SOFTWARE LICENSE AGREEMENT

This SOFTWARE LICENSE AGREEMENT ("Agreement") is made and entered into as of ___________, 2026, by and between the COUNTY OF FRESNO, a political subdivision of the State of California ("Customer") and MEGABYTE SYSTEMS, INC., a California corporation ("Contractor"). For purposes of this Agreement, Customer and Contractor may be referred to individually as a "party" and collectively as the "parties" in this Agreement.

Recitals

A. Customer is a California county whose officers, specifically the Auditor-Controller/Treasurer-Tax Collector and the Assessor-Recorder, are responsible for assessing property for purposes of taxation, collecting taxes, and disbursing the proceeds of taxes, in compliance with all applicable law, including Division 1 (beginning with section 50) of the California Revenue and Taxation Code.

B. Customer requires a single software system capable of supporting the performance of those diverse statutory duties by those officers.

C. Contractor has developed and owns all rights in and to the computer software known as the Megabyte Property Tax System, referred to in this Agreement as the "Software" and the related documentation, which together with the Software comprise the "System," as defined herein.

D. Customer issued Request for Proposal (RFP) Number 25-106 for Integrated Property Tax System and Contractor submitted a proposal in response.

E. Based on Contractor's proposal, Customer wishes to acquire from Contractor, and Contractor is willing to grant to Customer, certain rights with respect to the Software, on the terms and conditions set forth in this Agreement.

NOW THEREFORE, in consideration of the mutual agreements contained in this Agreement, the parties agree as follows:

Agreement

1. DEFINITIONS

1.1 Documentation. "Documentation" means the user documentation relating to the Software, which documentation is described in Exhibit A, "Specifications," attached to this Agreement. Contractor will not provide the Documentation to Customer until after this Agreement is signed; Contractor therefore acknowledges that Customer is entering this Agreement without having seen the Documentation and in reliance upon Contractor's representations that the System will perform in compliance with the provisions of this Agreement, including Exhibit A.

1.2 License. "License" has the meaning assigned to that term in Section 2.1.

1.3 Software. "Software" means the computer application software known as the Megabyte Property Tax System, or "MPTS," described in Exhibit A, including all coding (object code and source code), tapes, discs, modules, and similar materials comprising such software. The Software is described more specifically in the Documentation.

1.4 System. "System" means the Software and the Documentation, collectively. Reference to the System includes any component of the Software and the Documentation. All modifications and enhancements to the System are deemed to be part of the System as defined in this Agreement and are subject to the provisions of this Agreement.

2. GRANT OF LICENSE

2.1 Grant of License. Contractor hereby grants to Customer a license to use the Software, subject to the provisions of this Agreement (the "License").

2.2 Scope of License.

2.2.1 The License granted in this Agreement consists solely of the perpetual, non-exclusive, non-transferable right of Customer to (1) operate the Software for the purpose of providing services solely in connection with Customer's business or functions; (2) copy the Software solely for backup purposes; and (3) receive and use the Documentation.

2.2.2 The License granted in this Agreement does not entitle Customer to: (1) operate the Software on any equipment other than Customer-owned hardware; (2) operate the Software other than in connection with Customer's business or function; (3) permit any person or entity other than Customer, its employees and its patrons to operate the Software; (4) copy the Software in any manner or in any form other than solely for backup purposes; (5) modify or enhance the Software in any respect; or (6) transfer any right in the Software to any other person or entity.

2.3 Ownership. Customer acknowledges and agrees that, as between Contractor and Customer, title and full ownership of all rights in and to the System and all other materials provided to Customer under this Agreement shall remain with Contractor. Customer further acknowledges and agrees that the System, and all ideas and expressions contained in it, are proprietary information and trade secrets of Contractor. However, Customer shall receive, at no additional cost, a perpetual license to use the Software for its own use.

2.4 Source Code Access. Contractor shall place source code for the licensed Software and any changes thereto, into a software escrow account. Customer shall have access to the source code in the event Contractor fails to fulfill its maintenance and support obligations, or in the event of Contractor's bankruptcy, Contractor's dissolution, or appointment of a receiver for Contractor. Customer shall be able to use the source code according to the terms of this Agreement, and must also be permitted to modify the code for its own use consistent with this Agreement.

3. TERM

3.1 Duration. The License is effective as of the Installation Date (defined in Section 4.1) and remains in effect perpetually unless terminated as provided in Section 3.2.

3.2 Termination. Prior to the "Installation Date," as defined below, Customer may terminate this Agreement in its entirety if Contractor has breached a material provision of this Agreement, including by failing to complete a phase established in Exhibit B within a reasonable time, and has failed to cure such breach within sixty (60) days after receiving written notice of the breach. Customer may at any time terminate the License if Contractor has breached a material provision of this Agreement and has failed to cure such breach within sixty (60) days after receiving written notice of the breach.

3.2.1 Customer upon ninety (90) days' written notice may terminate the License if there is a change in the nature, scope, or requirements of Customer's program or operations. Contractor may at any time terminate the License if Customer has breached a material provision of this Agreement (which includes limitation Sections 5, 7, and 8) and has failed to cure such breach within thirty (30) days after receiving written notice of the breach.

3.3 Fiscal Appropriations. Contractor acknowledges that Customer is a governmental agency, and as such has fiscal legal limitations, including, but not limited to, the availability of funding from fiscal year to fiscal year for ongoing contracts. Contractor agrees that if Customer is required to terminate its contract as a result of necessary fiscal appropriation for the contract, that is not a default by Customer of any terms of this Agreement, and no liability will be placed on Customer.

3.4 Events Upon Termination. Upon any termination of the License, the parties shall comply with the provisions of Section 10.

4. INSTALLATION, TRAINING AND SUPPORT

4.1 Installation. Contractor shall deliver and install the System for Customer in the manner and on the schedule set forth in Exhibit B, "Project Plan," attached to this Agreement. The date on which Contractor has delivered and installed the System in accordance with Exhibit B is the "Installation Date."

4.2 Training. Contractor shall provide to Customer the training services relating to the System described in Exhibit B.

4.3 Support Services. Contractor shall provide to Customer the other support services (the "Support Services") relating to the System as provided in "MPTS Property Tax System Maintenance Agreement," which is separate from this Agreement.

5. COMPENSATION

5.1 License Fee. As compensation for the License, Customer shall pay to

Contractor a fee in accordance with the schedule set forth in Exhibit C, "Schedule of Payments," attached to this Agreement.

5.2 Other Compensation

5.2.1 Compensation for Additional Services. If Customer requests services in writing that are in addition to the services specified in Section 4, Contractor shall, before providing such services, provide a quote for the compensation for such additional services based on Contractor's then prevailing rate for such services. Customer may accept the quote in writing as presented, or negotiate further to establish the compensation for additional services.

5.2.2 Expenses Relating to Services. As provided in Exhibit C, Customer shall reimburse Contractor for all reasonable and necessary travel, lodging, and per diem expenses incurred by Contractor and its employees in performing Contractor's obligations under this Agreement. Any reimbursement for travel costs is subject to the current County Travel Policy (Management Directive 500) and shall not exceed those amounts paid to the Customer's employees under such policy.

5.3 Maximum Amount Payable. The maximum amount payable to Contractor under this Agreement, including, without limitation, all fees provided in section 5.1 and all compensation and expenses provided in section 5.2, is $3,971,000. Except as provided in Section 5.2.2, all expenses incidental to Contractor's performance of services under this Agreement shall be borne solely by Contractor.

5.4 General

5.4.1 Invoices. Contractor shall invoice Customer for all sums which Customer owes Contractor hereunder, and Customer shall pay each invoice within forty-five (45) days after receipt thereof.

5.4.2 Taxes. Customer is responsible for payment of any and all taxes or other governmental charges or fees attributable to the License.

5.4.3 Audit by California State Auditor. If the compensation to be paid by Customer under this Agreement exceeds $10,000.00, Contractor is subject to the examination and audit by the California State Auditor, as provided in Government Code section 8546.7, for a period of three (3) years after final payment under this Agreement. To facilitate these potential examinations and audits, Contractor shall maintain, for a period of at least three (3) years after final payment under this Agreement, all books, records and documentation necessary to demonstrate its performance under this Agreement. This section survives the expiration or termination of this Agreement.

6. ENHANCEMENTS

6.1 Representation. Contractor represents and warrants that all billable enhancements, upgrades, modules, features, or additional software functionality available at the time of contract execution, as well as those made available during the implementation period, have been fully incorporated into the proposed cost. The Customer shall not be subject to any additional fees or charges for such enhancements, including, but not limited to, those identified in Exhibit A.

6.2 Disclosure and Certification. Contractor shall disclose all billable or premium enhancements, upgrades, modules, features, or functionality applicable to the software and certifies that Exhibit A constitutes a complete and accurate disclosure of such items.

6.3 Non-Disclosure. Any enhancements or functionality not disclosed in Exhibit A that is later required for implementation or use of the software shall be provided to the Customer at no additional cost.

7. WARRANTY

7.1 General Warranty. Contractor warrants to Customer that Contractor has full right and authority to grant to Customer the License and that Customer's possession and use of the System in accordance with the License do not infringe any United States copyright or patent.

7.2 Performance. Contractor warrants to Customer that the System will perform in compliance with the provisions of Exhibit A and that the Software will perform in substantial compliance with the Documentation and any enhancements, releases, or new versions. There are no express or implied warranties, including the implied warranty of merchantability and fitness for a particular purpose not specifically set forth in this Agreement, with respect to this Agreement, or the Software or other products, or Documentation or other products.

8. CONFIDENTIALITY

8.1 Customer Obligations. Customer acknowledges that, by virtue of the License, it will have access to certain proprietary information and trade secrets of Contractor, including without limitation proprietary information and trade secrets relating to the System (collectively, the "Confidential Matters"). Customer agrees that the Confidential Matters, and all information comprising or relating to the Confidential Matters, shall be deemed confidential and proprietary to Contractor, shall be held in trust by Customer, and shall be safeguarded by Customer to the same extent that Customer safeguards confidential matters relating to its own operation, which in no event shall be less than the safeguards that a reasonably prudent person or business would exercise under similar circumstances.

8.2 Exceptions. Customer's obligations pursuant to Section 7.1 shall not apply to information which is in the public domain, other than as a result of any breach of this Agreement, or to information which Customer is obligated to disclose pursuant to the lawful order of any court or government instrumentality in the United States, but only to the extent required by such order.

8.3 Contractor's Obligations. Contractor acknowledges that, by virtue of the customer/developer relationship established by this agreement, it will have access to certain confidential information relating to Customer and the individuals and entities that interact with Customer as a local government agency that administers property taxes, and Contractor shall comply with the confidentiality obligations set forth in Section 11.5 of this Agreement.

8.4 Exceptions. Contractor's obligations pursuant to Section 7.3 do not apply to information that is in the public domain, other than as a result of any breach of this Agreement, or to information which Contractor is obligated to disclose pursuant to the lawful order of any court or government instrumentality in the United States, but only to the extent required by such order.

9. LIABILITY

9.1 Indemnification by Contractor. Contractor shall indemnify and hold harmless Customer, and its directors, officers, and employees from and against any and all liability, losses, damages, and expenses (including without limitation reasonable attorneys' fees and costs) incurred by Customer, or its directors, officers, or employees which arise out of or relate to Contractor's breach of any provisions of this Agreement.

9.2 Indemnification by Customer. Customer shall indemnify and hold harmless Contractor, and its directors, officers, and employees from and against any and all liability, losses, damages, and expenses (including without limitation reasonable attorneys' fees and costs) incurred by Contractor, or its directors, officers, or employees which arise out of or relate to Customer's breach of any provision of this Agreement.

9.3 Limitations on Liability. Notwithstanding the provisions of Sections 8.1 and 8.2, the liability of the parties and the remedies of the parties shall be limited as follows:

9.3.1 Uncontrollable Events. Neither party shall bear any liability arising out of events beyond the control of such party, including without limitation acts of God, acts of a public enemy, fires, floods, storms, earthquakes, riots, strikes, lock outs, wars, restraints of government, court orders, power shortages or outages, equipment or communications malfunctions, nonperformance by any third parties, or other events which cannot be controlled or prevented with reasonable diligence by such party.

9.3.2 Consequential Damages. Neither party shall bear any liability for special, consequential, incidental, or indirect damages (including without limitation loss of anticipated income or profits, loss of goodwill, or other loss or damages), even if such party has been informed of the possibility of such damages.

9.3.3 Value of Contract. In no event shall the aggregate liability of Contractor to Customer or Customer to Contractor (regardless of the form, whether in contract or tort) exceed the amount of the compensation payable by Customer to Contractor pursuant to Section 5.

9.4 Insurance. Without limiting Customer's right to obtain indemnification from Contractor or any third parties, Contractor, at its sole expense, shall maintain in full force and effect the following insurance policies throughout the term of this Agreement.

9.4.1 Commercial General Liability. Commercial general liability insurance with limits of not less than Two Million Dollars ($2,000,000) per occurrence and an annual aggregate of Four Million Dollars ($4,000,000). This policy must be issued on a per occurrence basis. Coverage must include products, completed operations, property damage, bodily injury, personal injury, and advertising injury. Contractor shall obtain an endorsement to this policy naming the County of Fresno, its officers, agents, employees, and volunteers, individually and collectively, as additional insureds, but only insofar as the operations under this Agreement are concerned. Such coverage for additional insureds will apply as primary insurance and any other insurance, or self-insurance, maintained by Customer is excess only and not contributing with insurance provided under Contractor's policy.

9.4.2 Workers Compensation. Workers compensation insurance as required by the laws of the State of California with statutory limits.

9.4.3 Employer's Liability. Employer's liability insurance with limits of not less than One Million Dollars ($1,000,000) per occurrence for bodily injury and for disease.

9.4.4 Technology Professional Liability (Errors and Omissions). Technology professional liability (errors and omissions) insurance with limits of not less than Two Million Dollars ($2,000,000) per occurrence and in the aggregate. Coverage must encompass all of Contractor's obligations under this Agreement, including but not limited to claims involving Cyber Risks.

9.4.5 Cyber Liability. Cyber liability insurance with limits of not less than Two Million Dollars ($2,000,000) per occurrence. Coverage must include claims involving Cyber Risks.

9.4.6 Definition of Cyber Risks. "Cyber Risks" include but are not limited to (i) security breach, which may include disclosure of personally identifiable information to an unauthorized third party; (ii) data breach; (iii) breach of any of Contractor's obligations under Section 11 of this Agreement; (iv) system failure; (v) data recovery; (vi) failure to timely disclose data breach or security breach; (vii) failure to comply with privacy policy; (viii) payment card liabilities and costs; (ix) infringement of intellectual property, including but not limited to infringement of copyright, trademark, and trade dress; (x) invasion of privacy, including release of private information; (xi) information theft; (xii) damage to or destruction or alteration of electronic information; (xiii) cyber extortion; (xiv) extortion related to Contractor's obligations under this Agreement regarding electronic information, including personally identifiable information; (xv) fraudulent instruction; (xvi) funds transfer fraud; (xvii) telephone fraud; (xviii) network security; (xix) data breach response costs, including security breach response costs; (xx) regulatory fines and penalties related to Contractor's obligations under this Agreement regarding electronic information, including personally identifiable information; and (xxi) credit monitoring expenses.

9.5 Verification of Coverage. Within 30 days after Contractor signs this Agreement, and at any time during the term of this Agreement as requested by

Customer's Risk Manager or the County Administrative Office, Contractor shall deliver, or cause its broker or producer to deliver, to the County Risk Manager, at 2220 Tulare Street, 16th Floor, Fresno, California 93721, or HRRiskManagement@fresnocountyca.gov, and by mail or email to the person identified to receive notices under this Agreement, certificates of insurance and endorsements for all of the coverages required under this Agreement.

9.5.1 Each insurance certificate must state that the insurance coverage has been obtained and is in full force.

9.5.2 The commercial general liability insurance certificate must also state, and include an endorsement, that the County of Fresno, its officers, agents, employees, and volunteers, individually and collectively, are additional insureds insofar as the operations under this Agreement are concerned. The commercial general liability insurance certificate must also state that the coverage shall apply as primary insurance and any other insurance, or self-insurance, maintained by the County of Fresno shall be excess only and not contributing with insurance provided under the Contractor's policy.

9.6 Acceptability of Insurers. All insurance policies required under this Agreement must be issued by admitted insurers licensed to do business in the State of California and possessing at all times during the term of this Agreement an A.M. Best, Inc. rating of no less than A: VII.

9.7 Notice of Cancellation or Change. For each insurance policy required under this Agreement, Contractor shall provide to Customer, or ensure that the policy requires the insurer to provide to Customer, written notice of any cancellation or change in the policy as required in this paragraph. For cancellation of the policy for nonpayment of premium, Contractor shall, or shall cause the insurer to, provide written notice to Customer not less than 10 days in advance of cancellation. For cancellation of the policy for any other reason, and for any other change to the policy, Contractor shall, or shall cause the insurer to, provide written notice to Customer not less than 30 days in advance of cancellation or change. Customer in its sole discretion may determine that the failure of Contractor or its insurer to timely provide a written notice required by this paragraph is a breach of this Agreement.

9.8 Customer's Entitlement to Greater Coverage. If Contractor has or obtains insurance with broader coverage, higher limits, or both, than what is required under this Agreement, then Customer requires and is entitled to the broader coverage, higher limits, or both. To that end, Contractor shall deliver, or cause its broker or producer to deliver, to Customer's Risk Manager certificates of insurance and endorsements for all of the coverages that have such broader coverage, higher limits, or both, as required under this Agreement.

9.9 Waiver of Subrogation. Contractor waives any right to recover from Customer, its officers, agents, employees, and volunteers any amounts paid under any insurance policy required by this Agreement. Contractor is solely responsible to obtain any policy endorsement that may be necessary to accomplish that waiver, but

Contractor's waiver of subrogation under this paragraph is effective whether or not Contractor obtains such an endorsement.

9.10 Customer's Remedy for Contractor's Failure to Maintain. The insurance specified above shall be in a form and placed with an insurance company or companies satisfactory to Customer, and shall be kept in force and effect until the completion to the satisfaction and acceptance by Customer of all work to be performed by the Contractor under this Agreement. If Contractor fails to keep in effect at all times any insurance coverage required under this Agreement, the County may, in addition to any other remedies it may have, suspend or terminate this Agreement upon the occurrence of that failure, or purchase such insurance coverage, and charge the cost of that coverage to Contractor. Customer may offset such charges against any amounts owed by Customer to Contractor under this Agreement.

9.11 Subcontractors. Contractor shall require and verify that all subcontractors used by Contractor to provide services under this Agreement maintain insurance meeting all insurance requirements provided in this Agreement. This paragraph does not authorize Contractor to provide services under this Agreement using subcontractors.

10. TERMINATION

10.1 Upon any termination of the License, Customer shall immediately cease using the System, and Customer shall, within ten (10) days after the date of termination, return to Contractor the System and all other materials provided to Customer under this Agreement, and all copies of the System and other materials in Customer's possession or under its control. Notwithstanding the preceding sentence, if Customer has terminated this Agreement in accordance with Section 3.2 and Customer has paid to Contractor the full amount of the compensation provided in Section 5.1 and all other amounts then owing to Contractor under Section 5, then Customer may retain the System and continue to use the System, subject to the provisions of Sections 2, 8, 9, 11, and 12.

11. CUSTOMER DATA; RESPONSIBILITIES

11.1 Ownership of Customer Data. Customer hereby acknowledges and agrees that, from time to time, Customer may request Support Services from Contractor pursuant to Section 4.3 of this Agreement and, in such circumstances, Customer may directly or indirectly provide, or Contractor will otherwise have access to and retain, confidential, non-public information (including personally identifiable information), statistics, metrics, and other data concerning Customer or the individuals and entities that interact with Customer as a local government agency that administers property taxes (collectively, "Customer Data").

11.2 Ownership of Customer Data. As between Customer and Contractor, Customer owns Customer Data and all Customer Data shall remain the property of Customer. Customer hereby grants to Contractor and its affiliates and subcontractors a right and license to use and process Customer Data to the extent reasonably necessary to (i) monitor, provide, administer, ensure the proper operation of, develop, improve, and modify the Support Services and System, (ii) develop and provide new and existing functionality and services to Customer and other Contractor customers, and (iii) perform Contractor's rights and obligations under this Agreement.

11.3 Privacy Rights; California Privacy. Contractor (i) shall not collect, retain, use, sell, or disclose Customer Data for any purpose (including for any commercial purpose) other than for the specific purposes set forth in this Agreement, unless otherwise required by law, (ii) shall not use Customer Data for the purposes of conducting online/targeted behavioral advertising for Customer or any other third party, (iii) shall, at Customer's reasonable request, cease any unauthorized processing of Customer Data and grant Customer authorization to assess and remediate any such unauthorized processing.

11.4 Customer Obligations. Customer shall comply with all requirements that apply to it under applicable laws governing data privacy. Customer represents to Contractor that Customer has the legal authority to provide Contractor with any and all Customer Data for the contemplated uses under this Agreement, and when legally required, Customer has obtained all legal consent for the collection, use, disclosure, and processing of Customer Data. Except to the extent otherwise agreed to by Contractor in writing (and a statement of work, order form, or similar documentation are acceptable forms of writing), Customer shall not provide Contractor with any unencrypted personally identifiable information that is considered sensitive (e.g., a social security number, driver's license number, financial account data, health data) as part of the Support Services or otherwise. If Customer violates provisions of the previous sentence by providing unencrypted personally identifiable information that is considered sensitive, Customer hereby releases Contractor from, and shall not hold Contractor liable for, any loss, damages, or harm Contractor incurs as a result of Contractor's violation of this Section 11.4.

11.5 Confidentiality; Information Security. Contractor shall (i) implement measures designed to (a) maintain the confidentiality of Customer Data and (b) limit access to Customer Data to only those individuals who have a business need for such access and (ii) undertake reasonable steps to ensure the reliability of all individuals who have access to Customer Data. Contractor shall implement and maintain commercially reasonable technical and organizational security controls to protect and safeguard Customer Data from unauthorized use or disclosure, which shall include written policies describing its security controls and the relevant procedures and responsibilities of Contractor personnel who have access to Customer Data. Contractor shall designate a senior employee to be responsible for the overall management of Contractor's information security program.

11.6 Cooperation; Assistance. Contractor shall provide reasonable assistance to Customer to enable Customer to comply with its obligations and responsibilities under any applicable privacy law, including with respect to providing access to, correcting, and deleting Customer Data. Contractor shall promptly notify Customer if Contractor receives a correspondence, inquiry, complaint, request, or demand concerning Contractor's use or processing of Customer Data.

11.7 Security Procedures. Contractor shall, where legally required, notify Customer of any unauthorized access to or use of Customer Data when Contractor discovers the same. In such circumstances, Contractor shall provide timely information to Customer relating to such unauthorized access or use and promptly take reasonable steps to contain, investigate, and mitigate the same. Any action or notification taken by Contractor in accordance with this clause shall not be interpreted or construed, in any manner, as an admission of liability, wrongdoing, or fault. Contractor shall not be liable to Customer or any third party for damages, losses, or harm arising from any unauthorized access to or use of Customer Data, provided such damages, losses or harm are caused by an act or omission of Customer or a third party acting outside the control of Contractor, or by Customer's breach of this Agreement.

11.8 Subcontractors. Customer hereby acknowledges and agrees that Contractor may use affiliates and subcontractors to assist with its provision of Support Services to Customer, provided Contractor executes with any such affiliates and subcontractors a written agreement that contains provisions that are substantially similar to the provisions set forth in this Agreement. Contractor shall undertake all reasonable efforts to ensure that any such affiliates and subcontractors can comply, and are in compliance, with the provisions of this Agreement.

11.9 Feedback. Customer may voluntarily, but is not required to, provide Contractor, Contractor's affiliates and subcontractors, or both, with ideas, suggestions, requests, recommendations, and feedback about the System or Customer's business operations ("Feedback"). In circumstances where Customer provides Contractor, Contractor's affiliates and subcontractors, or both, with such Feedback, Contractor shall own all rights, title, and interest, including all intellectual property rights, in and to the Feedback, including any configurations and customizations thereof. Customer hereby represents and warrants to Contractor that Customer has all rights to provide Feedback to Contractor in accordance with this Section 11.9.

11.10 Sufficiency. Customer is solely responsible for reviewing the System, including the Documentation, to determine whether it satisfies Customer's requirements and legal obligations. For the avoidance of doubt, Customer is responsible for its use of the System, including making appropriate use of the System to ensure a level of security appropriate to the risk with respect to securing its account authentication credentials, protecting the security of its data and information when in transit to and from, or otherwise retained in, the System, taking appropriate steps to securely encrypt, backup, or both encrypt and backup, any data and information Customer uploaded to the System, and properly configuring the System and using available features and functionalities to maintain appropriate security. Customer acknowledges and agrees that Contractor is not responsible to serve as Customer's primary data backup repository and the System is not designed to be a data backup repository. Customer shall further ensure that it has implemented and maintains security protection and adequate backup and recovery for its System, any data and information Customer uploaded to the System, and Customer Data. Contractor has no obligation to protect Customer Data retained in the System or within information technology infrastructure, systems, or networks that Contractor does not own or license.

12. GENERAL PROVISIONS

12.1 [Reserved.]

12.2 Compliance with Laws. Each party shall, in performing its obligations under this Agreement, comply with all laws, rules, regulations and governmental orders applicable to such party.

12.3 Amendments. This Agreement may be amended or supplemented from time to time, but only by a written instrument executed by Customer and Contractor. The term "Agreement" includes all such future amendments or supplements.

12.4 Construction. Headings or captions to the provisions of this Agreement are solely for the convenience of the parties, are not part of this Agreement, and shall not be used to interpret or determine the validity of this Agreement. Any ambiguity in this Agreement shall not be construed against the drafter, but rather the provisions of this Agreement shall be given a reasonable interpretation as if both parties had in fact drafted this Agreement.

12.5 Recitals and Exhibits. The Recitals to this Agreement and the exhibits attached to this Agreement are part of the Agreement and are incorporated by this reference.

12.6 Survival. The provisions of Sections 5, 8, 9, 11, and 12 shall survive any termination or expiration of this Agreement and the License granted herein.

12.7 Relation Between the Parties. This Agreement shall not be construed to constitute either party as the agent or legal representative of the other for any purpose whatsoever. Neither party is granted any express or implied right or authority by the other party to assume or create any obligation or responsibility on behalf of or in the name of the other party, or to bind the other party in any manner or thing whatsoever.

12.8 Assignment. Neither this Agreement, the License, nor any other right or obligation under this Agreement shall be assigned, delegated or otherwise transferred by either party, without the prior written consent of the other party. Notwithstanding the preceding sentence, Contractor may assign, delegate, or otherwise transfer this Agreement, the License, and Contractor's rights and obligations under this agreement to any affiliate or contractor or to any successor of Contractor's business or any part thereof, with the prior written consent of Customer; provided, however, that such consent shall not be unreasonably withheld, conditioned, or delayed. Notwithstanding section 12.14, Contractor shall provide notice of any proposed assignment by certified mail, and Customer shall respond by certified mail within sixty (60) days of receipt of such notice. Failure by Customer to respond within such sixty (60) day period shall be deemed approval of the proposed assignment.

12.9 Successors. Subject to the restrictions in Section 12.8 of this Agreement, this Agreement shall bind and inure to benefit of the respective assigns, successors, representatives and affiliates of the parties.

12.10 Waiver. Waiver of any default by either party to this Agreement shall not be deemed to be waiver of any subsequent default. Waiver or breach of any provision of this Agreement shall not be deemed to be a waiver of any other or subsequent breach, and shall not be construed to be a modification of the terms of this Agreement unless this Agreement is modified as provided below.

12.11 Certain Remedies. The parties acknowledge and agree that any breach by Customer of Section 8 of this Agreement would cause irreparable damage to Contractor, the exact amount of which would be impossible to ascertain, and for that reason, Contractor shall be entitled to injunctive relief in the event of any actual or threatened breach of Section 7. Such relief shall be in addition to any remedies to which Contractor may be entitled under law or otherwise.

12.12 Severability. If any portion of this Agreement is declared invalid by a court of competent jurisdiction or if it is found to be unlawful or otherwise unenforceable, the remaining provisions of this Agreement shall remain in full force and effect to the extent that the provisions of this Agreement are severable, and the parties shall make best efforts to replace the unlawful or unenforceable part of this Agreement with lawful and enforceable provisions intended to accomplish the parties' original intent.

12.13 Nondiscrimination. During the performance of this Agreement, Contractor and its officers, employees, agents, representatives or subcontractors shall not unlawfully discriminate in violation of any federal, state or local law, rule or regulation against any employee, applicant for employment or person receiving services under this Agreement because of race, religion, color, national origin, ancestry, physical or mental handicap, medical condition (including genetic characteristics), marital status, age, political affiliation or sex. Contractor and its officers, employees, agents, representatives or subcontractors shall comply with all applicable federal, state and local laws and regulations related to non-discrimination and equal opportunity, including without limitation the Customer's nondiscrimination policy; the Fair Employment and Housing Act (Government Code sections 12900 et seq.); California Labor Code sections 1101, 1102 and 1102.1; the Federal Civil Rights Act of 1964 (P.L. 88-352), as amended; and all applicable regulations promulgated in the California Code of Regulations or the Code of Federal Regulations.

12.14 Notice. Any notice, communication, amendment, addition or deletion to this Agreement, including change of address of either party during the term of this Agreement, which Contractor or Customer shall be required or may desire to make shall be in writing and may be delivered either by personal service, by first-class United States mail, by an overnight commercial courier service, by telephonic facsimile transmission, or by Portable Document Format (PDF) document attached to an email.

(A) A notice delivered by personal service is effective upon service to the recipient

(B) A notice delivered by first-class United States mail is effective three Customer business days after deposit in the United States mail, postage prepaid, addressed to the recipient.

(C) A notice delivered by an overnight commercial courier service is effective one Customer business day after deposit with the overnight commercial courier service, delivery fees prepaid, with delivery instructions given for next day delivery, addressed to the recipient.

(D) A notice delivered by PDF document attached to an email is effective when transmission to the recipient is completed (but, if such transmission is completed outside of Customer's business hours, then such delivery is deemed to be effective at the next beginning of a Customer business day), provided that the sender maintains a machine record of the completed transmission.

To Customer:	Auditor-Controller/Treasurer-Tax Collector County of Fresno Hall of Records, Room 105 Attn: Administration 2281 Tulare Street Fresno, CA 93721 Email: FresnoAuditor@fresnocountyca.gov
To Contractor:	Nicholas M Betts, President Megabyte Systems, Inc. 2630 Sunset Blvd Rocklin, CA 95677 Email: NBetts@megabytesystems.com

12.15 Conflicts. Contractor agrees that it has no interest and shall not acquire any interest direct or indirect which would conflict in any manner or degree with the performance of the work and services under this Agreement.

12.16 Advice of Attorney. Each party warrants and represents that in executing this Agreement, it has received independent legal advice from its attorneys or the opportunity to seek such advice.

12.17 Enforcement. If either party brings an action of any nature against the other party by reason of the breach of any provision of this Agreement, or otherwise arising out of this Agreement, whether for declaratory or other relief, the prevailing party in such action shall be entitled to such party's reasonable expenses relating to such action, including its costs of suit and attorneys' fees.

12.18 Dispute Resolution. In the event of any dispute, claim, question, or disagreement arising from or relating to this Agreement or the breach thereof, the parties shall use their best efforts to settle the dispute, claim, question, or disagreement. To this effect, they shall consult and negotiate with each other in good faith and, recognizing their mutual interests, attempt to reach a just and equitable solution satisfactory to both parties. For all claims arising from or related to this Agreement, nothing in this Agreement establishes, waives, or modifies any claims presentation requirements or procedures required by law, including the Government Claims Act (Division 3.6 of Title 1 of the Government Code, beginning with section 810).

12.19 Entire Agreement. This Agreement supersedes any and all other agreements, either oral or in writing, between any of the parties with respect to the subject matter of this Agreement and contains all the agreements between the parties with respect to such matter. Each party acknowledges that no representations, inducements, promises or agreements, oral or otherwise, have been made by any party, or anyone acting on behalf of any party, which are not embodied in this Agreement, and that no other agreement, statement or promise not contained in this Agreement shall be valid or binding.

12.20 Governing Law and Venue. This Agreement shall be deemed to be made under, and shall be governed by and construed in accordance with, the laws of the State of California. This Agreement is signed and performed in Fresno County, California. Any action brought to enforce the terms or provisions of this Agreement shall have venue in Fresno County, California.

12.21 Website Hosting Terms. Contractor may, from time to time, provide Customer with website hosting services described in a separate written agreement (and a statement of work, order form, or similar documentation are acceptable forms of a written agreement) that are designed to enable Customer's clients and constituents to access and review property tax-related information, and to address, respond to, or otherwise facilitate property tax-related payments, debts, and similar issues (collectively, "Website Hosting Services"). To the extent that Contractor furnishes to Customer such Website Hosting Services, then each party agrees to comply with the additional terms and conditions set forth in the Website Hosting Addendum attached and incorporated into this Agreement. For the avoidance of doubt, the Website Hosting Addendum shall supplement this Agreement.

[*Signature page follows*]

The parties are signing this Agreement as of the date stated in the introductory paragraph.

COUNTY OF FRESNO

____

Garry Bredefeld, Chairman of the Board of Supervisors of the County of Fresno

MEGABYTE SYSTEMS, INC

By: N. Betts

Nicholas M. Betts
President
Taxpayer Identification No. 77-0547969

Attest:

Bernice E. Seidel
Clerk of the Board of Supervisors
County of Fresno, State of California

By: ______________________
Deputy

Date: ____________

Website Hosting Addendum

This Website Hosting Addendum (the "Addendum") governs the Website Hosting Services, and it supplements the Software License Agreement (the "Agreement"). Any term that is capitalized but not otherwise defined in this Addendum shall be ascribed the meaning set forth in the Agreement. Any and all terms and conditions that are set forth in the Agreement that are not otherwise addressed by this Addendum remain in full force and effect and apply to this Addendum. To the extent of a conflict between the terms and conditions of the Agreement and this Addendum, the terms and conditions set forth in this Addendum shall supersede and control with respect to such conflict only.

1. SCOPE OF SERVICES

1.1 Customer Site. To the extent so agreed upon in writing between the parties, Contractor may maintain and operate for and on behalf of Customer a website (the "Customer Site"), including all hardware and software therein, in which certain Customer content, materials (including but not limited to Customer's logos, trademarks, service marks, trade names, service names, insignia, internet domain names, corporate names, and contact information), and other related documentation (collectively, "Customer Content") will be placed, as determined in Contractor's sole discretion, within one or more of Contractor's web-servers and made publicly available. Contractor will, in its sole discretion, assign one or more domain (or sub-domain) names to the Customer Site, such as [http://mptsweb.com/mbap/Customer/asr].

1.2 Features and Resources. Customer acknowledges and agrees that hardware and/or software resources utilized to deliver the Customer Site may be shared by Contractor among Contractor's other customers located on the same Contractor server. Customer further acknowledges and agrees that the purpose of the applicable Web Hosting Services is solely to host websites, including Customer Site, and the use of the applicable Web Hosting Services for online file storage and/or archiving electronic files or with data unrelated to a Customer Site is prohibited. Customer agrees that Customer Content that adversely affects Contractor's servers or network performance must be immediately modified or corrected by the parties, or by Contractor in its sole discretion, and Customer will be required to upgrade to a different web hosting solution as determined by Contractor in order to host Customer Content.

2. DOMAIN NAME RIGHTS; THIRD-PARTY SOFTWARE AND SERVICES

2.1 Domain Name Rights. By creating a Customer Site, Customer agrees that (i) Contractor shall, at all times, be the owner of the domain (or subdomain) name of the Customer Site, (ii) Customer does not have any right to, or in, any domain (or sub-domain) name that Contractor assigns to the Customer Site, and Customer shall not challenge Contractor's ownership thereof or engage in "domain squatting," and (iii) Customer will not seek to claim or procure an unreasonable number of domain (or sub-domain) names, or to sell access to any such domain (or sub-domain) names. The exact number of domain (or sub-domain) names that Contractor will assign to a Customer Site will be determined by Contractor in its sole discretion.

2.2 Third-Party Rights and Terms. Customer acknowledges and agrees to be bound by any terms and conditions related to any third-party software or services, including but not limited to payment card processing services, provided by Contractor for Customer's use of the Customer Site. By accepting this Addendum, Customer expressly acknowledges and agrees to comply with the terms and conditions related to Contractor's third-party payment card processors, and Customer acknowledges and agrees that Contractor is not liable for any act or omission by such third-party payment card processors.

3. CUSTOMER CONTENT; CONTRACTOR MATERIALS

3.1 Ownership of Customer Content. As between the parties, Customer owns all rights, title, and interest in Customer Content. During the Term of the Agreement, Customer hereby grants to Contractor, a license and right to use Customer Content on the Customer Site in accordance with the terms of this Addendum and the Agreement. Contractor shall implement commercially reasonable measures designed to use and imprint the Customer Content within the Customer Site in a manner consistent with the written branding guidelines or written instructions, if any, provided by Customer regarding the proper use of its Customer Content. Customer reserves all rights to the Customer Content not expressly granted herein, and all goodwill associated with Contractor's use of the Customer Content shall inure to the benefit of Customer. Upon termination of this Agreement, Contractor will promptly discontinue all use of Customer Content. Contractor further agrees it will not challenge Customer's ownership of the Customer Content during or after the Term of the Agreement. Customer hereby represents that it has the rights to provide Customer Content to Contractor for purposes of the Agreement (including this Addendum), and such Customer Content is, and shall remain, accurate, complete, and reliable.

3.2 Ownership of Contractor Materials. Except with regard to Customer Content, Contractor retains all intellectual property rights in and to the content related to the Customer Site, including all information, data, logos, marks, designs, graphics, pictures, sound files, other files, and their selection and arrangement (collectively referred to as the "Contractor Materials"). Except with regard to Customer Content, Contractor Materials are, and all software available through the Customer Site or used to create and operate the Customer Site is, the property of Contractor or its licensors, and such property is protected by domestic and international copyright laws. All rights to the Customer Site, the Contractor Materials and such software are expressly reserved to Contractor. All Contractor trademarks, registered trademarks, product names and company names or logos appearing through the Customer Site are the property of Contractor or its affiliates or licensors. Any use of any portion of the Contractor Materials without Contractor's prior written permission is strictly prohibited and will terminate Customer's permission to use the Customer Site.

3.3 Right to Use. Customer hereby represents that it has the right to provide Customer Content to Contractor for purposes of the Agreement (including this Addendum). Customer represents and warrants to Contractor that any information

Customer provides to Contractor and Customer Content is accurate, true and complete and Customer shall maintain and immediately update any such information and Customer Content to keep it accurate, true and complete at all times. Customer is solely responsible for ensuring that material (including Customer Content) submitted for inclusion on the Customer Site complies with all applicable laws, statutes, and regulations, and any other applicable governmental order or requirement. Notwithstanding any other clause in the Agreement (including this Addendum), Customer expressly grants to Contractor a right and license to cache the entirety of the Customer Content and agrees that such caching is not an infringement of any of Customer Content. Although Contractor is not obligated to monitor Customer Content and assumes no responsibility for Customer Content or the content of its other customers, Contractor reserves the right, subject to all applicable laws, to investigate Customer Content and may block access to, refuse to host, or remove any information or material that it deems to be unacceptable or inappropriate, or otherwise in breach of the Agreement (including this Addendum).

4. DATA PROTECTION

4.1 Data Protection. Each party hereby agrees that Customer is a data "controller" for purposes of any personally identifiable information inputted to the Customer Site ("Site Personal Data") and Contractor is a data "processor" of such Site Personal Data. Contractor agrees to collect and process Site Personal Data to the same extent and manner Contractor collects, retains, and processes Customer Data pursuant to Section 10 of the Agreement. Site Personal Data does not include Publicly Available Information. The term "Publicly Available Information" means "information that is lawfully made available from federal, state, or local government records, or information that Contractor has a reasonable basis to believe is lawfully made available to the general public by the data subject or from widely distributed media; or information made available by a person to whom the data subject has disclosed the information if the data subject has not restricted the information to a specific audience."

4.2 Data Back-Up. Contractor shall not be responsible for retaining copies of any Customer Content, or any other data inputted into the Customer Site, in either a temporary or permanent status. Customer is solely responsible for making backup copies of any Customer Content and any other data inputted into the Customer Site. Customer is encouraged to backup all such Customer Content and data in separate regular backup.

5. MAINTENANCE AND WARRANTIES; INDEMNIFICATION

5.1 Maintenance and Support. Contractor will use commercially reasonable efforts to provide technical support relating to the Customer Site via its helpdesk. The helpdesk aims to provide technical support in a commercially reasonable manner. Customer must provide any assistance reasonably necessary to allow Contractor to verify and resolve the issues and problems it brings to Contractor's attention through the helpdesk. Contractor will undertake commercially reasonable efforts to remove from public view any Customer Content that Customer deletes, or requests be deleted, from the Customer Site, but Customer acknowledges that caching or references to Customer

Content may not be made immediately unavailable. Contractor is under no obligation to retain Customer Content, and Customer is solely responsible for making copies, duplicates, or otherwise "backing-up" Customer Content.

5.2 WARRANTY AND DISCLAIMERS. EXCEPT AS OTHERWISE SET FORTH IN SECTION 5.1 OF THIS ADDENDUM, THE CUSTOMER SITE IS PROVIDED ON AN "AS IS" BASIS WITH ALL FAULTS. CONTRACTOR EXPRESSLY DISCLAIMS ANY AND ALL REPRESENTATIONS, WARRANTIES, OR CONDITIONS WITH RESPECT TO THE CUSTOMER SITE. CONTRACTOR DOES NOT REPRESENT OR WARRANT THAT THE CUSTOMER SITE WILL BE ERROR-FREE, FREE OF VIRUSES OR OTHER HARMFUL COMPONENTS, OR THAT DEFECTS WILL BE CORRECTED. CONTRACTOR DOES NOT REPRESENT OR WARRANT THAT THE INFORMATION AVAILABLE ON OR THROUGH THE CUSTOMER SITE WILL BE CORRECT, ACCURATE, TIMELY OR OTHERWISE RELIABLE. CONTRACTOR RESERVES THE RIGHT, IN ITS SOLE DISCRETION, TO EDIT OR DELETE ANY INFORMATION OR CONTENT APPEARING THROUGH USE OF THE CUSTOMER SITE (INCLUDING THE CUSTOMER CONTENT). CONTRACTOR DISCLAIMS ALL REPRESENTATION AND WARRANTIES, WHETHER EXPRESS OR IMPLIED, PAST OR PRESENT, STATUTORY OR OTHERWISE, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OR CONDITIONS OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTY THAT THE SERVICES WILL BE UNINTERRUPTED OR ERROR FREE. CONTRACTOR IS NOT LIABLE FOR, AND CUSTOMER RELEASES CONTRACTOR FROM ALL LIABILITY ARISING FROM, ANY ACT OR OMISSION PERFORMED ON THE CUSTOMER SITE BY A THIRD PARTY.

5.3 Indemnification. Customer agrees to indemnify and hold Contractor and its affiliates, and its and their directors, officers, employees, agents and assigns harmless from and against any liabilities, losses, damages or costs, including reasonable attorneys' fees, incurred in connection with or arising from any of the following: (i) Customer or a third party's use of the Customer Site as so provided in accordance with the Agreement (including this Addendum), (ii) Contractor's use of Customer Content, and (iii) any violations of this Addendum by Customer.

6. BETA SERVICES

6.1 Contractor may offer previews of new services and/or new features to existing Website Hosting Services in a pre-release version or limited preview services ("Beta Services"). Beta Services (unless otherwise exempted) are subject to the following: (i) Customer acknowledges and agrees that, as Beta Services are pre-release versions, Beta Services may not work properly; (ii) Customer acknowledges and agrees that Customer use of Beta Services may expose Customer to the risk of operational failures; (iii) because Beta Services are provided "as is," Contractor does not recommend using Beta Services in production or mission-critical environments; (iv) Contractor may modify, change, or discontinue any aspect of Beta Services at any time; (v) programs that use or run with Beta Services may not work with the commercially released versions or subsequent releases; (vi) Contractor may limit the availability of customer service and/or technical support for Beta Services; and (vii) Beta Services are provided "as is," "as available," and "with all faults." To the fullest extent permitted by law, Contractor disclaims any and all warranties, statutory, express or implied, with respect to Beta Services including, but not limited to, any implied warranties of title, merchantability, fitness for a particular purpose and non-infringement.

EXHIBIT A: SPECIFICATIONS

The System shall meet all specifications provided in this Exhibit A.

1. General Requirements

1.1. Contractor shall provide an integrated California Property Tax System that meets the Customer's operational requirements. The System shall provide functionality for secured, unsecured, supplemental and delinquent property tax processing. The System shall maintain workflow continuity across Assessor, Auditor, and Tax Collector operations and shall support Proposition 8 value adjustments, proration calculations and roll corrections.

1.2. Contractor shall provide a system that complies with the California Revenue and Taxation Code. All System modules shall maintain audit trails, perform levy calculations and satisfy statutory reporting obligations. Contractor shall fully test and deploy system updates when legislative changes require modifications to maintain legal compliance.

1.3. Contractor shall provide user interfaces (UI) that comply with the Customer's established user interface standards. The application shall employ Contractor's standard design library, and all layouts shall follow Contractor's defined accessibility and workflow requirements. User Interfaces are optimized for department and role-based workflows.

1.4. Contractor shall provide reporting tools that use dynamic data sources. The Reporting tools shall connect to live assessment and tax roll data and shall generate on-demand statutory reports and reconciliation outputs without manual data entry by users.

1.5. Contractor shall provide administrative interfaces that allow configuration of System behavior. Authorized users shall be enabled to configure levy rates, penalty schedules and workflow rules through an administrative control screen without requiring custom software development, allowing for timely response to operational or policy changes.

1.6. Contractor shall provide an integration adapter that supports interaction between System components, ensuring data integrity and enhancing interoperability. The integration layer shall enable secure data exchanges across Assessor, Auditor, and Tax Collector modules and external systems through file transfer protocol (FTP) and application programming interfaces (API) protocols.

1.7. Contractor shall provide comprehensive training and user screen documentation, including training class videos, how-to on-demand training videos, user manuals, and quick-reference materials upon contract execution. Contractor shall continue to provide ongoing access to documentation updates after the System is implemented to assist with rapid onboarding and proficiency.

1.8. Contractor shall provide the knowledge and experience of Contractor personnel required to support the System. Contractor personnel shall apply their experience in California property tax administration during implementation and ongoing operations, while employing methodologies that adhere to County property tax processing requirements.

1.9. The System shall provide comprehensive inquiry access to property tax information. Authorized users shall be enabled to review information needed for research, value questions and ownership verification to support cross-department operations.

1.10. Contractor shall, as part of the implementation services and the Data Conversion/Migration cost in Exhibit C, migrate all current fiscal year data and historical data necessary for full operational functionality of the System. This shall include four (4) years of Value History, Ownership History, and Sales History on the Assessor side. Tax Roll History shall include two (2) years, consisting of one (1) year converted and one (1) year created through the go-live turnover process. All delinquent records shall remain on the roll.

2. Auditor Functions

2.1. The System shall provide apportionment functions for secured, unsecured, unitary, supplemental (secured & unsecured), secured delinquent/redemption and unsecured delinquent rolls, including refunds from roll corrections, negative supplementals and AB454 (Chapter 921 Statutes of 1987) processing. The System shall generate separate apportionment reports for each tax roll and maintain audit controls to ensure transparency and statutory adherence.

2.2. The System shall provide administrative tools allowing for precise configuration and maintenance of tax rate areas, enabling dynamic updates to reflect jurisdictional changes without custom programming.

2.3. The System shall provide tax roll controls and built-in audit functions. The System shall track all roll modifications and shall generate daily reports that reconcile roll-change activity with audit logs, enabling same-day reconciliation and exception review.

2.4. The System shall provide refund issuance functions excluding physical check processing. The System shall calculate and authorize refunds related to value reductions, prior escapes, roll corrections and overpayments. Following County review and approval, automated refund creation is triggered by approved roll changes or overpayments and is tracked within collection and register workflows to ensure traceability.

2.5. The System shall support multi-year tax rates, applying tax rates across multiple fiscal years to ensure accurate levy calculations for historical and future periods. The System shall maintain a multi-year tax rates database table which shall retain historical rates for County review.

2.6. The System shall provide administrative interfaces for creating and maintaining ad-valorem tax codes, ensuring compliance with statutory requirements and local policies.

2.7. The System shall include user-controlled reporting tools. Authorized users shall be enabled to generate reports using dynamic data sources, including Crystal Reports and structured query language (SQL) Server Reporting Services (SSRS) to support operational reporting and audit needs.

2.8. The System shall provide configurable system parameters to enable granular control over operational thresholds, such as low-bill limits and roll balancing criteria.

2.9. The System shall provide authorized users with access to collection information for all roll types, including real-time system dashboards displaying collected, uncollected and percentage-collected amounts. The System shall generate standard collection reports by roll type with running percentages for review of current status, enhancing fiscal monitoring.

2.10. The System shall include inquiry access to prior-year tax bills for auditor-specific views. Authorized users shall be provided with instant access to review historical tax bill information within the converted years, streamlining research and audit review.

2.11. The System shall provide auditor-specific inquiry access to tax bills, including functions for displaying bill details and change history for any converted fiscal year to support compliance and reconciliation tasks.

2.12. The System shall include reporting for the auditor's homeowner exemption submission to State agencies, ensuring compliance with reporting mandates.

2.13. The System shall automate Assembly Bill 8 (AB8) allocation and processes, including calculation and distribution of tax increments. AB8 tools maintain Base Year values and increment factors and include certified value reporting.

2.14. The System shall provide standardized functions for the secure import of direct charges (including special taxes, special assessments and other charges that are not ad valorem taxes) using validation routines for accuracy. Direct charges import shall include structure and content validation and paid and unpaid tracking for the current and delinquent rolls. The Agency Direct Charge Portal shall provide agencies with the capability to upload files and shall validate such files at the time of upload.

2.15. The System shall provide utility roll import functions, including automated validation of imported utility roll data, correction of address and TRA errors and generation of the State Utility Roll Certified Values report for additional verification.

2.16. The System shall support setup and maintenance of special assessment codes and levy calculations, integrated with billing and collection workflows to support assessment administration.

2.17. The System shall provide roll change functions that integrate with the Assessor and Tax Collector departments. The System shall process roll adjustments for value changes, escapes, name and address updates, due date changes, penalty adjustments and redemption maintenance under audit control to maintain traceability.

2.18. The System shall include value changes to the tax roll with refund information created for reduction in values, prior escapes and name or address changes. The System shall process value adjustments and generate corresponding refund details, ensuring compliance and accuracy. Approved value and ownership corrections automatically compute refunds and update reporting.

2.19. The System shall provide tax bill creation functions for new bills, corrected bills, roll changes, refunds and supplemental bills. The System shall automate bill issuance for each applicable bill type, ensuring accuracy and efficiency.

2.20. The System shall include functions for inactivating parcels when they become exempt, inactive, or otherwise removed from the active tax roll to maintain roll integrity.

2.21. The System shall enable generation of auditor-specific control reports designed to validate roll integrity and fiscal accuracy. This includes apportionment, allocation factors, roll changes and refund activity for auditor reconciliation.

2.22. The System shall include redemption roll corrections. Balances shall be updated automatically by the System to reflect payments on delinquent accounts, apply statutory interest and generate corresponding notices to reflect redemption activity.

2.23. The System shall provide change-tax functions for auditor users, enabling authorized auditor users to modify tax amounts under controlled conditions such as correcting levy errors or implementing court-ordered changes. The System shall log all changes in the audit trail and control reports to ensure accountability during audit review.

2.24. The Auditor module shall provide secure workflows for approving and processing refunds resulting from roll corrections or overpayments. Refund authorizations are integrated with the County's financial systems for accurate disbursement tracking.

2.25. The System shall provide penalty-cancellation functions, enabling authorized users to cancel penalties under defined conditions such as administrative errors. The System shall log all cancellations for audit review.

2.26. The System shall automate delinquent account management, including penalty calculations. Maintenance routines update delinquent rolls during year-end rollover and provide inquiry access to historical delinquency data to ensure collections are accurate.

2.27. The System shall include due-date change functions for flexibility in special cases, allowing authorized users to modify due dates for tax obligations and implement approved adjustments.

2.28. The System shall provide prorated tax calculations for secured properties. The System shall calculate prorated taxes based on ownership duration and shall support supplemental extension processing to ensure accurate partial-year billing.

2.29. The System shall support Roll Corrections for all roll types through integrated roll change functionality. Consistent roll change menus and actions across all roll types shall be included under audit control to standardize processing and tracking.

2.30. The System shall include generation of daily balancing reports to ensure roll data accuracy and integrity. Daily report outputs highlight discrepancies for correction and daily reconciliation.

2.31. The System shall provide tools for generating letters and reports using Crystal Reports and Structured Query Language (SQL) Server Reporting Services (SSRS). Reporting tools shall support apportionment, TRA controls, direct charge summaries and auditor control reports to ensure County reporting requirements are met.

2.32. The System shall provide secure data exchange features for importing and exporting roll data. System interfaces enable import and export with approved County financial systems and agency reporting workflows.

2.33. The System shall provide an interactive year-end rollover checklist that guides users through the rollover process. The interactive checklist shall sequence tasks and validations to support orderly year-end closeout.

3. Tax Collector Functions

3.1. The System shall provide a universal form for all tax bills, including online bill production for secured, unsecured, supplemental, corrected bills resulting from roll changes, additional bills, prior secured bills, prior unsecured bills and prior unsecured supplemental bills. The System shall use a standard look and feel that applies across original, corrected and supplemental billing scenarios and integrates with roll-change workflows to maintain consistency across all bill types.

3.2. The System shall include tax bills for original secured and unsecured bills, generating forms in digital and print-ready formats to support statutory distribution and archival.

3.3. The System shall provide support for CORTAC tax service providers and lenders. The System shall exchange data with CORTAC interfaces and provide inquiry access to support escrow and mortgage processing.

3.4. The System shall identify duplicate billing addresses and consolidate non-lender bills to reduce mailing costs and improve customer experience. This shall be an automated process with logging for all consolidation actions.

3.5. The System shall provide certified agency data export functions for current and delinquent secured and unsecured rolls. The export files shall follow standardized formats to ensure compatibility with external systems.

3.6. The System shall provide authorized users with secure online access to view and print property tax bills for up to seven years, subject to the amount of historical billing data maintained within the System. This feature shall retrieve billing details and bill images directly from the System database and shall use the same calculation outputs used in the System's live billing processes, ensuring data consistency across platforms. Online bill details shall be presented in a PDF format, consistent with the County's standard bill layout.

3.7. Contractor shall provide online inquiry and tax information research functions on the web. Authorized users shall access real-time tax records, bills and payment history through online inquiry screens including detailed search filters to enable rapid retrieval of account information details.

3.8. The System shall provide access to MyCountyConnect, a secure online portal designed to deliver property-related services to taxpayers. MyCountyConnect enables authorized users to view designated assessment and tax information, submit requests and access online forms and self-service tools for reviewing property and tax bill details.

3.9. The System shall include redemption processing and delinquency notice generation. Redemption payoff amounts shall be calculated and updates shall be reflected immediately in the redemption roll and audit logs to support delinquency enforcement.

3.10. The System shall provide comprehensive online collection functions including register control, deposit lists, stub information verification, automated error processing and refund creation, vendor information maintenance and online audit records. The System shall balance registers and track deposits across payment types to enhance financial control and inform reconciliation proceedings.

3.11. The System shall provide remittance processing for batch and individual payments, which shall validate payment details automatically and integrate with cashiering and audit modules to maintain transaction traceability. The System shall support the Cashiering API and documentation shall be provided.

3.12. The System shall provide functions to collect various fees, enabling authorized users to configure and apply additional fees such as administrative charges or service fees. All fees are tracked in billing and collection reports for transparency.

3.13. The System shall include flexible cashiering functions, supporting both manual entry and integrated check scanning. Transactions will post to the System in real-time to maintain accurate account balances. Scanners used for integrated check scanning must be compatible with Silver Bullet to ensure correct hardware functionality.

3.14. The System shall provide five-pay installment plan processing for delinquent accounts, including automated schedules generation and notice issuance. The System shall apply compliance checks to ensure adherence to County policy.

3.15. The System shall include trust activity maintenance functions, and shall track deposits, disbursements and reconciliations. Authorized users shall be enabled to generate reports containing detailed audit trails to support trust account maintenance and financial oversight.

3.16. The System shall provide collections information for all roll types including collected, uncollected and percentage-collected amounts. Real-time dashboards shall display collection metrics across secured, unsecured, delinquent and supplemental rolls, enabling authorized users to view totals and percentages to monitor fiscal performance.

3.17. The System shall provide DMV-compliant reports for delinquent vessel accounts. Reports and data exports shall include ownership and lien data for enforcement purposes.

3.18. The System shall provide unsecured partial payment processing, applying payments according to statutory rules and adjusting balances automatically to maintain accurate account status.

3.19. The System shall provide flexible payment plans with both interest-bearing and interest-free options. Notices and schedules shall reflect the selected plan terms to support payment administration.

3.20. The System shall include a lien module which shall automate lien creation, release and removal and notice generation for delinquent accounts. Integration ensures lien status updates will be reflected in inquiry and collection workflows. The module shall support CeRTNA and SECURE lien import and export for secure data exchange and compliance.

3.21. The System shall provide a transient occupancy tax (TOT) module. The module will support billing, collection and reporting to effectively administer TOT obligations.

3.22. The System shall generate delinquency notices for secured, unsecured and supplemental rolls. Notices shall be produced in batches or on demand to support delinquency administration.

3.23. The System shall produce published delinquency lists in digital or print formats. Lists shall include required statutory information to meet publication requirements.

3.24. The System shall provide bankruptcy maintenance functions and related reports. The System shall track case status, apply stays and generate compliance reports to support legally required handling of affected accounts.

3.25. The System shall include a tax sale module that enables authorized users to manage all aspects of tax sale processing, including but not limited to eligibility determination, notice generation and reporting for properties subject to sale. The System shall log all actions taken within the module to support legal compliance and auditability for tax sale processing.

3.26. The System shall automatically transfer mobile homes flagged for delinquency to the unsecured delinquent roll. Transfers will update billing and enforcement records to maintain accurate roll classification.

3.27. The System shall generate mobile home tax clearance certificates for mobile home transfers. Certificates shall validate payment status and be stored for future reference to assist with ownership and transfer recordkeeping.

3.28. The System shall support discharge of accountability processing for uncollectible accounts. All actions taken and documentation produced will be logged by the System to maintain statutory compliance.

3.29. The System shall perform 30-year roll-off processing for unsecured liens. Liens will be removed from the System after 30 years to comply with statutory retention requirements, and historical records shall remain accessible for research.

3.30. The System shall support roll changes for Non-Sufficient Funds (NSF) checks, misapplied payments, penalty cancellations and due-date changes. All changes shall be logged in the System for audit review.

3.31. The System shall generate system-produced letters for short or overpayment scenarios, detailing discrepancies and next steps for account resolution. Generated letters shall support staff review and approval prior to external distribution. The System shall archive letter records for compliance tracking and audit purposes.

3.32. The System shall support adding various fees to accounts at any billing stage. Account balances and reports shall update automatically to reflect fee changes and maintain accurate financial records.

3.33. The System shall track returned mail and update account records accordingly. Workflow tools shall guide users in resolving address issues promptly to maintain accurate taxpayer contact information.

3.34. The System shall provide online inquiry access to real-time payoff amounts, including penalties and interest. Payoff amounts shall update dynamically as payments are applied to ensure accurate settlement processing.

3.35. The System shall provide inquiry access to payment plan statuses. Authorized users shall be enabled to view remaining installment details and due dates online to inform payment plan monitoring and increase transparency.

3.36. The System shall generate daily balancing reports for all rolls. Reports shall highlight discrepancies for immediate reconciliation, supporting continuous audit readiness.

3.37. The System shall provide templates for statutory letters and operational reports using Crystal

Reports and Structured Query Language (SQL) Server Reporting Services (SSRS), which shall be customizable to County requirements. Reporting tools shall support daily balancing, installment detail, lien and judgment reporting and DMV vessel delinquency reporting.

3.38. The System shall enable authorized users to print lien and judgment documents for unsecured accounts. Documents will follow statutory formats and include audit metadata to support legal processing.

3.39. The System shall provide secure, controlled data exchange exclusively with pre-approved external systems using standardized formats. Standardized import and export formats are designed to maintain compatibility and ensure data integrity within authorized integration boundaries.

3.40. The System shall provide real-time Tax Collector public inquiry access. Public users will receive updated account details immediately to support taxpayer self-service.

3.41. The System shall be integrated with online payment portals for immediate posting of transactions, and confirmation receipts and audit logs shall be generated automatically. The System shall be integrated with payment providers Point & Pay, InvoiceCloud, Heartland and LexisNexis.

3.42. The System shall deliver electronic tax bills and reminder emails through MyCountyConnect. Communications shall comply with County requirements and standards to support electronic taxpayer notifications.

3.43. The System shall provide digital turnover and rollover processing to reduce manual effort and risk of error. Automated validations shall run during year-end functions to ensure orderly closeout and compliance with statutory timelines.

3.44. Within supported modules, the System shall provide ad hoc query capabilities. Authorized users shall be enabled to run custom queries across tax, payment and roll data for operational analysis. Query results shall be available for export for reporting or audit purposes where this functionality shall be available.

3.45. The System shall support assessment notes with interdepartmental sharing for collaborative analysis. Access controls shall restrict note visibility to support both confidentiality and compliance.

3.46. The System shall support recovery workflows for delinquent accounts, including delinquent notices and payment tracking. Reports summarize recovery performance for management review, streamlining delinquency recovery.

3.47. The System shall store and link document images to assessment records, increasing ease of retrieval. This feature will support audit and research requirements.

4. Assessor Functions

4.1. The System shall provide inquiry access for secured, unsecured and supplemental tax rolls, including current and redemption rolls. Inquiry shall enable authorized users to view ownership, values, billing details, payoff calculations and delinquency status for streamlined processing.

4.2. The System shall include a Direct Enrollment program that evaluates eligible properties using predefined rules. The System shall automatically enroll qualifying properties within statutory timelines to maintain compliance and accuracy.

4.3. The System shall provide parameter-driven resource files that define standard system parameters without custom coding. Authorized users will be enabled to configure valuation, billing and workflow settings, and updates to resource files will propagate across modules to maintain consistency.

4.4. The System shall provide roll correction and escape processing for current and delinquent rolls, including integrated refund calculations. All changes will be logged in audit trails and reflected in daily control reports for enhanced audit oversight.

4.5. The System shall provide access to history for documents, ownership, assessments, values and tax bills. For all converted data, four years of history will be retained including scanned documents and prior-year valuations. Inquiry screens will support rapid navigation across related records to support research and compliance.

4.6. The System shall provide exemption setup and maintenance, including automated workflows homeowner exemption workflows. The System shall support exemption card scanning for data capture, reducing manual data entry and improving accuracy.

4.7. The System shall include annual secured and unsecured inflation processing. Inflation adjustments will be applied automatically based on statutory factors, ensuring timely updates to assessed values. Summary reports will be available for generation to support audit review.

4.8. The System shall generate and queue supplemental value notices each day as changes occur. Notices will be archived and tracked for compliance.

4.9. The System shall calculate prorated taxes for supplemental assessments based on ownership duration. The calculation will run automatically to support processing for partial-year billing, eliminating risk of manual computation errors.

4.10. The System shall provide digital appraisal worksheets that capture calculation details using multiple supported approaches. Worksheets will integrate with property records to support seamless updates to appraisal documentation.

4.11. The System shall include a Proposition 8 module which allows for the mass review of properties, and will enable users to determine if properties should be enrolled with new market values. Prop 8 module workflows will automate identification of properties eligible for market value adjustments, and batch processing accelerates enrollment decisions and reporting.

4.12. The System shall provide an integrated Clerk of the Board (COB) Appeals module that enables users to manage the assessment appeals process from filing through final determination. Authorized users will be enabled to record appeal applications, track statuses, document actions taken and maintain all information required for statutory compliance.

4.13. The System shall provide appraisal work queues and automatic work assignment. Tasks will be assigned based on roles and workload to support workflow management efficiency and accountability.

4.14. The System will support assessment notes with interdepartmental sharing for collaborative analysis. Access controls will restrict note visibility to support both confidentiality and compliance.

4.15. The System shall provide a digital Roll Correction worksheet shared between the Assessor and Auditor offices, which will enable real-time collaboration, status tracking, and approvals. This feature will eliminate paper-based processes and supports secure electronic approvals. Real-time updates will ensure both Assessor and Auditor offices work from the same data set.

4.16. The System shall include a Market Value program that will evaluate properties in direct-enroll neighborhoods that do not have a sale price or a % change in ownership. Automated valuation models will estimate market values for properties lacking recent sales data, and results feed directly into enrollment workflows for user review and evaluation.

4.17. The System shall provide a Commercial Valuation module that will derive market, income and cost approaches while also collecting sales, rent and rate data for subject properties. The module will support commercial appraisal calculations for comprehensive commercial evaluation, and will include data collection tools to ensure accurate inputs.

4.18. The System shall track Proposition 8 adjustments and construction in progress throughout the calendar year. Status updates will be available in inquiry screens and audit reports to support monitoring and reporting.

4.19. The System shall import building permit data and link permits to property records. Maintenance tools will allow updates and corrections for valuation and enrollment as needed.

4.20. The System shall generate supplemental bills automatically 30 days after value notices are issued. Billing will follow statutory timelines to maintain compliance.

4.21. The System shall freeze physical characteristics at the time of sale and store comparable sales data. Characteristics and comparables will be retained to preserve the valuation basis.

4.22. The System shall allow authorized users to download selected sales and property characteristics. Export formats will support integration with appraisal tools to support appraisal analysis.

4.23. The System shall generate management audit reports summarizing appraisal activity, roll changes, and compliance metrics. Report parameters will be customizable for departmental and managerial review.

4.24. The System shall support Williamson Act contracts and agricultural exemptions, including online submission by property owners.

4.25. The System shall provide Timber Preserve subsystems for valuation and reporting. Specialized modules will integrate with enrollment and billing to support Timber Preserve administration.

4.26. The System shall provide a Possessory Interest module that will calculate values and generate related notices. Inquiry tools will provide visibility into active contracts, increasing Possessory Interest review efficiency.

4.27. The System shall provide a Personal Property module for valuation, including automated depreciation schedules and asset tracking. Reports will summarize valuations to support compliance and audit.

4.28. The System shall provide an Online Business Property Forms (OBPF) module for streamlined online data submission and validation of business property statements, reducing reliance on mailed forms. OBPF submissions will be retained to support accurate data collection and validation.

4.29. The System shall provide vessel valuation using the National Automobile Dealers Association (NADA) if the County has an active subscription with NADA. The System shall retrieve NADA values for vessels and will support manual overrides when necessary. Valuation results will be integrated with billing workflows to ensure consistency.

4.30. The System shall provide aircraft valuation by manual entry or import from approved valuation sources. Integrated tools will ensure consistency across valuation and billing.

4.31. The System shall include a Mobile Home module that will track base year for all Personal Property Mobile Homes (PPMHs), calculate AH531 values, compare values to factored base year value and enroll the lower value at roll turnover. The module will support secured and unsecured classifications and will automate mobile home valuation and enrollment based on statutory rules, ensuring compliance and accuracy.

4.32. The System shall automatically generate secured notifications when assessment valuations are updated. Notices will comply with statutory requirements and will be archived for audit purposes.

4.33. The System shall produce Proposition 111 reports for state compliance, including fuel tax allocations. Reports will be formatted for submission to regulatory agencies.

4.34. The System shall include online user documentation and help resources within the System. Documentation will be updated regularly to reflect System changes and new features.

4.35. The System shall support year-round value updates, including updates for a new lien date. Updates will propagate across modules to maintain data consistency.

4.36. The System shall provide an interactive, digital checklist to guide users through Year-End Roll Turnover and minimize errors. The checklist will sequence tasks and validations, and will track user progress to ensure timely year-end duty completion.

4.37. The System shall provide image inquiry for maps, deeds and related records linked to property records. Authorized users will be enabled to view stored images directly from property records, enhancing review efficiency and accuracy.

4.38. The System shall generate State 801 and 802 reports required by the California State Board of Equalization (BOE). Reports will be available in electronic and print formats to meet state reporting requirements.

4.39. The System shall include templates for statutory letters and advanced Crystal Reports and Structured Query Language (SQL) Server Reporting Services (SSRS) reports. Authorized users will be enabled to customize layouts and export formats as needed based on reporting requirements. Reports will include appraisal detail and overview reporting, Proposition 8 tracking, supplemental bill reporting, State 801 and 802 reports, and Williamson Act and agricultural exemption reports.

4.40. The System shall provide geographic information system (GIS) integration with ESRI ArcGIS for spatial analysis and parcel mapping capabilities for property data. Authorized users will be enabled to visualize parcels and overlays for planning and valuation.

4.41. The System shall provide ApexSketch integration for creating and storing property sketches digitally. Sketches will link to property records for appraiser reference and documentation needs.

4.42. The System shall provide secure import and export capabilities with pre-approved external systems using standardized formats. Standardized formats are designed to maintain compatibility and ensure data integrity within authorized integration boundaries.

4.43. The System shall provide Power BI (Business Intelligence) reports for department heads, providing insight into appraiser activity, sales trends and pending work items in appraiser queues. Interactive dashboards will present real-time analytics and visualizations that will highlight performance metrics, supporting management review and decision-making.

4.44. The System shall provide Assessor Public Web inquiry functionality. Public inquiry tools will provide taxpayers with access to valuation details and annual notices, with data updates occurring in real-time to reflect changes. Taxpayers will be enabled to access the Informal Review Form online, providing a convenient way to request a review of their property valuation prior to formal appeal processes.

4.45. The System shall allow updates until the day before tax roll turnover. This capability will reduce the need for post-turnover tax roll corrections and improve operational efficiency.

4.46. The System will support Active Directory via Single Sign-On (SSO), allowing organizations to authenticate users through centralized directory services and streamline access. Additionally, system program-level permissions will be controlled by assigning and restricting access through user and group profiles, ensuring consistent, secure and centralized access management

Exhibit A
Specifications

This appendix to Exhibit A provides a detailed listing of all programs referenced in Exhibit A.

5. System Program Overview

Below table contains a listing of all programs currently available in the System and their descriptions, including associated department and group names.

5.1. Assessor Module

Dept Name	Group Name	Program Name	Description	Proj Spec #
Assessor	System Admin [Resource]	ASW0003	Assessor Control Info	4.3
Assessor	Personal Property System Admin [Resource]	ASW0004	OBPF Control Info	4.28
Assessor	System Admin [Resource]	ASW0005	Standard Notes Maintenance	4.14
Assessor	System Admin [Resource]	ASW0015	MapBook/Category Maintenance	4.3
Assessor	System Admin [Resource]	ASW0020	Appraisal Code Maintenance	4.3
Assessor	System Admin [Resource]	ASW0025	Taxability Code Maintenance	4.3
Assessor	System Admin [Resource]	ASW0030	Exemption Code Maintenance	4.6
Assessor	Public Inquiry	ASW0030INQ	Exemption Code Inquiry	4.6
Assessor	System Admin [Resource]	ASW0035	Land Use Code Maintenance	4.3
Assessor	System Admin [Resource]	ASW0045	Document Code Maintenance	4.3
Assessor	Appraiser Activity [Char/Comp]	ASW0072	MH Factor Schedule - User Defined	4.31
Assessor	Appraiser Activity [Char/Comp]	ASW0073	AH531 Factor Maintenances	4.31
Assessor	Appraiser Activity [Char/Comp] System Admin [Resource]	ASW0078	MH Attribute Control	4.31
Assessor	System Admin [Resource]	ASW0085	Situs Street And Codes Maintenance	4.3
Assessor	Inquiry	ASW0085INQ	Situs Street Codes Inquiry	4.1
Assessor	Jobs	ASW0090	State HOX & DAV Claim File Request	4.6
Assessor	Jobs	ASW0095	State Aircraft File Creation	4.30
Assessor	Inquiry	ASW0100	Assessor Inquiry	4.1
Assessor	Public Inquiry	ASW0100INQ	Assessor Inquiry	4.1
Assessor	Inquiry	ASW0100INQW	Assessor Public Inquiry Web	4.44

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Dept Name	Group Name	Program Name	Description	Proj Spec #
Assessor	Real Property	ASW0101	Asmt Miscellaneous Update	4.27
Assessor	Inquiry	ASW0105	Assessor Imaging Document Viewer	4.37
Assessor	Inquiry	ASW0110	Ownership Index (Search)	4.5
Assessor	Inquiry	ASW0120	Situs Index Search	4.1
Assessor	Public Inquiry	ASW0120INQ	Situs Index Search, Public	4.1
Assessor	Appraiser Activity [Char/Comp] Commercial/Industrial Appraisal	ASW0200	Physical Characteristics-Control	4.21
Assessor	Public Inquiry	ASW0200INQ	Physical Characteristics Inquiry	4.1
Assessor	Appraiser Activity [Char/Comp] Commercial/Industrial Appraisal	ASW0201	Physical Characteristics-Control	4.21
Assessor	System Admin [Resource]	ASW0205	Physical Characteristics Code List Maintenance	4.3
Assessor	Inquiry Public Inquiry Real Property	ASW0205INQ	Physical Characteristics Code List Inquiry	4.1
Assessor	Appraisal Functions	ASW0345	Convert Bldg Permits to MPTS Standard Format	4.19
Assessor	Appraisal Functions	ASW0350	Bldg Permit Transfer Import	4.19
Assessor	Appraisal Functions	ASW0355	Bldg PermitTransfer History Screen	4.19
Assessor	Appraisal Functions	ASW0360	Building Permits	4.19
Assessor	Appraisal Functions	ASW0365	Finalize Building Permits	4.19
Assessor	Appraisal Functions	ASW0380	Valuation Update	4.27
Assessor	Appraisal Functions	ASW0389	Prop 58 Imaging	4.37
Assessor	Real Property	ASW0393	Document Screening Queue	4.5
Assessor	Real Property	ASW0394	Base Year Tracking	4.32
Assessor	Real Property Roll Prep	ASW0395	Analysis/Transfer Queue	4.13
Assessor	System Admin [Resource]	ASW0399	Recorders Interface Maintenance	4.23
Assessor	Real Property	ASW0410	Parcel Description Maintenance	4.35
Assessor	System Admin [Resource]	ASW0411	Parcel Description Sequence Maintenance	4.35

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Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Assessor	PROP19	ASW0415	Proposition 19 OCR Document Scanning	4.5
Assessor	PROP19	ASW0418	Proposition 19 Control	4.35
Assessor	PROP19 Real Property	ASW0419	Proposition Maintenance	4.35
Assessor	Exemptions	ASW0420	Exemption Maintenance	4.6
Assessor	Exemptions	ASW0423	SSN Export	4.6
Assessor	Exemptions	ASW0424	Exported HOX Imaging SSNs	4.6
Assessor	Inquiry	ASW0430	Appraisal Worksheet	4.10
Assessor	Inquiry	ASW0440	Value Notice	4.8
Assessor	Inquiry	ASW0450	Appraisal Control Index	4.10
Assessor	Public Inquiry	ASW0455INQ	Supplemental Index Inquiry	4.1
Assessor	Real Property	ASW0460	Roll Assessee Maintenance	4.35
Assessor	Real Property	ASW0470	Assessor Reference Assessee Maintenance	4.35
Assessor	History	ASW0480	Transfer History Maintenance	4.5
Assessor	Real Property	ASW0490	Secured Assessment Create/Modify	4.35
Assessor	Unsecured	ASW0495	Unsec Assessment Create/Modify	4.35
Assessor	Appraisal Functions	ASW0500	Value History Maintenance	4.5
Assessor	Appraisal Functions Real Property	ASW0510	Appraisal Control Maintenance	4.10
Assessor	Real Property	ASW0570	Address Only Corrections	4.35
Assessor	Real Property Unsecured	ASW0575	Situs Address Maintenance	4.35
Assessor	Trees & Vines	ASW0600	Trees and Vines	4.24
Assessor	Public Inquiry Trees & Vines	ASW0600INQ	Trees and Vines Inquiry	4.24
Assessor	Unsecured	ASW0610	Aircraft Attribute Maintenance	4.30
Assessor	Unsecured	ASW0620	Boat Attributes	4.29
Assessor	Real Property Unsecured	ASW0630	Business Attribute Maintenance	4.26
Assessor	Personal Property	ASW0635	Business License Import	4.26
Assessor	AgPreserve[CLCA] Real Property Tax Sale	ASW0640	Ag Preserve	4.24
Assessor	AgPreserve[CLCA] System	ASW0641	Ag Preserve Internal Inquiry	4.24

Exhibit A
Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
	Admin [Resource]			
Assessor	AgPreserve[CLCA]	ASW0642	OAR Maintenance	4.24
Assessor	AgPreserve[CLCA]	ASW0643	OAR New Year Setup	4.24
Assessor	AgPreserve[CLCA]	ASW0644	Agricultural Contact Maintenance	4.24
Assessor	AgPreserve[CLCA]	ASW0645	Assessment Group Maintenance	4.24
Assessor	AgPreserve[CLCA]	ASW0646	OAR Administration	4.24
Assessor	AgPreserve[CLCA] Trees & Vines	ASW0650	Ag Resources	4.24
Assessor	Possessory Interest Unsecured	ASW0655	Possessory Interest	4.26
Assessor	Possessory Interest	ASW0656	Possessory Interest Agency Maintenance	4.26
Assessor	Possessory Interest	ASW0657	Possessory Interest Control	4.26
Assessor	Real Property	ASW0660	Assessor Notes Maintenance	4.14
Assessor	System Admin [Resource]	ASW0665	Assessor Notes Reprint	4.14
Assessor	History	ASW0670	Recorded Document Maintenance	4.5
Assessor	Real Property	ASW0680	Ownership Maintenance	4.35
Assessor	History	ASW0690	Ownership History Maintenance	4.5
Assessor	Appraiser Activity [Char/Comp] Real Property	ASW0700	MH Attributes/Valuations	4.31
Assessor	Appraiser Activity [Char/Comp] Unsecured	ASW0701	Manufactured Home Inquiry	4.1
Assessor	Personal Property Roll Prep	ASW0750	Aircraft Interface	4.30
Assessor	Personal Property	ASW0770	Vessel Valuation Worksheet	4.29
Assessor	Personal Property	ASW0771	Vessel Valuation Inquiry	4.29
Assessor	System Admin [Resource]	ASW0775	Vessel Valuation Control	4.29
Assessor	Personal Property	ASW0780	Online Vessel Property Reporting (OVPR)	4.29
Assessor	System Admin [Resource]	ASW0781	OVPR Control	4.29
Assessor	Personal Property	ASW0782	Web Form Data	4.29
Assessor	Personal Property	ASW0790	Personal Property Resource Maintenance	4.27
Assessor	Personal Property	ASW0795	Global Late File Penalty: Mass Update	4.27

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Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Assessor	Personal Property	ASW0800	Personal Property Summary/Detail	4.27
Assessor	Personal Property	ASW0800INQ	Personal Property Summary/Detail Inquiry	4.27
Assessor	Jobs	ASW0805	Personal Property Transfer to Roll	4.27
Assessor	Personal Property	ASW0815	Asmt Roll PP Value Update [Aircraft]	4.27
Assessor	Jobs	ASW0820	Personal Property New Year Set Up	4.27
Assessor	Personal Property	ASW0825	Recalc All Personal Property	4.27
Assessor	Personal Property	ASW0830	PP Global Factor Schedule Change	4.27
Assessor	Personal Property	ASW0835	Cost Detail/Summary Copy	4.27
Assessor	Personal Property	ASW0837	Global Schedule/Category Change	4.27
Assessor	Real Property Unsecured	ASW0839	Transfer Assessment to New Fee Parcel	4.35
Assessor	Jobs Real Property	ASW0841	Remap Request	4.35
Assessor	System Admin [Resource]	ASW0850	Neighborhood Code Maintenance	4.3
Assessor	Personal Property	ASW0865	Personal Property Batch Form Recd Scanned Entry	4.27
Assessor	System Admin [Resource]	ASW0870	MH (Manufactured Home) CodeList	4.3
Assessor	Jobs	ASW0875	Transfer MH Value to Roll	4.27
Assessor	Jobs	ASW0880	SetUp MH for New Roll Year	4.3
Assessor	Personal Property System Admin [Resource]	ASW0890	OBPF Administration	4.28
Assessor	Personal Property	ASW0895	OBPF Viewer	4.28
Assessor	System Admin [Resource]	ASW0899	OBPF Go Live Schedule	4.28
Assessor	Real Property	ASW0970	Asmt # Tracking Log Maintenance	4.5
Assessor	Inquiry Public Inquiry	ASW0970INQ	Asmt/FeeParcel Tracking Inquiry	4.1
Assessor	Roll Prep	ASW0999	Assessor Rollover/Turnover Schedule	4.36
Assessor	Appraisal Functions	ASW1100	Assessor Roll Corrections	4.4
Assessor	Inquiry Public Inquiry	ASW1100INQ	Assessor Control Info	4.3

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Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Assessor	Personal Property	ASW1101	PP Assessor Roll Corrections	4.4
Assessor	System Admin [Resource]	ASW1102	Roll Correction Status Change	4.4
Assessor	Inquiry	ASW1110	Roll Change Index	4.4
Assessor	System Admin [Resource]	ASW1120	CPI Factor Maintenance	4.7
Assessor	Jobs	ASW1370	601 Roll Agency CD Creation(Asr)	4.22
Assessor	Jobs	ASW1390	BOE Report Setup	4.39
Assessor	Real Property	ASW1400	Improvement Bond Maintenance	4.35
Assessor	System Admin [Resource]	ASW1402	Assessor Codelist Maintenance	4.3
Assessor	System Admin [Resource]	ASW1412	Asr Action Code List Maintenance	4.3
Assessor	Real Property System Admin [Resource]	ASW1500	ASR Document Path Setup	4.37
Assessor	Inquiry	ASW1501	Appraisal Code Inquiry	4.1
Assessor	Inquiry	ASW1502	Taxability Code Inquiry	4.1
Assessor	Inquiry	ASW1503	Document Code Inquiry	4.1
Assessor	Inquiry	ASW1504	Map Book/Category Inquiry	4.1
Assessor	Inquiry	ASW1506	Land Use Code Inquiry	4.1
Assessor	Inquiry	ASW1507INQ	Neighborhood Code Inquiry	4.1
Assessor	System Admin [Resource]	ASW1508	Global TRA Changes	4.3
Assessor	System Admin [Resource]	ASW1520	Department Name Address Maintenance	4.3
Assessor	Appraiser Activity [Char/Comp]	ASW1600	Sales Comps	4.10
Assessor	Appraiser Activity [Char/Comp]	ASW1605	Assessor Appeals Appraisal	4.12
Assessor	Appraiser Activity [Char/Comp] Commercial/Industrial Appraisal	ASW1610	Appraiser Queue	4.13
Assessor	Appraiser Activity [Char/Comp]	ASW1615	Direct Enrollment	4.2
Assessor	Inquiry	ASW1615INQ	Direct Enrollment History Inquiry	4.2
Assessor	System Admin [Resource]	ASW1620	Direct Enrollment Resources Maintenance	4.2
Assessor	Appraiser Activity	ASW1625	Chief Appraiser Queue	4.13

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Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
	[Char/Comp] Commercial/Industrial Appraisal			
Assessor	Appraiser Activity [Char/Comp] System Admin [Resource]	ASW1630	Value Update Queue	4.13
Assessor	Appraiser Activity [Char/Comp]	ASW1640	Prop 8s	4.11
Assessor	Appraiser Activity [Char/Comp]	ASW1640INQ	Prop 8s Inquiry	4.11
Assessor	Appraiser Activity [Char/Comp]	ASW1645	Assessor Appeals Scheduling	4.12
Assessor	Appraiser Activity [Char/Comp]	ASW1650	Market Value Projection	4.16
Assessor	System Admin [Resource]	ASW1655	Appeal Standard Notes Maintenance	4.12
Assessor	Appraiser Activity [Char/Comp] PROP19	ASW1660	Value Set Tracker	4.34
Assessor	Commercial/Industrial Appraisal	ASW1700	Commercial/Industrial Appraisal	4.17
Assessor	Commercial/Industrial Appraisal	ASW1712	Comm/Ind Appraisal Improved Sales	4.17
Assessor	Commercial/Industrial Appraisal	ASW1714	Comm/Ind Appraisal Land Sales	4.17
Assessor	Commercial/Industrial Appraisal	ASW1716	Comm/Ind Appraisal Capitalization Rates	4.17
Assessor	Commercial/Industrial Appraisal	ASW1718	Comm/Ind Appraisal Rental Rates	4.17
Assessor	Commercial/Industrial Appraisal	ASW1720	Comm/Ind Appraisal Cost Approach	4.17
Assessor	Commercial/Industrial Appraisal	ASW1730	Comm/Ind Appraisal Income Approach	4.17
Assessor	Commercial/Industrial Appraisal	ASW1740	Comm/Ind Rental Maintenance	4.17
Assessor	Commercial/Industrial Appraisal	ASW1750	Comm/Ind Rental Type Maintenance	4.17

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Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Assessor	Commercial/Industrial Appraisal	ASW1760	Comm/Ind Out of County Properties	4.17
Assessor	Commercial/Industrial Appraisal	ASW1770	Comm/Ind Report Text Template Maintenance	4.17
Assessor	Real Property System Admin [Resource]	ASW2400	Web Review Maintenance	4.44
Assessor	Personal Property	ASW5515	PP Statement Labels [Annual]	4.27
Assessor	Real Property	ASW5520	HOX/Chg Owner/Permit Letters/Labels	4.6
Assessor	Real Property	ASW5522	Annual New Construction Questionnaire	4.18
Assessor	Jobs	ASW5595	Roll Assessee Purge	4.23
Assessor	Jobs	ASW5650	Supplemental Notices	4.20
Assessor	Personal Property	ASW5750	Aircraft Appraisal	4.30
Assessor	Timber Preserve	ASW6000	TPZ Account-Create/Modify/Lien Update	4.25
Assessor	Timber Preserve	ASW6010	TPZ-Resource Maintenance	4.25
Assessor	Timber Preserve	ASW6020	TPZ-Other Value Added	4.25
Assessor	Jobs	ASW8100	CASS Certification	4.42
Assessor	Jobs	ASW8500	Assessor Misc Process [Clear 99 Appraisal Codes]	4.10
Assessor	Jobs	ASW8600	Low Value Exemptions	4.6
Assessor	Roll Prep	ASW8700	Ag Preserve HS Inflation & Values Transfer	4.24
Assessor	Roll Prep	ASW8800	Trees and Vines Transfer to the Roll	4.24
Assessor	Appraiser Activity [Char/Comp]	CBW0100	COB Inquiry	4.12
Assessor	Appraiser Activity [Char/Comp]	CBW0200	COB Quick Search & Export	4.12
Assessor	Appraiser Activity [Char/Comp]	CBW7220	COB Scheduling	4.12
Assessor	System Admin [Resource]	MSW0305	Report Registry	4.39
Assessor	System Admin [Resource]	MSW0310	Actions Code List-All Departments	4.3
Assessor	System Admin [Resource]	MSW0327	Document Type Maintenance	4.37

Exhibit A
Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Assessor	Jobs	MSW0500	Prop111 Parameter Setup	4.33
Assessor	Jobs	MSW0510	Supplemental Extension Control	4.9
Assessor	Personal Property	MSW0545	Generic Wrapper - ModelNum/TaxYear/Exclude	4.39
Assessor	Inquiry System Admin [Resource]	MSW0610	Old to New Asmt Maintenance	4.35
Assessor	Public Inquiry	MSW0610INQ	Old to New Assessment Inquiry	4.1
Assessor	System Admin [Resource]	MSW1000	Application Security	4.46
Assessor	System Admin [Resource]	MSW2000	Installation History	4.5
Assessor	System Admin [Resource]	MSW2400	Web Applications Maintenance	4.44
Assessor	System Admin [Resource]	MSW3000	Interface Control Maintenance	4.3
Assessor	Jobs	MSW6010	Job Scheduler	4.3
Assessor	System Admin [Resource]	MSW9999	SQL Security	4.46
Assessor	Inquiry Public Inquiry	TCW0100INQ	Tax Collector Public Inquiry	3.40

5.2. **Auditor Module**

Dept Name	Group Name	Program Name	Description	Proj Spec #
Auditor	Public Inquiry	ASW0030INQ	Exemption Code Inquiry	4.6
Auditor	Inquiry Public Inquiry	ASW0100INQ	Assessor Inquiry	4.1
Auditor	Inquiry Public Inquiry	ASW0120INQ	Situs Index Search, Public	4.1
Auditor	Public Inquiry	ASW0200INQ	Physical Characteristics Inquiry	4.1
Auditor	Public Inquiry	ASW0455INQ	Supplemental Index Inquiry	4.1
Auditor	Public Inquiry	ASW0970INQ	Asmt/FeeParcel Tracking Inquiry	4.1
Auditor	Inquiry Public Inquiry	ASW1100INQ	Assessor Control Info	4.3
Auditor	Inquiry	ASW1110	Roll Change Index	4.4
Auditor	Apportionments	AUW0025	GL Accounts for Tax Codes	2.6
Auditor	Direct Charges	AUW0045	Direct Charge Setup for New Year	2.14
Auditor	Direct Charges	AUW0050	Direct Charge Global Modify	2.14

Exhibit A
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Dept Name	Group Name	Program Name	Description	Proj Spec #
Auditor	Queries Resource Functions Taxroll Activities	AUW0055	AuditorControl:Pen/Int/Holidays	2.8
Auditor	Direct Charges	AUW0070	Direct Charge WorkFile Maintenance	2.14
Auditor	Direct Charges Trees & Vines	AUW0080	Direct Charge Import	2.14
Auditor	Direct Charges Resource Functions	AUW0081	Direct Charge Export	2.14
Auditor	Direct Charges Jobs	AUW0085	Direct Charge Create/Edit	2.14
Auditor	Apportionments	AUW0095	Tax Code Redistribution	2.6
Auditor	Inquiry	AUW0105	Imaging Document Viewer	1.9
Auditor	Resource Functions Taxroll Activities	AUW0120	Ad Valorem Tax Setup New Year	2.6
Auditor	Taxroll Activities	AUW0125	Manual Entry for Prior Year Multi Year Rates	2.8
Auditor	Resource Functions	AUW0140	Department Name Address Maintenance	2.8
Auditor	AB8Function Resource Functions	AUW0145	AB8 New Year Setup	2.13
Auditor	AB8Function Apportionments	AUW0150	Miscellaneous Tax Apportion Factors	2.1
Auditor	Apportionments	AUW0170	Manual Apportionment Input	2.1
Auditor	AB8Function	AUW0200	AB8 Calculations	2.13
Auditor	Resource Functions Taxroll Activities	AUW0465	Aud Utility Roll Name/Address Maint	2.15
Auditor	Roll Prep	AUW0999	Auditor Rollover/Turnover Schedule	2.33
Auditor	Roll Change Functions	AUW1000	Auditor Roll Change	2.17
Auditor	Roll Change Functions	AUW1110	Roll Change Status Update	2.17
Auditor	Commercial/Industrial Appraisal Refunds	AUW1140	Auditor Refund Authorization	2.24
Auditor	AB8Function	AUW1200	TRA Shift	2.2
Auditor	Resource Functions	AUW1412	Aud Action Code List Maintenance	2.8

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Dept Name	Group Name	Program Name	Description	Proj Spec #
Auditor	Resource Functions	AUW1500	AUD Document Path Setup	2.32
Auditor	Apportionments Roll Prep	AUW5300	Paid Apportionment Reports	2.21
Auditor	Apportionments	AUW5310	Unpaid Apportionment Reports	2.21
Auditor	Direct Charges	AUW5620	Direct Charge Tax Code Detail/Summary	2.14
Auditor	Jobs	AUW8000	Auditor Discharge of Accountability	3.28
Auditor	Taxroll Activities	AUW8200	Utility Roll	2.15
Auditor	Jobs	AUW9000	Rollover Process	2.33
Auditor	Resource Functions	MSW0305	Report Registry	2.31
Auditor	Resource Functions	MSW0310	Actions Code List-All Departments	2.8
Auditor	Resource Functions	MSW0327	Document Type Maintenance	2.32
Auditor	Jobs	MSW0510	Supplemental Extension Control	2.28
Auditor	Public Inquiry	MSW0610INQ	Old to New Assessment Inquiry	4.1
Auditor	Resource Functions	MSW1000	Application Security	4.46
Auditor	Resource Functions	MSW2000	Installation History	4.5
Auditor	Resource Functions	MSW2400	Web Applications Maintenance	4.44
Auditor	Jobs	MSW2500	Secured/Unsecured Extension - Status Monitor	3.16
Auditor	Jobs	MSW6010	Job Scheduler	2.8
Auditor	Resource Functions	MSW9999	SQL Security	4.46
Auditor	Resource Functions	PBW0001	Auditor / Tax Collector Code List Maint	1.9
Auditor	Inquiry	TCW0006	Collector Note Maintenance	3.45
Auditor	Inquiry	TCW0100	Taxroll Inquiry	3.40
Auditor	Public Inquiry	TCW0100INQ	Tax Collector Public Inquiry	3.40
Auditor	Inquiry	TCW0400	Tax Stats Inquiry	3.16
Auditor	Roll Change Functions	TCW1010	Roll Change Inquiry	3.30
Auditor	Direct Charges	TCW5700	Benefit Assessment	2.14

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Specifications

5.3. **Clerk of the Board Module**

Dept Name	Group Name	Program Name	Description	Proj Spec #
Clerk of the Board	Inquiry	ASW0100INQ	Assessor Inquiry	4.1
Clerk of the Board	Inquiry	ASW0120INQ	Situs Index Search, Public	4.1
Clerk of the Board	Inquiry	ASW0200INQ	Physical Characteristics Inquiry	4.1
Clerk of the Board	Resource Functions	CBW0005	COB Standard Note Maintenance	4.12
Clerk of the Board	Appeal Maintenance Inquiry	CBW0006	COB Note Maintenance	4.12
Clerk of the Board	Appeal Maintenance Inquiry	CBW0100	COB Inquiry	4.12
Clerk of the Board	Inquiry Utilities	CBW0105	COB Imaging Document Viewer	4.37
Clerk of the Board	Appeal Maintenance Inquiry	CBW0200	COB Quick Search & Export	4.12
Clerk of the Board	Resource Functions	CBW1500	COB Document Path Setup	4.37
Clerk of the Board	Appeal Maintenance	CBW5915SR	COB Notices - Merced - SSRS	4.39
Clerk of the Board	Appeal Maintenance	CBW7205	COB Appeal Queue	4.12
Clerk of the Board	Appeal Maintenance	CBW7210	COB Appeal Create / Modify	4.12
Clerk of the Board	Appeal Maintenance	CBW7220	COB Scheduling	4.12
Clerk of the Board	Appeal Maintenance	CBW7230	COB Appeal Results	4.12
Clerk of the Board	Appeal Maintenance Resource Functions	CBW7240	COB Agent / Contact Maintenance	4.12
Clerk of the Board	Appeal Maintenance	CBW7250	COB Appeal Status Maintenance	4.12
Clerk of the Board	Resource Functions	CBW7260	COB Hearing / Board Member Maintenance	4.12
Clerk of the Board	Resource Functions	CBW7270	COB Code List Maintenance	4.12

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Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Clerk of the Board	Resource Functions	CBW7280	COB Control Record Maintenance	4.12
Clerk of the Board	Resource Functions	CBW7290	COB Action Code List Maintenance	4.12
Clerk of the Board	Resource Functions	MSW0310	Actions Code List-All Departments	4.3
Clerk of the Board	Resource Functions	MSW0327	Document Type Maintenance	4.37
Clerk of the Board	Inquiry	TCW0100INQ	Tax Collector Public Inquiry	3.40

5.4. IT Module

Dept Name	Group Name	Program Name	Description	Proj Spec #
IT	Queries	ASW0100	Assessor Inquiry	4.1
IT	Resources	MSW0050	Integrations Maintenance	4.40
IT	Resources	MSW0305	Report Registry	4.39
IT	Resources	MSW0327	Document Type Maintenance	4.37
IT	Resources Security	MSW1000	Application Security	4.46
IT	Resources	MSW2410	MPTS API Security Screen	3.8
IT	Resources	MSW2420W	My County Connect Admin Portal	4.3
IT	Jobs	MSW6010	Job Scheduler	4.3
IT	Resources Security	MSW9999	SQL Security	4.46
IT	Queries	TCW0003	Tax Collector Control Maintenance	3.30
IT	Queries	TCW0010	Holiday Calendar Inquiry	4.1

5.5. Public Inquiry Module

Dept Name	Group Name	Program Name	Description	Proj Spec #
N/A	Inquiry	ASW0030INQ	Exemption Code Inquiry	4.6
N/A	Inquiry	ASW0100INQ	Assessor Inquiry	4.1
N/A	Inquiry	ASW0120INQ	Situs Index Search, Public	4.1
N/A	Inquiry	ASW0200INQ	Physical Characteristics Inquiry	4.1
N/A	Inquiry	ASW0455INQ	Supplemental Index Inquiry	4.1

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Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
N/A	Inquiry	ASW0970INQ	Asmt/FeeParcel Tracking Inquiry	4.1
N/A	Inquiry	ASW1100INQ	Assessor Control Info	4.1
N/A	Inquiry	MSW0610INQ	Old to New Assessment Inquiry	4.1
N/A	Inquiry	TCW0100INQ	Tax Collector Public Inquiry	3.40

5.6. Tax Collector Module

Dept Name	Group Name	Program Name	Description	Proj Spec #
Tax Collector	Inquiry Public Inquiry	ASW0030INQ	Exemption Code Inquiry	3.40
Tax Collector	Inquiry Public Inquiry	ASW0100INQ	Assessor Inquiry	3.40
Tax Collector	Public Inquiry	ASW0100INQW	Assessor Public Inquiry Web	3.40
Tax Collector	Inquiry Public Inquiry	ASW0120INQ	Situs Index Search, Public	3.40
Tax Collector	Public Inquiry	ASW0200INQ	Physical Characteristics Inquiry	3.40
Tax Collector	Public Inquiry	ASW0455INQ	Supplemental Index Inquiry	3.40
Tax Collector	Public Inquiry	ASW0970INQ	Asmt/FeeParcel Tracking Inquiry	3.40
Tax Collector	Inquiry Public Inquiry	ASW1100INQ	Assessor Control Info	3.40
Tax Collector	Resource	MSW0305	Report Registry	3.37
Tax Collector	Resource	MSW0327	Document Type Maintenance	3.47
Tax Collector	Jobs	MSW0510	Supplemental Extension Control	3.22
Tax Collector	Jobs	MSW0511	Record Retention Control	3.39
Tax Collector	Public Inquiry	MSW0610INQ	Old to New Assessment Inquiry	3.40
Tax Collector	Resource	MSW1000	Application Security	4.46
Tax Collector	Resource	MSW2000	Installation History	3.10
Tax Collector	Resource	MSW2400	Web Applications Maintenance	3.41
Tax Collector	Redemption Roll Activities	MSW2420W	My County Connect Admin Portal	3.8
Tax Collector	Jobs	MSW2500	Secured/Unsecured Extension - Status Monitor	3.16
Tax Collector	Jobs	MSW6010	Job Scheduler	3.43
Tax Collector	Resource	MSW9999	SQL Security	4.46

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Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Tax Collector	Resource	PBW0001	Auditor / Tax Collector Code List Maintenance	3.40
Tax Collector	Certificate Maintenance Resource	TCW0003	Tax Collector Control Maintenance	3.10
Tax Collector	Returns Unsec Delinq Activities	TCW0004	Lien Control Maintenance	3.20
Tax Collector	Collections	TCW0005	Assessment Fee Maintenance	3.12
Tax Collector	Inquiry Resource Functions	TCW0006	Collector Note Maintenance	3.45
Tax Collector	Resource	TCW0008	Tax Collector Standard Note Maintenance	3.45
Tax Collector	Resource	TCW0010	Holiday Calendar Inquiry	3.30
Tax Collector	Resource	TCW0013	CORTAC Lender Maintenance	3.3
Tax Collector	Resource	TCW0015	Fee Code Maintenance	3.12
Tax Collector	Resource	TCW0020	Tax Collector Notes Reprint	3.45
Tax Collector	Resource	TCW0060	Court Address Maintenance	3.24
Tax Collector	Bankruptcy	TCW0070	Bankruptcy Maintenance	3.24
Tax Collector	Collections Inquiry Public Inquiry	TCW0100	Taxroll Inquiry	3.40
Tax Collector	Public Inquiry	TCW0100INQ	Tax Collector Public Inquiry	3.40
Tax Collector	Public Inquiry	TCW0100INQW	Tax Collector Public Inquiry Web	3.40
Tax Collector	Redemption Roll Activities	TCW0200	Default 5 Pay Plans & Produce Notice	3.14
Tax Collector	Redemption Roll Activities	TCW0210	Default Individual 5 Pay Plan	3.14
Tax Collector	Collections	TCW0300	Cashiering	3.13
Tax Collector	Collections	TCW0310	Cashiering with Check Scanner	3.13
Tax Collector	Collections	TCW0350	Auxiliary Cashiering	3.13
Tax Collector	Inquiry	TCW0400	Tax Stats Inquiry	3.16
Tax Collector	Four Pays	TCW0450	Secured Four-Pay Maintenance	3.19
Tax Collector	Four Pays	TCW0455	Unsecured Four Pay Maintenance	3.19
Tax Collector	Unsec Delinq Activities	TCW0900	Lien Processing	3.20
Tax Collector	Unsec Delinq Activities	TCW0925	Courtesy Lien Notice Creation	3.22
Tax Collector	Unsec Delinq Activities	TCW0950	Unsecured Misc Maintenance	3.46

Exhibit A
Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Tax Collector	Roll Prep	TCW0999	Tax Collector Rollover/Turnover Schedule	3.43
Tax Collector	Roll Change Functions [NSF,etc	TCW1010	Roll Change Inquiry	3.30
Tax Collector	Collections	TCW1100	On-Line Collections	3.10
Tax Collector	Collections	TCW1106	Deposit List	3.10
Tax Collector	Collections	TCW1110	Lockbox Import	3.10
Tax Collector	Trust Activities	TCW1140	Collector Refund Authorization	3.10
Tax Collector	Trust Activities	TCW1150	Trust Activity	3.15
Tax Collector	Inquiry Trust Activities	TCW1150INQ	Trust Activity Inquiry	3.15
Tax Collector	Collections	TCW1153	Register Summary/Control	3.10
Tax Collector	Collections	TCW1160	Deposit Permit	3.10
Tax Collector	Resource	TCW1165	Department Name Address Maintenance	3.10
Tax Collector	Jobs	TCW1200	Bill Print Control	3.1
Tax Collector	Annual Functions Jobs	TCW1220	Annual Bill Creation	3.1
Tax Collector	Jobs	TCW1255	Bills To Print	3.1
Tax Collector	Resource	TCW1280	Bill Message Maintenance	3.1
Tax Collector	Resource	TCW1290	Nightly Bill Maintenance	3.1
Tax Collector	Redemption Roll Activities	TCW1300	Reinstate Defaulted 5 Pay Plan	3.14
Tax Collector	Redemption Roll Activities	TCW1310	Power to Sell Data	3.25
Tax Collector	Redemption Roll Activities	TCW1350	Pending Power to Sell	3.25
Tax Collector	Jobs	TCW1371	Agency File Creation	3.5
Tax Collector	Jobs	TCW1375	Microfiche Data Export	3.5
Tax Collector	Trust Activities	TCW1380	Tax Collector Refund Export	3.15
Tax Collector	Resource	TCW1500	TAX Document Path Setup	3.47
Tax Collector	Unsec Delinq Activities	TCW1800	DMV Transfer	3.17
Tax Collector	Resource	TCW1900	Tax Roll Administrative Maintenance	3.43
Tax Collector	Tax Sale	TCW4005	Tax Sale Control	3.25
Tax Collector	Tax Sale	TCW4010	Tax Sale Maintenance	3.25

Exhibit A
Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Tax Collector	Tax Sale	TCW4011	Tax Sale Edit	3.25
Tax Collector	Tax Sale	TCW4015	Group Sale Maintenance	3.25
Tax Collector	Tax Sale	TCW4030	Vendor Maintenance	3.25
Tax Collector	Tax Sale	TCW4040	Parties Of Interest Maintenance	3.25
Tax Collector	Tax Sale	TCW4050	Taxing Agency Maintenance	3.25
Tax Collector	Tax Sale	TCW4060	Qualified Bidder Maintenance	3.25
Tax Collector	Tax Sale	TCW4070	Proposed Fees Maintenance	3.25
Tax Collector	Tax Sale	TCW4080	Purchaser Maintenance	3.25
Tax Collector	Tax Sale	TCW4090	Denial Reason Maintenance	3.25
Tax Collector	Jobs	TCW5025	CORTAC Request Import-Edit	3.3
Tax Collector	Jobs	TCW5030	CORTAC Collections Import-Edit	3.3
Tax Collector	Jobs	TCW5050	County CORTAC Assignment	3.3
Tax Collector	Unsec Delinq Activities	TCW5590	Lien Notice [Pending]	3.20
Tax Collector	Unsec Delinq Activities	TCW5595	Certificate of Lien (report)	3.20
Tax Collector	Unsec Delinq Activities	TCW5600	Release of County Tax Lien	3.20
Tax Collector	Redemption Roll Activities	TCW5655	5 Pay Notices/Default Notices	3.14
Tax Collector	Annual Functions	TCW5656	Current/Suppl Sec Reminder Notices	3.42
Tax Collector	Annual Functions	TCW5657	Current/Suppl Sec Reminder Notices - County Custom	3.42
Tax Collector	Four Pays	TCW5710	Four Pay Eligibility Letters & Contracts	3.19
Tax Collector	Unsec Delinq Activities	TCW5720	Unsecured Notices	3.22
Tax Collector	Unsec Delinq Activities	TCW5725	Mobile Home Tax Clearance Certificate	3.27
Tax Collector	Unsec Delinq Activities	TCW8000	Discharge of Accountability	3.28
Tax Collector	Unsec Delinq Activities	TCW8010	CUBS Interface	3.39
Tax Collector	Redemption Roll Activities	TCW8200	Published Delinquent List	3.23
Tax Collector	Redemption Roll Activities	TCW8600	Chg Parcel Number on Default Remaps	3.9
Tax Collector	Unsec Delinq Activities	TCW8800	Lien Import/Export	3.20
Tax Collector	Collections	TCW8850	FTB Intercept Export	3.39
Tax Collector	Unsec Delinq Activities	TCW8900	CeRTNA Import/Export	3.39

Dept Name	Group Name	Program Name	Description	Proj Spec #
Tax Collector	Resource Unsec Delinq Activities	TCW9000	SECURE Import/Export	3.39

5.7. Transient Occupancy Tax Module

Dept Name	Group Name	Program Name	Description	Proj Spec #
Transient Occupancy Tax	Resource Functions	MSW0305	Report Registry	4.39
Transient Occupancy Tax	Resource Functions	MSW0327	Document Type Maintenance	4.37
Transient Occupancy Tax	Resource Functions	MSW1000	Application Security	4.46
Transient Occupancy Tax	Jobs	MSW6010	Job Scheduler	3.43
Transient Occupancy Tax	Resource Functions	MSW9999	SQL Security	4.46
Transient Occupancy Tax	Inquiry	TOW0006	TOT Note Maintenance	3.45
Transient Occupancy Tax	Resource Functions	TOW0008	TOT Standard Note Maintenance	3.45
Transient Occupancy Tax	Inquiry Returns	TOW0100	TOT Inquiry	3.21
Transient Occupancy Tax	Resource Functions	TOW0105	TOT Imaging Document Viewer	3.47
Transient Occupancy Tax	Inquiry	TOW0110	TOT Contact Index Search	3.21

Exhibit A
Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Transient Occupancy Tax	Inquiry	TOW0120	TOT Property Search	3.21
Transient Occupancy Tax	Inquiry	TOW1200	TOT Property Extract	3.21
Transient Occupancy Tax	Resource Functions	TOW1500	TOT Document Path Setup	3.37
Transient Occupancy Tax	Certificate Maintenance	TOW2040	BIN Generation and Letter	3.21
Transient Occupancy Tax	Returns	TOW3010	TOT Return Processing	3.21
Transient Occupancy Tax	Returns	TOW3040	TOT Payments	3.21
Transient Occupancy Tax	Returns	TOW3050	TOT Deposit	3.21
Transient Occupancy Tax	Returns	TOW3070	TOT Trust Activity	3.15
Transient Occupancy Tax	Returns	TOW3080	TOT Refund Export	3.21
Transient Occupancy Tax	Resource Functions	TOW3510	TOT Resource Maintenance	3.15
Transient Occupancy Tax	Resource Functions	TOW3550	TOT Form Text Master Maintenance	3.37
Transient Occupancy Tax	Certificate Maintenance Resource Functions	TOW7110	TOT Certificate Maintenance	3.21

Exhibit A
Specifications

Dept Name	Group Name	Program Name	Description	Proj Spec #
Transient Occupancy Tax	Certificate Maintenance	TOW7120	TOT Contact Maintenance	3.21
Transient Occupancy Tax	Certificate Maintenance Resource Functions	TOW7130	TOT Property Maintenance	3.21

EXHIBIT B: PROJECT PLAN

Contractor shall implement the System according to a schedule that consists of the 5 phases identified in the overview below and elaborated in the detailed phase descriptions that follow.

Overview

- **Phase 1**
  - Discovery & Assessment
  - Planning
- **Phase 2**
  - County Data Receipt
  - Data Mapping
  - Infrastructure & Environmental Setup
  - County Conversion Team Training
- **Phase 3**
  - Data Migration
  - Data Integrity Testing
  - Data Augmentation
- **Phase 4**
  - Balancing and Turnover
  - User Acceptance Testing (UAT)
  - Training & Change Management
- **Phase 5**
  - Go-Live & Post Migration
  - Hypercare Support Period
  - Personal Property Module

EXHIBIT B: PROJECT PLAN

PHASE 1

Discovery & Assessment

This phase of the project will focus on the hardware and 3rd party software required, identification & definition of interfaces required, establishing the data conversion processes needed, and determining hardware/security configurations.

The parties reasonably expect to complete Phase 1 within approximately 120 days after execution of the Agreement.

Activities

- **Inventory Current System**: Identify all data sources, integrations, and dependencies.
- **Data Audit**: Assess data quality, completeness, and compliance requirements.
- **Gap Analysis**: Compare old system capabilities with new system requirements.
- **County Purchases of Hardware / software:** obtained by the County.

Planning

Planning sets the foundation for a successful migration. This portion of Phase 1 includes defining the scope of data and processes to be moved, order of phased data migration, and creating a timeline with assigned roles and responsibilities across IT and business teams.

Activities

- **Define Scope**: Which data, modules, and processes will be migrated.
- **Develop Migration Strategy**.
- **Risk Assessment**.
- **Timeline & Resources**: Assign roles (IT, business analysts, SME on County teams).

EXHIBIT B: PROJECT PLAN

Phase 1 Deliverables

Deliverable	Description	Contractor Responsibility	County Responsibility
Discovery & Assessment	Inventory current system and perform data audit and gap analysis. County confirms purchases of required hardware and/or software. Completion will be supported by a brief findings summary and a readiness checklist identifying required inputs (legacy documentation, known interfaces, available datasets, access constraints) and documenting any assumptions or unknowns for County validation.	Define interface, conversion and system integration requirements and provide cost quotes for any required fit-gap development items. Conduct structured discovery working sessions to gather requirements and inputs, then validate and approve findings with County.	Provide SMEs, legacy documentation and required datasets to support discovery. Confirm purchases of required hardware and/or software. Validate discovery outputs with Contractor by confirming what is accurate, and identifying missing inputs, constraints, or corrections needed. Provide timely clarifications for data sources, integrations and security and access requirements.
Planning Completion	Definition of the scope of data and processes to be moved, order of phased data migration, and creating a timeline with assigned roles and responsibilities across IT and business teams. Planning completion will be verified through confirmation between Contractor and County noting agreed scope boundaries, sequencing assumptions and required inputs for Phase 2.	Define server configuration requirements, obtain necessary planning approvals, and deliver a Microsoft Project schedule outlining activities for County review. Identify and document required inputs (environment access, datasets) using a checklist, and confirm each item during planning review sessions.	Review planning material, confirm configuration decisions, provide required inputs and participate in schedule and scope-alignment discussions. Confirm planning assumptions (scope, sequence, inputs) and provide a single-point acknowledgement of Phase 1 completion and readiness to proceed. County Identifies SMEs for Contractor.

EXHIBIT B: PROJECT PLAN

Phase 1 Checklist

Purpose: Confirm readiness to proceed to Phase 2 (Data Mapping & Environment Setup)

Discovery & Assessment

☐ Inventory of current systems, data sources, integrations, and dependencies completed
☐ Data extract audit of Assessor Roll closed / Tax Collector new year data extracts completed (quality, completeness, compliance considerations).
☐ County and Contractor agree on format for all future data extracts.
☐ Gap analysis completed comparing legacy system to new system requirements
☐ Recommended hardware and/or software purchases provided by Contractor
☐ Discovery findings summary delivered
☐ Readiness checklist completed identifying required inputs:
☐ Known interfaces identified
☐ Available datasets confirmed
☐ Access constraints documented
☐ Assumptions and unknowns documented and reviewed
☐ Structured discovery working sessions conducted
☐ Discovery outputs reviewed and validated jointly with County

Planning

☐ Scope of data, modules, and processes to be migrated defined
☐ Migration strategy developed
☐ Risks identified and documented
☐ Roles and responsibilities assigned (IT, business, SMEs)
☐ Server and environment configuration requirements defined
☐ Microsoft Planner schedule delivered for County review
☐ Planning assumptions (scope, sequencing, inputs) confirmed

Phase 1 Exit Approval:

☐ Phase 2 strategy document, including estimated time to complete Phase 2, created and approved

EXHIBIT B: PROJECT PLAN

PHASE 2

Data Mapping

This step focuses on aligning old system data structures with the new system. Field mapping ensures compatibility, while data cleansing removes duplicates and corrects errors. Transformation rules standardize formats and apply necessary conversions, preparing the data for accurate migration.

Activities

- **Contractor receives County Pre/Post Turnover data and reports to match:** Confirm extract specifications, source tables, and field-level mappings in a readable format.
- **Field Mapping**: Match old system fields to new system fields.
- **Data Cleansing**: Remove duplicates, correct errors, standardize formats. This is a joint responsibility.
- **Transformation Rules**: Apply conversions (ASMT's in new format).

Infrastructure & Environment Setup

Before migration, the new system environment must be configured. This includes provisioning servers and creating connections for transformation.

Activities

- **Provision New System**: Configure servers, cloud environments, and security.
- **Integration Points**: Connections for Megabyte to transfer data.
- **Initial Data Upload**: First pass of Assessor converted data uploaded.
- **Resource Setup**: Initial resource setup for Assessor, Auditor and Tax Collector.

County Conversion Team Training

County Conversion Team Training during Phase 2 equips County staff with the knowledge and tools needed to actively participate in the mapping and validation process. Through structured sessions, staff learn how to interpret mapping documents, review validation reports, identify anomalies in transformed datasets, and use error-tracking tools.

Activities

- **Orientation to Mapping & Validation Materials**: Introduce County staff to mapping documents, validation reports and error-tracking tools, ensuring a joint understanding.
- **Guided Review of Transformed Datasets:** Provide instructions on how to examine converted datasets, identify anomalies and validate field-level accuracy against expected values.

Phase 2 Deliverables

Deliverable	Description	Contractor Responsibility	County Responsibility
Receive County Pre/Post Turnover data and reports to match	Contractor receives County-provided pre-Turnover and post-Turnover datasets, along with associated balancing, count and Turnover reports. Confirmation of receiving required data will be logged, noting file names, dates, formats and completeness checks for expected extracts. Review includes data types received, file formats, and whether extracts match the agreed structure.	Review received datasets and reports, confirm file structure and completeness and incorporate validated data into mapping and conversion development activities. Perform data completeness and format validation (readable format, expected tables and fields present) and document questions or gaps for County response.	Provide the data in a readable format that can be converted, including all required pre-Turnover and post-Turnover datasets and related balancing/count reports. Confirm data extracts align to the agreed structure and provide corrections or replacements when validation identifies missing or inconsistent content.
Data Mapping	Complete initial field mapping, data cleansing and apply transformation rules. Initial Mapping completion will be verified via a validation criteria checklist that defines how transformed data will be reviewed (required fields populated, acceptable formats).	Create mapping specifications, transformation rules and supporting documentation needed for data conversion. Capture mapping assumptions and decisions in a controlled log and review open	Verify mapping assumptions, clarify data meaning, review mapping outputs and supply any additional information required for mapping. Confirm validation criteria and respond to clarification items (definitions, special cases, codes).

		items with the County for confirmation.	Participate in joint review of sample transformed datasets using agreed criteria.
Infrastructure & Environment Setup	Provision new system, establish integration points and complete initial data upload. Perform Initial resource setup for Assessor, Auditor and Tax Collector modules. Completion will be verified via a readiness confirmation (access and connectivity available, accounts and permissions in place, transfer method confirmed) and a successful Assessor and Current Secured Roll initial data upload.	Configure application test environments, coordinate required setup tasks and validate technical readiness for testing and conversion. Perform initial resource setup as a joint effort with County. Provide a concise list of required access and connectivity prerequisites and record completion status.	Prepare required hardware, network access, accounts and permissions, and confirm County-managed systems are ready for Contractor use. Perform initial resource setup as a joint effort with Contractor. Provide and confirm remote access availability (if applicable) and ensure required permissions are granted for the agreed transfer method.
County Conversion Team Training	Conduct training focused on preparing County conversion staff to validate transformed datasets, including instruction on reviewing data within the application. This conversion staff-targeted training supports data-validation duties required for conversion and is not full end-user training. Completion will be verified via a training acknowledgement and a brief reference document shared by Contractor and County for validation steps (how to review reports, where to record issues, etc.).	Deliver training to County conversion team members, including materials, demonstrations and guidance required for data validation. Provide a limited set of reusable training aids (agendas, reference document, etc.).	Ensure assigned staff attend all training sessions, complete required learning activities and make required SMEs available for conversion-related validation training. Use the provided reference document to support consistent review and issue reporting during conversion cycles. County will ensure that SMEs are available for timely one-on-one training sessions for testing purposes.

EXHIBIT B: PROJECT PLAN

Phase 2 Checklist

Purpose: Confirm readiness to proceed to Phase 3 (Data Migration)

County Data Receipt

☐ Assessor Roll closed / Tax Collector new tax year data extracts received from County
☐ Balancing, count, and Turnover reports received from County
☐ Data extract validated per specifications in Phase 1
☐ Questions or gaps documented

Data Mapping

☐ Initial Field-level mappings completed
☐ Mapping assumptions and decisions logged
☐ Validation criteria checklist defined
☐ County confirmed mapping assumptions

Infrastructure & Environment Setup

☐ Application and test environments provisioned
☐ Integration and transfer methods confirmed
☐ Access, accounts, and permissions validated
☐ Initial data upload completed successfully (Assessor & Current Secured Roll)
☐ Initial resource setup for Assessor, Auditor and Tax Collector

County Conversion Team Training

☐ Conversion-focused training delivered
☐ Error-tracking and issue-logging process explained and initiated
☐ Conversion-focused training completed and acknowledged

Phase 2 Exit Approval:
☐ Initial Mapping complete and validated
☐ Initial data load of Assessor and Current Secured Roll completed
☐ Environments ready for migration
☐ Phase 3 strategy document, including estimated time to complete Phase 3, created and approved

EXHIBIT B: PROJECT PLAN

PHASE 3

Data Migration

The migration process follows the ETL (Extract, Transform, Load) approach. Data is extracted from the old system, transformed according to mapping and cleansing rules, and loaded into the new system using scripts developed in house. Validation checks confirm data integrity and completeness through multiple iterations of refinement.

Activities

- **Extracts**: County will pull data from the old system whenever requested.
- **Transform**: Apply mapping and cleansing rules.
- **Load**: Import into the new system using ETL process.
- **Validation**: Check record counts, integrity, and relationships.
- **Refine**: Identify adjustments through testing.
- **Repeat**: Repeat process until data is successfully migrated.

This conversion includes four (4) years of Assessor data including value history, ownership history (if available for conversion in current system), document history for four (4) years and sales history for four (4) years.

This conversion also includes one year of historical Tax Roll converted data plus a second year created through the Turnover process creating 2 years of Tax Roll data.

Additional Assessor and/or Tax Collector historical data may be converted under an hourly rate if desired by the County, *as specified in Exhibit C (B).* Factors that impact the cost of conversion are:

- Quality of the data to be converted
- Source of the data
- History required
- Knowledge of people to assist in identifying data issues

The County will provide existing data and corresponding data format(s). The County will be responsible for extracting and providing legacy data to Megabyte. Megabyte will map and convert the data into MPTS data structure and provide validation reports and information to the County.

EXHIBIT B: PROJECT PLAN

Assumptions

- The County will provide clean data to the best of their ability. Complete data is required for development, testing and Go-Live.
- The County will provide balancing and count reports to accompany extracted data whenever requested by the Contractor.
- The County will provide pre-Turnover and post Turnover complete datasets for conversion development and Go-Live.
- The data format once agreed upon will be provided in the exact same format, tables, fields and extracts on every extraction.
- Each conversion step will be executed in a manner that is auditable (i.e. all data will be accounted for).
- County will provide personnel familiar with the end-user functionality to work with Megabyte Systems, Inc. during the conversion and testing phases to ensure complete accuracy of the converted data.

Data Integrity Testing Activities

Data Integrity Testing Activities include:

- **Validate Pre-Conversion vs. Post-Conversion Counts:** Compare record totals and dataset completeness before and after conversion to confirm that all expected records have successfully migrated.
- **Review Key Value Fields and Financial Totals:** Validate assessed values, tax amounts, and other financial fields to ensure accuracy and alignment.
- **Confirm Dataset Accuracy:** Verify that required datasets, tables, and dependent reference values are fully populated and that no available components are missing from the migrated data.

Data Augmentation Activities

Data Augmentation Activities include:

- **Apply Required Corrections:** Implement data corrections identified during integrity testing, including structural fixes, value adjustments, and updates needed to resolve discrepancies.

- **Re-Run Validation Reports:** Execute validation routines again after updates have been applied to confirm that all corrections are accurate and that no new issues have been introduced.

Phase 3 Deliverables

Deliverable	Description	Contractor Responsibility	County Responsibility
Data Migration	Extract data from the old system, transform according to established rules and load into the new system. Each migration iteration will be tracked using a conversion cycle log as provided by Contractor (dates, datasets included, validation checks run, and outcomes) to verify completion of the phase activities.	Map and iteratively convert the data into new system data structure and provide validation reports and information to the County. Resolve issues identified throughout migration cycles. Identify required inputs for each cycle and confirm receipt and format before processing.	Provide existing data and corresponding data format(s), and extract and provide legacy data to Contractor. Review converted data, document discrepancies, provide needed clarifications and participate in validating each migration cycle. Provide consistent extracts in the agreed format for each iteration and review validation outputs against agreed criteria. Log discrepancies in a consolidated issues list for resolution.
Data Integrity Testing	Validate pre-conversion vs. post-conversion counts, review key value fields and financial totals and confirm dataset accuracy. Testing will be verified with a brief integrity review summary documenting the checks performed and pass/fail outcomes (counts if relevant, key totals, required datasets present). Validation criteria will be based on agreed	Correct issues from County review to ensure conversion accuracy. Confirm fixes by re-running the agreed validation checks and recording results in the integrity summary.	Validate converted data, document findings and confirm that the results are accurate. Review the integrity summary and confirm acceptance or provide consolidated correction requests.

	control totals and required field and population rules.		
Data Augmentation	Apply required corrections identified during integrity testing and re-run validation to confirm that all corrections are accurate and no new issues occurred. Completion will be verified though a correction confirmation record (what was corrected and which validation checks were re-run).	Incorporate corrected data provided by the County and update transformed datasets as required. Maintain a concise list of applied corrections and confirm the re-validation results.	Provide missing or corrected data and validate that augmented datasets meet conversion requirements. Confirm corrected source data is complete and consistent with the agreed format for reprocessing.

Phase 3 Checklist

Purpose: Confirm readiness to proceed to Phase 4 (UAT & Balancing)

Data Migration

☐ Legacy data extracts provided by County if / when requested
☐ Transformation rules applied to approved mappings
☐ Data loaded into new system
☐ Conversion cycle log maintained (datasets, dates, results)
☐ Issues identified and resolved iteratively

Data Integrity Testing

☐ Required datasets and dependencies confirmed present
☐ Integrity review summary completed
☐ Validation outcomes documented (pass/fail)
☐ County reviewed and accepted integrity results or provided corrections

Data Augmentation

☐ Corrections identified and applied
☐ Updated datasets reprocessed
☐ Validation checks re-run

EXHIBIT B: PROJECT PLAN

☐ Correction confirmation record completed
☐ County confirmed augmented data meets requirements

Phase 3 Exit Approval:
☐ Initial load of history and Current Unsecured, Supplemental Secured, Supplemental Unsecured, Delinquent Secured and Delinquent Unsecured Rolls completed
☐ Phase 4 strategy document, including estimated time to complete Phase 4, created and approved

EXHIBIT B: PROJECT PLAN

PHASE 4

Balancing and Turnover

This activity focuses on balancing the Assessor Roll and Parcel counts. Control totals and statutory reports are reviewed to confirm data integrity and readiness for transition to production operations.

Activities

- **Roll and Control Total Balancing:** Assessor Roll and Parcel counts are balanced.
- **Fund and Distribution Verification:** Confirm balances and allocations align with statutory and operational requirements.
- **Turnover Reporting:** Produce and review required Turnover and reconciliation reports.
- **Variance Resolution:** Identify and resolve discrepancies in coordination with County staff.
- County is required to apply for an Assessor Roll extension to allow flexibility for balancing (prior to April, 2028).

User Acceptance Testing (UAT)

Testing ensures the migration is successful and the new system functions as intended. Unit tests validate individual data sets, system tests check workflows and integrations, and User Acceptance Testing (UAT) allows business users to confirm accuracy and usability before Go-Live.

Activities

- **Unit Testing**: Validate individual data sets.
- **System Testing**: Ensure workflows and integrations function correctly.
  - Inquiry validation of the County's pre-conversion data within the new system.
  - Detailed balancing reports and worksheets to validate value, counts, paid/unpaid taxes and total charge from the previous and the new system.
- **User Acceptance Testing (UAT)**: Business users confirm accuracy and usability.

EXHIBIT B: PROJECT PLAN

Training & Change Management

This phase prepares users for the new system through training sessions and documentation. A structured communication plan keeps stakeholders informed, addresses concerns, and promotes adoption, reducing resistance and ensuring a smooth transition. Please see the Training document accompanying Exhibit B for further details (includes Contractor base training).

Activities

- **Training Documentation and/or Training Videos**
- **Virtual Training**
- **Classroom Training**
- **Live User Training**: hands-on sessions during Go-Live stage.
- **Communication Plan**: Keep stakeholders informed about timelines and changes.

Phase 4 Deliverables

Deliverable	Description	Contractor Responsibility	County Responsibility
Balancing and Turnover	Final balancing and rollover validation activities using County-provided data extracts, including reconciliation of pre- and post-Turnover roll values and confirmation of system-to-legacy alignment. Completion will be verified using a balancing checklist (roll totals, parcel counts, fund and distribution checks, Turnover report review) plus a concise reconciliation summary.	Perform reconciliation using all County-provided exports; analyze variances; document findings; produce balancing reports; complete Turnover documentation; present results for County approval. Confirm required inputs (exports, control totals, statutory reports) via a simple requirements list and use agreed criteria for variance thresholds.	**Provide required data extracts**, including: (1) **Pre-Turnover / Pre-Rollover data export upon ASR roll close**, (2) **Post-Turnover / Post-Rollover data export.** Review balancing results, validate accuracy, and approve completion. Validate outputs using the balancing checklist and provide consolidated questions and variance exceptions for resolution.

Assessor Roll Extension	County is required to apply for an Assessor Roll extension to allow flexibility for balancing (prior to April, 2028).	Non-applicable.	Apply for an Assessor Roll extension prior to April, 2028.
User Acceptance Testing (UAT)	Confirm the migration is successful and the new system functions as intended through unit testing, system testing and User Acceptance Testing (UAT). UAT completion will be verified by a concise UAT entry and exit criteria record (start readiness and completion conditions) and a consolidated list of findings and resolutions.	Define and provide UAT test case scenarios, support UAT execution, resolve findings and ensure all tested functionality meets defined acceptance criteria. Provide a platform for logging findings and tracking resolution status. Confirm closure of critical issues before Go-Live.	Execute defined UAT test cases, record findings, verify fixes and confirm readiness for production use. Use the findings list to confirm acceptance criteria are met and formally acknowledge readiness.
Training & Change Management	Implement structured communication and training plan to ensure users are prepared for the new system. Training completion will be verified with a training completion record (sessions delivered, audiences covered) and a brief communication milestone checklist.	Deliver digital training materials, conduct user training sessions, and provide change-management guidance to prepare departments for Go-Live. Provide a training record and brief milestone checklist to confirm required training has been delivered.	Complete required training, distribute internal communications and ensure departmental readiness for process and system changes. Ensure attendance and confirm completion using the training record.

Phase 4 Checklist

Purpose: Confirm readiness to proceed to Go-Live

Balancing

☐ Assessor Roll closed / Tax Collector new year data extracts / balancing reports and counts received from County (this will need to include all other data discovered during previous phases)
☐ Assessor Roll totals and parcel counts balanced
☐ Fund and distribution balances verified
☐ Turnover and reconciliation reports reviewed
☐ Variances resolved

☐ Assessor Roll Balancing checklist completed
☐ Reconciliation summary approved by County

User Acceptance Testing (UAT)

☐ Unit testing completed
☐ System testing completed
☐ UAT entry criteria confirmed
☐ UAT test cases executed
☐ Findings logged and resolved
☐ Critical issues closed
☐ UAT exit criteria met
☐ County formally acknowledged UAT completion

Training & Change Management

☐ User training sessions conducted (virtual/classroom)
☐ Communication milestones completed
☐ User training completion record finalized

Phase 4 Exit Approval:
☐ County authorizes Go-Live
☐ Phase 5 strategy document, including estimated time to complete Phase 5, created and approved

EXHIBIT B: PROJECT PLAN

PHASE 5

Go-Live & Post-Migration

The cutover plan switches operations to the new system, followed by a hyper-care period where support teams and developers address issues quickly. Performance monitoring ensures stability, and any discrepancies are resolved promptly to maintain business continuity.

Activities

- **Cutover Plan**: Switch from old system to new system.
- **Installation Date**: New system is installed at County July, 2028.
- **Hypercare Period**: Intensive support for initial weeks including live training.
- **Performance Monitoring**: Ensure stability and resolve issues quickly.

Phase 5 Deliverables

Deliverable	Description	Contractor Responsibility	County Responsibility
Cutover Plan / Production Go-Live Deployment	Execution of cutover and activation of the new system's production environment. Go-Live execution will be verified using a Go-Live readiness checklist (UAT complete, balancing approved, access validated, final datasets confirmed) and a cutover completion confirmation.	Execute migration, activate system. Validate prerequisites using the readiness checklist and document completion via a brief confirmation record.	Provide required access, support staff, and final datasets. Confirm checklist items within County control (access, staffing, final extracts) and provide acknowledgement to proceed.
Hypercare Support Period	Tracking of issues, resolutions, and support actions during the intensive post-Go-Live period. Hypercare will be managed using a shared issue tracking log documenting reported	Provide enhanced support and resolve issues rapidly. Maintain the issue log and provide status	Report issues and validate resolutions. Confirm issue closure in the shared log and identify impacts.

	issues, resolution status and County validation of closure.	updates through agreed cadence.	
Personal Property Module	Activation of the Personal Property module, designated for post-Go-Live deployment. This module is converted after Go Live. Activation completion will be verified via a readiness and validation checklist and a County approval acknowledgement once the module is operational.	Plan, configure, deploy and validate the Personal Property Module. Identify required inputs (datasets, configurations, access) and confirm them with the County before deployment.	Complete required testing and validation of the Personal Property Module, ensuring operational readiness and providing formal approval. Validate using the agreed upon checklist and provide formal approval or acknowledgement.

Phase 5 Checklist

Go-Live / Cutover

☐ UAT completed and approved
☐ Assessor Roll balancing approved
☐ Previous year of Tax roll history converted
☐ Turnover performed in live system (resulting in 2 years of Tax roll data)
☐ Access and permissions validated
☐ Go-Live readiness checklist completed
☐ Cutover executed successfully

Hypercare

☐ Hypercare support initiated
☐ Issue tracking log active
☐ Issues resolved and validated
☐ Hypercare status updates provided
☐ County confirms issues closure

Personal Property Module (Post Go-Live)

☐ Required datasets and configurations confirmed
☐ Module deployed

☐ Module validated
☐ Readiness and validation checklist completed
☐ County provided formal approval

Phase 5 Final Exit Approval

☐ All Phase 5 deliverables completed
☐ System accepted for ongoing operations
☐ Post-implementation support transitioned as agreed
☐ County and Contractor jointly acknowledge project completion

Required Hardware, Software and Infrastructure

The County is required to have a separate Application Server and SQL Server for production purposes.

Internet access at T1 or business DSL speed between County and Megabyte Systems is required for conversion and testing phases as well as for on-going support and maintenance. This is the County's responsibility to provide.

The database utilized will be MS-SQL 2025. Megabyte will provide setup, tailoring and tuning for the SQL 2025[1] database.

MS-OS 2025 Setup / network connections are the responsibility of the County. However, Megabyte will provide any support / assistance requested by the County remotely.

Megabyte Systems will work with the County to determine hardware, 3rd party software, disk space requirements. All hardware & 3 party software are County responsibilities.

Licensing for the above components is the responsibility of the County and should be procured in accordance with the County's IT standards and procurement policies. Associated costs for these software licenses are not included in Megabyte's pricing.

Prior to purchasing any hardware or software, please contact Megabyte Systems staff to confirm current requirements and ensure that all specifications are up to date. Megabyte will provide guidance on system requirements and assist County staff in verifying that all necessary licenses are in place prior to implementation.

Assumptions

The County will ensure adequate participation in the work session of end user representatives which are (a) knowledgeable in the requirements and (b) have the authority to make determinations as necessary relating to requirements. The County will ensure that

[1] SQL Server version is subject to change based on the duration of this project.

County decisions are made in a timely manner.

Property Tax Database & File Servers – Hardware Requirements

Property Tax Database & File Servers: SQL Server

Item	Minimum	Recommended	Notes
CPU — # of Processing Cores	16	**24+ cores**	Scaling cores provides the biggest gain. SQL benefits more from *parallelism* than clock speed.
Processor Type	64-bit Intel/AMD	64-bit Intel/AMD (modern gen)	Prioritize per-core performance + NUMA-balanced layouts.
System Memory (RAM)	96 GB	**128+ GB**	Reduces I/O pressure, improves TempDB, supports larger buffer pool.
Storage — OS [C:]	100 GB	150–200 GB	OS + patching + SQL binaries.
Storage — Program Data [E:]	250 GB	250–500 GB	SQL binaries, SSIS packages, and future growth.
Storage — Log/Image [F:]	250 GB	**500 GB+ (high-IOPS SSD)**	Writes are the bottleneck. Needs high durability throughput.
Storage — Backups [G:]	250 GB	500 GB–1 TB	If doing local retention or multiple roll backups.
Drive Layout	Separate volumes	**Physically separate SSDs (NVMe preferred)**	Include dedicated volumes for: Data, Logs, TempDB, Backups.
TempDB	4 data files	**8–12 data files, SSD, isolated volume**	Critical for workload concurrency.
Network	**10Gb recommended**		

Property Tax Database & File Servers: Application Server				
Item	**Description**	**Min.**	**Rec.**	**Notes**
CPU	# of Processing Cores	16	24–32	CPU cores are more important than CPU speed. High concurrency (350–500 users) requires additional parallel processing capability.
Processor	64-bit Intel/AMD	Yes	Yes	Modern multi-core Xeon/EPYC recommended.
Memory	System RAM	64 GB	96–128 GB	Supports WinForms/DevExpress UI, Crystal runtime, caching, session load, and background job concurrency.
Storage	**Operating System [C:\]**	200 GB	250–300 GB	OS + .NET + application binaries.
	Program Data / Application Files [E:\]	250 GB	250–500 GB	MPTS binaries, runtime files, logs.
	Temp / Processing / Spool [F:\]	250 GB	250–500 GB	
Network	10Gb recommended			

*DMZ Server is also needed to allow traffic to/from Megabyte Azure services.

EXHIBIT B: PROJECT PLAN

Property Tax Database & File Servers: Software Requirements		
Item	**Description**	**Notes**
Operating System	64-bit Version ***only*** Windows Server 2022 (or newer) Standard Edition Datacenter Edition	CPU speed is less important than # CPU cores Database operations can process in parallel to take advantage of additional CPU cores
Database	Microsoft SQL Server 2025* (or newer) Standard Edition PowerBI Reporting Server Enterprise Edition SQL Server Integration Services (SSIS) SQL Server Management Services (SSMS)	Plus licensing, as applicable
Other	Crystal Reports 2020 Professional	County required to own a single copy of ***Crystal Reports 2020 Professional***, which is not to be installed onto the server. ***Business Objects*** requires County-owned ***Crystal Reports 2020 Professional*** for licensing. County may/likely own their copy, which will be transferable to the new server.
Remote Access	Virtual Private Network (VPN)	Allows for 24/7 remote access availability for Megabyte Support/Service

Please Contact Megabyte before making any software or hardware purchases to ensure system viability.

EXHIBIT C: SCHEDULE OF PAYMENTS

Software License
Schedule Payments
Data Migration
Additional Items

A. Software License Cost and Schedule of Payments

CONTRACT AMOUNT	**$3,971,000.00**

Licensing and Associated Costs

Data Conversion/Migration – Cost methodology specified below in section B

System Setup & Configuration	$ 150,000.00
Initial License Fee	$3,000,000.00
Project Management Fees	$ 405,000.00

Training

Technical Training	$ 24,000.00
Standard User Training	$ 48,000.00
Travel Expenses (For Megabyte Personnel)	$ 20,000.00
Professional Discount	- $ 630,000.00
Total Licensing Cost	$3,017,000.00
Data Migration	$ 954,000.00
CONTRACT AMOUNT	**$3,971,000.00**

Schedule of Payments

Contractor is not entitled to any payment requiring a County written acceptance until the County written acceptance is (1) fully executed by all of (a) the County's Auditor-Controller/Treasurer-Tax Collector, (b) the County's Assessor-Recorder, and (c) the County's Director of Information Technology Services/Chief Information Officer; and (2) delivered to Contractor pursuant to section 12.14 of the Agreement. Each County written acceptance shall not be unreasonably withheld, but County officials specified in the previous sentence have no authority to execute a County written acceptance for any phase of the project until and unless the relevant phase checklist provided in Exhibit B has been completed.

25% Within Forty-Five Days of Contract Execution	$ 754,250.00

EXHIBIT C: SCHEDULE OF PAYMENTS

Exhibit B Phase 1 Within Forty-Five Days of County Written Acceptance of the Following Deliverables:	**$ 377,125.00**

- Discovery & Assessment
- Planning

Exhibit B Phase 2 Within Forty-Five Days of County Written Acceptance of the Following Deliverables:	**$ 377,125.00**

- County Data Receipt
- Data Mapping
- Infrastructure & Environment Setup
- County Conversion Team Training

Exhibit B Phase 3 Within Forty-Five Days of County Written Acceptance of the Following Deliverables:	**$ 377,125.00**

- Data Migration
- Data Integrity Testing
- Data Augmentation

Exhibit B Phase 4 Within Forty-Five Days of County Written Acceptance of the Following Deliverables:	**$ 377,125.00**

- Balancing and Turnover
- User Acceptance Testing (UAT)
- Training & Change Management

Exhibit B Phase 5 Within Forty-Five Days of County Written Acceptance of the Following Deliverables:	**$ 754,250.00**

- Go-Live & Post Migration
- Hypercare Support Period
- Personal Property Module

Data Migration will be Billed Monthly in Accordance with Methodology in Section B Below.

As determined by the State of California, sales tax is not applicable at this time. However, if in the future, sales tax becomes required, it will be County responsibility.

EXHIBIT C: SCHEDULE OF PAYMENTS

B. Data Migration Schedule of Payment

This conversion includes four (4) years of Assessor data including value history, ownership history (if available for conversion in current system), document history for four (4) years and sales history for four (4) years.

This conversion also includes one year of historical Tax Roll converted data plus a second year created through the Turnover process creating 2 years of Tax Roll data, which shall be billed monthly at a time/expense charge of $200.00 per/hour with a not to exceed cap set of $954,000.00.

Additional Assessor and/or Tax Collector historical data may be converted under an hourly rate if desired by the County, *as specified in Exhibit C (B)*. This rate shall be billed monthly at a time/expense charge of **$200.00 per/hour.**

Any additional historical data requested by the County shall be migrated at the same hourly rate; however, prior to commencing such work, the Contractor shall submit a County-approved work plan identifying scope, estimated hours, assumptions, and risks. No historical data migration costs shall be incurred without the County's prior written approval, and any costs exceeding an approved threshold shall require additional County authorization.

The County shall not be responsible for costs attributable to Contractor inefficiencies, rework, conversion failures, or tool limitations.

C. Maintenance and Support Services

Maintenance and Support Services Costing shall be provided under a separate agreement.

D. Additional Items

County travel expenses will be the responsibility of Fresno County.

Enhancements or modifications desired by the County for those items not currently included in Exhibit A – Project Specifications will be made available at a fixed price after requirements' definition.

For accounting use only:

Org No: 0410

Subclass: 10000

Account: 8500, 7295

Program: 92108, 0

Fund: 0001

Org No: 0420

Subclass: 10000

Account: 7295

Program: 0

Fund: 0001