AMENDMENT 2 TO AGREEMENT
BETWEEN THE COUNTY OF SAN MATEO AND
EASY ACCESS, INC.

THIS AMENDMENT 2 TO THE AGREEMENT, entered into this 28th day of June 2022, by and between the COUNTY OF SAN MATEO, hereinafter called "County," and Easy Access, Inc (EAI), hereinafter called "Contractor";

W I T N E S S E T H:

WHEREAS, pursuant to Government Code, Section 31000, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof;

WHEREAS, the parties entered into an Agreement (13000-21-D023) with EAI to provide operations planning support for the EZ Access system migration to the APAS system and to integrate backup capabilities to the ACRE IT Manager from April 1, 2021, through April 1, 2022; and

WHEREAS, the parties amended (Amendment 1) to the Agreement (13000-21-D023) to extend the term of the agreement through June 30, 2022; and

WHEREAS, the parties wish to amend the Agreement (Amendment 2) to extend the Operational Support Agreement required by ACRE to operate the EZ-Access system from July 1, 2022, through June 30, 2023, with an option 1 to further extend the agreement from July 1, 2023, through June 30, 2024, and increase the amount by $648,000 to an amount not to exceed $829,400;

NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES HERETO AS FOLLOWS:

1. Exhibit A: is replaced in its entirety as follows:

Exhibit A

In consideration of the payments set forth in Exhibit B, Contractor shall provide the following services:

ACRE EZ Access Support:
   a. EZ Access system operational support:

EAI will provide system operations, operational support, roll close activities in the following areas including but not limited to:

KT#	Module Description
UP1B	AAB Core application support: EAI to provide as needed application support to the Assessment Appeals Board system.
UP2D	Building permit - Loading the data to EZA and generating Events: Loading reviewed / cleaned Building Permit data that came out of SouthTec , loads it into Staging table in EZA/AS400 and ultimately creates events in F09002 for valid building permit records.
DL1	Annual Load of new TRAs for / from Mapping Team: BOE send mapping team lists of new TRAs, and new assignment of parcels to those TRAs. For secured system, the new TRAs need to be entered into F01001.
DL2	Loading Special Property Values (TPZ, Williamson, Mobile Home, Cal Water): Run special EZ Access program CAWPGM and ultimately load them into the values table F27004.
DL5	CTL: Inbound pull of Tax Acct / TRA mapping: ACRE pulls in Tax Account <-> TRA mappings from the CTL team into table(s) on AS/400. This activity has to be performed on an annual basis after CTL team updates their mappings.
KT4	Institutional Exemption Processes, including BOE part: There are two technical components EAIREQUEST.LASHKOFF (Secured) and PROPPATTI/QCLSRC/EXMCLP. The output file that lists all the institutional exemptions of each type on the roll.
KT51	CTL: Secured Annual. Get the file that contains our secured annual roll out to the Controller team so that they can calculate the taxes for each parcel and send them to tax for billing.
KT52a-c	CTL: Roll Correction + Escapes; Run processes that: - Assist in validating all of our annual escapes and roll corrections - Generate board changes and notices for taxpayers - Send the data down to Controller for processing

KT54	Roll Correction: PDF workflow Assist in feeding the roll corrections and escapes to Appraisal Support team so that they can print and process the board changes
KT56	CTL: Supplemental Publish to CTL Get our qualified supplementals that have been notice'd out to the controller for processing
KT57a	CTL: Supplemental RCS; APR to NOTC Assist in validating and generate notices for our supplemental roll corrections
KT57b	CTL: Supplemental RCS; APR/NOTC to pdf / REL Assist in processing our qualified supplemental roll corrections. Determine which ones are eligible for controller and route them for appraisal support processing
RC2	Roll Close Data Audit Checklist; Ensure all audits needed to close SMC roll are identified, produced, and delivered to SMC personnel for review and action
RC3	Generate Decline Notices for Annual Roll Close
KT66	Core steps for Roll Close as per Patti Checklist Execute all steps needed to close the previous years roll, do all needed transactional processing, produce needed reports, and open the subsequent annual roll for processing
RC5	Create Files for Precise Mailing, for annual mailings; Create and Print Change Notice Files
RC6	Get reports for Leon and Ray; J:\ASSESSOR\BOE\ROLL 2021\2021 FILES
RC7	Public Works: export parcel data for County Sewer and Garbage districts
RC8	AB 589 Report

	Produce critical report needed for annual operations
RC9	CTL: Growth in Non-Residential New Construction to compute County's GANN limit
	Produce critical report needed for annual budgeting
BOE1	BOE: Multi-County Listing Process for HOE & DV
	Assist in managing the 7-step process throughout the fiscal year to handle messages received from the BOE Re: social security # overlaps across countries for exemptions
ADH1	What to do when a parcel doesn't calc correctly
	Solve individual one off cases for appraisers where a parcel's calculations are not turning out correctly
ADH2	Reversing Parcel Splits and Combines for Mapping Team
	Help the team undo a parcel split or combine where it has been done in error
ADH4	Ensure values add up correctly on APN-NEW activities
	Help team when problems come adding a new APN into our working roll.
UNS1	CTL: Publish Unsecured Annual in June
	Send our unsecured roll down to the CTL team as per established processes
UNS2	CTL: Publish Unsecured Monthly re-billings/Escapes July -> Nov; + Transfer SUPs from Unsecured to Secured
	This gets all unsecured transactions that need new bills down to controller throughout the fiscal year
UNS7	UNS: Transferring PP and Fixt values to Secured Roll
	Execute SMC's processes for copying PP and FXT values over from our unsecured system to our secured annual roll during the annual roll close cycles

ADM1	Locking People out of the system (roll close time)

   b. General

      i. EAI will have a 5 Business Day turnaround time on requested services, unless they are deemed to be critical production requests vital to mission success. In those cases, it will be a 2-business day turnaround time if elevated by ACRE Management.

      ii. EAI may be requested to perform program modifications to optimize the job submission process and allow for SMC ACRE personnel to be responsible for the new routine.

NOTE: Regarding Exceptions and Interruptions

As EAI runs the processes and procedures on schedule as defined by SMC to manage the appraisal roll and prep it for close there could be data or parameter exceptions encountered that would prevent EAI from proceeding. This would normally occur in the test environment while performing test loads, extracts, or updates. In this case, EAI expects to send these exceptions to SMC Staff to review and resolve timely.

As SMC ACRE runs processes and procedures on schedule as defined by SMC, if any exceptions or interruptions are encountered, EAI will assist as necessary to review and resolve. SMC will utilize the Atlassian JIRA ticketing system hosted by EAI to document and request assistance in these cases.

Added Assumptions

End User Support would continue to be provided by SMC ACRE primarily with a supportive role by EZ Access. For example, questions for the use of appraising or auditing records would be addressed by SMC ACRE personnel. Requests for individual record or individual data corrections would be addressed by SMC ACRE. If there is a mass data cleansing issue, EZ Access will be available to SQL data if needed.

EAI would need access to the Production server that is hosting and running EZCAM PP/RE. This would include a SMC resource that would perform timely actions as directed by EAI locally on the server if physical interaction is required. EAI will also need VPN access to the server. Finally, EAI will need at least one account with QSECOFR authority to the server.

SMC ACRE Responsibilities

- Reviewing and approving all ownership changes and valuations generated by the EZCAM PP/RE system.

- All associated pre and post audit reviews and data approvals to be completed by SMC with Hamer's Assistance as requested via the Hamer provided JIRA ticketing system.

- All downloads and uploads from third parties to be completed by SMC ACRE, and

placed in a FTP file folder area for processing by EAI.

- An SMC ACRE IT subject matter expert will be available to answer questions and document existing processes when requested by EAI.

- Any special library lists that the Assessor's IT office uses on top of EAI libraries need to be disclosed with a description of purpose.

- All physical media backups of the production environment to be performed by SMC ACRE to maintain media storage.

- SMC ACRE will have the responsibility to review and approve all data updates that are requested and performed by EAI. EAI will not be responsible for assessor data issues, but EAI will make its best effort to resolve issues.

- EAI requires direct access to the 3 iSeries servers without going thru a remote desktop application or any other tier to get access.

- EAI user to have full security access "QSECOFR".

- EAI will not modify any software, APIs or processes that do not belong to EAI without the written consent of SMC ACRE

- SMC ACRE will provide EAI a scheduled job calendar.

- SMC ACRE shall not transmit any confidential or sensitive personal data to EAI.

- SMC ACRE is ultimately responsible for all rolls generated and delivered to the controller & tax collector.

Roles and Responsibilities

EAI Roles:

EAI Project Manager:
The EAI Project Manager will have the overall responsibility for all of EAI Project's day-to-day activities and personnel. The EAI Project Manager will be responsible for the management and administration of the overall EAI Project Team. Moreover, the EAI Project Manager will consult regularly with the SMC ACRE Project Manager to help ensure that all deliverables meet the refined requirements that are ascertained in EAI's implementation of professional services. In addition, EAI's Project Manager will be responsible for resolving project issues and when deemed necessary, report such issues to the Executive Sponsor/Steering Committee.

EAI Lead Technical Resource(s):
EAI Technical Consultants will be comprised of a Technical Lead that will be augmented with technical hardware, network and software staff that are experienced in the subject matter area of California Mass Appraisal systems specifically utilized by SMC ACRE. The Technical Lead will be responsible for requirements, analysis, validation, Training and the

eventual implementation of any requested professional IT services for the SMC ACRE IT Department.

EAI Technical Resource (s):
The EAI Lead Technical Resources and the project manager will assign out tasks that SMC ACRE has formally requested. The EAI Lead Technical Resources will be responsible for transferring knowledge to subordinate personnel of the appropriate skill level so the scope of work can be dispersed and redundancy acquired for this mission critical Project.

SMC ACRE Roles:

Project/Process Lead
The Project/Process Lead is responsible for managing the ACRE process, re-engineering project lifecycle, and its deliverables to completion, in accordance with the ACRE project management plan and schedule. The Process Lead is enthusiastic about improving overall processes, is empowered to make recommendations/decisions and will assist with training and employee adoption of business processes and procedures for their assigned area.

Process Owner(s)
The Process Owner is accountable for making project decisions as it relates to their assigned end-to-end business process. Process Owners will be responsible for applying process/functional knowledge and expertise to the definition, planning and implementation activities of the specific IT Service requests. The Process Owner is enthusiastic about improving process and will assist in the escalation and resolution of issues impacting their assigned end-to-end business process.

Business Analyst(s)
Responsible for providing functional knowledge and expertise on ACRE requirements such as current SMC ACRE business processes and procedures. They also escalate to the SMC ACRE Project Manager issues that may impact the go-live date.

Technical Analysts/Leads
Technical Analysts are responsible for providing technical knowledge and expertise related to ACRE integration requirements.

Project Change Control

All SMC ACRE IT changes to existing EAI software, data tables, data elements, jobs, triggers, scripts, etc. shall require a written change request. SMC ACRE IT and EAI recognizes that changes to the scope of this project may occur as part of the proposed implementation. These proposed changes may result in new or modified requirements and will be presented in a manner which best represents the benefit trade-offs necessary to implement the function or service. The following procedure will be followed for all change requests:

Project Change Request

A Project Change Request will be the vehicle for approving change. The request must detail the change and identify the impact of the change on deliverables, timeframes, and the cost of the project.

Project Manager's Review of Change Request

EAI and SMC ACRE Project Managers will review the change request and its impact and mutually agree upon its content, cost, and delivery schedule.

Approval of Change Requests

EAI's and SMC ACRE Project Managers will be responsible for obtaining approval for all change requests.

Once approved, all changes will become an addendum to the SOW. Authorized representatives from all parties must sign each Project Change Request. Upon approval signature, work will be performed per the change request.

2. **Exhibit B:** is modified to add the following:

In consideration of the services provided by Contractor described in Exhibit A and subject to the terms of the Agreement, County shall pay Contractor based on the following fee schedule and terms:

The payments will be invoiced at the 1st day of each quarter in 4 equal installments of $81,000.
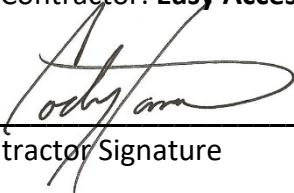
EZ-Access Operational Support Payment Schedule		
Payment 1	July 1, 2022	$81,000.00
Payment 2	October 1, 2022	$81,000.00
Payment 3	January 1, 2023	$81,000.00
Payment 4	April 1, 2023	$81,000.00
	Payment 1, 2, 3 and 4 Subtotal	**$324,000.00**
Renew Option 1		
Payment 1	July 1, 2023	$81,000.00
Payment 2	October 1, 2023	$81,000.00
Payment 3	January 1, 2024	$81,000.00
Payment 4	April 1, 2024	$81,000.00
	Renew Option 1 Subtotal	**$ 324,000.00**
	TOTAL	**$ 648,000.00**

ACRE and EAI will review the Option 1 of the Operational Support Agreement Amendment 2 payment schedule based on the support required by ACRE during the term.

3.   Section 3. Payments: is replaced in its entirety as follows:

a.   In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A, County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B. County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is unacceptable. In no event shall County's total fiscal obligation under this Agreement exceed Eight hundred twenty-nine thousand four hundred ($829,400). In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or expiration. Contractor is not entitled to payment for work not performed as required by this agreement.

4.   Section 4. Term: is replaced in its entirety as follows:

a.   Subject to compliance with all terms and conditions, the term of this Agreement shall be from July 1, 2022, through June 30, 2024.

5.   **All other terms and conditions of the agreement dated April 1, 2021, between the County and Contractor shall remain in full force and effect.**

In witness of and in agreement with this Agreement's terms, the parties, by their duly authorized representatives, affix their respective signatures:

For Contractor: **Easy Access, Inc (EAI)**

	6/2/2022	**CODY HAMER**
_____	_____	_____
Contractor Signature	Date	Contractor Name (please print)

_____

COUNTY OF SAN MATEO

By:
President, Board of Supervisors, San Mateo County

Date:

ATTEST:

By:
Clerk of Said Board