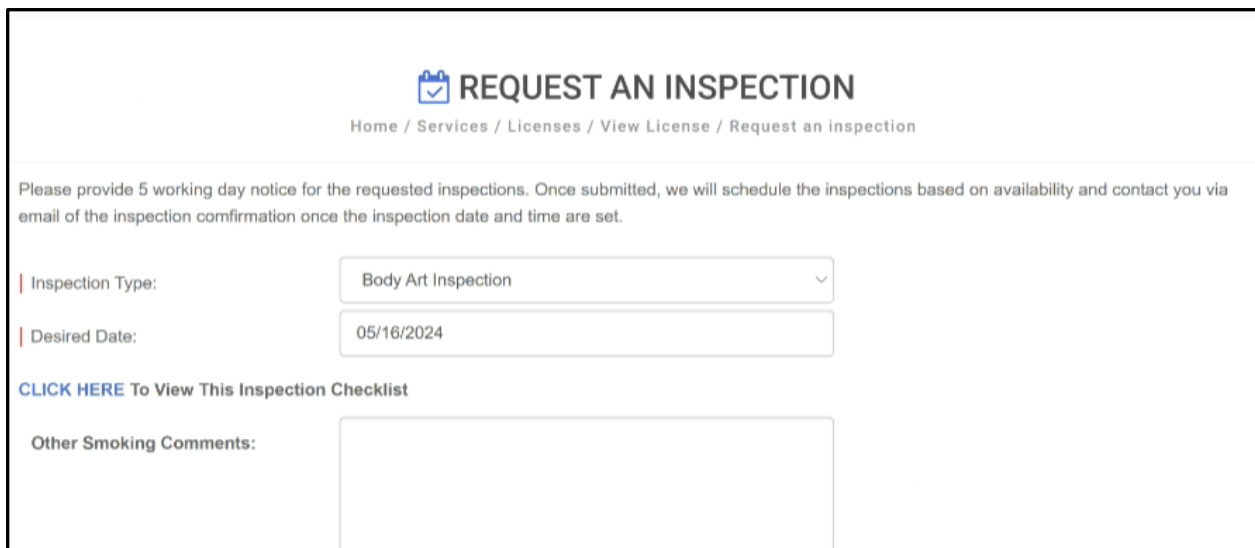
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2.1.6   Mobile Inspections

Citizenserve supports the creation of an unlimited number of inspection types, including health and environmental inspections. Citizenserve easily manages annual inspections. Each inspection type can be set up as a custom form or to-do list with template outputs such as an inspection report. Templates can be created as letters, emails, or any other combination of text and graphics. Individual checklists can be created for each different inspection type.

Customers can request an inspection from the portal; the inspection types are customizable

You can configure hyperlinks to inspection checklists so the applicant is prepared for the inspection (optional)

COCONINO COUNTY
ENVIRONMENTAL HEALTH

PUBLIC HEALTH SERVICES DISTRICT
COCONINO COUNTY

Body Art Sanitation Inspection Form

Critical

Non-Critical

Closed ☐

FACILITY_____ ID#_____

ADDRESS_____ INSP/TYPE_____

Time in:

Time out:

(y=yes n=no n/o=not observed n/a=not applicable, * Critical Violation)

Requirements for Premises

1. y n n/o n/a   Floors/walls/ceilings clean and good repair.
2. y n n/o n/a   Lighting and ventilation as required.
3. y n n/o n/a   Equipment storage clean and organized.
4. y n n/o n/a   Single-use items stored clean and organized.
5. y n n/a   **Animals limited as required.***
6. y n n/o n/a   Waste receptacles are clean, covered and labeled.
7. y n n/o n/a   **Proper red sharps container for needles.***
8. y n n/o n/a   Bathrooms are clean and in good repair

Hand / Instrument Sinks

9. y n n/o n/a   **Hand sinks provided, adequate, clean, accessible.***
10. y n n/o n/a   **Hand sinks equipped with hot and cold running water.***
11. y n n/o n/a   Hand sink equipped with dispensed soap and paper towels.
12. y n n/o n/a   **Instrument sink is available, separate, equipped with hot and cold water.***

Sanitation and Sterilization Procedures

19. y n n/o n/a   **Approved sanitizer available, properly stored, labeled.***
20. y n n/o n/a   Procedure surfaces and chairs cleaned and sanitized.
21. y n n/o n/a   Peel packs labeled with date of sterilization.
22. y n n/o n/a   **Steam autoclave clean, good repair and functional.***
23. y n n/o n/a   **Sterile equipment properly packaged, indicators on/in peel packs.***
24. y n n/o n/a   **Ultrasonic unit available and used properly.***
25. y n n/o n/a   **Operators are demonstrating effective hygiene/sanitation practices.***
26. y n n/o n/a   Proper skin preparation for body art.

Documentation

27. y n n/o n/a   **Monthly 3rd party spore destruction test results.***
28. y n n/o n/a   Release form and aftercare instructions are approved.
29. y n n/o n/a   Release form or aftercare signed by client and operator.
30. y n n/o n/a   Records maintained for min. of 3 years.
31. y n n/o n/a   **Records accurate for procedures performed on minors.***

Coconino County, Arizona Body Art Inspection Checklist

Citizenserve is device and browser independent, so your inspectors can access the full functionality of citizenserve from the field. Any information entered in the field is immediately available to staff in the office, and vice versa; no synching of data is required. As a fully mobile solution, inspectors are notified of inspections due and can look up property ownership information, fill out an inspection report, add violations, take and attach photos, mark up images, generate tickets or notices of violation, and schedule re-inspections – all in the field from a laptop, iPad, or other mobile device. Your inspectors can write tickets for violations from the field using a mobile device, provide a signature, and print tickets using a Bluetooth printer. Photos can be taken and added directly from device cameras.

Your inspectors can select from multiple code sections, including health and environmental codes. As part of Citizenserve's unlimited support, we will ensure that your codes are kept current. Inspectors can also add inspection comments using speech-to-text from iPads and other devices that support this feature. We also have an offline inspection mode that enables inspectors to conduct inspections from the field when coverage is unreliable.

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2.1.7 Complaint Tracking & Investigation

Citizenserve completely automates the process of routing complaints, opening cases, scheduling inspections, recording violations, generating case forms, and coordinating resolutions. Citizens can enter complaints and check on the status from the online portal. We will work with the City to configure business rules in citizenserve to automatically route complaints to the appropriate department for quick action.

Property ownership, inspection results, photos, notices, violations, and notes become an electronic record of each case. Citizenserve's robust case management capabilities enable code enforcement cases to be created with multiple violations, and each violation can be tracked and resolved separately. We can build violation types to reflect local codes, and maintenance of violation types and codes is included in our unlimited support. You can add violations to a file and filter by section to list only the applicable violations.

Public portal users can submit complaints from the portal

An unlimited number of people, businesses, and other contact types can be associated with a case, and each person or entity can have a different association with the case. An unlimited number of notice or letter forms can be created; each can be completely customized and can initiate database processes such as fee assessment or file status changes. Code cases can be

prioritized and escalated. Code enforcement case processes can take a case from complaint through resolution.

Code inspections can be scheduled automatically according to complaint type or can be added manually. Code cases can be assigned to inspectors based upon geographic attributes provided through integration to the City's ESRI GIS. Citizenserve has a built-in device and browser independent calendar feature that allows inspections and tasks to be easily assigned and managed. Inspectors can select a setting to email them a calendar invitation when an inspection is scheduled. The email contains an ICS file that adds an appointment to the inspector's Outlook calendar, similar to how appointments and meetings created in Outlook are sent from these calendars to meeting attendees and added to their calendars when they choose the Accept option.

As a fully mobile solution, code enforcement inspectors are notified of inspections due and can look up property ownership information; enter their findings from an inspection; add violations; add freeform notes; take and attach photos; generate tickets, notices of violation, or warnings; close violations after verifying the required fix; and schedule re-inspections – all in the field from a tablet or laptop. Enforcement documents and forms can be generated in the field using an iPad or other mobile device and Bluetooth printer. We also have an offline inspection mode that enables inspectors to conduct inspections from the field when coverage is unreliable.

2.1.8 Permit and License Document Issuance

An unlimited number of permit and license documents can be created. Inspectors can create documents from the field that are automatically attached to the case, including photos, notices of violation, permit cards, certificates of compliance, or other documentation generated during an inspection. Any of the documents can be generated in the field and emailed using an iPad or other mobile device or printed with a Bluetooth printer.

Certificate of Compliance

The Onsite Wastewater Treatment System (OWTS) and/or well at the below stated address was inspected and found to be in compliance with all State and County regulations.

Comments (if any):

Reviewer: Patrick Hackmann, Building and Code Enforcement - 636-949-7345 x7287◆(phackmann@sccmo.org)

   1. **Comment** - Meets assessment criteria

OWC24-000069	MISSOURI	DR IN ST. CHARLES COUNTY,		04/04/2024
Permit Number	Property Address		Steve Swinney Building Inspector	Issuance Date

This property meets all requirements of the Private Sewage Disposal Code of St. Charles County.

St. Charles County's favorable evaluation of OWTS and wells shall not be construed in any court as a warranty of their adequate performance in the future. This certificate shall be valid for the period as determined by local requirements.

Example Septic Well Certificate of Compliance (identifying details are whited out)

The Citizenserve implementation manager will work with the City during implementation to build all documents that will be issued and identify points in the workflows where the documents are generated and the conditions for issuance. We will include the text, graphics, and fields required by the City; we can either replicate existing documents or can use the existing document as a starting point and include changes. Documents such as permit cards or licenses can be designated to be placed on the portal so the applicant can download, review, and print them.

2.1.9   Reporting and Dashboards

Reporting

While citizenserve has a robust list of standard reports, most customers request custom reports to meet individual business decisions and processes. The Citizenserve implementation manager will provide guidance to the City's team members on the iterative process of identifying and designing the reports by functional area, including leveraging reporting and best practices from other customers. Each Citizenserve subscription includes the development of an unlimited number of custom reports. Below is an example Permits Issued map report.
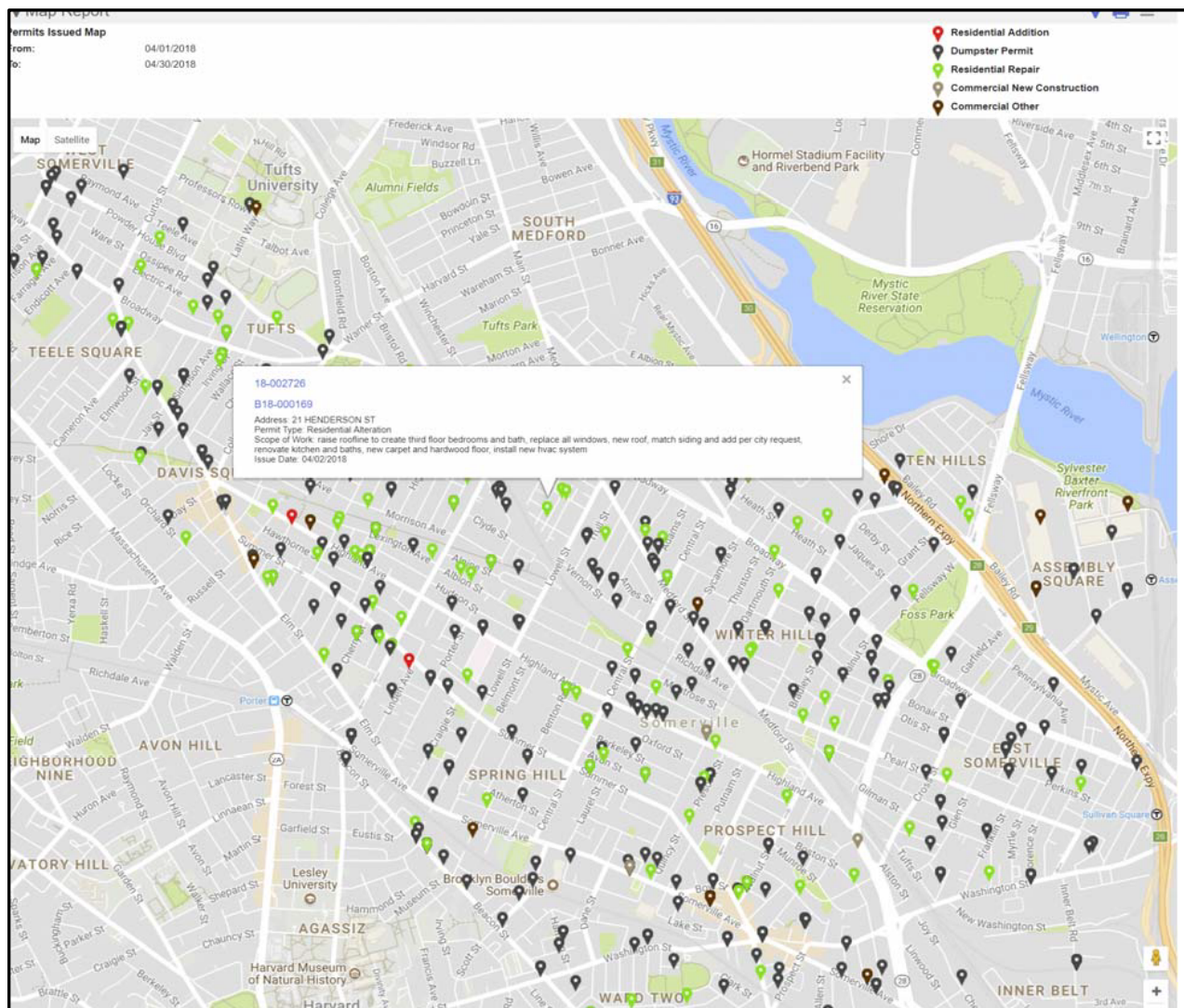
Sample Citizenserve Map Report

Citizenserve reports can be tabular, maps, and charts. We will work with the City during implementation to identify and develop the required reports; post go live, the City's subscription includes the development of an unlimited number of additional custom reports. Citizenserve reports are rendered in HTML, and HTML can be used within the report, such as a link to a graphic displaying status. Reports are interactive; a click on a map report will show the underlying tabular information and provide a link to the underlying file, such as a permit. Citizenserve also supports merge reports where the information from the report is merged with a template letter or email; merge reports save a copy of the letters generated to their files.

Reports can perform processing, such as a report that generates invoice statements, late fees, or penalties, and can be added to the file. Tabular reports can be exported to Excel format. Any report can be saved as a PDF for archiving. All reports can be put on the online portal for public consumption, and reports can be placed anywhere on the portal pages.

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There is a built-in end-user reporting wizard in citizenserve that allows non-technical users to design their own reports and share the reports with others. The reporting tool allows users to report on any fields in the database. End users can create their own tabular, map, chart, and merge reports.
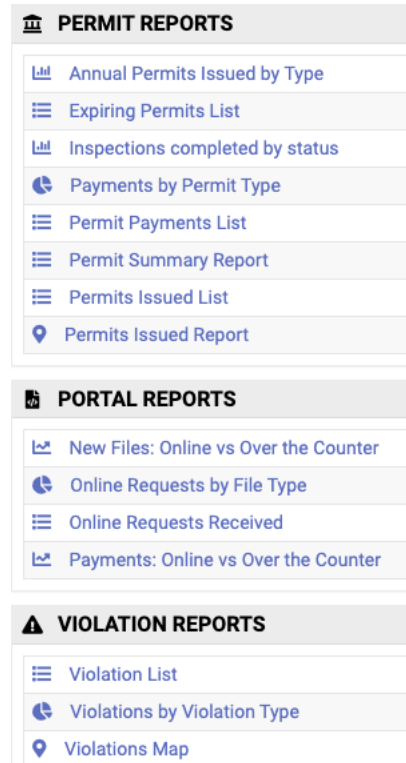

Citizenserve's Reporting Wizard Enables the Inclusion of Any Field, Mathematical Conditions, and Totals

Citizenserve has a robust offering of standard reports. Don't see the report you need? You can create your own report with citizenserve's reporting wizard, or have a custom report developed for you by a Citizenserve Support team member in less than a day.

STANDARD REPORTS

◉ MAP REPORT

◉ Proximity Search

☰ ACTIVITY REPORTS

☰ Completed Activities By Type and Users Report
◐ Completed Activities By Users Report
☰ User Activity Report

◉ CODE ENFORCEMENT REPORTS

☰ Close Time Report
☰ Initial Response Time Report

📁 FILE REPORTS

☰ File Category Report
☰ File Status Report
📊 Files by Type
◉ Files Opened by File Type

💼 LICENSE REPORTS

☰ Expiring Licenses List
☰ License Payments List
☰ Licenses Issued List
◉ Licenses Issued Report
◐ Payments by License Type

🏛 PERMIT REPORTS

📊 Annual Permits Issued by Type
☰ Expiring Permits List
📊 Inspections completed by status
◐ Payments by Permit Type
☰ Permit Payments List
☰ Permit Summary Report
☰ Permits Issued List
◉ Permits Issued Report

📊 PORTAL REPORTS

📈 New Files: Online vs Over the Counter
◐ Online Requests by File Type
☰ Online Requests Received
📈 Payments: Online vs Over the Counter

⚠ VIOLATION REPORTS

☰ Violation List
◐ Violations by Violation Type
◉ Violations Map

Citizenserve Standard Reports (page 1)   *Citizenserve Standard Reports (page 2)*

Dashboards

Citizenserve provides multiple dashboards to enable your users to quickly obtain the information they need. Dashboards are very easy to configure and change by simply selecting the desired metrics from a list of available metrics, or Citizenserve will create any custom metric containing the data a user requests as part of our unlimited support. Four types of metrics are available: chart, report, single, and trend metrics.
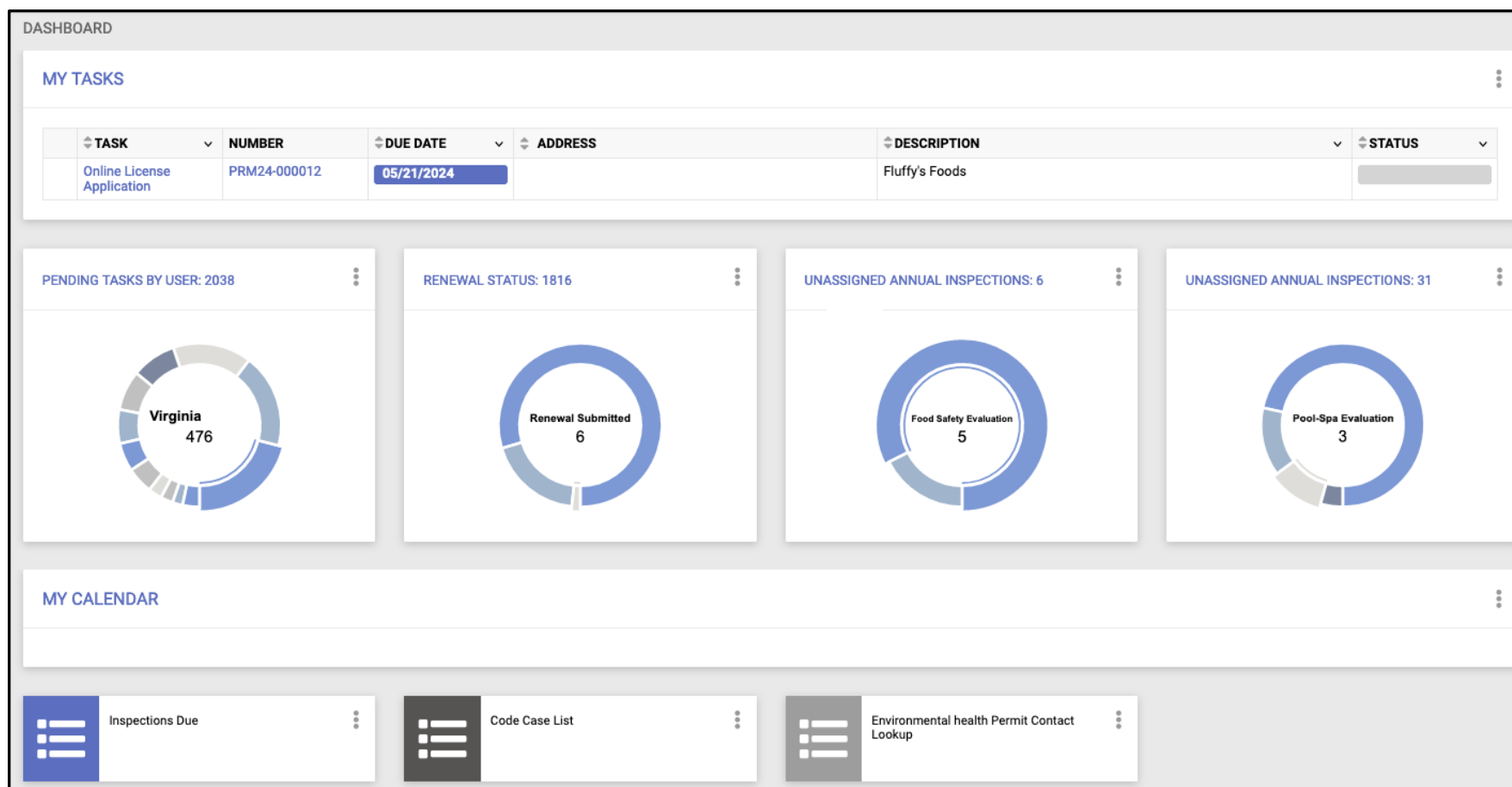
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Example Citizenserve Dashboard – Environmental Health User

Single Item Metrics. Single item metrics provide quick access to your most important metrics. Each metric is fully customizable, including the data that is displayed when you click the metric to view detailed information.

Open Files	Rental Renewals Submitted
✓ 5 ⋮	🧯 268 ⋮

OPEN FILES ⊗

FILE#	ADDRESS	OPEN DATE	DESCRIPTION
20-010646		04/22/2020	Hair salon is still open and not practicing social distancing measures. rot
21-016910		03/11/2021	BUSINESS ON THE RIGHT HAS A FRIDGE OUTSIDE FOR HOMELESS TO HAVE ACCESS TO. CP DOESN'T WANT THE FRIDGE THERE. SHE STATES THEIR IS A LOT OF GARBAGE OUTSIDE IN THIS AREA FROM THE HOMELESS AS WELL. THE FRIDGE IS A HAZARD AND ATTRACTS HOMELESS TO THE BUSINESS. FRIDGE IS BLACK AND THEY HAVE A PURPLE BOOK SHELF., LOCATION: RD
22-007240		02/10/2022	PO SET OUT A COLORFUL REFRIGERATOR ON THE PROPERTY VISIBLE FROM THE STREET THAT HAS A SIGN ON IT THAT SAYS COMMUNITY REFRIGERATOR
22-017865		04/28/2022	ROAD CLOSURE WITHOUT REQUIRED PERMITS VIOLATING SCC 12.24.110 PEDESTRIAN AND VEHICLE INTERFERENCE
22-022865		06/03/2022	unknown

Example single item metrics. Clicking on the Open Files metric opens the list of open files.

Chart Metrics. Chart metrics give you the ability to view complex performance metrics in a single graph. Each metric is fully customizable and there is no limit to the number of metrics you can have.

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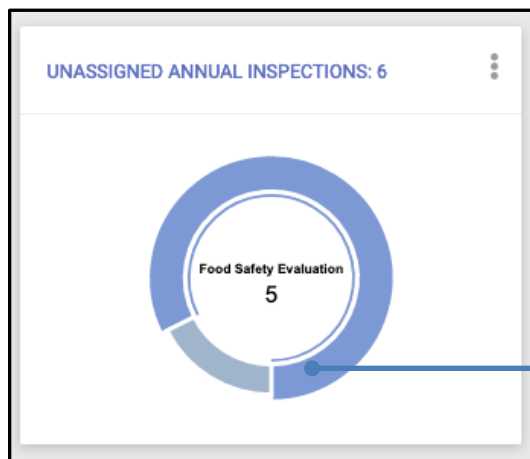
Hovering over a different colored segment of the chart displays specific information; in this case, the user is displaying the number of Food Safety Evaluation inspections that are unassigned. Clicking on the segment opens the related list of inspections.

Example Chart Metric

Trend Metrics. Trend metrics give you the ability to view data over time, such as number of inspections, response time, or number of cases opened. Trend metrics are fully customizable and can be set up for annual, monthly, weekly, or daily comparisons.

Example Trend Metric

User Locations. With user locations you can see exactly where your inspectors are in the field at any time.
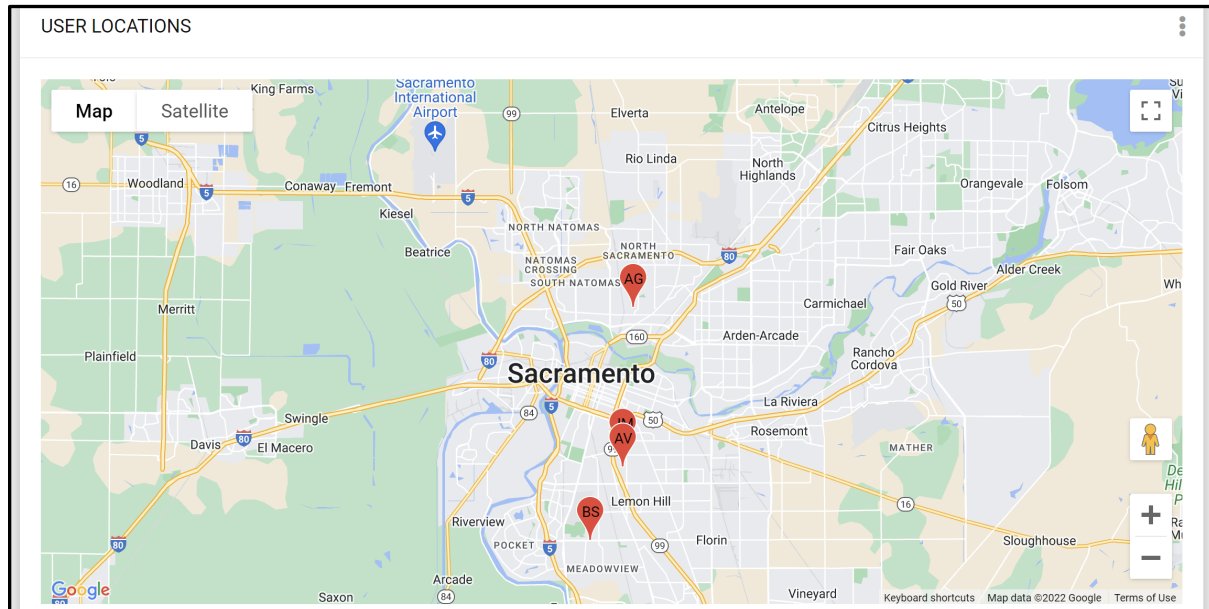
Example User Locations Map

Clicking on the map marker will display the inspector, the location, and the arrival date and time.
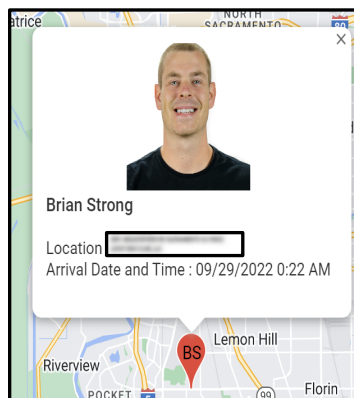
Example Inspector Drill Down

My Tasks. With the My Tasks list each user can view their inspections or tasks due on a list (shown below) or a map (accessed by selecting Map View from the drop-down). You can filter by status, priority, or due date.

View Your Inspections or Tasks Due in a List View (identifying details have been masked)

View your inspections or tasks due in a map view

Each User Can Add Metrics to Individual Dashboards

Each user can add metrics and configure their individual dashboard to display the metrics of interest, and it's easy to request custom metrics from Citizenserve's Support Center, at no additional charge. For example, a map report can be added to a user's dashboard that enables filtering for all permit or license types.

Each User Can Configure Individual Dashboards

2.1.10 Multilingual Capabilities

We use browser translation tools such as Google Translate (which supports 133 different languages) to accommodate multilingual portal and staff users.

Browser translation tools accommodate multilingual users

2.2   Citizenserve System Architecture, Hosting Environment and Security

2.2.1   Citizenserve System Architecture

Citizenserve is only offered as a Cloud-based or Software-as-a-Service (SaaS) subscription. Citizenserve is device independent; it can be accessed from any desktop, laptop, tablet, phone, or other mobile device, including both iOS and Android devices. Citizenserve can be used on cellular and wireless networks from any location.

Citizenserve works on all contemporary browsers. For security reasons, we recommend current versions of the major browsers: Safari, Chrome, Edge, or Firefox. Citizenserve cannot be used on Internet Explorer, as Internet Explorer does not support HTML5 and is no longer maintained (thus opening security vulnerabilities). The application is developed with HTML5 and JavaScript and does not require any applications to be loaded locally on the desktop or device.

We developed citizenserve 22 years ago running on a Java application server with a middle tier of Enterprise Java Beans using a backend database of Microsoft SQL Server. This is the same technology we use today, although we incorporate much more JavaScript and HTML5 today as the current browser technology richly supports these features. Since we offer unlimited support to end users and technical staff, we are motivated to keep the application easy to use and focus on usability.

We have included a copy of our System Architecture design on the following page.

2.2.2 Citizenserve Hosting Environment

We house our customers' data in the Iron Mountain data centers. Our primary data center is in Phoenix, Arizona; our full backup data center is located in Edison, New Jersey. Both data centers are Uptime Institute Tier III Design Certified and SSAE 16 SOC 2 Type II Certified and are audited annually by Schellman & Company, LLC.

Physical security is managed by the Iron Mountain Data Center. The data centers are gated and secure. Iron Mountain employees and partners do not have logical access to Citizenserve systems hosted within their data centers. All Iron Mountain employees and partners undergo thorough background checks. Access to the data centers is restricted through controlled card access systems. Data halls are secured with retina scan, key card, and PIN. Additional security includes mantraps and tailgate prevention. CCTV monitoring occurs 24/7/365, and security officers are onsite 24/7/365.

The Citizenserve equipment in the Iron Mountain Data Center facilities is dual corded, receiving power from two separate feeds, including separate power supplies. The equipment itself has dedicated uninterruptable power supplies and staggered power to redundant power supplies.

All Iron Mountain Data Centers have advanced fire suppression systems:

- Three-hour fire-resistant firewalls between each storage chamber.
- Roofs constructed with noncombustible steel and metal decking and protected with NFPA-compliant sprinklers.
- Roof support structures independently support each records storage chamber in the event of a fire or natural disaster.
- Integrated water backup supplies exceed fire hose and sprinkler standards of two hours.
- Fire detection and suppression systems are built according to guidelines set by the National Fire Protection Association.

Citizenserve runs with a single code base in a multitenant environment. We replicate all databases, application servers, and operations from the primary data center in Phoenix, Arizona to the backup data center in Edison, New Jersey. We operate under a business continuance approach; in a failover situation, all our support and test systems need to be available for us to continue operations. We also replicate locally in Phoenix. We have copies locally of all servers in the event of a server failure.

Incremental backups or logs are made every 15 minutes and the logs are kept indefinitely so data can be restored to any point in time. Full backups are performed weekly and whenever a new version is released. Full backups are always test restored in read-only recovery mode to

Citizenserve Architecture Diagram

Tempe Management & DR

Database Servers

Mail Server

Tempe Firewall

File transfer Server

Site to Site VPN

Internet

Site to Site VPN

Phoenix DC Firewall

Management Stations

Phoenix DC Management (DMZ)

New Jersey Data Center DR

WEB App Servers

New Jersey Firewall

Database Servers

Private Transport

Database Servers

Mail Relay Server

WEB App Servers

File transfer Server

Transport Router

Phoenix Data Center (LAN)

allow for logs to be restored, if necessary, to the backup copy. Database consistency checks are performed regularly with offline copies. At least one full copy is maintained per month for historical archiving. Combined with the logs, we can restore to any point in time.

Online database replicas are maintained at the primary data center. In the event of a hardware failure, we do not have to switch to the secondary data center. Data is replicated to a regionally diverse location in the secondary data center. System Recovery Time Objective (RTO) on production servers for minor failures such as a server failure is less than one hour. RTO on production servers for major failures such as a data center failure is four hours. System Recovery Point Objective (RPO) is 15 minutes on application servers and database servers.

2.2.3   Citizenserve Security

We take the security of our customers' data very seriously. Citizenserve has never had an electronic or physical security breach. Our security protocols are described below.

Data Encryption. Citizenserve encrypts data at rest on workstations and devices through browser security encryption using TLS. Client data is encrypted at the browser level using a GoDaddy encryption certificate; data cached in the browser is also encrypted. All data sent over the internet is encrypted using HTTPS. Citizenserve enforces masking of PII and/or financial related information through application security.

Prevention of a DDoS. Citizenserve has never had an electronic security breach. We use Malware Bytes to scan emails for emerging threats. Citizenserve uses two different companies for vulnerability scans: Halo Security (formerly TrustedSite) and Tenable. Both are SOC 2 and FedRAMP certified. We have Windows and SQL Server alerting configured to notify the CIO/CISO and Director of Information Architecture of potential issues. Application logs are always available to enable usage analysis. We run penetration tests annually as part of our annual PCI DSS and SOC 2 Type 2 credentialing.

We use the Sonic Wall Suite with Analytics firewall; alerting is configured to notify the CIO/CISO and Director of Information Architecture of any potential threats. Features and protection types include:

- Stateful packet filtering – rule-based port and device access to resources.
- GeoIP – Allows traffic filtering based on geographic location.
- Gateway Anti-Virus – Enforces virus scanning on all incoming data for HTTP, FTP, and SMTP.
- Intrusion Prevention – Protects against agent and script-based attacks.
- Anti-Spyware - Protects against specific trojan and adware-based attacks.
- Botnet filtering - Blocks connections to/from Botnet Command and Control Servers.

- Real time alerting – Monitors and alarms at critical conditions.
- Syslog and analysis – Provides long-term log recording and traffic analysis.

Employee Background Checks. We run background checks on every Citizenserve employee as part of the hiring process.

Employee Security Training. Every Citizenserve employee takes multiple security training classes annually to ensure an ongoing focus on secure practices, the latest sources of vulnerability, and prevention of threats. Training includes:

- 2025 Common Threats,
- Intro to PCI DSS,
- Putting Data Protection into Practice,
- Internet Security When You Work from Home,
- Phishing Foundations,
- Protect Yourself from Ransomware, and
- Security Application Development: OWASP Top 10 (for technical staff).

File Integrity Monitoring. The ManageEngine DataSecurity Plus file integrity monitoring solution (the File Audit module) is configured on our DevOps servers to enforce Separation of Duties. The software is configured to send emails to the Infrastructure Director every time a change is made to a file on one of the DevOps servers (add, delete, or change). The Infrastructure Director is the only person with rights to change the notifications.

Cybersecurity Insurance. We have cyber insurance that includes breach investigation and mitigation; we will include the City as additional insured.

PCI DSS Certification. We store no credit card information in our databases, just a confirmation code for each credit card transaction. Citizenserve is credentialed annually as a Payment Card Industry (PCI) DSS Level 2 Service Provider with Abrams Security Group, a PCI DSS certified Qualified Security Assessor.

SOC 2 Type 2 Audits. Citizenserve is audited annually for Service Organization Control 2 (SOC 2) Type 2 compliance with Moore Colson.

Backup & Recovery and Disaster Recovery Strategies. Citizenserve has a Business Continuity/Disaster Recovery (BCDR) plan in place that complies with NIST SP 800-53.

Primary Data Center and Failover Site. We house our customers' data in the Iron Mountain data centers. Our primary data center is in Phoenix, Arizona; our full backup data center is located in Edison, New Jersey. Both data centers are Uptime Institute Tier III Design Certified and SSAE 16 SOC 2 Type II Certified and are audited annually by Schellman & Company, LLC.

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Other Data Security Requirements. The RFP mentions compliance with HIPAA and CLIA. We do not store data in our databases that requires HIPAA or CLIA compliance.

2.3   Citizenserve Integration Approach

Most of our customers require integration to one or more external systems, and we are very experienced in creating custom integrations for a wide variety of integration points. Our experience includes developing custom REST webservices for integration with external systems, creating payment gateways to accept customer credit card payments online, creating daily closeout export files for input into financial systems, integrating with GIS systems for parcel and other data imports, sending emails from the system, and many more integration points with external systems. We can also make citizenserve data available for consumption by external systems through JSON endpoints.

The requirements for the configuration of each integration will be gathered during the weekly walkthroughs; the typical integration is accomplished via REST webservices. The Citizenserve solution architect will develop the scripts for each integration point to send data to target systems and receive data from providing systems, including any data migrations required. The City's team will test the data exchanged between citizenserve and the external systems and will provide feedback on needed changes. We will continue making edits to the integration scripts and testing until the City signs off on each integration.

If coordination is required with an external vendor, we will rely upon the City to provide a contact to the correct vendor resource. For example, we may require a contact from the City's payment processor to provide us with details for a testing environment and production credentials.

As part of the implementation, we will include integration with the City's following external systems:

- ESRI GIS,
- AUTH0 for Single Sign-On,
- AUTH0 for Multifactor Authentication,
- Quest Lab Systems, and
- TBD Payment Processor.

A few comments on the City's requested integrations:

ESRI GIS. GIS integration is our most common integration, and ESRI GIS is the most common GIS to which we integrate. Integration is typically established via REST webservices. We will work with you to determine the data, layers, and attributes that need to be loaded; we do not limit any of these integration components.

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AUTH0 for Single Sign-On (SSO) and Multifactor Authentication. We can integrate to the City's Active Directory via AUTH0 to enable Single Sign-On. AUTH0 integrates with Active Directory using the City's federation service. AUTH0 will also be used for multifactor authentication.

Quest Lab Systems. The City has requested integration to Quest Lab Systems. Our research shows that there are APIs available for integration; we are assuming a two-way integration will be required.

To-be-determined Payment Processor. If the City selects a payment processor and version for which we have already established integration, there will be no charge for this integration; see the following list. If the City selects a payment processor that is not on the list, integration will incur a one-time charge of $15,000. We have not integrated to the AS400 payment processor.

- ACI Universal Official Payments
- BIQ SHO
- CityHall Payment
- Convergys
- EGov Payment
- Forte
- Government Windows
- Invoicecloud
- Kubra EZ-Pay
- OpenEdge HostPay
- Payeezy
- Pay Connect
- Paypal
- Point and Pay
- PSN
- Unipay
- Xpress Bill Pay 3.0

- Authorize.Net v2
- Bluefin PayConex
- Civitek Paynow V2
- CyberSource 4.0
- ETS
- GovPayNet
- Heartland Bolletta Pay
- JetPay Magic
- MuniciPay
- Paybill
- PayExpressPay
- Paymentus Payment
- Payflow Pro
- PlugnPay
- SCGovPEGV3
- VPS

2.4   Citizenserve Data Migration Approach

We will first complete the setup of your permits, licenses, and associated fees and your enforcement processes in citizenserve. We will ask the City to provide the Tyler DHD legacy databases that are to be migrated in an unmodified state. We will migrate 8 years of data for previous inspections, citations, licenses, and contacts.

The City's team will be responsible for selecting test cases in the legacy system and providing screen shots from each of the legacy screens; our data migration lead will use these screen shots to map the citizenserve fields to the legacy fields. Our data migration lead will work with the City to map the fields from the legacy databases to the corresponding fields in citizenserve.

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We do walkthroughs with key users to make sure files are getting set up properly. The City team will review the migrated data by selecting test cases and comparing the data in the legacy system to the data in citizenserve, identifying any errors or omissions. The Citizenserve implementation manager will document and track any errors or omissions identified during testing and the Citizenserve data migration lead will make changes to the migration scripts as needed. If the data migration import is modified and rerun, the City team will be responsible for reviewing the migrated data to ensure the accuracy of the imported data.

A data migration environment is available for test runs of the data migrations, where we will load the City's citizenserve configuration and setup. We can run the migration scripts as many times as necessary to identify and resolve any scripting errors; this process requires time from City staff to review the migrated data prior to go live.

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SECTION 3 – CITIZENSERVE IMPLEMENTATION PLAN AND TIMELINE

We have provided some information below on our implementation approach and our unlimited support and maintenance.

3.1   Citizenserve Implementation Approach

We use an agile methodology for our project implementations; our approach involves the following steps.

Completion of the Setup Checklist. The Citizenserve account manager provides a Setup Checklist of supporting documentation that will be required to begin the setup. The supporting documentation typically includes items like copies of permit and license applications, fee structures, certificates, notices and forms etc. The customer's team gathers all the documentation and information included in the Setup Checklist. Gathering all the documentation on the setup document prior to project kickoff ensures the most efficient implementation.

Project Kickoff. The project kickoff meeting includes the key customer and Citizenserve team members. Key components of the project are discussed including roles, responsibilities, timeline, and objectives. The Citizenserve implementation manager provides a report summarizing the meeting and assigning action items.

Initial Setup. The Citizenserve implementation manager works from the information on the Setup Checklist to configure the system; typically, the initial setup comprises 50% of the entire setup.

System Walkthroughs. Once the initial setup is complete, a weekly meeting is scheduled with the customer team and the Citizenserve implementation manager. During the weekly walkthrough meetings, the City's key users will meet with Citizenserve to review new work and identify requirements; the solution architect is included as needed during the development of the system interfaces. The key users also spend hands-on time every week in between the meetings to try out the new functionality and identify needed changes. This process continues until the City is ready to go live. Rapid progress is made, the users become extremely familiar with the configuration, and new approaches can be tried. Changes in requirements are expected and welcomed, as we recognize that the knowledge gained through the project will lead to new ideas and improvements.

Data Migration. We will migrate the data from the City's legacy Tyler DHD system to citizenserve. Once the setup is nearly complete, the Citizenserve data migration lead will map the fields from the legacy system to citizenserve and write and test the scripts to migrate the legacy data; this process cannot take place until all custom fields that are related to a legacy system have been identified and configured in citizenserve. City staff will perform data migration testing to ensure that the legacy data is being copied to the correct fields. The Citizenserve data migration lead will continue to revise the data migration scripts prior to go live until the City signs off on data migration testing.

System Integration. The Citizenserve solution architect will write and test the integration scripts; City staff will test the integrations for accuracy. The Citizenserve solution architect will make any required changes to the integrations.

User Acceptance Testing (UAT). User acceptance testing is performed prior to training and go live. The City's users will review and approve each application type, all fee schedules, inspections, review workflows, reports, dashboards, templates, enforcement, etc. Changes are easy to make if issues are identified. The City determines when the implementation is complete and they are comfortable with the system; we will continue to iterate changes until the City is ready to go live.

Training. Prior to go live, staff members will be trained in small groups. Our traditional approach to training is to conduct training via web conferencing in small groups; unlimited live web conferencing training is included as part of implementation and post go live as part of Citizenserve's unlimited support. With web conferencing, we can transfer screen control to the users so they obtain experience using the system during training. Any of the web conferences used for training can be recorded and edited for later viewing.

Each training session will focus on that group's core job responsibilities. Most users attend one or two training sessions that last up to three hours; additional one-on-one training sessions can be scheduled for users who would benefit from additional training. Unlimited live, instructor-led online training is included post go live as part of Citizenserve's unlimited support.

Go Live. Final data is typically provided on a Friday afternoon. Over the weekend all test data is removed from the system and the legacy data is migrated. The weekly walkthrough meetings typically continue for 2-4 weeks after go live to identify any issues or changes that could be beneficial; the City decides when they are comfortable with the system and no longer require the weekly walkthrough meetings.

Ongoing Support. Users can request support for any needs or questions through the Citizenserve Support Center. Response time to a standard support request is within one hour; urgent requests receive a response within 15 minutes. Our support staff members are available to develop custom reports, make edits to templates, help you utilize existing and new features,

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modify your setup for process changes and new permits and licenses, and provide unlimited user training.

3.2 Project Work Plan

We have provided a high-level project work plan below, broken out by phase, that includes the project milestones and deliverables and the key team members who are responsible for each deliverable.

Planning Phase

Deliverables

- Setup Checklist of required documentation from the City (Owner: Citizenserve account manager)
- List of All Forms, Notices, and Standard Letters (Owner: City project manager)
- Examples of All Forms, Notices, and Standard Letters (Owner: City project manager)
- Workflow Document describing all workflow routes (Owner: City project manager)
- List of Users and Security Rights (Owner: City project manager, City technology lead)
- Data Sources to be migrated (UNMODIFIED) (Owner: City project manager)

Milestones

- Setup Checklist Complete
- List and Examples of All Forms, Notices, and Standard Letters Complete
- Workflow Document Complete
- List of Users and Security Rights Complete
- Data sources to be migrated provided to Citizenserve implementation manager

System Setup and Configuration Phase

Deliverables

- Weekly Walkthrough Meetings (Owners: Citizenserve implementation manager)
- Weekly Walkthrough Meeting Minutes (Owner: Citizenserve implementation manager)
- Basic Installation (Owner: Citizenserve implementation manager)
- Configured Forms, Notices, Letters, etc. (Owner: Citizenserve implementation manager)
- Configured User Accounts and Rights (Owner: Citizenserve implementation manager)
- Configured Citizenserve System in Test Environment (Owner: Citizenserve implementation manager)
- Citizenserve Integration Programs (Owner: Citizenserve solution architect)
- Data Migration Programs (Owner: Citizenserve data migration lead)

Milestones

- Weekly Walkthrough Meeting Minutes Delivered
- Basic Installation Complete
- Configuration of Forms, Notices, Letters Complete
- Configuration of User Accounts and Rights Complete
- Geocode Property Data Imported and Approved
- GIS Layers Used in Mapping and Reporting Imported and Approved
- Payment Gateway for Applications Paid in Online Portal Complete
- Data Migration Programs Tested and Complete
- Integration Programs Tested and Complete

System Readiness Phase

Deliverables

- User Acceptance Testing (Owner: City implementation manager)
- Updated Citizenserve Configuration (Owner: Citizenserve implementation manager)

Milestones

- User Acceptance Testing Complete
- Citizenserve Configuration Approved

Training Phase

Deliverables

- Training Documents for City's Users (Owner: Citizenserve implementation manager)
- Training Courses for City's Users (Owner: Citizenserve implementation manager)

Milestones

- Training Documents Approved
- City's Users Fully Trained on Citizenserve Use

Implementation Phase

Deliverables

- Weekly Walkthrough Meetings (Owners: Citizenserve implementation manager)
- Weekly Walkthrough Meeting Minutes (Owner: Citizenserve implementation manager)
- Fully Configured Production Instance of Citizenserve (Owner: Citizenserve implementation manager)
- Fully Migrated Legacy Data (Owner: Citizenserve data migration lead)

- Integration Points Configured in Production (Owner: Citizenserve solution architect)
- Supplemental Training Courses for Users (Owner: Citizenserve implementation manager)

Milestones

- Weekly Walkthrough Meeting Minutes Delivered
- Citizenserve Production Instance Approved
- Migrated Legacy Data Approved
- Citizenserve Integration Points Approved
- Users Fully Trained on Citizenserve

Go-Live Phase

Deliverables

- Fully Configured Production Instance (Owner: Citizenserve implementation manager)
- Loaded Data in Citizenserve Production Instance (Owner: Citizenserve implementation manager, Citizenserve data migration lead)

Milestones

- Citizenserve Production Instance and Migrated Data Approved
- Citizenserve Goes Live

Post Go-Live Phase

Deliverables

- Weekly Walkthrough Meetings (Owners: Citizenserve implementation manager)
- Weekly Walkthrough Meeting Minutes (Owner: Citizenserve implementation manager)
- Updated Citizenserve Configuration (Owner: Citizenserve implementation manager)

Milestones

- Weekly Walkthrough Meeting Minutes Delivered
- No Further Changes to Citizenserve Configuration Identified

Unlimited Support Phase

Deliverables

- Biweekly Updates and Enhancements (Owner: Citizenserve Development Team)
- Release Notes (Owner: Citizenserve Development, Implementation, & Support Director)
- Major Upgrades (Owner: Citizenserve Development Team)
- Change Management Support for Major Upgrades (Owner: Citizenserve Support Team)

- Unlimited Customer Support (Owner: Citizenserve Support Team)

Milestones

- Release Notes Delivered
- Biweekly Updates and Enhancements Delivered
- Major Upgrades Delivered
- Major Upgrade Change Management Support Delivered
- Support Tickets Resolved and Closed

3.3   Draft Project Schedule

We have included a draft project schedule below. We made the following assumptions when developing the project schedule:

- We assume that the City team will collect the required information on the setup checklist provided by Citizenserve prior to the beginning of the project, including copies of permit and license applications, fee schedules, letters and notifications, etc. The timely start of the project depends upon the collection of this information.
- We assume that knowledgeable subject matter experts from each area will be available for the weekly walkthrough meetings as scheduled.
- We assume that City team members will complete their assignments in the days between the weekly walkthrough meetings.
- We assume the City will ensure the attendance of key end users and system administrators in training classes.
- We have labeled the schedule "draft" because it requires the City's input.

Task/Phase	Month 0	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6		
Laredo, Texas								▮	Parent Tasks
Information Gathering Phase								▮	Citizenserve Tasks
Provide Setup Checklist								▮	City Tasks
Gather All Items on the Setup Checklist									
Environmental Health									
System Setup and Configuration Phase									
Conduct Weekly Walkthroughs									
Configure Permit & License Installation, Forms, Notices, Letters, Reports									
Configure User Accounts and Rights									
Practice with New Permitting, Licensing, Enforcement Functionality, Provide Feedback									
System Integration									
Develop Integration Documents									
Develop and Test Integration Programs									
Test Integration Programs									
System Readiness Phase									
Create User Acceptance Test Scripts and Plan									
Perform User Acceptance Testing									
Provide Feedback on Issues, Changes									
Update Citizenserve Configuration									
Training Phase									
Create Training Plan									
Create Training Documents for City Users									
Provide Training for City Users									
Attend Training for City Users									
Implementation Phase									
Configure Production Instance									
Configure Integration Points in Production									
Supplemental Training for City Users									
Go-Live Phase									
Load Data Into Production, Test									
Test Production Configuration, Data									
Approve Go Live									
Develop Closeout Report									

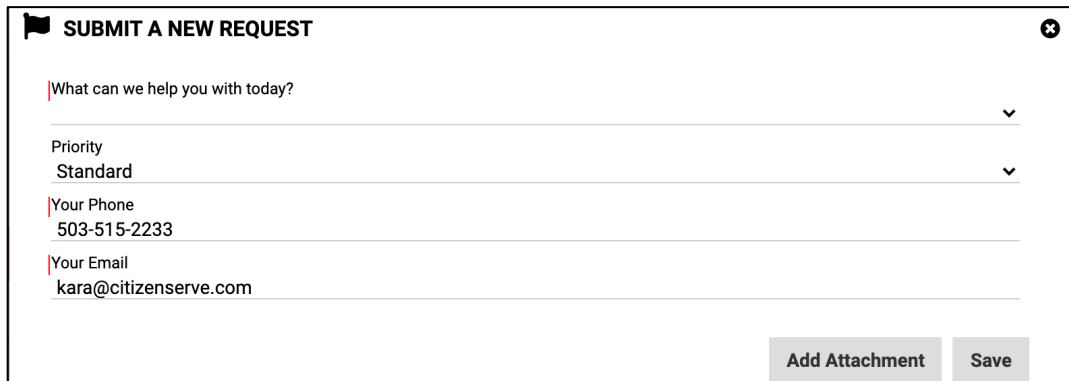*Laredo, Texas Citizenserve Implementation*

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SECTION 4 – TECHNICAL SUPPORT & MAINTENANCE

4.1 Citizenserve Unlimited Support & Maintenance

Unlimited Support and Training

Citizenserve offers unlimited support and training for the life of the subscription. The support extends to addressing any issues, adding new permits and licenses, setting up new workflows, changes in fee schedules, writing custom reports, and user training. The employees who staff the support desk are the same resources that work on project implementations; each of our implementation staff is assigned to a support shift once a week. This structure means that when you contact support, you will be working with someone who is an expert and extremely familiar with all aspects of the system.

We have a toll-free support line that any user can use to request support. The software also has a built-in Support Center and we encourage users to use this feature to submit requests for support help and enhancements. Where other vendors set the priority of support requests or rely on an algorithm to do so, Citizenserve empowers our users to identify the severity of their problem. Users can mark their request as Standard (response within 1 hour) or Urgent (response within 15 minutes). Users select from a drop-down menu of issue types to aid in describing the problem.

Support Center Request Submission Form (View 1)

SUBMIT A NEW REQUEST

A question related to a specific file
Admin options (adding inspection types, violations, review routes, etc.)
Fee structure changes (changes to how your permit or license fees are calculated)
Letter or email templates
Portal changes or questions
Reports
User account changes or additions
Training
Something else

Support Center Request Submission Form (View 2)

Once a user selects an option from the "What can we help you with today?" menu, they are presented with a field where they can type a description of the problem or request. Users can add one or more attachments to aid in diagnosing the issue or providing detail on the enhancement request.

SUBMIT A NEW REQUEST

What can we help you with today?
Reports

Would you like to make changes to an existing report or create a new report?
Create a new report

Please describe the report you would like to create:
I would like a new report that identifies all application review tasks older than 7 days

Priority
Standard

Your Phone
503-515-2233

Your Email
kara@citizenserve.com

Add Attachment   Save

Support Center Request Submission Form (View 3)

We have implemented artificial intelligence (AI) in our Support Center that analyzes incoming customer requests and the availability of support staff to intelligently assign the support request to the most appropriate staff member. This innovation has resulted in a reduction in the handoffs of support tickets and the time required to close them, providing more timely support for our customers.

The user who submitted the request will be notified that the ticket has been assigned; the Citizenserve support team member will contact the user for any information required to troubleshoot the issue.

As a Software-as-a-Service company, we remotely service customers who are geographically distributed. We use web conferencing, conference calls, and emails to provide support. Using web conferencing for support allows us to provide higher quality resources in a timelier fashion while providing consistency in the people with whom your staff will be working. We can also view the user's screen; the user can walk us through the issue they are experiencing, and this visibility supports rapid troubleshooting.

Citizenserve also provides full system maintenance with every subscription. You will not need a technical team to install and maintain the software, optimize the database, patch the servers, handle system security, or monitor the performance; Citizenserve provides all these services as part of the subscription. As a hosted solution, Citizenserve staff monitor the performance of the system. The application servers and database are monitored continuously with alerting to ensure the continued optimal performance of the system. Processor utilization, pages, memory utilization, and replication are all monitored. Expensive queries are easily identified and can be optimized on a continual basis.

4.2   Citizenserve Response Times

Where other vendors set the priority of support requests or rely on an algorithm to do so, Citizenserve empowers our users to identify the severity of their problem. Users can mark their request as Standard or Urgent. We respond to standard requests within one business hour and urgent requests within 15 minutes. For urgent system requests, Citizenserve staff are available 24/7/365. Urgent requests trigger notification to senior members of Citizenserve, who determine the best resources to resolve the issue.

We resolve 85% of all tickets within one day.

4.3   Escalation Procedures

Every Citizenserve customer is assigned an account manager. If escalation of an issue is required, the customer can escalate directly to the account manager. If the issue is not resolved with the account manager, the issue is escalated to the Director of Implementation and Support.

4.4   Support Hours

Support requests can be marked as standard or urgent. Users determine the priority of their requests. All support staff are seasoned Citizenserve employees.

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- For standard requests, support staff are available from 7:00 a.m. Central Time through 7:00 p.m. Central Time during non-holiday business days (Monday – Friday). Response is within one business hour.
- For urgent system requests, Citizenserve staff are available 24/7/365. Response is within 15 minutes.

4.5   System Updates and Regulatory Compliance

We release new features and any fixes once to twice a month; all are included in the Citizenserve subscription. Our model is not the typical "big bang" version upgrade that combines long lists of enhancement requests that have been gathered over months or years, with no improvement to the software between versions. Citizenserve is continually improving based upon customer feedback and requested enhancements. Local and state regulatory requirements that require updates to the software are reported via Citizenserve's Support Center and prioritized for development and release.

Requests for new features and functionality (enhancements) are tracked in the Support Center that is built into citizenserve. Users can subscribe to the updates and get a list via email of all the changes and fixes in the most recent version before it is released.

A Citizenserve subscription also includes major upgrades, which occur every few years – we are currently rolling out a major upgrade to our portal. Major upgrades and the associated change management and training are offered with every subscription. With new major features, the customers who requested these features are in the vanguard of testing the feature in the test environment and in moving to the feature or upgrade, providing us with great feedback early on so we can refine the features and fix any issues without affecting other customers, all while still on one software code base.

We have 22 years of experience managing the twice monthly software updates. We test changes in a full test environment with a full database copy. When a new version is ready, we move it to production; the process happens at night and only takes an application server restart, which requires less than 5 minutes total. Full database backups are performed when each new version is released and the prior version of the software is always available if there is a critical issue with the new version and the decision is made to roll back.

When new patches are released for server operating systems, we start by patching all non-production servers to ensure there are no issues, then patch production environments last. The exception to this approach is when known issues are imminent threats; in this case everything gets patched immediately. Since we maintain one high availability multi-tenant environment rather than hosted instances for each customer, the patching process is greatly simplified.

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SECTION 5 – CITIZENSERVE COST PROPOSAL

We provide fixed price bids for all our projects. We have provided a detailed description of each of the cost elements of a project. Subscriptions and implementations are priced by the number of named users, while data migration and systems integration are priced individually.

5.1   One-Time Costs

5.1.1   Implementation, Configuration, Project Management, & Online Training

Implementation, configuration, project management, and instructor-led online (web conferencing) training are provided for a flat, one-time fee of $1,500 per named user. If the City later adds users to the subscription, there will be a one-time charge of $1,500 for each new user.

5.1.2   Data Migration

We run multiple testing cycles for data migration prior to go live to catch any errors in the custom conversion scripts. The one-time cost to convert the City's legacy Tyler DHD data is $8,000.

5.1.3   System Integration

We have provided fixed pricing for the below integrations. If the City decides it does not require one or more of the listed integrations, the corresponding price can be removed from the fixed price bid.

Systems Integration	Fixed Price
ESRI GIS	$10,000
AUTH0 for Single Sign-On	$2,500
AUTH0 for Multifactor Authentication	$5,000
Quest Lab Systems	$16,000
TBD Payment Processor	$0
Total Integration Price	**$33,500**

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5.2   Recurring Costs

5.2.1   Annual Subscription Fees

Citizenserve is only offered as an annual subscription. Subscription pricing is tiered based on the number of users. A subscription includes the online portal, document repository with unlimited storage, and electronic markup tool.

A subscription includes maintenance and **unlimited support**; the City will never be charged a separate maintenance or support fee. A few additional clarifications on the annual subscription pricing:

- A subscription is NOT required for the online portal; the City will not be charged for the constituents who use the portal.
- A subscription includes mobile access to citizenserve.
- Annual subscriptions are priced by named user. The City can add users at any time; subscriptions are prorated to the term of the subscription.

Number of Users	Annual Cost Per Named User
5 (5 user minimum)	$2,700
6 - 10	$2,400
11 - 24	$2,100
25 - 49	$1,800
50+	$1,500

The City specified 25 users; the annual subscription cost per user is therefore $1,800. If the City requires a different number of users, the above subscription pricing matrix can be used to determine the annual cost of Citizenserve subscriptions.

5.3 Citizenserve 4-Year Cost Matrix

The 4-year cost summary has been prepared for you based on our understanding of your needs as outlined in the RFP and responses to questions. The fixed price quotes include all the cost elements detailed above.

	Year 1	Year 2	Year 3	Year 4
Annual Citizenserve Subscription (25 users)	$45,000	$45,000	$45,000	$45,000
One-Time Initial Fees				
Citizenserve Implementation, Configuration, Project Mgmt, & Online Training (25 users)	$37,500	$0	$0	$0
Data Migration Tyler DHD	$8,000	$0	$0	$0
Integration to ESRI GIS	$10,000	$0	$0	$0
Integration to AUTH0 for Single Sign-On	$2,500	$0	$0	$0
Integration to AUTH0 for Multifactor Authentication	$5,000	$0	$0	$0
Integration to Quest Lab Systems	$16,000	$0	$0	$0
Integration to TBD Payment Processor	$0	$0	$0	$0
Total One-Time Fees	$79,000	$0	$0	$0
Total Annual Costs	$124,000	$45,000	$45,000	$45,000

Citizenserve 4-year cost summary for 25 users