



**San Francisco EZHTC Process Estimate v1.1**

## Project Description

San Francisco have described a need for a web based application that can control the Enterprise Zone credit application process. The process is a process that will be housed entirely within a drupal site, using AchieveForms for the request forms and process control.

## Process Description – Full Review

This section describes the process the Enterprise Zone Tax Credit Application form. Each step represents a different user role and their actions to complete each step.

1. Application
  - a. User logs in and see list of active applications and past inactive applications
  - b. User can choose to submit a new application
    - i. In each application, user can list a number of employees for credit
    - ii. For each employee added to the application, an application fee is added to total payable
    - iii. On submission of form, user is taken to a payment screen to pay for all charges via credit card
2. EZHTC Admin Review
  - a. EZHTC Admin logs in and sees list of applications requiring review
  - b. EZHTC Admin can review each application and choose to approve or reject each employee
    - i. If rejected, the EZHTC Admin enters a reason
    - ii. If Approved, a voucher is generated as a pdf
    - iii. On submission, User is notified of all approvals and rejections
    - iv. On Submission, all vouchers are emailed to User

## Screen Description

This section gives a rough description of what each user will see. Once the project starts, San Francisco will have an opportunity to review and request changes to the screens.

1. User
  - a. Create new applications
  - b. My active applications (list all)
  - c. My completed applications (list all)
  - d. My Vouchers
2. All other roles
  - a. My tasks (list all)
  - b. Reports Link
  - c. Find Application
  - d. Find Voucher

## Reports

Below is a list of reports that will be configured as part of the application build.

- List details of all active applications
- List details of all approved applications for user selected start and end date
- List details of all dis-approved applications for user selected start and end date
- List details of all applications for user selected User
- List active, approved, dis-approved counts
- Export all request to CSV format for excel viewing

### **Assumptions**

- A user can submit as many employees as they wish in each form
- User must pay for applications via online credit card payment
- Each stage is a single action (open, complete required and optional fields, submit)
- Process is a simple 2 stage process. Apply and review only.
- Applications are marked as approved or rejected only. No edit option required.

### **Cost Estimate**

#### **Services**

- Process Building - 2 days
- Site Configuration - 2 days
- Report Building - 3 days
- Voucher Generation – 1 day
- Site Theming - 1 day
- Handover and Training - 1 day
- Total estimate: 10 days @ \$1,600 (US) per day - Discounted to \$0

#### **Licence**

- AchieveForms Licence - \$11,520 per annum
  - Up to 1500 submissions per month
  - Usage will be monitored and if usage exceeds limits, San Francisco will be contacted to discuss usage levels. If appropriate, licence will be increase to 3000 per month at a cost of \$16,000 per annum (prorated for remaining contract)
- AchieveForms Payment Integration - \$3,000
- AchieveForms Payment Integration Support and Maintenance - \$1,000 per annum