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City and County of San Francisco
Office of Contract Administration
Purchasing Division

First Amendment

THIS AMENDMENT (this "Amendment") is made as of January 1, 2023, in San Francisco, California, by and between **Sapient Corporation** ("Contractor"), and the City and County San Francisco, a municipal corporation ("City"), acting by and through its Office of the Assessor.

Recitals

WHEREAS, City and Contractor have entered into the Agreement (as defined below); and

WHEREAS, City and Contractor desire to modify the Agreement on the terms and conditions set forth herein to extend the project schedule to complete project implementation, provide for ongoing maintenance of Phase 1, and adjust the period of maintenance after go-live; and

WHEREAS, the Agreement was competitively procured as required by San Francisco Administrative Code Chapter 21.1 through Request for Proposals ASR2017-01 issued October 27, 2017 and this modification is consistent therewith; and

WHEREAS, approval for the original Agreement was obtained on January 22, 2018 and amended on October 12, 2018 from the Civil Service Commission under PSC number 47331 – 17/18 in the amount of $29,000,000 for the period of 12 years and 51 weeks; and

WHEREAS, the City's Board of Supervisors approved this Agreement by 136-23 on March 21, 2023; and

WHEREAS, the Contractor is responsible for providing all resources at Contractor's own cost to ensure an on-time, on-budget completion and satisfying all of the remaining business requirements included in Appendix A2, Exhibit 6, Requirements and all mutually agreed-to contract change orders. Contractor's current submission of the remaining project plan is in draft form and does not include all activities, resources, and/or critical path. The City is willing to accept the draft project plan for purposes of seeking Board of Supervisor's approval of this Amendment.; and

WHEREAS, the Contractor's complete resource and cost loaded detailed project plan with critical path as outlined in the Statement of Work is due within 30 days of formal adoption by the Board of legislation approving the contract modification.

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WHEREAS, the Contractor further understands and agrees that should Contractor fail timely to deliver its services, satisfy all business requirements and complete implementation on time and on budget in the manner specified in the contract modification, then under San Francisco Administrative Code Section 21.33, the City may terminate the contract and/or purchase services from another source and if a greater price that than named in the contract is paid by the City for the completion work, then Contractor will be charged and responsible for all such increased costs.

NOW, THEREFORE, Contractor and the City agree as follows:

Article 1 Definitions

The following definitions shall apply to this Amendment:

1.1 **Agreement.** The term "Agreement" shall mean the Agreement dated November 1, 2018 between Contractor and City.

Other Terms. Terms used and not defined in this Amendment shall have the meanings assigned to such terms in the Agreement.

Article 2 Modifications of Scope to the Agreement

The Agreement is hereby modified as follows:

2.1 Term. Section 2.1 of the Agreement currently reads as follows:

The term of this Agreement shall commence on November 1, 2018, and expire twelve (12) years later on November 1, 2030, unless earlier terminated as otherwise provided herein.

Such section is hereby amended in its entirety to read as follows:

The term of this agreement shall commence on November 1, 2018 and expire on December 31, 2027

2.2 Payment. Section 3.3.1 of the Agreement currently reads as follows:

Contractor shall provide an invoice to the City for Work on a monthly basis for Work completed in accordance with the Acceptance Criteria set forth in the Implementation Statement of Work, in the immediate preceding month, unless a different schedule is set out in Appendix B (Calculation of Charges)." Payment for the Work provided under the Maintenance Statement of Work shall invoiced and paid annually in advance of the provision of such Work, unless a different schedule is set out in Appendix B (Calculation of Charges). To the extent the City requests Contractor to provide any As-Needed Professional Services, payment for the As-Needed Professional Services shall paid on a time and materials basis monthly in arrears. Payment shall be made within 30 calendar days of receipt of the invoice, unless the City notifies the Contractor that a dispute as to the invoice exists in accordance with Section 11.6.1. In no event shall the amount of this Agreement exceed **$21,414,700** [TWENTY ONE MILLION AND FOUR

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HUNDRED AND FOURTEEN THOUSAND AND SEVEN HUNDRED DOLLARS]. This amount shall include a $3,569,117 contingency to be expended only at the request of the City and upon mutual agreement of the Parties. The breakdown of charges associated with this Agreement appears in Appendix B, "Calculation of Charges," attached hereto and incorporated herein by this reference as though fully set forth herein. In no event shall City be liable for interest or late charges for any late payments.

Such section is hereby amended in its entirety to read as follows:

Contractor shall provide an invoice to the City for Work on a monthly basis for Work completed in accordance with the Acceptance Criteria set forth in the Implementation Statement of Work, in the immediate preceding month, unless a different schedule is set out in Appendix B (Calculation of Charges)." Payment for the Work provided under the Maintenance Statement of Work shall invoiced and paid annually in advance of the provision of such Work, unless a different schedule is set out in Appendix B (Calculation of Charges). To the extent the City requests Contractor to provide any As-Needed Professional Services, payment for the As-Needed Professional Services shall paid on a time and materials basis monthly in arrears. Payment shall be made within 30 calendar days of receipt of the invoice, unless the City notifies the Contractor that a dispute as to the invoice exists in accordance with Section 11.6.1. In no event shall the amount of this Agreement exceed **$27,158,702** [TWENTY SEVEN MILLION, ONE HUNDRED AND FIFTY EIGHT THOUSAND, SEVEN HUNDRED AND TWO DOLLARS]. This amount shall include a $2,969,117 contingency to be expended only at the request of the City and upon mutual agreement of the Parties. The breakdown of charges associated with this Agreement appears in Appendix B, "Calculation of Charges," attached hereto and incorporated herein by this reference as though fully set forth herein. In no event shall City be liable for interest or late charges for any late payments.

2.3 **Appendix A-1.** Appendix A-1a is hereby added as a new appendix, attached to this Amendment, and fully incorporated within the Agreement and is intended to restate and describe certain key Deliverables and phases that remain outstanding under Appendix A-1.

2.4 **Appendix A-2.** Appendix A-2 is hereby replaced in its entirety by Appendix A-2a, attached to this Amendment and fully incorporated within the Agreement. To the extent the Agreement refers to Appendix A-2 in any place, the true meaning shall be Appendix A-2a, which is a correct and updated version.

2.5 **Appendix B.** Appendix B is hereby replaced in its entirety by Appendix B-1, attached to this Amendment and fully incorporated within the Agreement. To the extent the Agreement refers to Appendix B in any place, the true meaning shall be Appendix B-1 which is a correct and updated version.

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2.6 **Appendix C.** Appendix C is hereby added as a new appendix, attached to this Amendment, and fully incorporated within the Agreement.

Article 3 Updates of Standard Terms to the Agreement

The Agreement is hereby modified as follows:

3.1 **Definitions.** *The following is hereby added to the Agreement as a Definition in Article 1:*

1.10 "Confidential Information" means confidential City information including, but not limited to, personally-identifiable information ("PII"), protected health information ("PHI"), or individual financial information (collectively, "Proprietary or Confidential Information") that is subject to local, state or federal laws restricting the use and disclosure of such information, including, but not limited to, Article 1, Section 1 of the California Constitution; the California Information Practices Act (Civil Code § 1798 et seq.); the California Confidentiality of Medical Information Act (Civil Code § 56 et seq.); the federal Gramm-Leach-Bliley Act (15 U.S.C. §§ 6801(b) and 6805(b)(2)); the privacy and information security aspects of the Administrative Simplification provisions of the federal Health Insurance Portability and Accountability Act (45 CFR Part 160 and Subparts A, C, and E of part 164); and San Francisco Administrative Code Chapter 12M (Chapter 12M).

3.2 **Withholding.** *The following is hereby added to Article 7 of the Agreement:*

7.3 **Withholding.** Contractor agrees that it is obligated to pay all amounts due to the City under the San Francisco Business and Tax Regulations Code during the term of this Agreement. Pursuant to Section 6.10-2 of the San Francisco Business and Tax Regulations Code, Contractor further acknowledges and agrees that City may withhold any payments due to Contractor under this Agreement if Contractor is delinquent in the payment of any amount required to be paid to the City under the San Francisco Business and Tax Regulations Code. Any payments withheld under this paragraph shall be made to Contractor, without interest, upon Contractor coming back into compliance with its obligations.

3.3 **Consideration of Salary History.** *The following is hereby added to Article 10 of the Agreement,:*

10.16 **Consideration of Salary History.** Contractor shall comply with San Francisco Administrative Code Chapter 12K, the Consideration of Salary History Ordinance or "Pay Parity Act." Contractor is prohibited from considering current or past salary of an applicant in determining whether to hire the applicant or what salary to offer the applicant to the extent that such applicant is applying for employment to be performed on this Agreement or in furtherance of this Agreement, and whose application, in whole or part, will be solicited, received, processed or considered, whether or not through an interview, in the City or on City property. The ordinance also prohibits employers from (1) asking such applicants about their current or past salary or (2) disclosing a current or former employee's salary history without that employee's authorization unless the salary history is publicly available. Contractor is subject to the enforcement and penalty provisions in Chapter 12K. Information about and the text of Chapter 12K is available on the web at https://sfgov.org/olse/consideration-salary-history. Contractor is required to comply with all of the applicable provisions of 12K, irrespective of the listing of obligations in this Section.

3.4 **Limitations on Contributions**. *The following is hereby added to Article 10 of the Agreement, replacing the previous Section 9.11 in its entirety:*

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9.11 **Limitations on Contributions.** By executing this Agreement, Contractor acknowledges its obligations under Section 1.126 of the City's Campaign and Governmental Conduct Code, which prohibits any person who contracts with, or is seeking a contract with, any department of the City for the rendition of personal services, for the furnishing of any material, supplies or equipment, for the sale or lease of any land or building, for a grant, loan or loan guarantee, or for a development agreement, from making any campaign contribution to (i) a City elected official if the contract must be approved by that official, a board on which that official serves, or the board of a state agency on which an appointee of that official serves, (ii) a candidate for that City elective office, or (iii) a committee controlled by such elected official or a candidate for that office, at any time from the submission of a proposal for the contract until the later of either the termination of negotiations for such contract or twelve months after the date the City approves the contract. The prohibition on contributions applies to each prospective party to the contract; each member of Contractor's board of directors; Contractor's chairperson, chief executive officer, chief financial officer and chief operating officer; any person with an ownership interest of more than 10% in Contractor; any subcontractor listed in the bid or contract; and any committee that is sponsored or controlled by Contractor. Contractor certifies that it has informed each such person of the limitation on contributions imposed by Section 1.126 by the time it submitted a proposal for the contract, and has provided the names of the persons required to be informed to the City department with whom it is contracting.

3.5 **Notification of Legal Requests.** *The following section is hereby added and incorporated in Article 10 of the Agreement:*

10.16 **Notification of Legal Requests.** Contractor shall immediately notify City upon receipt of any subpoenas, service of process, litigation holds, discovery requests and other legal requests ("Legal Requests") related to all data given to Contractor by City in the performance of this Agreement ("City Data" or "Data"), or which in any way might reasonably require access to City's Data, and in no event later than 48 hours after it receives the request. Unless otherwise required by applicable law, Contractor shall not respond to Legal Requests related to City without first notifying City other than to notify the requestor that the information sought is potentially covered under a non-disclosure agreement. Contractor shall retain and preserve City Data in accordance with the City's instruction and requests, including, without limitation, any retention schedules and/or litigation hold orders provided by the City to Contractor, independent of where the City Data is stored.

3.6 **Contractor Vaccination Policy.** *The following section is hereby added and incorporated in Article 4 of the Agreement:*

4.3.1 **Contractor Vaccination Policy.**

(a) Contractor acknowledges that it has read the requirements of the 38th Supplement to Mayoral Proclamation Declaring the Existence of a Local Emergency ("Emergency Declaration"), dated February 25, 2020, and the Contractor Vaccination Policy for City Contractors issued by the City Administrator ("Contractor Vaccination Policy"), as those documents may be amended from time to time. A copy of the Contractor Vaccination Policy can be found at: https://sf.gov/confirm-vaccine-status-your-employees-and-subcontractors.

(b) A Contract subject to the Emergency Declaration is an agreement between the City and any other entity or individual and any subcontract under such agreement, where Covered Employees of the Contractor or Subcontractor work in-person with City employees in connection with the work or services performed under the agreement at a City owned, leased,

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or controlled facility. Such agreements include, but are not limited to, professional services contracts, general services contracts, public works contracts, and grants. Contract includes such agreements currently in place or entered into during the term of the Emergency Declaration. Contract does not include an agreement with a state or federal governmental entity or agreements that do not involve the City paying or receiving funds.

(c) In accordance with the Contractor Vaccination Policy, Contractor agrees that:

(i) Where applicable, Contractor shall ensure it complies with the requirements of the Contractor Vaccination Policy pertaining to Covered Employees, as they are defined under the Emergency Declaration and the Contractor Vaccination Policy, and insure such Covered Employees are either fully vaccinated for COVID-19 or obtain from Contractor an exemption based on medical or religious grounds; and

(ii) If Contractor grants Covered Employees an exemption based on medical or religious grounds, Contractor will promptly notify City by completing and submitting the Covered Employees Granted Exemptions Form ("Exemptions Form"), which can be found a*t* https://sf.gov/confirm-vaccine-status-your-employees-and-subcontractors (navigate to "Exemptions" to download the form)..

Article 4 Effective Date

Each of the modifications set forth in Articles 2 and 3 shall be effective on and after "the date of this Amendment".

Article 5 Legal Effect

Except as expressly modified by this Amendment, all of the terms and conditions of the Agreement shall remain unchanged and in full force and effect.

[SIGNATURES ON FOLLOWING PAGE]

IN WITNESS WHEREOF, Contractor and City have executed this Amendment as of the date first referenced above.

CITY

Recommended by:

DocuSigned by:
Simone Jacques
097C32EA6568497...
Simone Jacques

Simone Jacques
Deputy Assessor of Finance and Administration
Office of the Assessor-Recorder
Simone.jacques@sfgov.org

Approved as to Form:

David Chiu
City Attorney

By:
DocuSigned by:
Louise S. Simpson
BD54168A4C3B452...
Louise S. Simpson

Louise S. Simpson
Deputy City Attorney

Approved:

DocuSigned by:
Sailaja Kurella
78EAEA4AB01C4E0...
Sailaja Kurella

Sailaja Kurella
Director of the Office of Contract Administration,
and Purchaser

CONTRACTOR

Sapient Corporation

DocuSigned by:
9290DEF0AD92466...
Ryan Walsh

Ryan Walsh
Chief Financial Officer
Ryan.Walsh@publicissapient.com

City Supplier Number: 0000036670

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Appendices

A-1a: Phase Two Completion Tasks and Critical Deliverables
A-2: Maintenance Statement of Work
B-1: Calculation of Charges
C: List of Remaining Phase 1.x, Phase 2.0 and Phase 2.x Requirements

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Appendix A-1a

Phase Two Completion Tasks and Critical Deliverables

A. This Appendix A-1a (this "Appendix A-1a") sets forth the key deliverables and phases to be delivered by Contractor under Appendix A1. Unless otherwise modified, amended or supplemented by the terms of this Appendix A-1a, the terms of Appendix A1 shall remain in full force and effect. In the event of any conflict between the terms of this Appendix A-1a and the terms of Appendix A-1, the terms of this Appendix A-1a shall control. Updated Resource and Cost Loaded Schedule Including Project Status Reporting

1. **Final Completion Schedule**: Contractor's completion schedule with critical path as outlined in Appendix A1 is due within 30 days of formal adoption by the Board of legislation approving the Amendment. In the event Contractor fails to deliver the completion schedule within such thirty (30) day period, and such failure is solely the result of Contractor's failure to perform its obligations under the Agreement, the City may, acting in its sole discretion, may issue a notice of default in accordance with Section 8.3.1 of the Agreement. Upon receipt of such notice, Contractor shall be entitled to a thirty (30) day period to cure such default.
2. **Interim Project Plan**: Pending Contractor's delivery of a completion schedule as required in Section A.1 above, the parties shall utilize a draft project plan (in excel format) with an implementation date of December 2023 for Phase 2.0 and February 2024 for Phase 2.x.
3. **Project Status Reporting**: Contractor must comply with all project status reporting requirements set forth in the Appendix A-1, including but not limited to the submission of weekly status reports in a template format acceptable to the City.

B. Implementation – Remaining Phases

I. The remaining phases for SMART as described in Appendix A1 are as follows with the associated stories defined in Appendix C:

1. Phase 1.x – Business Personal Property Remaining Scope
2. Phase 2.0 – Real Property Minimum Viable Product
3. Phase 2.x – Real Property Remaining Scope

C. Deliverables

The following Deliverables have been identified as the remaining critical deliverables under Appendix A1. Subject to City's responsibilities set forth in Appendix A1, Contractor shall deliver these deliverables in accordance with the terms of Appendix A1 and the Agreement

C.1) (Appendix A1 Section 2.2) Business Reporting Functionality

Contractor must develop all reports and dashboards listed in the original SOW Exhibit 6.

C.2) (Appendix A1 Section 2.3) External System Integrations

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Contractor will implement system integrations between the SMART system and the following systems:

i. ASR's Document Management System (Onbase)

ii. Recorder System

iii. City's Enterprise Address System

iv. Controller/Tax Collector system

v. Appeals Board

vi. External City Department Files (e.g., Property Characteristics, Ownership and Address).

vii. Department of Building Inspections System

viii. ASR's BI/Analytical tool

C.3) (Appendix A1, Section 4.4.6) Functional Design Document (FDD):

i. Drafts of the Functional Design Document are due at the end of each sprint, subject to City review and approval acting in its sole discretion. City shall provide written feedback within five (5) business days of receipt, unless otherwise agreed between the parties. Contractor will provide any requested revisions within seven (7) calendar days of City's written feedback.

ii. The final Functional Design Document will be delivered by Contractor to City on or before final delivery of the Property Assessment System (phase 2.x), subject to City review and approval acting in its sole discretion.

C.4) (Appendix A1, Section 4.4.7) Technical Design Document (TDD) and Security Design Document (SDD):

i. Drafts of the Technical Design Document will be delivered to the City at the end of each calendar quarter subject to City review and approval acting in its sole discretion. City shall provide written feedback within five (5) business days of receipt, unless otherwise agreed between the parties. Contractor will provide any requested revisions to the Technical Design Document drafts within seven (7) calendar days of City's written feedback..

ii. The final Technical Design Document will be delivered by Contractor to City on or before final delivery of the Property Assessment System (phase 2.x), subject to City review and approval acting in its sole discretion.

C.5) (Appendix A1, Section 10.4) Support Transition Plan: Due December 2023

The following documentation, at a minimum, shall be prepared by the Contractor and included in the System Maintenance, Support and Transition Plan provided to ASR:

i. Development of a System support structure and organization, including estimates of the Contractor and Assessor-Recorder manpower requirements to support operation and maintenance of the System

ii. The skill sets required to operate and maintain the System should be specified, with recommendations of the skills, knowledge, and abilities required by

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Assessor-Recorder business and technical staff

iii. System Installation and Administration Manual

iv. Operating procedures manual, including diagnostic procedures, backup and restore procedures and disaster recovery procedures

v. Maintenance manual, including Information to aid in analyzing and debugging the software, apart from information already available in other delivered documentation

vi. Maintenance and repair policies and procedures

vii. System “Run Book” as defined by ASR

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Appendix A-2
AMENDMENT 1 - APPENDIX A-2 - MAINTENANANCE STATEMENT OF WORK
Property Assessment Solution

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1.0 Hosted Environment Upgrades

After City has obtained access to the Hosted Services, the Contractor will complete Software version upgrades, revisions and patches working with the Product Vendor(s) and ASR on the following schedule:

a. **Major version upgrade** (3 times per year for Salesforce. Per the release schedule of additional software vendors)

b. **Minor version revisions** (per an agreed-to schedule between ASR and Contractor based on hot fixes and/or desired changes to the solution)

c. **Support Packs / Patches** – Monthly / weekly as needed, on Thursday night during maintenance window

d. **Interface Hosting upgrade - As needed**

Contractor will perform regression testing on all software upgrades to ensure any upgrades will not adversely impact the application. Contractor will document regression test results and provide the results to the City before the City commences testing.
Contractor will establish criteria and plan for coordinating environment software upgrades. Work products will be created explaining the related approach, activities, procedures, tools, and templates. These work products include:

1. Configuration migration procedures
2. Object/code migration procedures
3. Methodology for developing and applying software patches and fixes

Contractor will apply fixes, patches and bundles as needed (except for Major releases), when available from Salesforce and in consultation and coordination with the City. and with the approval from the ASR Project Manager

1. Roles and Responsibilities

Topic	Contractor	ASR
Environment Software Upgrades	1. Contractor will provide an Environment Software Upgrade Plan	· ASR Project Manager will review and approve.

Unless as otherwise agreed to by City on a case-by-case basis, for non-emergency maintenance, City and Contractor shall have a mutually agreed upon test period ("Test Period") to test any maintenance changes prior to Contractor introducing such maintenance changes into production. Prior to the start of the Major or Minor Version Test Period the Contractor will provide associated Release Notes. At the end of the Test Period, Contractor and ASR will elect if the

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maintenance changes will be implemented or not (except for Major Releases from Salesforce that are mandatory).
Contractor will assist with questions and provide technical assistance regarding Release Notes, new functionality and new application workflows. Contractor will provide documentation on new features.
Contractor will provide standard training on the Vendor's standard upgrade tools to the support team.
Contractor will lead the testing process for each interface for upgrades and when changes are made. Contractor will perform initial regression testing for Vendor code updates. Also perform testing of new features introduced in Vendor upgrades and release notes that are mutually agreed-to between ASR and Contractor.

2.0 Open Source Software Upgrades

Contractor will ensure all Open Source Software patches/upgrades are applied as needed. Contractor will perform regression testing to ensure all Open Source Software patches/upgrades does not adversely impact the Property Assessment Solution. After the Contractor performs the regression testing, they will provide City the opportunity to test the upgrade.

Unless as otherwise agreed to by City on a case-by-case basis, for non-emergency maintenance, Contractor and City shall have a mutually agreed upon test period ("Test Period") to test any Open Source Software patches/upgrades changes prior to Contractor introducing such maintenance changes into production. Contractor will provide associated Release Notes. At the end of the Test Period, Contractor and City elect if the maintenance changes will be implemented or not.

3.0 Support.

Contractor will:

a. provide Critical Severity priority resolution;

b. provide Technical Experts trained and familiar with the City's production environment;

c. schedule quarterly defects trend analysis between ASR and Contractor;

d. provide support for the current Version of all software vendor products. Patches for critical issues will only be applied to the final release of a supported Version.

e. Manage and oversee support for all third-party software supplied by City or Contractor as part of this application..

f. Provide support for interfaces (working with ASR)

g. Manage and oversee the City on-going relationship with Hosting Provider (or internal hosting services) vendor to ensure services are performed according to contract.

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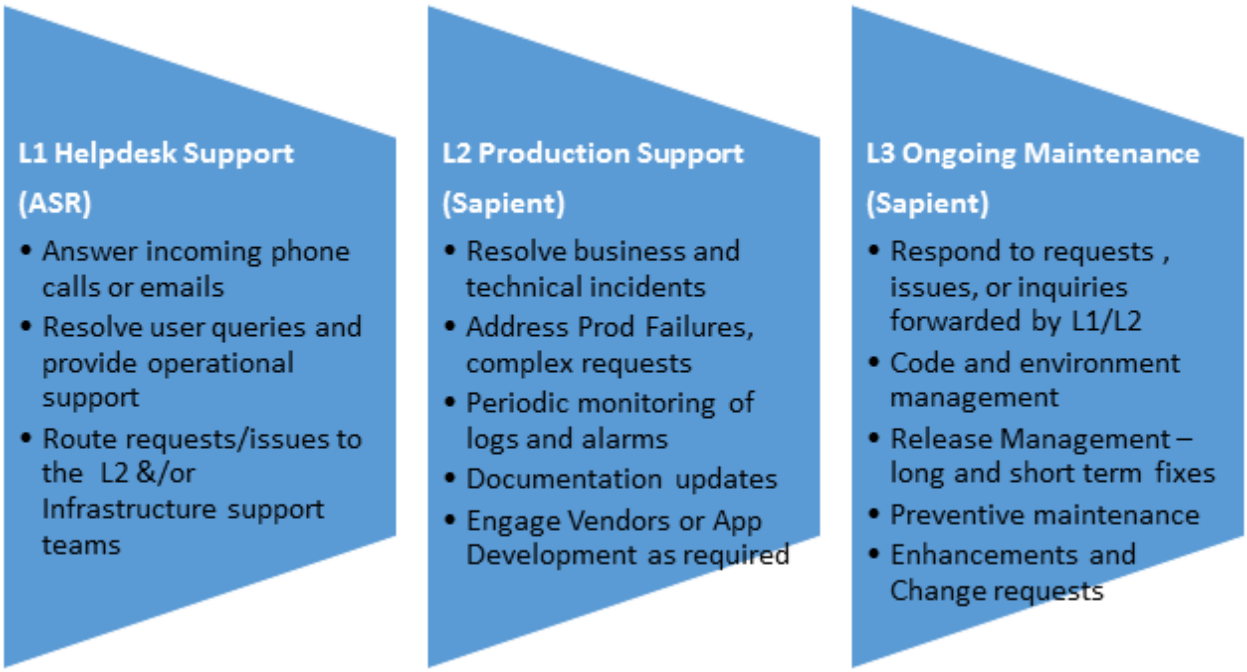
The support model for this engagement along with the coverage and ownership is depicted below:



3.1 Support Scope L1 (Helpdesk)

ASR will be responsible for level 1 support that comprises of the Helpdesk (HD) to answer user queries and provide operational support to the users of the system. ASR will setup the Help Desk in the form of a mailbox, a hotline number etc. to perform the following activities:

- User query (phone calls/emails) resolution
- User Provisioning and account management
    - New user requests
    - Modify access/roles for existing users
    - Reset passwords
    - Terminate user access
- Logging, routing and escalating complex incidents to L2/L3 team and follow-ups
- Communicating and liaising with users raising the incident
- Maintenance and update of knowledge articles, standard operating procedures.
- System monitoring of Scheduled jobs and communicating the failure and delays to respective team (auxiliary system owner POCs or L2 team as applicable) - US Hours
- Liaising with auxiliary system owner POC for incident resolution such as data correction, Replay of messages (as applicable)

Contractor will be responsible for enabling ASR Helpdesk by providing documentation and system user manuals for resolving common user queries.

3.1.1 Roles and Responsibilities

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Topic	Contractor	ASR
Helpdesk	1. Contractor will be responsible for enabling ASR Helpdesk to resolve queries around System Operations and Administration, User Provisioning and account management by providing training and documentation to the ASR Helpdesk team.	1. ASR will be responsible for resolving user queries and providing operational support based on documentation and standard operating procedures 2. ASR will be responsible for incident logging, documenting details about incident and testing the solutions suggested by Contractor support team. 3. ASR and Contractor will be responsible for System monitoring (See L1 and L2 sections)

3.2 Support Scope L2 (Production Support)

Contractor will be responsible for providing level 2 production support which includes technical Help Desk that would provide problem resolutions to Incidents being tracked. The various activities to be taken care under this level of support would be:

a) Resolving complex business and technical queries assigned by Level-1 Helpdesk team
b) Performing a root cause analysis of the issues and acting on the remediation steps if in the responsibility of the L2 support team
c) Communication of remediation steps which are outside scope of L2 support team to business team
d) Problem re-Prioritization based on root cause analysis
e) Proposing alternate solutions for issues with no known solution for business continuity
f) Documentation on known solutions for business users and L1 Helpdesk team
g) Handling and managing crisis and major incidents as per the Crisis Management Procedures
h) Escalating product issues to vendor and follow up on solutions
i) Escalating complex issues to L3 Support Team and resolution coordination
j) Handling user requests for ad-hoc activities/process runs on the application
k) Certification of feature requests (if any) raised by L2 Team for L3 Team
l) Periodic monitoring of logs & alarms
m) System monitoring of Scheduled jobs and communicating the failure and delays to

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respective team (auxiliary system owner POCs or L2 team as applicable) - India Hours

3.2.1 Roles and Responsibilities

Topic	Contractor	ASR
Production Support	1. Contractor will be responsible for managing incident lifecycle including identifying, triaging, classifying, prioritizing, resolving. tracking and reporting. 2. Contractor will be responsible for System monitoring of Scheduled jobs and communicating the failure and delays to respective team (auxiliary system owner POCs or L2 team as applicable) - India Hours	1. ASR will be responsible for incident logging, documenting details about incident and testing the solutions suggested by Contractor support team. 2. ASR will be responsible for assigning and escalating complex business and technical queries to the Contractor

3.3 Support Scope L3 (Ongoing Maintenance)

Contractor will be responsible for providing L3 support which includes defect fixes & enhancements and will work in a Software Development Life Cycle (SDLC) approach to plan for the release of the fixes/enhancements. Enhancements are defined as updates to the existing system and adding new features and functionality to the system. New features and functionality may include changes to the revenue and taxation code and legislative requirements and will be mutually agreed to by ASR and Contractor.

The various activities to be taken care under this level of support would be:

- Prioritization of Enhancements/change requests
- Implement fixes, both long & short term
- Provide preventive maintenance
- Performance tuning
- Release Planning for upgrades, patches, fixes. In addition perform regression testing to ensure updates, patches and fixes will not adversely impact the application. Contractor will run test scripts and provide test results to ASR.
- Quality Management, Training and Documentation

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- Coordinating with third-party vendors for technical assistance

3.4 Support Coverage

As part of this support engagement Contractor will provide support coverage as per below timeline:

- Non critical incidents:
  - Business Hours: Weekdays - 8:00 AM PST to 5:00 PM PST
- Critical Incidents
  - Business Hours: Weekdays - 8:00 AM PST to 5:00 PM PST
  - Non Business Hours: On call support

3.5 Reporting

Contractor will develop reports and dashboards per agreed-to scope at pre-agreed frequency that will allow ASR to view the summary of support incidents handled by the support team. Some example reports are listed below:

- Incident Status Summary - Reported, resolved, open, work in progress
- Incident summary by application area
- Incident response and resolution time charts
- Incident Ageing report
- Monthly reporting on Maintenance and Enhancement utilization and balances

3.6 Assumptions

- For L2 support: Average Per Day Volume of incidents that will be managed by support personnel will be determined based on the data gathered in the initial 2 months of maintenance post completion of each implementation phase.
-
- For L3 support: If support hours is less than 5,600 hours, than the residual hours will be applied toward the enhancements. Enhancement hours is anticipated to be 20% of the total team allocation.
-

Go-Live	Description	Total Team Allocation (Hrs./year)	Enhancements (Hrs./year) *	% Enhancement allocation
2024	RP + BPP Maintenance	7000	1400	20%
2025	RP + BPP Maintenance	5600	1120	
2026	RP + BPP Maintenance	4480	896	
2027	RP + BPP Maintenance	3580	716	

- The total team allocation from year 2025 through year 2027 is assumed to be 20% less than the previous year as the system stability and team efficiency improves.
-
- ASR will identify and provide on-demand access to subject matter experts to the

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contractor for resolution of queries during enhancements implementation and bug fixes.

4.0 Assigned Resources

Contractor will provide a team consisting of Relationship Manager, Support Case Manager, Technical Support team, Quality Assurance with the following allocation

Year	Description	Role	Allocation
2024	RP + BPP Maintenance	Relation Ship Manager	0.25
		Support Case Manager	0.25
		Technical Support (Salesforce + Integration)	4.5
		Quality Assurance	1
2025		Relation Ship Manager	0.25
		Support Case Manager	0.25
		Technical Support (Salesforce + Integration)	3.75
		Quality Assurance	1
2026		Relation Ship Manager	0.25
		Support Case Manager	0.25
		Technical Support (Salesforce + Integration)	3
		Quality Assurance	1
2027		Relation Ship Manager	0.25
		Support Case Manager	0.25
		Technical Support (Salesforce + Integration)	2.5
		Quality Assurance	1

5.0 Phase 2.0 Maintenance Invoicing

Maintenance payments for 2024 will be tied to the % of system that is put into production. If phase 2 represents 80% of all remaining work, ASR will pay 80% of the maintenance budget after phase 2 go-live. ASR will begin paying maintenance on phase 2.x once phase 2.x goes-live.

6.0 Live Incident Handling and Case Handling

The following incident handling, time frames and support are applicable for Support only to City's live-production environment.

7.0 Response Definition and Expectation Table

Step 1: This column represents Contractor's acknowledgement of a problem and the time by which Contractor will begin the information gathering and the trouble shooting processes.

Step 2: This column represents the timeframe in which Contractor will work with ASR and Product Vendor(s) including Salesforce to address the problems and provide a fix or workaround to restore the Systems to operate in accordance with the service specifications. The goal is to provide a fix or a workaround for a problem as soon as possible. Contractor shall work on critical issues continually until a satisfactory problem resolution can be reached.

Step 3: This column indicates the time by when Contractor will work with ASR and Product Vendor(s) including Salesforce to provide a solution. This may be in the form of a tested application fix, completely new coding, or patch from ASR/Salesforce/Other Product Vendor

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depending on the problem requirements and timetable.

Severity/Urgency	Step 1 - Confirmation	Step 2 – Assignment and Resolution	Step 3 – Long-Term Fix
Critical Severity Issues (Priority 1): Supported Service is non-functional or seriously affected and there is no reasonable workaround available (e.g. business is halted).	Confirmation of receipt within one (1) business hour	Work starts immediately upon acknowledgement and continues until resolved. Contractor will put forth commercially reasonable efforts with ASR and product vendors up to and including 24 hour days, 7 days a week, through holidays and weekends until a fix or workaround is provided to restore Service to production state.	A long-term fix provided in a scheduled release mutually agreed upon by Contractor and ASR
High Severity Issues (Priority 2): Supported Service is affected and there is no workaround available or the workaround is impractical. E.g. System response is very slow, day to day operations continue but are impacted by the work around.	Confirmation of receipt within two (2) business hours.	Work starts immediately upon acknowledgement and continues until resolved. Contractor will put forth commercially reasonable efforts with ASR and product vendors to provide a workaround or long-term fix or estimated completion date within five (5) business days after the problem has been	A long-term fix provided in a scheduled release mutually agreed upon by Contractor and ASR

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		diagnosed and replicated	
Medium Severity Issues (Priority 3): Supported Service is non-functional however a known workaround exists, E.g. Non-critical feature is unavailable or requires additional user intervention.	Confirmation of receipt within four (4) business hours.	Contractor will work with ASR and product vendors to prioritize and resolve the issue within a mutually agreed upon timeline	As appropriate
Low Severity Issue (Priority 4): System or application feature works, but there is a minor problem. E.g. Incorrect label, or cosmetic defect.	Confirmation of receipt within eight (8) business hours	Resolution for the issue may be released as a patch set or be incorporated into future scheduled release of Supported Service.	As Appropriate

1. System Defect Resolution Reports

All within scope defect resolution requests must be documented and communicated with ASR within a reasonable, agreed upon time frame. The Defect Resolution Report must contain the description of the maintenance request, resolution status, and the proposed course of action for remedying all open defect resolution requests.

All changes and fixes will be implemented based on a mutually agreed upon schedule. Changes will go through all phases of testing by the Contractor and ASR. The Contractor shall document the test results and provide them to ASR for approval before a decision is made to put a new release into production. At the conclusion of any Property Assessment System changes, the Contractor shall update all required system documentation as appropriate and provide it to ASR.

The Contractor shall provide System Incident and Defect Resolution Reports to ASR that include the elements described above.

2. Roles and Responsibilities

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Topic	Contractor	ASR
Project Team Availability	1. Contractor's project team will be available during deployment activities.	1. ASR Project Manager will review and approve.
System Incident and Corrective Action Reports	2. Contractor shall document all incidents and defects that occur during System Deployment.	2. ASR Project Manager will review and approve.
System Defect Resolution Reports	3. Contractor will provide a System Defect Resolution Reports.	3. ASR Project Manager will review and approve.

8.0 Performance Service Credits

Should the City determine, based upon an objective commercially reasonable standard, that Contractor is not meeting its performance obligations, the following service credits shall apply. Any dispute regarding response time performance may be submitted to Dispute Resolution under Section 11.5 of the Agreement. If submitted, no service credits may be assessed until the conclusion of the Dispute Resolution process. For clarity, service credits apply only to issues that a root cause analysis shows are solely attributable to Contractor, unless otherwise agreed by the parties.

Performance Category	Missed SLA Occurrences (monthly)	Service Credit (monthly)
Step 1 – Confirmation	95% of total incidents AND 95% of Priority 1 incidents	10%
Step 2 – Assignment and Resolution	95% of total incidents AND 95% of Priority 1 incidents	10%
Step 3 – Long Term Fix	95% of total incidents AND 95% of Priority 1 incidents	5%

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The service credits payable each month shall be capped at twenty five (25) percent of the monthly fee (Calculated: Annual Fee/12). A sum representing the service credit shall be credited by Contractor to City as a non-transferable credit (not convertible to cash) that may be applied forward to any additional Work performed under the Implementation Statement of Work or this Maintenance Statement of Work (for clarity, service credits, if any, shall be deducted from/credited against future sums billed by and owed to Contractor). The service credits set forth in this Section shall be the exclusive remedy of the City for any failure by Contractor to meet its performance obligations. Service credits shall not apply to performance problems that are not solely attributable to Contractor. For clarity, service credits shall not apply to performance problems or defects caused by the City or its personnel, third party delays, or a force majeure event.

9.0 Upgrade/Downgrade of Severity Level.

If, during the Support Request process the issue either warrants assignment of a higher severity level than currently assigned or no longer warrants the severity level currently assigned based on its current impact on the production operation of the System, then the severity level will be upgraded or downgraded accordingly to the severity level that most appropriately reflects its current impact as mutually agreed by the Parties.

10.0 Escalation.

If Contractor does not respond within the time frames set forth above, City may use the escalation procedures as provided in this paragraph. As a first stage, party subject matter experts will seek to resolve the issue. If that attempt is unsuccessful, either party may escalate the issue per the table below. The goal of the escalation procedures will be to (i) resolve the specific problem as quickly as possible; and (ii) ensure that future delays in service response times are prevented. At each stage of this process, the individuals occupying the positions listed below, or their functional equivalents, if the titles within the organizations have changed, will confer and attempt to resolve the relevant issues. Each party understands that depending on the circumstances, it may be impossible to reach one or more of the individuals set forth below. These discussions may occur by telephone, videoconference or in person. Escalation at each step of this process will occur based on City determination that the existing level of involvement is not satisfactorily resolving the problem.

The parties will exchange mutual peer escalation lists (including lead application) as the point persons for issue resolution. This will ensure that the parties have peer to peer subject matter experts to work on issue resolution. On City's side, the issue leads will be maintained at the City service desk.

The focus of this process is to resolve the problem as quickly as possible. The escalation path will be:

Contractor	City
Assigned Support Resource	**Service Desk**

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Support Case Manager	**Property Assessment Support Manager**
Contractor Executive	**ASR Deputy Director Finance and Administration**

11.0 Help Desk Issue Management Software Tool.

The Contractor will use a help desk issue management software tool (e.g. JIRA) to collect and track all issues submitted to the Contractor for production support. The Contractor will additionally provide ASR with an export (in excel or other format specified) of the contents of the help desk issue management software suite used by the Contractor's Production Support staff to import into ASR's Help Desk software tool (If a decision is made to use a Contractor proprietary tool and not the ASR provided Tool like JIRA) .

Contractor will participate in regular issue calls with the City's team. Review care concerns and assist with mitigation.

12.0 Environments

The following functions/activities will be supported within an agreed-to number of environments for the Property Assessment Solution and related integrations.

a. Development (for Developers)
b. Test (for Sapient)
c. Test (for ASR)
d. Training (for ASR)
e. Staging – An environment available to the City to test new Contractor application releases against their production configuration.
f. Production – The environment used by the City to submit, tract and manage live transactions and associated data.

This list of environments will be supported by the agreed-to licensing between ASR and Contractor.

The environments will be refreshed with configuration, code and data on a schedule that is mutually agreed to by ASR and Contractor. The schedule will ensure that activities including testing and deployment are properly supported and completed successfully. Refreshes may occur on a quarterly basis or on an as needed basis as mutually agreed to by ASR and Contractor.

13.0 Ongoing Training

Contractor will provide training/demo on new features and enhancements to city designated key end-user personnel. Contractor will also provide documentation, configuration guides (if needed) and operating procedures documentation to ASR's L1 Helpdesk Team to enable them to perform post release maintenance and provide support.

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14.0 Upgrades and Enhancements.

Contractor will provide City with notice of the availability of all Upgrades and Enhancements.

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Appendix B-1
Calculation of Charges

#	Description of Parent Deliverables	Revised Description of Parent Deliverables (Amd 1)	Planned Invoice Date	RPB #2	Change	Amendment 1
1.0	Definition Phase - Establish Baseline Project Work Plan and Schedule			229,836	-	229,836
2.0	Definition Phase - Document System Implementation Strategy			229,836	-	229,836
3.0	Definition Phase - Document Master Testing Strategy			229,836	-	229,836
4.0	Definition Phase - Develop Requirements Traceability Matrix			229,836	-	229,836
5.0	Definition Phase - Develop Data Migration Plan and Document Integration Strategy			229,836	-	229,836
6.0	Phase 1 - Confirm User Stories			419,055	-	419,055
7.0	Phase 1 - Sprint #1 Complete and Sprint #2 Complete (Invoice 1 of 2)			550,010	-	550,010
8.0	Phase 1.0 - Sprints #3 - Sprint #10 Complete		15-May-20	1,867,682	-	1,867,682
9.0	Phase 1.0 - Sprint #11 and Sprint #12 Complete		30-Jun-20	358,767	-	358,767
10.0	Phase 1.0 - Sprint #13 and Sprint #14 Complete		10-Aug-20	358,767	-	358,767
11.0	Phase 1.0 - Sprint #15 and Sprint #16 Complete		15-Sep-20	358,767	-	358,767
12.0	Phase 1.0 - Develop Technical Design Document and Security Design Document (which includes security profiles)		30-Sep-20	138,271	-	138,271
13.0	Phase 1.0 - Complete System (QA) Testing and Document System Test Results		30-Oct-20	504,640	-	504,640
14.0	Phase 1.0 - Complete User Acceptance Testing (UAT)		15-Dec-20	224,287	-	224,287
15.0	Phase 1.0 - Complete Project Training and Training Manuals, Guides, and Materials		31-Dec-20	224,287	-	224,287
18.0	Phase 1.0 - Acceptance of all Phase 1.0 Implementation Deliverables		15-Jan-21	549,664	-	549,664
19.0	Phase 1.1 - Sprint 1 Complete		31-Jan-21	148,961	-	148,961
20.1	Phase 1.1 - Sprint 2 Complete		26-Feb-21	50,000	-	50,000
20.2	Phase 1.2 - Sprints Complete		15-May-21	50,000	-	50,000
22.1	Phase 1.1 - Complete User Acceptance Testing (UAT)		16-Mar-21	8,000	-	8,000
22.2	Phase 1.2 - Complete User Acceptance Testing (UAT)		16-May-21	8,000	-	8,000
23.1	Phase 1.1 - Complete Project Training and Update Training Manuals , Guides, and Materials		16-Mar-21	8,000	-	8,000
23.2	Phase 1.2 - Complete Project Training and Update Training Manuals , Guides, and Materials		16-May-21	7,000	-	7,000
24.2	Phase 1.2 - Acceptance of all Phase 1.2 Implementation Deliverables		22-May-21	23,000	-	23,000
24.3	Phase 1.3 - Implementation of Audits		31-Dec-21	87,231	(87,231)	-
24.5	Phase 1.3 - Implementation of Audits - MVP		30-Jan-23		50,000	50,000
24.6	Phase 1.3 - Implementation of Audits(Increments) + Others		30-Jun-23		37,231	37,231
24.7	Phase 1.1 - Acceptance of all Phase 1.1 Implementation Deliverables		22-Mar-21	23,000	-	23,000
25.0	Phase 2 - Sprint #1 Complete and Sprint #2 Complete		26-Feb-21	370,609	-	370,609
26.0	Phase 2 - Sprint #3 Complete and Sprint #4 Complete		15-Apr-21	370,609	-	370,609
27.0	Phase 2 - Sprint #5 Complete and Sprint #6 Complete		31-May-21	370,609	-	370,609
28.0	Phase 2 - Sprint #7 Complete and Sprint #8 Complete		15-Jul-21	370,609	-	370,609
29.0	Phase 2 - Sprint #9 Complete and Sprint #10 Complete		30-Aug-21	370,609	-	370,609
30.0	Phase 2 - Sprint #11 Complete and Sprint #12 Complete		30-Sep-21	370,609	-	370,609
31.0	Phase 2 - Sprint #13 Complete and Sprint #14 Complete		15-Nov-21	370,609	-	370,609
32.0	Phase 2 - Sprint #15 Complete and Sprint #16 Complete		31-Dec-21	370,609	-	370,609
33.0	Phase 2 - Confirm User Stories - Sprint #1 to #20		28-Feb-22	68,772	-	68,772
34.0	Phase 2 - Confirm User Stories - Sprint #21 to #25		30-Jun-22	276,989	-	276,989
35.0	Phase 2 - Confirm User Stories - Sprint #26 to #30		3-Feb-23	267,028	-	267,028
36.0	Phase 2 - Update Technical Design Document and Security Design Document (which includes security profiles) - Sprint #1 to #20		28-Feb-22	46,666	-	46,666
37.0	Phase 2 - Update Technical Design Document and Security Design Document (which includes security profiles) - Sprint #21 to #25		30-Jun-22	34,568	-	34,568
38.0	Phase 2 - Update Technical Design Document and Security Design Document (which includes security profiles) - Sprint #26 to #30		3-Feb-23	39,753	-	39,753
39.0	Phase 2 - Complete System (QA) Testing and Document System Test Results - Sprint #1 to #20		28-Feb-22	78,283	-	78,283
40.0	Phase 2 - Complete System (QA) Testing and Document System Test Results - Sprint #21 to #25		30-Jun-22	208,754	-	208,754
41.0	Phase 2 - Complete System (QA) Testing and Document System Test Results - Sprint #26 to #30		3-Feb-23	195,707	-	195,707
42.0	Phase 2 - Complete Project Training and Training Manuals, Guides, and Materials - Sprint #1 to #25		30-Jun-22	29,844	-	29,844
43.0	Phase 2 - Complete Project Training and Training Manuals, Guides, and Materials - Sprint #26 to #30		3-Feb-23	29,844	-	29,844

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Amendment 1
Appendix B-1
Calculation of Charges

#	Description of Parent Deliverables	Revised Desription of Parent Deliverables (Amd 1)	Planned Invoice Date	RPB #2	Change	Amendment 1
44.0	Phase 2 - Confirm User Stories - Final Delivery	(Moved to final delivery milestones 52 - 67)	31-Jan-23	94,241	(94,241)	-
45.0	Phase 2 - Update Technical Design Document and Security Design Document (which includes security profiles) - Final Delivery	(Moved to final delivery milestones 52 - 67)	31-Mar-23	17,284	(17,284)	-
46.0	Phase 2 - Complete System (QA) Testing and Document System Test	(Moved to final delivery milestones 52 - 67) Results - Final delivery	31-Mar-23	104,377	(104,377)	-
47.0	Phase 2 - Complete User Acceptance Test (UAT) - MVP	(Moved to final delivery milestones 52 - 67)	31-Dec-22	293,561	(293,561)	-
48.0	Phase 2 - Complete User Acceptance Test (UAT) - Final RP Release	(Moved to final delivery milestones 52 - 67)	31-Mar-23	293,561	(293,561)	-
49.0	Phase 2 - Complete Project Training and Training Manuals, Guides,	(Moved to final delivery milestones 52 - 67) and Materials - Final delivery	31-Mar-23	119,375	(119,375)	-
50.0	Phase 2 - Acceptance of Phase 2 Secured Implementation Deliverables - 1 - Sprint 35	(Moved to final delivery milestones 52 - 67)	31-Jan-23	354,031	(354,031)	-
51.0	Phase 2 - Acceptance of Phase 2 Secured Implementation Deliverables - 2 - Post 2023 Roll Close	(Moved to final delivery milestones 52 - 67)	30-Jul-23	354,031	(354,031)	-
52.0		SIT 4.2 Complete (zero P1 and P2 errors)	31-Jan-23		294,818	294,818
53.0		SIT 5.1 Complete (zero P1 and P2 errors)	24-Mar-23		147,409	147,409
54.0		SIT 5.3 Complete (zero P1 and P2 errors)	30-Jun-23		147,409	147,409
55.0		Platform Build Complete 2.0	11-Jul-23		884,455	884,455
56.0		Data Migration Complete (post data recon by ASR) 2.0	11-Jul-23		589,637	589,637
57.0		Performance Testing Complete 2.0	22-Aug-23		117,927	117,927
58.0		UAT Start 2.0	23-Aug-23		471,709	471,709
59.0		UAT – Phase 2 Complete User Acceptance Testing 2.0	14-Nov-23		589,637	589,637
60.0		Go Live – Phase 2 – Acceptance of Phase 2 Secured Implementation Deliverables 1 for 2.0	11-Dec-23		1,179,274	1,179,274
61.0		Training – Phase 2 – Complete Project Training and Training Materials, Guides and Materials for 2.0	5-Dec-23		294,818	294,818
62.0		Platform Build Complete 2.x	5-Dec-23		235,855	235,855
63.0		UAT Start 2.x	27-Dec-23		235,855	235,855
64.0		UAT – Phase 2.x Complete User Acceptance Testing	6-Feb-24		235,855	235,855
65.0		Training – Phase 2.x – Complete Project Training and Training Materials, Guides and Materials	20-Feb-24		235,855	235,855
66.0		Go Live – Phase 2.x – Acceptance of Phase 2.x Secured Implementation Deliverables	26-Feb-24		235,855	235,855
67.0		First Roll Close – Phase 2 Acceptance of Phase 2 Secured Implementation Deliverables 2 for 2.0	30-Jul-24		1,474,092	1,474,092
				12,988,109	**5,740,000**	**18,728,109**

#	Maintenance During Implementation Revised Description of Parent Deliverables	Planned Invoice Date	RPB #2	Change	Amendment 1
68.0	Phase 1 Maintenance (after Phase 1 go-live) - 2.2 Months	15-Jan-21	533,033	-	533,033
69.0	Phase 1.1 Maintenance (after Phase 1.1 go-live) - 12 Months	22-Mar-21	228,443	-	228,443
70.0	Phase 1 Maintenance (after Phase 1 go-live)	23-Dec-22		660,000	660,000
71.0	Phase 1 Maintenance (after Phase 1 go-live)	15-Dec-23		440,000	440,000
			761,476	**1,100,000**	**1,861,476**

#	Maintenance After Phase 2 Go-Live Revised Description of Parent Deliverables		Planned Invoice Date	RPB #2	Change	Amendment 1
72.0		Year 1 Maintenance (after Phase 2 go-live)	0	504,025	(504,025)	-
73.0		Year 2 Maintenance	0	504,025	(504,025)	-
74.0		Year 3 Maintenance	0	504,025	(504,025)	-
75.0	Year 4 Maintenance	Year 1 Maintenance (after Phase 2 go-live)	01-Jan-24	504,025	695,975	1,200,000
76.0	Year 5 Maintenance	Year 2 Maintenance	01-Jan-25	504,025	495,975	1,000,000
77.0	Year 6 Maintenance	Year 3 Maintenance	01-Jan-26	504,025	295,975	800,000
78.0	Year 7 Maintenance	Year 4 Maintenance	01-Jan-27	504,025	95,975	600,000
79.0	Year 8 Maintenance	Year 5 Maintenance	01-Jan-28	504,025	(504,025)	-
80.0	Year 9 Maintenance	Year 6 Maintenance	01-Jan-29	504,025	(504,025)	-
81.0	Year 10 Maintenance (3.8 months - through July 15, 2031)	Year 7 Maintenance	01-Jan-30	159,776	(159,776)	-
	Total Maintenance After Phase 2 Go-Live			**4,696,001**	**(1,096,001)**	**3,600,000**
	Office of the Assessor-Recorder Contingency			**2,969,117**	**-**	**2,969,117**
	TOTAL NOT TO EXCEED AMOUNT			**21,414,703**	**5,743,999**	**27,158,702**

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Amendment 1
Appendix B-1
Calculation of Charges

ASR Proposed Payment Schedule for Final Deliverables and $5.74M CR									80%	20%		80%	20%	80%	20%
#	Description	Child Deliverables	Planned Invoice Date	CR $	Unpaid Final Deliverables	Grand Total	payment basis - % of subtotal	Total CR Cost	Payment	Retainage	Unpaid Final Delierales	Payment	Retainage	Total Payment	Total Retainage
1	SIT 4.2 Complete (zero P1 and P2 errors)	Zero P1 and P2 Updated integration specification document Updated mapping documents All final test results documented and provided Help desk documentation updated (i.e., error messages and recovery steps)	1/31/2023	229,600	65,218	294,818	5%	287,000	229,600	57,400	81,523	65,218	16,305	294,818	73,705
2	SIT 5.1 Complete (zero P1 and P2 errors)	See SIT 4.2 Completed Child Deliverables	3/24/2023	114,800	32,609	147,409	3%	143,500	114,800	28,700	40,762	32,609	8,152	147,409	36,852
3	SIT 5.3 Complete (zero P1 and P2 errors)	See SIT 4.2 Completed Child Deliverables	6/30/2023	114,800	32,609	147,409	3%	143,500	114,800	28,700	40,762	32,609	8,152	147,409	36,852
4	Platform Build Complete	Updated technical design document Updated functional design document Updated security design document Updated security matrix Updated integration specification document Software development standards Help desk documentation related to platform updated (i.e., error messages and recovery steps, etc) Updated Requirements Traceability Matrix - Functional and Non Functional	7/11/2023	688,800	195,655	884,455	15%	861,000	688,800	172,200	244,569	195,655	48,914	884,455	221,114
5	Data Migration Complete (post data recon by ASR)	Zero P1, P2, and acceptable and mutually agreed number of P3s All data migrated successfully within acceptable performance timeframes for ASR. Acceptable performance timeframe Acceptable and mutually agreed with PS, ASR IT Director and CIO Final data conversion plan Final mapping documents Note: bugs arising from data cleanup are not PS responsibilities	7/11/2023	459,200	130,437	589,637	10%	574,000	459,200	114,800	163,046	130,437	32,609	589,637	147,409
6	Performance Testing Complete 2.0	All final performance test results documented and provided to ASR Performance test requirements will be mutually agreed to by PS and the ASR IT Director and CIO	8/22/2023	91,840	26,087	117,927	2%	114,800	91,840	22,960	32,609	26,087	6,522	117,927	29,482
7	UAT Start	UAT entry requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts	8/23/2023	367,360	104,349	471,709	8%	459,200	367,360	91,840	130,437	104,349	26,087	471,709	117,927
8	UAT – Phase 2 Complete User Acceptance Testing	UAT remaining defect report and results presentation by Sapient Zero P1 and P2 defects	11/14/2023	459,200	130,437	589,637	10%	574,000	459,200	114,800	163,046	130,437	32,609	589,637	147,409
9	Go Live – Phase 2 – Acceptance of Phase 2 Secured Implementation Deliverables	Go Live entry requirements satisified - Go_NoGoCriteria_Phase2_Release1.docx Final requirements traceability for Go Live - functional Final requirements traceability for Go Live - non-functional System incident and corrective action report (SOW 7.4.2) Deployment bill of materials (SOW 7.3) Documented implementation project closeout (SOW 10.1) Support transition plan (SOW 10.4) Software configuration management (SOW 5.1.6) Software successfully installed and data fully migrated without errors During the warranty period there will be rapid detection and escalation of issues and quick resolution and communication	12/11/2023	918,400	260,874	1,179,274	20%	1,148,000	918,400	229,600	326,092	260,874	65,218	1,179,274	294,818
10	Training – Phase 2 – Complete Project Training and Training Materials, Guides and Materials	OCM communication plan Project training Training manuals, guides and materials (documents will be stored in Sharepoint) Knowledge transfer Help desk scripts	12/5/2023	229,600	65,218	294,818	5%	287,000	229,600	57,400	81,523	65,218	16,305	294,818	73,705
11	Platform Build Complete 2.x	Updated technical design document Updated functional design document Updated security design document Updated security matrix Updated integration specification document Software development standards Help desk documentation related to platform updated (i.e., error messages and recovery steps, etc) Updated Requirements Traceability Matrix - Functional and Non Functional	12/5/2023	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964
12	UAT Start 2.x	UAT entry requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated script	12/27/2023	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964
13	UAT – Phase 2.x Complete User Acceptance Testing	UAT remaining defect report and results presentation by Sapient Zero P1 and P2 defects	2/6/2024	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964
14	Training – Phase 2.x – Complete Project Training and Training Materials, Guides and Materials	OCM communication plan Project training Training manuals, guides and materials (documents will be stored in Sharepoint) Knowledge transfer Help desk scripts	2/20/2024	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964

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Amendment 1
Appendix B-1
Calculation of Charges

ASR Proposed Payment Schedule for Final Deliverables and $5.74M CR																
									80%	20%		80%	20%	80%	20%	
#	Description	Child Deliverables	Planned Invoice Date	CR $	Unpaid Final Delierales	Grand Total	payment basis - % of subtotal	Total CR Cost	Payment	Retainage	Unpaid Final Delierales	Payment	Retainage	Total Payment	Total Retainage	
15	Go Live – Phase 2.x – Acceptance of Phase 2.x Secured Implementation Deliverables	OCM communication plan Project training Training manuals, guides and materials (documents will be stored in Sharepoint) Knowledge transfer Help desk scripts	2/26/2024	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964	
16	First Roll Close and Acceptance of Secured Implementation Deliverables (20% retainage)	Zero P1 and P2 defects related to first roll close Successful roll close with No Pending P1 and P2 defects from First Roll Close and TTX acceptance of the roll During the warranty period there will be rapid detection and escalation of issues and quick resolution and communication Acceptance of all secured implementation deliverables	7/30/2024	-	-	1,474,092		-	-	-	-	-	-	-	-	
				4,592,000	**1,630,460**	**7,370,460**	**100%**	**5,740,000**	**4,592,000**	**1,148,000**	**1,630,460**	**1,304,368**	**326,092**	**5,896,368**	**1,474,092**	

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UAT Entry & Exit Criteria

As of 3-30-2023

#	ENTRY CRITERIA	OWNER	
1	**FEATURE SET**: Prior to moving from System Testing to UAT, the System's feature set shall be fullydefined and static.	ASR/Sapient	
2	**FINAL RELEASE SOURCE CONTROL:** The final release version shall have been built from source control.	Sapient	
3	**FINAL RELEASE QA:** This final version shall have passed a formal Contractor quality assurance acceptance test.	Sapient	
4	**PRODUCTION DATA:** Production copy data shall be used for UAT	ASR/Sapient	
5	**P1/P2 DEFECTS:** The requirements for release to UAT shall be zero Priority 1 and zero Priority2 defects. ASR and Contractor Project managers will meet and mutually agree on an acceptable levelof Priority 3 defects in order to move forward. Defect levels of Priority are defined as: • *Priority 1 (P1) Show Stopper:* The Deliverable cannot provide core functionality and/or thesystem has stopped working unless the issue is resolved • *Priority 2 (P2) High:* A major function of the Deliverable produces the wrong result and there isno acceptable workaround. An acceptable workaround is one that does not pose a significant risk to ASR operations, will not cause missed SLAs and must have a reasonable level of effort*Priority 3 (P3) Medium:* The Deliverable is operable with only moderate deficiency and a work-around exists • *Priority 4 (P4) Low:* Functionality of the Deliverable is not affected, and only minor, cosmetic changes are required Note: This includes System Integration Testing (SIT) having no P1/P2 defects.	Sapient	
--	The team shall perform the following activities prior to UAT:		
6	**UAT TESTING PLAN & SCHEDULE:** Development of the overall UAT Testing plan and schedule	ASR/Sapient	
7	**UAT SYSTEM RELEASE:** Build the UAT System release	Sapient	
8	**TEST ENVIRONMENT CONFIGURATION:** Install and configure the UAT release Systemcomponents and database(s) on the designated testing environments	Sapient	
9	**DATABASE LOAD:** Load database(s) with complete and validated production-ready datasets(converted Legacy ASR data)	Sapient	
10	**TESTING DOCUMENTATION:** Develop and provide the required UAT Testing documentation (e.g.end user guides, systems administration manuals, user help files) and provide to ASR for approval foruse during UAT activities. The documentation may be in draft or the latest version, and not requiredto be in final state for UAT entry	Sapient	
11	**SECURITY ROLES SET UP:** Ensure security roles are in the ASRTEST environment. We need ASRTEST to mimic PROD exactly from a security perspective in order to effectively test. Note: The security roles will be set up by PS then verified by and officially approved by ASR beforeentering UAT	Sapient	
12	**SYSTEM INTEGRATION JOBS:** System integration jobs are scheduled and set to run automatically, in ASRTEST. The Jobs should be not be overwritten before UAT starts	Sapient/ASR	
13	**SERVICE LEVEL REQUIREMENTS:** Ensure Service Level Requirements are met by systemfunctions (excluding ASR load testing for transaction volumes)	Sapient	
14	**S.I.T COMPLETION:** Complete SIT and resolved all P1/P2 defects related to SIT	ASR/Sapient	
15	**QA FINAL REGRESSION:** Complete QA final regression testing and resolved all P1/P2 defectsrelated to final regression	Sapient	
16	**ENVIRONMENT DATA REQUIREMENTS:** Ensure environment data requirements are met for UAT execution	ASR/Sapient	
17	**ENVIRONMENT IMPACT PLAN:** Develop a plan to address environment impacts during UATduration e.g. Salesforce upgrades	Sapient	
18	**UAT SUPPORT RESOURCES:** Identification and allocation of the required ASR and Contractorresources to support UAT activities (Contractor/ASR)	Sapient/ASR	
19	**DEFECT MANAGEMENT PLAN:** Development of the defect resolution management plan	Sapient	
20	**DEFECT MANAGEMENT PLAN:** Review and acceptance of the defect management plan	ASR	
#	**EXIT CRITERIA**	**OWNER**	

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1	**P1/P2 DEFECTS:** The requirements for release from UAT are zero **Priority 1** and zero **Priority 2** identified defects. The ASR Project Manager, ASR Product Owners, and Contractor Project Managers will meet and mutually agree on an acceptable level of **Priority 3** defects in order to moveforward. Defect levels of priority are as defined above	Sapient	
2	**ASR SIGN-OFF:** All known problems are to be reviewed by ASR Project Manager, ASR Product Owner and any additionally designated staff. Supporting materials such as release notes, user manuals, and training manuals shall be in final form and shall also been verified by the Contractor'squality assurance or other appropriate reviewers. Customer support (if applicable) shall be fully prepared to support the product at this point	ASR	
3	**REPORT OF OPEN ISSUES:** Sapient shall also prepare a report detailing any remaining defects ofall severities and the expected impacts of each, and deliver the report at the same time as the presentation. ASR will review the results and approve or reject the completion of the UAT phase.	Sapient	

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Go/No Go Criteria
Phase 2 – Release 1
FINAL – March 30, 2023

Criteria	Sign Off Owner	Expected Sign Off Date	Status	Criteria Met	Deliverable Acceptance Criteria
Application Readiness					
1. UAT Passed with No P1, P2 and acceptable P3	Chris Connie	TBD			No P1, P2 and acceptable P3 in the Functional, Integration and Data Migration programs
2. Confirmation of SMART-TaxSys integration tested and approved	Chris Connie Jordyn	TBD			No P1, P2 and acceptable P3 in the integration test results
3. Data Migrated, Data Reconciled and Validated (includes data cleanup)	Chris Connie Dana Inna	TBD			ASR approved data migrated and reconciled in Datamig. For example, when ASR runs a Volume Report it matches AS400. If there are deltas, ASR is able to explain it and is OK with it.
4. Non-Functional Requirements Tested and Approved	Sean	TBD			Sapient provides evidence of satisfying Non-Functional requirements from a testing and RTM perspective. Non-Functional requirements that require testing will be mutually agreed to by PS and ASR.
5. SMART Reports Tested and Approved by ASR	Chris Connie Dana	TBD			ASR reports are satisfied – ability to run standard reports and create ad hoc reports as mutually agreed to.
6. Ability to Shut Down EZ Access	Sean Chris Connie Dana Megan	TBD			EZ Access will be read only. EZ Access is not needed for doing ASR business and will be done in SMART

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Criteria	Sign Off Owner	Expected Sign Off Date	Status	Criteria Met	Deliverable Acceptance Criteria
7. Approval of Cut Over Plan and UAT cutover test.	Chris Connie Dana Megan Simone Bill	TBD			Cutover plan has been tested (dry run) and approved by ASR. Note: The dry run will be done as part of preparing our UAT environment.
8. Approved RTM	Chris Connie Dana Megan Simone Sean Bill Wendy	TBD			ASR approves RTM for Phase 2, Release 1. ASR approves what is outstanding in RTM. The RTM format will be in alignment with our SOW and include the following information: 1. Requirement (Template D) 2. EPIC 3. User Stories 4. Test Cases
9. ASR Sign Off on QA Regression Test Results	Chris Connie Dana	TBD	.		ASR will review and approve QA Regression test results.
11. Disaster recovery plan documented and tested successfully	Sean Bill				ASR will successfully execute the Disaster Recovery plan with the support of Sapient.
Maintenance and Operations Readiness					
1. Trouble Shooting Guide	Sean Bill Wendy				Confirm trouble shooting documentation is sufficient.
2. M & O Staffing Plan	Simone Sean Bill	TBD			Confirm M & O Staff Plan has been documented per SOW

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Organizational Readiness					
User Guide (End Users)					
1. Technical Support Guide	Sean Bill	TBD			Confirm technical support material satisfies SOW requirements (e.g., System installation and administration manual, administrative manual, etc.).
2. Train the Trainer Trained	Chris Connie Megan Simone	TBD			ASR Trainers fully trained as per the TTT plan / Curriculum defined and agreed by ASR/PS. Note: TTX CON staff will be trained on the appropriate functions in SMART.
3. IT Support Staff Trained	Sean Bill	TBD			IT Support staff fully trained as per the TT plan / Curriculum defined and agreed by ASR/PS.
4. Deployment Bill of Materials	Sean Bill	TBD			Confirm Deployment Bill of Material as defined in SOW completed and approved by ASR.
5. User Guides	Cecilia Connie Chris	TBD			• Confirm User Guides completed and approved by ASR • Confirm Work arounds full documented and approved by ASR
6. System Implementation Strategy Document	Sean Bill	TBD			Confirm the System Implementation Strategy document completed and approved by ASR.
7. Other:					
a. Contingency Plan	Sean Bill Simone	TBD			Confirm contingency plan has been completed and approved by ASR.
b. Split Warranty Plan	Simone Megan	TBD			Sprint warranty plan approved.

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Appendix C
List of Remaining Phase 1.x, Phase 2.0 and Phase 2.x Requirements

Remaining Phase 1.x Stories as of January 21, 2023

Status	(Multiple Items)

Note: The appendix does not represent an exhaustive list as stories continue to be added in accordance with Exhibit 6. Requirements

Row Labels	Count of Issue Type	Sum of Story Points
Integration, Data Migration & Infra	**1**	**5**
Phase 1.x	1	5
Platform	**57**	**501**
Phase 1.x	57	501
TBD	**4**	**-**
Phase 1.x	4	-
Grand Total	**62**	**506**

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-38230	Penalties for audit adjustment cases should be copied fr	High	Backlog	12/29/2022 12:29	Phase 1.x	ASR-2054	TBD	
Story	ASR-24050	Convert Form 576-D Vessel Statement VIP Form to a Scr	Medium	Backlog	2/7/2022 21:03	Phase 1.x		TBD	
Story	ASR-24049	Convert Form 571-STR Short-term Rental Statement VIP	Medium	Backlog	2/7/2022 21:02	Phase 1.x		TBD	
Story	ASR-24048	Convert Form 571-R Apartment Statement VIP Form to a	Medium	Backlog	2/7/2022 20:59	Phase 1.x		TBD	
Story	ASR-38925	Refactor ASR-1549: Update Property Roll Code for BPP	Medium	Business Analysis	1/20/2023 16:03	Phase 1.x	ASR-2048	Platform	
Story	ASR-38722	Display Rework Button on Revision of Rejected Audit Pa	High	Ready for Internal Test	1/13/2023 10:13	Phase 1.x	ASR-836	Platform	5
Story	ASR-38579	Generate Closeout Escape Notice Letter for Manual crea	Medium	Backlog	1/11/2023 9:59	Phase 1.x	ASR-2056	Platform	13
Story	ASR-38343	Allow Vessel owner to Update Email Address from Porta	Medium	Backlog	1/4/2023 11:36	Phase 1.x	ASR-831	Platform	
Story	ASR-36706	Placeholder- New Document Type of Supporting Docum	Medium	Business Analysis	11/21/2022 9:38	Phase 1.x	ASR-907	Platform	
Story	ASR-36420	Add a Threshold Value Field in Roll Year Object to Only G	High	Business Analysis	11/14/2022 19:51	Phase 1.x	ASR-858	Platform	
Story	ASR-13581	Send Assessment details to Taxpayer (Mass Generation)	Medium	Business Analysis	4/27/2021 10:52	Phase 1.x	ASR-1807	Platform	21
Story	ASR-13530	Translation on Community Portal	Medium	Business Analysis	4/22/2021 14:23	Phase 1.x	ASR-833	Platform	
Story	ASR-12364	Add restrictions & alerts for deleting records	High	Backlog	3/4/2021 10:28	Phase 1.x	ASR-1881	Platform	13
Story	ASR-11694	Prevent Document Generation Request for Email if Emai	Medium	Backlog	1/4/2021 10:54	Phase 1.x	ASR-2052	Platform	
Story	ASR-11185	Auto-update Accounts and Properties using Mismatch R	Medium	Business Analysis	11/18/2020 12:25	Phase 1.x	ASR-833	Platform	
Story	ASR-10672	Phase 2.0 - User Interface Updates - Platform	Medium	In Progress	10/6/2020 13:52	Phase 1.x	ASR-833	Platform	34
Story	ASR-9945	Submit 571L (and the associated Billboard fields) in Com	Low	Business Analysis	8/27/2020 14:08	Phase 1.x	ASR-833	Platform	0
Story	ASR-9079	Restrict Location City to San Francisco	High	In Progress	7/10/2020 9:50	Phase 1.x	ASR-833	Platform	8
Story	ASR-9066	Enforce Unique Assessment Line Items	Low	Backlog	7/9/2020 14:43	Phase 1.x	ASR-1807	Platform	13
Story	ASR-9013	Require Specific Phone Format	Medium	Design	7/8/2020 14:18	Phase 1.x	ASR-833	Platform	8
Story	ASR-8781	Create only one Assessment line Item for Supplies and C	High	Backlog	6/26/2020 10:39	Phase 1.x	ASR-833	Platform	8
Story	ASR-8439	Compare Property Costs Across Years in 571-R and 571-	Medium	Business Analysis	6/8/2020 12:35	Phase 1.x	ASR-833	Platform	21
Story	ASR-8200	Provide Statements for Archiving in OnBase (Flow 1)	Medium	Blocked	5/27/2020 20:48	Phase 1.x	ASR-834	Platform	13
Story	ASR-7859	Notice to File 571-L (Translated)	Medium	Backlog	5/1/2020 16:40	Phase 1.x	ASR-832	Platform	13
Story	ASR-7858	Direct Bill and Low Value Exemption Notice - Business (T	Medium	Backlog	5/1/2020 16:38	Phase 1.x	ASR-832	Platform	13
Story	ASR-7444	Mass Generation of Barcodes for BPP/Vessel Properties	Medium	Backlog	4/2/2020 12:42	Phase 1.x	ASR-1039	Platform	5
Story	ASR-5661	Choose Contact Preferences	Low	Business Analysis	11/22/2019 15:01	Phase 1.x	ASR-24226	Platform	3
Story	ASR-4399	Upload Landlord Report in Community	Medium	Backlog	9/16/2019 10:55	Phase 1.x	ASR-831	Platform	13
Story	ASR-4374	Smartcomm Print Screen Functionality	Medium	Business Analysis	9/12/2019 9:25	Phase 1.x	ASR-832	Platform	
Story	ASR-4333	Generate Depreciation Factor w/Billboards, all depreciat	Medium	Business Analysis	9/9/2019 14:38	Phase 1.x	ASR-1807	Platform	8
Story	ASR-4330	Select Predetermined Useful Life for Billboards and Asse	Medium	Business Analysis	9/9/2019 13:05	Phase 1.x	ASR-1807	Platform	13
Story	ASR-4207	Select Predetermined Useful Life for Billboards and Asse	Medium	Business Analysis	9/4/2019 10:14	Phase 1.x	ASR-1807	Platform	13
Story	ASR-4205	Create Caltrans Payment Schedule	Medium	Business Analysis	9/4/2019 9:21	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3810	Mass Change in Valuation [PENDING]	Low	Business Analysis	7/24/2019 10:44	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3809	Mass Change in Ownership for Property Records (Billboa	Low	Business Analysis	7/24/2019 10:43	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3547	Current Year Cost Calculation (Billboards)	Medium	Business Analysis	7/12/2019 14:15	Phase 1.x	ASR-1807	Platform	8
Story	ASR-3546	Base Year Cost Calculation (Billboards)	Medium	Business Analysis	7/12/2019 14:06	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3535	Determine if Other Assets Need Review (Phase 2)	Medium	Business Analysis	7/11/2019 14:58	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3534	Select Costs from Caltran Payment	Medium	Business Analysis	7/11/2019 14:40	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3528	Select Lower Total Value (Billboards)	Medium	Business Analysis	7/11/2019 13:42	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3303	Set Base Year for Billboards	Low	Business Analysis	6/21/2019 10:44	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3296	Calculate and Display Billboard Final Summed Value (Ph	High	Business Analysis	6/21/2019 10:44	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3294	Identify Non-Billboard Properties? (Phase 2)	Low	Business Analysis	6/21/2019 10:44	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3293	Determine if Property is a Billboard	Low	Business Analysis	6/21/2019 10:44	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3219	In Case Assessment build Vessels Comparables to view	High	Backlog	6/21/2019 9:34	Phase 1.x	ASR-1808	Platform	13
Story	ASR-2989	Identify any Bounced Emails	Low	Backlog	6/14/2019 13:51	Phase 1.x	ASR-833	Platform	3
Story	ASR-2607	Review and Calculate Vessel Valuation Using Comparabl	High	Business Analysis	5/28/2019 19:19	Phase 1.x	ASR-1808	Platform	13
Story	ASR-2598	Select and Adjust Vessel Comparables	Medium	Business Analysis	5/28/2019 19:06	Phase 1.x	ASR-1808	Platform	5
Story	ASR-2245	Receive Agent Registration Email	Low	Business Analysis	5/6/2019 13:08	Phase 1.x	ASR-833	Platform	5
Story	ASR-1612	Add Comparable Characteristics For Marine Comparable	Medium	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-1808	Platform	13
Story	ASR-1611	View Values for Comparable Vessels	High	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-1808	Platform	5
Story	ASR-1598	Route Customer Service Requests to Auditor	Low	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-33944	Platform	3
Story	ASR-1571	Prompt Agent to Register to Community	Medium	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-833	Platform	13
Story	ASR-1570	Provide Authorization Information - Agent	High	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-833	Platform	5
Story	ASR-1404	Select Properties for Landlord Report Request (Phase 2)	High	Business Analysis	3/18/2019 17:11	Phase 1.x	ASR-831	Platform	13
Story	ASR-1158	Assignment Issues and automatically reassign Audit Pack	Medium	Backlog	3/13/2019 16:04	Phase 1.x	ASR-836	Platform	8
Story	ASR-1145	Receive Statute Expiration Warning	High	Backlog	3/13/2019 16:04	Phase 1.x	ASR-837	Platform	5
Story	ASR-1144	Generate Statute of Limitations Waiver- Mass Approval	Medium	Business Analysis	3/13/2019 16:04	Phase 1.x	ASR-837	Platform	13
Story	ASR-1142	Assign Businesses to Specific Auditors- OmniChannel	Low	Business Analysis	3/13/2019 16:04	Phase 1.x	ASR-33944	Platform	1
Story	ASR-1139	Receive Notification - Taxpayer Response to Audit Notifi	Medium	Business Analysis	3/13/2019 16:04	Phase 1.x	ASR-836	Platform	13
Story	ASR-1135	Select Businesses for Audit Using Business Rules (System	Medium	Backlog	3/13/2019 16:04	Phase 1.x	ASR-836	Platform	21
Story	ASR-10818	OnBase Integration : Update Integration layer to provide	Medium	Blocked	10/20/2020 14:36	Phase 1.x	ASR-834	Integration, Data Migra	5

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Remaining Phase 2.0 Sories as of January 21, 2023

Note: The appendix does not represent an exhaustive list as stories continue to be added in accordance with Exhibit 6. Requirements

Status (Multiple Items)

Row Labels	Count of Issue Type	Sum of Story Points
Integration, Data Migration & Infra	**8**	**59**
Phase 2.0	8	59
Platform	**307**	**2,646**
Phase 2 Release 2.x;Phase 2.0	9	-
Phase 2.0	298	2,646
Grand Total	**315**	**2,705**

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-38889	Processing Any Other Event: Subsequent	Critical	Business Analysis	1/19/2023 15:32	Phase 2.0	ASR-2050	Platform	
Story	ASR-38885	Generate Quarterly Report With Situs Ad	Medium	Business Analysis	1/19/2023 15:14	Phase 2.0	ASR-1818	Platform	8
Story	ASR-38881	Manually enter Primary situs address in S	Medium	Business Analysis	1/19/2023 14:55	Phase 2.0	ASR-1818	Platform	13
Story	ASR-38874	Choose Primary situs address in SMART	Medium	Business Analysis	1/19/2023 14:11	Phase 2.0	ASR-1818	Platform	13
Story	ASR-38796	Process PMGT with Multiple Parent APNs	Medium	Business Analysis	1/17/2023 15:30	Phase 2.0	ASR-853	Platform	5
Story	ASR-38730	Creating Prop 19 Status field	Medium	Design	1/13/2023 12:11	Phase 2.0	ASR-24483	Platform	
Story	ASR-38729	Submit by TU for Prop 19	Medium	Business Analysis	1/13/2023 12:03	Phase 2.0	ASR-24483	Platform	
Story	ASR-38728	Adding button for Validating Prop 19	Medium	Design	1/13/2023 12:00	Phase 2.0	ASR-24483	Platform	
Story	ASR-38727	Processing Grantor/ Grantee for Prop 19	Medium	Business Analysis	1/13/2023 11:56	Phase 2.0	ASR-24483	Platform	
Story	ASR-38726	Capture all the codes used for Prop 19	Medium	Design Review	1/13/2023 11:45	Phase 2.0	ASR-24483	Platform	
Story	ASR-38695	Generate Spreadsheet - DC (Retail) | Sale	Medium	CCSF Final Review	1/13/2023 0:23	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38694	Generate Spreadsheet - DC (Retail) | Java	Medium	Business Analysis	1/13/2023 0:18	Phase 2.0	ASR-1032	Platform	1
Story	ASR-38693	Generate Spreadsheet - DC (Industrial) | J	Medium	Backlog	1/13/2023 0:11	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38692	Generate Spreadsheet - DC (Residential) |	Medium	Backlog	1/13/2023 0:05	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38691	Generate Spreadsheet - DC (Office) | Java	Medium	Backlog	1/12/2023 23:59	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38689	Generate Spreadsheet - DC (Mixed Use) |	Medium	Backlog	1/12/2023 23:49	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38687	Generate Spreadsheet Java Development	Medium	Backlog	1/12/2023 23:32	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38684	Generate Spreadsheet - DC (Industrial) | S	Medium	Backlog	1/12/2023 23:11	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38678	Generate Spreadsheet - DC (Residential) |	Medium	Backlog	1/12/2023 22:38	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38676	Generate Spreadsheet - DC (Office) | Sale	Medium	Backlog	1/12/2023 22:26	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38666	Generate Spreadsheet - DC (Mixed Use) |	Medium	Backlog	1/12/2023 13:52	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38665	Generate Spreadsheet - DCF (Hotel)| Sale	Medium	Backlog	1/12/2023 13:31	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38664	Generate Spreadsheet - DC (Retail)| Expo	Medium	Backlog	1/12/2023 13:12	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38663	Generate Spreadsheet - DC (Industrial)| G	Medium	Backlog	1/12/2023 13:02	Phase 2.0	ASR-1032	Platform	1
Story	ASR-38662	Generate Spreadsheet - DC (Residential) |	Medium	Backlog	1/12/2023 12:51	Phase 2.0	ASR-1032	Platform	1
Story	ASR-38659	Generate Spreadsheet - DC (Office)| Expo	Medium	Backlog	1/12/2023 10:58	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38656	Generate Spreadsheet - DC (Mixed Use) |	Medium	Backlog	1/12/2023 10:36	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38655	Generate Spreadsheet - DCF (Hotel) | Exp	Medium	Backlog	1/12/2023 10:00	Phase 2.0	ASR-1032	Platform	8
Story	ASR-38654	New Screen - Regression Valuation Outpu	Medium	Business Analysis	1/12/2023 9:23	Phase 2.0	ASR-24482	Platform	13
Story	ASR-38653	Ingest Regression Valuation Output into S	Medium	Business Analysis	1/12/2023 9:21	Phase 2.0	ASR-24482	Platform	13
Story	ASR-38607	Stop creating DGR (Document Generation	Critical	Backlog	1/11/2023 14:47	Phase 2.0	ASR-34958	Platform	8
Story	ASR-38589	Purge Old Notice Tracker Records for NAV	High	Backlog	1/11/2023 14:13	Phase 2.0	ASR-34958	Platform	8
Story	ASR-38584	UI Story for VR and FMV	Medium	Business Analysis	1/11/2023 11:42	Phase 2.0	ASR-24483	Platform	
Story	ASR-38583	UI Story, capturing and documenting layo	Medium	Business Analysis	1/11/2023 11:36	Phase 2.0	ASR-24483	Platform	
Story	ASR-38581	Calculate & Apply Penalty - RTC 214.13	Critical	Business Analysis	1/11/2023 11:17	Phase 2.0	ASR-2050	Platform	5
Story	ASR-38562	General Updates for TIC	High	Requirements Review	1/10/2023 16:24	Phase 2.0	ASR-873	Platform	13
Story	ASR-38548	Update Logic for CIO PE's on PMGT record	High	Business Analysis	1/9/2023 17:55	Phase 2.0	ASR-853	Platform	8
Story	ASR-38542	Fix to Determine Effect of Transaction on	Medium	Ready for Internal Testing	1/9/2023 13:49	Phase 2.0	ASR-847	Platform	8
Story	ASR-38539	Do Not Auto-Approve Homeowner Exemp	Medium	Backlog	1/9/2023 13:20	Phase 2.0	ASR-846	Platform	8
Story	ASR-38536	Informal Adjustment: Other Appeals (TU,	Medium	Business Analysis	1/9/2023 10:43	Phase 2.0	ASR-828	Platform	8
Story	ASR-38527	Negative Supps - Cannot have Exemption	Critical	Business Analysis	1/6/2023 15:22	Phase 2.0	ASR-2050	Platform	13
Story	ASR-38510	Assessment Impacts - Supplemental Appe	Critical	Business Analysis	1/5/2023 17:56	Phase 2.0	ASR-2050	Platform	34
Story	ASR-38504	Generate & Send Historical Condo Output	Medium	Business Analysis	1/5/2023 12:46	Phase 2.0	ASR-24482	Platform	13
Story	ASR-38503	Generate & Send Pending Condo Output	Medium	Backlog	1/5/2023 12:44	Phase 2.0	ASR-24482	Platform	13
Story	ASR-38500	Informal Adjustment: Escape Appeal (RP-	High	CCSF Final Review	1/5/2023 10:20	Phase 2.0	ASR-828	Platform	21
Story	ASR-38345	Reinstate DVET when TU Reopens a Trans	Medium	Ready for Internal Testing	1/4/2023 12:45	Phase 2.0	ASR-847	Platform	8
Story	ASR-38295	Create Customer Service component for R	Medium	In Progress	1/3/2023 11:45	Phase 2.0	ASR-24226	Platform	8
Story	ASR-38211	Update to 268-A - Submit Public School E	Medium	CCSF Final Review	12/28/2022 13:18	Phase 2.0	ASR-24226	Platform	8
Story	ASR-38209	Update to 265 - Submit Cemetery Exempt	Medium	Business Analysis	12/28/2022 13:16	Phase 2.0	ASR-24226	Platform	13
Story	ASR-38208	Update to 269-AH - Submit Claim for Vete	Medium	CCSF Final Review	12/28/2022 13:06	Phase 2.0	ASR-24226	Platform	8
Story	ASR-38207	Update to 263-C Submit Church Lessor's E	Medium	CCSF Final Review	12/28/2022 12:53	Phase 2.0	ASR-24226	Platform	8
Story	ASR-38206	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:24	Phase 2.0	ASR-1032	Platform	3
Story	ASR-38205	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:24	Phase 2.0	ASR-1032	Platform	3
Story	ASR-38204	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:23	Phase 2.0	ASR-1032	Platform	3
Story	ASR-38203	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:22	Phase 2.0	ASR-1032	Platform	3
Story	ASR-38202	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:19	Phase 2.0	ASR-1032	Platform	3
Story	ASR-38184	Exemptions - Impacts of another PE	Critical	Backlog	12/27/2022 12:51	Phase 2.0	ASR-2050	Platform	13
Story	ASR-37806	Create Work Item from Prop. 19 Stateme	High	Business Analysis	12/14/2022 10:56	Phase 2.0	ASR-24483	Platform	8
Story	ASR-37764	Save and Submit for Review | Direct Cap -	Medium	Backlog	12/13/2022 11:48	Phase 2.0	ASR-1032	Platform	13
Story	ASR-37763	Save and Submit for Review | Direct Cap -	Medium	Backlog	12/13/2022 11:47	Phase 2.0	ASR-1032	Platform	13
Story	ASR-37762	Save and Submit for Review | Direct Cap -	Medium	Backlog	12/13/2022 11:47	Phase 2.0	ASR-1032	Platform	13
Story	ASR-37761	Save and Submit for Review | Direct Cap -	Medium	Backlog	12/13/2022 11:47	Phase 2.0	ASR-1032	Platform	13
Story	ASR-37734	Informal Adjustment: Supplemental Appe	Medium	Ready for Internal Testing	12/12/2022 13:34	Phase 2.0	ASR-828	Platform	34
Story	ASR-37727	Indicate Primary Assessee on RP & PI Asse	High	Blocked	12/12/2022 11:10	Phase 2.0	ASR-2050	Platform	8
Story	ASR-37640	Update FBYV Logic For PI Declining Term	Medium	Design	12/8/2022 14:59	Phase 2.0	ASR-1812	Platform	5

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Appendix C
List of Remaining Stories
PHASE 2.0

Issue Type	Key	Summary	Priority	Status		Created	Fix versions	Epic Link	Track
Story	ASR-37612	Prop 19-V (Transfer of Base Year Value to	High	In Progress		12/7/2022 18:08	Phase 2.0	ASR-24483	Platform
Story	ASR-37610	Prop 19-P (Transfer Between Parent and	High	Ready for Internal Testing		12/7/2022 18:03	Phase 2.0	ASR-24483	Platform
Story	ASR-37606	Prop 19-D (Transfer of Base Year Value, S	High	Ready for Internal Testing		12/7/2022 16:35	Phase 2.0	ASR-24483	Platform
Story	ASR-37562	Prop 19-B (Transfer of Base Year Value, A	High	In Progress		12/6/2022 12:17	Phase 2.0	ASR-24483	Platform
Story	ASR-37525	Valuation Method for Direct Cap (DC)	Medium	Backlog		12/5/2022 12:57	Phase 2.0	ASR-1032	Platform
Story	ASR-37522	Generate Spreadsheet by clicking on Sub	Medium	Backlog		12/5/2022 11:17	Phase 2.0	ASR-1032	Platform
Story	ASR-37521	Save and Submit for Review | Direct Cap -	Medium	Backlog		12/5/2022 11:14	Phase 2.0	ASR-1032	Platform
Story	ASR-37469	System Moves Mapping Doc PE to Closed	High	Business Analysis		12/2/2022 7:46	Phase 2.0	ASR-853	Platform
Story	ASR-37422	Adding fields in (NAV) Letter - RP Properti	Medium	Ready for Internal Testing		12/1/2022 10:45	Phase 2.0	ASR-34958	Platform
Story	ASR-37400	Notice of value Reduction (with Open Apg	Medium	Business Analysis		11/30/2022 12:09	Phase 2.0	ASR-827	Platform
Story	ASR-37338	Updates for Handling Penalties- RP/PI	High	Business Analysis		11/29/2022 10:22	Phase 2.0	ASR-1881	Platform
Story	ASR-37320	Create Mills Act PEs for Properties with Ex	High	Business Analysis		11/28/2022 19:17	Phase 2.0	ASR-869	Platform
Story	ASR-37112	Request Informal Review of Reassessmen	High	Design		11/23/2022 15:29	Phase 2.0	ASR-24226	Platform
Story	ASR-37111	Request Informal Review/Prop 8 (Online)	High	Design		11/23/2022 15:22	Phase 2.0	ASR-24226	Platform
Story	ASR-36767	RP Appraiser can change status field on c	High	Requirements Review		11/22/2022 17:02	Phase 2.0	ASR-25963	Platform
Story	ASR-36765	Read access to all the SMART object for all	High	Business Analysis		11/22/2022 16:28	Phase 2.0	ASR-1881	Platform
Story	ASR-36764	Remove Property Address Validation on a	High	Business Analysis		11/22/2022 16:13	Phase 2.0	ASR-853	Platform
Story	ASR-36760	Display Parent Ownership and "0" values	High	Business Analysis		11/22/2022 14:23	Phase 2.0	ASR-853	Platform
Story	ASR-36759	Update to Monitor System For Required D	Medium	Business Analysis		11/22/2022 12:49	Phase 2.0	ASR-853	Platform
Story	ASR-36664	Community Access for PI Properties	High	Requirements Review		11/20/2022 19:34	Phase 2.0	ASR-24226	Platform
Story	ASR-36642	Update for Adjust Penalty on Enrolled No	Critical	Requirements Review		11/18/2022 9:52	Phase 2.0	ASR-2050	Platform
Story	ASR-36539	Manage HOX Exemptions for Unsegregate	Medium	Design Review		11/16/2022 19:07	Phase 2.0	ASR-846	Platform
Story	ASR-36531	Prior Event Mills Act with Subsequent Eve	Medium	Business Analysis		11/16/2022 14:37	Phase 2.0	ASR-869	Platform
Story	ASR-36461	Identify records whose ownership end da	Medium	Business Analysis		11/15/2022 15:46	Phase 2.0	ASR-873	Platform
Story	ASR-36418	File Exemptions Tab on Property Detail Pa	Medium	Requirements Review		11/14/2022 15:33	Phase 2.0	ASR-24226	Platform
Story	ASR-36351	Update property characteristics Pt 6	Medium	Business Analysis		11/10/2022 14:27	Phase 2.0	ASR-860	Platform
Story	ASR-36035	Populate Is Open Appeal check box on Ac	Medium	Business Analysis		11/9/2022 12:07	Phase 2.0	ASR-827	Platform
Story	ASR-35854	Cancel All Assessments with same Assess	Medium	Business Analysis		11/8/2022 6:18	Phase 2.0	ASR-2050	Platform
Story	ASR-35307	Other Filings Tab on Property Detail Page	Medium	Design Review		10/31/2022 17:47	Phase 2.0	ASR-24226	Platform
Story	ASR-35306	File Exclusions Tab on Property Detail Pag	Medium	Design Review		10/31/2022 17:44	Phase 2.0	ASR-24226	Platform
Story	ASR-35115	Comparable Analysis Matching properties	Medium	Ready for Internal Testing		10/26/2022 14:24	Phase 2.0	ASR-1032	Platform
Story	ASR-35076	64 - Submit Seismic Exclusion - Online	Medium	CCSF Final Review		10/24/2022 10:26	Phase 2.0	ASR-24226	Platform
Story	ASR-35062	Update Logic for Calamity Values	Critical	Backlog		10/21/2022 14:57	Phase 2.0	ASR-2050	Platform
Story	ASR-35061	OnBase - Tracking Information for Taxpay	Medium	Business Analysis		10/21/2022 14:47	Phase 2.0	ASR-34958	Platform
Story	ASR-34982	Submit Builder's Exclusion via Online	Medium	CCSF Final Review		10/19/2022 11:29	Phase 2.0	ASR-24226	Platform
Story	ASR-34946	Display search criteria filters (Operating S	Medium	Ready for Internal Testing		10/18/2022 20:13	Phase 2.0	ASR-1032	Platform
Story	ASR-34945	Calculate initial indicated values _ Hotel (	Medium	Business Analysis		10/18/2022 19:54	Phase 2.0	ASR-1032	Platform
Story	ASR-34938	View and Submit Lien Date or Completed	Medium	Design		10/18/2022 11:25	Phase 2.0	ASR-24226	Platform
Story	ASR-34931	Updates to Cost Approach	Medium	Design Review		10/18/2022 10:06	Phase 2.0	ASR-1033	Platform
Story	ASR-34911	Board Decision Letter-(AAB)	Medium	Business Analysis		10/17/2022 23:54	Phase 2.0	ASR-830	Platform
Story	ASR-34899	Update Lease Management Records	Medium	Ready for Internal Testing		10/17/2022 14:35	Phase 2.0	ASR-1813	Platform
Story	ASR-34898	Adjusting Legacy Assessments with Exem	Medium	Business Analysis		10/17/2022 12:40	Phase 2.0	ASR-2050	Platform
Story	ASR-34712	Assessment Impacts - Informal Review of	Critical	Backlog		10/13/2022 13:04	Phase 2.0	ASR-2050	Platform
Story	ASR-34584	Calculate & Apply Homeowners' Exempti	Medium	Design		10/10/2022 10:28	Phase 2.0	ASR-846	Platform
Story	ASR-34558	Parcel Management UI Updates	Medium	Business Analysis		10/9/2022 20:11	Phase 2.0	ASR-853	Platform
Story	ASR-34508	Integration - AAB (Assessment and Appea	Medium	Business Analysis		10/6/2022 12:39	Phase 2.0	ASR-830	Platform
Story	ASR-34387	Update Logic for CIO PE's on PMGT record	Medium	Business Analysis		10/3/2022 17:15	Phase 2.0	ASR-853	Platform
Story	ASR-34381	"No Intention to Split" Box Only for PMGT	Medium	Business Analysis		10/3/2022 16:29	Phase 2.0	ASR-853	Platform
Story	ASR-34314	Update Cancel Assessment Status When F	Critical	Business Analysis		9/30/2022 6:48	Phase 2.0	ASR-2050	Platform
Story	ASR-34299	Access to Parcel Management Cases to Pu	Medium	CCSF Final Review		9/29/2022 12:30	Phase 2.0	ASR-25963	Platform
Story	ASR-34278	Specify order of categories for default his	Medium	Business Analysis		9/28/2022 10:57	Phase 2.0	ASR-1032	Platform
Story	ASR-34277	Require Approval for Cancellations of NC/	Medium	Business Analysis		9/28/2022 10:57	Phase 2.0	ASR-2050	Platform
Story	ASR-34272	Adjust Transaction OBY Record Creation U	Medium	Backlog		9/28/2022 10:15	Phase 2.0	ASR-2050	Platform
Story	ASR-34124	Adjust BYV for Partial Demolition - Multip	Medium	Requirements Review		9/22/2022 22:41	Phase 2.0	ASR-863	Platform
Story	ASR-33985	Refactoring for Secured BPP Assessments	Critical	Backlog		9/19/2022 15:30	Phase 2.0	ASR-2050	Platform
Story	ASR-33934	System should provide capability of select	Medium	Business Analysis		9/16/2022 12:42	Phase 2.0	ASR-828	Platform
Story	ASR-33901	Updates for Special HOX Handling for TICs	Medium	Design		9/15/2022 11:43	Phase 2.0	ASR-846	Platform
Story	ASR-33854	System receives PH date from AAB and no	Medium	Business Analysis		9/14/2022 13:01	Phase 2.0	ASR-829	Platform
Story	ASR-33853	System records Info on PHC approval.	Medium	Business Analysis		9/14/2022 12:56	Phase 2.0	ASR-829	Platform
Story	ASR-33808	Assessment Impacts - Informal Review of	Medium	Business Analysis		9/13/2022 13:22	Phase 2.0	ASR-2050	Platform
Story	ASR-33603	Transaction Cancellation OBY & Ownershi	High	Requirements Review		9/7/2022 10:44	Phase 2.0	ASR-2050	Platform
Story	ASR-33410	Apply 270 Penalty and Interest after Appr	Critical	Business Analysis		8/31/2022 11:11	Phase 2.0	ASR-2050	Platform
Story	ASR-33360	Reports & List Views - PI	Medium	Business Analysis		8/29/2022 18:45	Phase 2.0	ASR-1812	Platform
Story	ASR-33359	Setup Reports & List Views for Mapping S	Low	Business Analysis		8/29/2022 18:38	Phase 2.0	ASR-852	Platform
Story	ASR-33357	Modify - Add per sq. ft. for residential tem	Medium	Requirements Review		8/29/2022 17:22	Phase 2.0	ASR-1032	Platform
Story	ASR-33341	Reports & List Views - Other RP (Workloa	Medium	Requirements Review		8/29/2022 12:24	Phase 2.0	ASR-863	Platform
Story	ASR-33156	Update Roll (Assessments) for Cancelled	Low	Business Analysis		8/22/2022 9:48	Phase 2.0	ASR-2050	Platform
Story	ASR-33155	Processing CIO or Completed NC: Subseq	High	Requirements Review		8/22/2022 9:20	Phase 2.0	ASR-2050	Platform
Story	ASR-32704	Automate Applying the Assessment Penal	High	Design		8/11/2022 20:07	Phase 2.0	ASR-869	Platform
Story	ASR-32691	Identify Properties for Annual Prop 8 Revi	Medium	Business Analysis		8/11/2022 10:03	Phase 2.0	ASR-872	Platform
Story	ASR-32464	Manual Work-Around: Processing Prior P	Critical	Requirements Review		8/5/2022 6:38	Phase 2.0	ASR-2050	Platform
Story	ASR-32406	Processing Prior Partial CIO: Subsequent	High	Requirements Review		8/4/2022 6:25	Phase 2.0	ASR-873	Platform
Story	ASR-31971	HOLD - Mass Upload Situs Address for Chi	High	Business Analysis		7/22/2022 20:08	Phase 2.0	ASR-853	Platform
Story	ASR-31957	Rearrange order of subject details and ad	Medium	Business Analysis		7/22/2022 12:45	Phase 2.0	ASR-1030	Platform
Story	ASR-30407	Re-Bucket PI Leases	High	Design		6/17/2022 12:17	Phase 2.0	ASR-1813	Platform
Story	ASR-30337	Exception Scenarios for Adjusting Escape	Critical	Business Analysis		6/16/2022 14:27	Phase 2.0	ASR-2050	Platform
Story	ASR-26149	Applying Validations for RTC 482 Non-LE	Critical	Business Analysis		4/11/2022 11:02	Phase 2.0	ASR-2050	Platform
Story	ASR-26033	Maintain land sales database	Medium	Business Analysis		4/6/2022 14:45	Phase 2.0	ASR-1030	Platform

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Appendix C
List of Remaining Stories
PHASE 2.0

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-25820	Modify - Specify order of categories for d	Medium	Ready for Internal Testing	3/31/2022 11:19	Phase 2.0	ASR-1032	Platform	13
Story	ASR-25748	Use Value from Single Valuation Approac	Medium	Business Analysis	3/30/2022 17:04	Phase 2.0	ASR-2179	Platform	5
Story	ASR-25736	Create task/work item to review master l	High	Business Analysis	3/30/2022 12:38	Phase 2.0	ASR-1812	Platform	8
Story	ASR-25733	Adjusting Value on Legacy Inactive PI Pro	High	Business Analysis	3/30/2022 12:38	Phase 2.0	ASR-1812	Platform	8
Story	ASR-25719	Add/update rent database	Medium	Business Analysis	3/30/2022 9:30	Phase 2.0	ASR-1032	Platform	13
Story	ASR-25676	GoLive | Community | Kiosk Login | Login	Medium	Backlog	3/28/2022 15:23	Phase 2.0	ASR-24225	Platform	3
Story	ASR-25615	Placeholder - Comparables for Land Prope	Medium	Business Analysis	3/25/2022 11:03	Phase 2.0	ASR-1030	Platform	5
Story	ASR-25614	Allow User to do a Land Valuation	Medium	Requirements Review	3/25/2022 11:02	Phase 2.0	ASR-1030	Platform	5
Story	ASR-25452	Update List Views & Related Tabs	Low	Business Analysis	3/22/2022 15:50	Phase 2.0	ASR-2179	Platform	8
Story	ASR-25072	Waiting to test - Issue adjustment/supple	Medium	Requirements Review	3/10/2022 16:06	Phase 2.0	ASR-2050	Platform	13
Story	ASR-25023	Allow Logged In User to Update their Sett	Medium	CCSF Final Review	3/9/2022 12:52	Phase 2.0	ASR-24226	Platform	8
Story	ASR-24964	Calamity Updates - PE, VLU etc.	High	Business Analysis	3/7/2022 12:54	Phase 2.0	ASR-870	Platform	5
Story	ASR-24941	Update Peter Daly Name Convention - Co	High	Ready for Internal Testing	3/4/2022 11:20	Phase 2.0	ASR-1033	Platform	21
Story	ASR-24619	Refine search results in map view (market	Medium	Ready for Internal Testing	2/24/2022 11:53	Phase 2.0	ASR-1032	Platform	13
Story	ASR-24519	Process EAS address records	Medium	Business Analysis	2/22/2022 11:49	Phase 2.0	ASR-1818	Platform	13
Story	ASR-24437	Institutional Exemption - First Filing Proce	Medium	Business Analysis	2/18/2022 10:22	Phase 2.0	ASR-19844	Platform	21
Story	ASR-24410	Request Property Update Tab on Real Pro	Medium	In Progress	2/17/2022 13:54	Phase 2.0	ASR-24226	Platform	8
Story	ASR-24385	Updates for PI Potential Match & Exact M	Medium	Backlog	2/17/2022 10:39	Phase 2.0	ASR-1812	Platform	13
Story	ASR-24310	Upload the PDF for Peter Daly Cost Guide	Medium	Business Analysis	2/15/2022 15:28	Phase 2.0	ASR-1033	Platform	8
Story	ASR-24139	Calculate Cost Approach Values (Non-Pet	High	Business Analysis	2/9/2022 14:38	Phase 2.0	ASR-1033	Platform	21
Story	ASR-24135	Display Taxpayer-Reported Information -	Medium	Business Analysis	2/9/2022 12:18	Phase 2.0	ASR-1033	Platform	13
Story	ASR-23992	Process Foreign Improvements	Medium	Business Analysis	2/4/2022 11:53	Phase 2.0	ASR-1812	Platform	13
Story	ASR-23508	Auto-process Existing Leases with No Cha	Medium	Design	1/24/2022 20:12	Phase 2.0	ASR-1812	Platform	8
Story	ASR-23150	Input vacancy and collection loss	Medium	Business Analysis	1/11/2022 15:21	Phase 2.0	ASR-1032	Platform	8
Story	ASR-23116	Create default historical grid templates (r	Medium	In Progress	1/10/2022 17:45	Phase 2.0	ASR-1032	Platform	8
Story	ASR-22640	Create Default Sales Comp Valuation Grid	Medium	Design	12/17/2021 11:46	Phase 2.0	ASR-1030	Platform	13
Story	ASR-22549	Retired legacy properties BYV to handle d	Medium	Business Analysis	12/13/2021 14:05	Phase 2.0	ASR-860	Platform	8
Story	ASR-22415	Exemptions Update	Medium	Business Analysis	12/7/2021 12:09	Phase 2.0	ASR-19844	Platform	8
Story	ASR-22376	Create Default Sales Comp Valuation Grid	Medium	Blocked	12/6/2021 10:29	Phase 2.0	ASR-1030	Platform	8
Story	ASR-22100	Calamity and Prop8 together in same yea	Medium	Design	11/23/2021 13:23	Phase 2.0	ASR-871	Platform	13
Story	ASR-22011	PLACEHOLDER: Suppress Noticing for BPF	Critical	Business Analysis	11/22/2021 9:12	Phase 2.0	ASR-2054	Platform	13
Story	ASR-21589	Setup Profiles & Homepages for Mapping	Low	Business Analysis	10/27/2021 15:40	Phase 2.0	ASR-852	Platform	8
Story	ASR-21544	Display User-Friendly Info (ex. APN vs Rel	Medium	Requirements Review	10/26/2021 9:13	Phase 2.0	ASR-852	Platform	5
Story	ASR-21260	Automate application of completed NC va	Medium	Business Analysis	10/13/2021 9:18	Phase 2.0	ASR-853	Platform	8
Story	ASR-20527	Close all linked property events/valuation	Medium	Design	10/7/2021 12:52	Phase 2.0	ASR-2179	Platform	8
Story	ASR-20109	Setup Homepages For RP Appraiser, RP Pr	Low	Business Analysis	9/28/2021 19:12	Phase 2.0	ASR-2179	Platform	21
Story	ASR-20036	Profiles and Access for City Departments	Medium	Business Analysis	9/23/2021 1:45	Phase 2.0	ASR-23788	Platform	5
Story	ASR-19902	EPIC ESTIMATE STORY FOR : REF 10.01 E	Medium	Business Analysis	9/15/2021 19:19	Phase 2.0	ASR-1818	Platform	50
Story	ASR-19633	Display Potential Duplicates & Merge - PI	Medium	Requirements Review	8/30/2021 15:07	Phase 2.0	ASR-1813	Platform	5
Story	ASR-19602	Submit Disaster Relief Application Online	Low	CCSF Final Review	8/26/2021 12:31	Phase 2.0	ASR-24226	Platform	8
Story	ASR-19146	OnBase - Notify of Documents from OnBa	Medium	Business Analysis	8/16/2021 14:39	Phase 2.0	ASR-34958	Platform	21
Story	ASR-19015	The number of property unit records shou	Medium	Business Analysis	8/10/2021 10:49	Phase 2.0	ASR-2179	Platform	5
Story	ASR-17491	Manually add PI lease lists into system (m	Medium	Business Analysis	6/30/2021 16:44	Phase 2.0	ASR-1813	Platform	8
Story	ASR-13814	Setup Profiles & Homepages for PI	Low	Business Analysis	5/12/2021 10:17	Phase 2.0	ASR-1813	Platform	8
Story	ASR-13507	Delete Assessments and Revert PVs, OBYs	Critical	Design	4/20/2021 15:07	Phase 2.0	ASR-860	Platform	8
Story	ASR-13441	Analyst Access to SMART System (Securit	Medium	Business Analysis	4/15/2021 10:54	Phase 2.0	ASR-25963	Platform	3
Story	ASR-12496	SMART Access rights for other City depart	Medium	Business Analysis	3/17/2021 13:02	Phase 2.0	ASR-25963	Platform	5
Story	ASR-12152	Determine Statute of limitation for Exemp	Medium	Business Analysis	2/11/2021 16:44	Phase 2.0	ASR-2050	Platform	3
Story	ASR-12044	RP Appraiser Adjusts or Cancels Legacy Pr	Medium	Requirements Review	2/4/2021 9:34	Phase 2.0	ASR-872	Platform	5
Story	ASR-11847	Update Fields per Cost Source Chosen	Medium	Design	1/19/2021 11:34	Phase 2.0	ASR-1033	Platform	8
Story	ASR-11824	PlaceHolder -- Associate unit(s) and/or ow	Medium	Business Analysis	1/15/2021 18:41	Phase 2.0	ASR-1033	Platform	13
Story	ASR-11717	Allocate FMV Between TIC Units - Update	Medium	Design Review	1/6/2021 11:02	Phase 2.0	ASR-2179	Platform	8
Story	ASR-11590	Respond to New Construction Letter (Har	High	Design	12/22/2020 20:02	Phase 2.0	ASR-24226	Platform	5
Story	ASR-11588	OnBase - Input Taxpayer Response From	Medium	Design	12/22/2020 18:33	Phase 2.0	ASR-34958	Platform	5
Story	ASR-11158	Reinstate HOX when TU Reopens a Transa	Medium	Ready for Internal Testing	11/17/2020 16:51	Phase 2.0	ASR-846	Platform	13
Story	ASR-10875	Indicate Assessment in Informal Review &	Medium	Design	10/27/2020 12:02	Phase 2.0	ASR-24226	Platform	8
Story	ASR-10662	Apply Penalty to Assessment After Enroll	Medium	Business Analysis	10/5/2020 12:32	Phase 2.0	ASR-2050	Platform	5
Story	ASR-9773	Principal Reviews Valuation Report/Packa	Medium	Business Analysis	8/19/2020 12:21	Phase 2.0	ASR-2179	Platform	8
Story	ASR-9764	Reconcile Values from Multiple Valuation	Medium	Design	8/19/2020 12:10	Phase 2.0	ASR-2179	Platform	8
Story	ASR-9763	Display Values from All Valuation Method	Medium	Design	8/19/2020 12:09	Phase 2.0	ASR-2179	Platform	5
Story	ASR-9762	Select Additional Valuation Method	Medium	Design	8/19/2020 12:08	Phase 2.0	ASR-2179	Platform	3
Story	ASR-9731	Process Supplementals for CIOs with Sam	Medium	Business Analysis	8/18/2020 9:59	Phase 2.0	ASR-2050	Platform	13
Story	ASR-9628	Add or Update Customer Service case	Medium	Requirements Review	8/12/2020 10:32	Phase 2.0	ASR-23788	Platform	5
Story	ASR-8886	OnBase - Taxpayer provides requested 44	Medium	Design	7/2/2020 7:01	Phase 2.0	ASR-34958	Platform	8
Story	ASR-8230	OnBase - Send Exemption Notice (Non-BP	Low	Design	6/1/2020 10:17	Phase 2.0	ASR-34958	Platform	5
Story	ASR-6432	Create or Link Cemetery Exemption Prope	Low	Backlog	1/8/2020 7:30	Phase 2.0	ASR-19844	Platform	13
Story	ASR-6400	OnBase - Create Exemptions Notice to Fil	Medium	Design	1/7/2020 15:35	Phase 2.0	ASR-34958	Platform	5
Story	ASR-6364	Calculate Exemption of Leased Property U	Low	Design	1/7/2020 7:52	Phase 2.0	ASR-19844	Platform	5
Story	ASR-6229	EAS Interface - Data Correction Story	High	Business Analysis	12/13/2019 11:27	Phase 2.0	ASR-1818	Platform	13
Story	ASR-6228	EAS Interface - Process Story	High	Design	12/13/2019 11:27	Phase 2.0	ASR-1818	Platform	13
Story	ASR-4884	View History Tracking - Appeals	Medium	Business Analysis	10/18/2019 8:31	Phase 2.0	ASR-1924	Platform	5
Story	ASR-4169	Assign Calamity to BPP	Medium	Design	8/29/2019 12:01	Phase 2.0	ASR-870	Platform	5
Story	ASR-3968	Reports, Dashboards, List Views (Appeals)	Medium	Business Analysis	8/7/2019 17:39	Phase 2.0	ASR-1924	Platform	5
Story	ASR-3806	Calculate & Apply statutes to Affected Ass	Critical	Business Analysis	7/24/2019 1:28	Phase 2.0	ASR-6266	Platform	8
Story	ASR-3805	Summarize Modifications for Approval	Critical	Business Analysis	7/24/2019 1:28	Phase 2.0	ASR-6266	Platform	8
Story	ASR-3803	Update Assessment Info based on AAB De	Critical	Business Analysis	7/24/2019 1:28	Phase 2.0	ASR-6266	Platform	8
Story	ASR-3800	Review & Approve Assessment Modificati	High	Requirements Review	7/24/2019 1:28	Phase 2.0	ASR-1928	Platform	5
Story	ASR-3798	Resolve Issues with Modified Assessment	Critical	Business Analysis	7/24/2019 1:28	Phase 2.0	ASR-1928	Platform	5

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Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-3797	Create Assessments Based on AAB Decisio	Critical	Design	7/24/2019 1:28	Phase 2.0	ASR-1928	Platform	5
Story	ASR-3767	Update Current/Prior Year RP Assessmen	Critical	Business Analysis	7/18/2019 20:16	Phase 2.0	ASR-2050	Platform	3
Story	ASR-3752	Updates to Handle Subsequent Non-asses	Critical	Business Analysis	7/18/2019 20:16	Phase 2.0	ASR-2050	Platform	13
Story	ASR-3461	Updates for CIO Adjustments/Cancellatio	Critical	Blocked	7/9/2019 11:20	Phase 2.0	ASR-2050	Platform	21
Story	ASR-3422	Informal Adjustment: Base Year Appeal (R	Medium	Backlog	7/1/2019 19:14	Phase 2.0	ASR-828	Platform	13
Story	ASR-3420	Display Legacy Income, Cost & Sales Com	High	Business Analysis	7/1/2019 19:14	Phase 2.0	ASR-1030	Platform	5
Story	ASR-3418	Apply Agreed Upon Corrections	Medium	Business Analysis	7/1/2019 19:14	Phase 2.0	ASR-828	Platform	5
Story	ASR-3417	Indicate if Stipulation Letter Required	Low	Business Analysis	7/1/2019 19:14	Phase 2.0	ASR-828	Platform	3
Story	ASR-3361	Receive Raise Letter Prompt	Low	Business Analysis	6/27/2019 9:56	Phase 2.0	ASR-828	Platform	5
Story	ASR-3289	Validate APN on PI Upload	Low	Design	6/21/2019 10:44	Phase 2.0	ASR-1812	Platform	8
Story	ASR-3285	Track PI Events	High	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-1812	Platform	8
Story	ASR-3282	Generate and Send Annual Inquiry to Gov	High	Design	6/21/2019 10:44	Phase 2.0	ASR-34958	Platform	5
Story	ASR-3281	Mark PI Structural Improvements Non-As	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-1812	Platform	3
Story	ASR-3273	Updates for PI Work Assignment by Agen	High	Ready for Internal Testing	6/21/2019 10:44	Phase 2.0	ASR-1812	Platform	13
Story	ASR-3267	Update Formal Hearing Sent From AAB to	High	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-1924	Platform	5
Story	ASR-3264	Document Taxpayer Response and Route	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-1924	Platform	5
Story	ASR-3263	Send Withdrawal Email & Form to Taxpay	Low	Design	6/21/2019 10:44	Phase 2.0	ASR-828	Platform	5
Story	ASR-3260	Updates when Creating PI Property or Lin	High	CCSF Final Review	6/21/2019 10:44	Phase 2.0	ASR-1813	Platform	13
Story	ASR-3257	Handle BPP Calamity Reductions (Secured	High	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-870	Platform	3
Story	ASR-3250	Updates to Appeals Record Property Even	High	Requirements Review	6/21/2019 10:44	Phase 2.0	ASR-1924	Platform	3
Story	ASR-3246	Notify Appeal Auditor/Appraiser that the	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-827	Platform	3
Story	ASR-3245	Track Taxpayer Response to Postpone He	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-827	Platform	3
Story	ASR-3233	Approve Appeals Package	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-830	Platform	5
Story	ASR-3232	Determine if Principal has Reviewed Appe	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-828	Platform	3
Story	ASR-3231	Generate Appeals Package for Hearing	High	Requirements Review	6/21/2019 10:44	Phase 2.0	ASR-830	Platform	13
Story	ASR-3230	Assessment Impacts - Informal Review of	Low	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-828	Platform	3
Story	ASR-3223	Notify ASR Staff of Pre-Hearing Conferenc	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-830	Platform	5
Story	ASR-3222	Receive Formal Hearing Dates from AAB	High	Requirements Review	6/21/2019 10:44	Phase 2.0	ASR-830	Platform	5
Story	ASR-2999	Create Expense Comparables Summary T	High	Business Analysis	6/14/2019 13:51	Phase 2.0	ASR-1032	Platform	13
Story	ASR-2996	Exemption Adjustment - Non-Taxable Ent	High	Business Analysis	6/14/2019 13:51	Phase 2.0	ASR-2050	Platform	13
Story	ASR-2969	Placeholder - Notify Exemptions Manager	High	Business Analysis	6/14/2019 13:51	Phase 2.0	ASR-1813	Platform	5
Story	ASR-2948	Defer - Prioritize Open Work Items on Par	Medium	Business Analysis	6/14/2019 13:51	Phase 2.0	ASR-853	Platform	3
Story	ASR-2899	Setup Reports & List Views - Exemptions	Low	Business Analysis	6/14/2019 13:12	Phase 2.0	ASR-846	Platform	5
Story	ASR-2898	DVET Assessment Calculations Update - P	Medium	Requirements Review	6/14/2019 13:12	Phase 2.0	ASR-847	Platform	13
Story	ASR-2896	Remove Homeowner Exemptions if DVET	Medium	Ready for Internal Testing	6/14/2019 13:12	Phase 2.0	ASR-846	Platform	13
Story	ASR-2892	Create or Link Service Members Civil Relie	Medium	Business Analysis	6/14/2019 13:12	Phase 2.0	ASR-19844	Platform	5
Story	ASR-2885	Disable Veteran's Exemption Update	Medium	Design	6/14/2019 13:12	Phase 2.0	ASR-847	Platform	5
Story	ASR-2883	Indicate Homeowners' Exemption Claim i	Medium	Business Analysis	6/14/2019 13:12	Phase 2.0	ASR-846	Platform	5
Story	ASR-2541	Create PI Accounts for Berths	Medium	Requirements Review	5/28/2019 19:06	Phase 2.0	ASR-1813	Platform	5
Story	ASR-2461	Request Prop 8 Review - Hard Copy	High	Ready for Internal Testing	5/16/2019 13:11	Phase 2.0	ASR-872	Platform	13
Story	ASR-2425	Remove Disaster Relief Claim - Change In	Medium	Business Analysis	5/16/2019 13:11	Phase 2.0	ASR-870	Platform	13
Story	ASR-2058	Calculate Structural Improvements - PI Va	High	Business Analysis	4/30/2019 9:03	Phase 2.0	ASR-1812	Platform	21
Story	ASR-1582	Receive Updated Controller Letter for an	High	Business Analysis	3/19/2019 23:31	Phase 2.0	ASR-830	Platform	5
Story	ASR-1564	Review and Approve Recalculated Assess	High	Business Analysis	3/19/2019 23:31	Phase 2.0	ASR-828	Platform	3
Story	ASR-1382	Assign APN (Phase 2)	Low	Business Analysis	3/18/2019 17:11	Phase 2.0	ASR-1818	Platform	3
Story	ASR-1150	Track Status & Completion Date - Audits	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-827	Platform	3
Story	ASR-1129	Select to Review and Research Appeals	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1127	Document Denied Appeal	Low	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-829	Platform	5
Story	ASR-1125	Residential Construction Project Informat	Low	Backlog	3/13/2019 16:04	Phase 2.0	ASR-863	Platform	13
Story	ASR-1124	Process Informal Adjustments	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	8
Story	ASR-1123	Review & Approve Proposed Adjustments	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1122	Informal Adjustment: Additional If Neede	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1116	Associate Multiple Assessments to Single	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	8
Story	ASR-1115	Updates for Assessments (RP, PI, RP Lega	Medium	Requirements Review	3/13/2019 16:04	Phase 2.0	ASR-2050	Platform	8
Story	ASR-1112	Propose Assessment Change	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	8
Story	ASR-1110	Receive Withdrawn Appeal Updates & No	Medium	CCSF Final Review	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1109	Prepare Appeals Package - No Agreement	High	Requirements Review	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	13
Story	ASR-1105	Process Appeal Staging to Appeal PE - Up	Medium	Backlog	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	13
Story	ASR-1100	Send Automatic 441D Letter	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-34958	Platform	5
Story	ASR-1092	Submit Recalculated Appeal Assessments	High	Requirements Review	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1088	UI Update - Appeal Valuation Record	Critical	Design	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	3
Story	ASR-904	Determine if Appeal Can be Administrativ	Low	Requirements Review	3/12/2019 14:38	Phase 2.0	ASR-828	Platform	8
Story	ASR-365	OnBase - Select 441D Template	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-34958	Platform	5
Story	ASR-362	Store Additional Location Information	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1818	Platform	3
Story	ASR-361	Validate Address Details	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1818	Platform	3
Story	ASR-359	Store and Display Rent Information	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1032	Platform	21
Story	ASR-357	Prepopulate Income/Cost Valuations	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1032	Platform	13
Story	ASR-351	Store Historical Addresses	Low	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1818	Platform	3
Story	ASR-340	Perform Income Calculation in System	High	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1032	Platform	21
Story	ASR-314	Updated Requirement - Generate and Ser	High	Design	3/4/2019 13:11	Phase 2.0	ASR-34958	Platform	13
Story	ASR-271	UI Updates- Sprint 2023.01/2023.02	Medium	Requirements Review	3/4/2019 13:11	Phase 2.0	ASR-1881	Platform	5
Story	ASR-249	Determine Statute of limitation for a tran	Medium	Design Review	3/4/2019 13:11	Phase 2.0	ASR-873	Platform	3
Story	ASR-236	Mark Transaction for Change in Ownershi	Medium	Design Review	3/4/2019 13:11	Phase 2.0	ASR-873	Platform	3
Story	ASR-232	OnBase - Track taxpayer response to infor	Low	Design	3/4/2019 13:11	Phase 2.0	ASR-34958	Platform	5
Story	ASR-195	Link Lien Date or Completed New Constru	Medium	Design	2/27/2019 19:36	Phase 2.0	ASR-34958	Platform	5
Story	ASR-194	Notify Appraiser of New Construction Tax	Low	Design	2/27/2019 19:36	Phase 2.0	ASR-24226	Platform	5
Story	ASR-193	OnBase - Generate and Send 441d Letter	Medium	Design	2/27/2019 19:36	Phase 2.0	ASR-34958	Platform	5
Story	ASR-38715	RP Security Model for External Users Prof	Medium	Business Analysis	1/13/2023 9:11	Phase 2 Release 2.x;Pha	ASR-25963	Platform	

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Appendix C
List of Remaining Stories
PHASE 2.0

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-38714	RP Security Model for Public Services Prof	Medium	Business Analysis	1/13/2023 9:10	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38713	RP Security Model for Exemption Staff Pr	Medium	Business Analysis	1/13/2023 9:08	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38712	RP Security Model for RP Community	Medium	Business Analysis	1/13/2023 9:05	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38711	RP Security Model for PI Staff Profile	Medium	Business Analysis	1/13/2023 9:04	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38710	RP Security Model for RP Staff Profile	Medium	Business Analysis	1/13/2023 9:00	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38709	RP Security Model for TU Staff Profile	Medium	Business Analysis	1/13/2023 8:58	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38708	RP Security Model for RP Business Admin	Medium	Business Analysis	1/13/2023 8:56	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38707	RP Security Model for System Admin Prof	Medium	Business Analysis	1/13/2023 8:51	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38822	Data Migration : Update to Account & Ow	Medium	Backlog	1/18/2023 8:41	Phase 2.0	ASR-873	Integration, Da	
Story	ASR-37643	Data Migration : Update RP Parcel Geneal	Medium	Ready for Internal Testing	12/8/2022 16:18	Phase 2.0	ASR-852	Integration, Da	5
Story	ASR-37314	Migration : Update logic for owner snaps	Medium	Ready for Internal Testing	11/28/2022 15:15	Phase 2.0	ASR-2050	Integration, Da	2
Story	ASR-34217	Data Migration : Update RP and PI assess	Medium	Ready for Internal Testing	9/26/2022 14:15	Phase 2.0	ASR-2050	Integration, Da	3
Story	ASR-25806	Integration : Provide training data to regr	Medium	Business Analysis	3/31/2022 6:40	Phase 2.0	ASR-24482	Integration, Da	21
Story	ASR-25802	Integration - EAS(Enterprise Address Syst	High	Requirements Review	3/31/2022 6:28	Phase 2.0	ASR-1818	Integration, Da	13
Story	ASR-25176	Migration : update TIC ownership percent	Medium	In Progress	3/15/2022 0:22	Phase 2.0	ASR-873	Integration, Da	2
Story	ASR-1849	Integration - AAB (Assessment and Appea	High	Ready for Internal Testing	4/9/2019 19:00	Phase 2.0	ASR-828	Integration, Da	13

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Remaining Phase 2.x Stories as of January 21, 2023

Note: The appendix does not represent an exhaustive list as stories continue to be added in accordance with Exhibit 6. Requirements

Status	(Multiple Items)

Row Labels	Count of Issue Type	Sum of Story Points
Platform	**275**	**1,986**
Phase 2 Release 2.x	266	1,986
Phase 2 Release 2.x;Phase 2.0	9	-
Grand Total	**275**	**1,986**

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-38869	266-E Statement (Online)	Medium	Business Analysis	1/19/2023 11:33	Phase 2 Release 2.x	ASR-846	Platform	
Story	ASR-37760	Salesforce Structure for Spreadsheet f	Medium	Business Analysis	12/13/2022 11:34	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-37759	Uploading Spreadsheet for Yield Capit	Medium	Business Analysis	12/13/2022 11:04	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-37731	Resume under Val Method for Yield C	Medium	CCSF Final Review	12/12/2022 13:09	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-37636	(NAV) Letter - Taxpayer requesting in	Medium	Business Analysis	12/8/2022 12:59	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-37607	Prop 19-DC (Certificate of Disability) -	High	Design	12/7/2022 16:48	Phase 2 Release 2.x	ASR-24483	Platform	13
Story	ASR-37570	Request for Notification of Individual	Medium	Business Analysis	12/6/2022 18:44	Phase 2 Release 2.x	ASR-859	Platform	8
Story	ASR-37468	Route Recorder Change in Ownership	Medium	Backlog	12/2/2022 7:35	Phase 2 Release 2.x	ASR-33944	Platform	21
Story	ASR-37110	Submit for Review for Yield Capitalizat	Medium	Backlog	11/23/2022 12:25	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-37109	Save for Yield Capitalization Analysis (	Medium	CCSF Final Review	11/23/2022 12:24	Phase 2 Release 2.x	ASR-1032	Platform	21
Story	ASR-36715	Valuation Method for Yield Capitalizat	Medium	CCSF Final Review	11/21/2022 13:43	Phase 2 Release 2.x	ASR-1032	Platform	34
Story	ASR-36705	Report for Timeshare Mass Closure	Medium	Design	11/21/2022 8:56	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-36592	Value Conclusion for Yield Capitalizati	Medium	CCSF Final Review	11/17/2022 10:49	Phase 2 Release 2.x	ASR-1032	Platform	13
Story	ASR-36451	Agents should not be able to assign ite	Medium	Business Analysis	11/15/2022 9:17	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-36450	Omni-Channel to set Status = Availabl	Medium	Business Analysis	11/15/2022 9:13	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-36414	Consolidated Metrics under List View	Medium	CCSF Final Review	11/14/2022 13:10	Phase 2 Release 2.x	ASR-1032	Platform	21
Story	ASR-36108	Generate Report - Sales Comp	High	Business Analysis	11/10/2022 10:09	Phase 2 Release 2.x	ASR-1030	Platform	8
Story	ASR-35651	Create Update Exemption PE - Service	Low	Business Analysis	11/7/2022 10:51	Phase 2 Release 2.x	ASR-19844	Platform	5
Story	ASR-35320	Ability to Mass Close PEs via List View	Medium	Business Analysis	11/1/2022 7:48	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-35210	263-B: Submit Lessees' Exemption For	Medium	Business Analysis	10/27/2022 16:11	Phase 2 Release 2.x	ASR-23788	Platform	5
Story	ASR-35144	Route Submissions of Property Statem	Medium	Business Analysis	10/27/2022 11:09	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-35143	Route Mail Bucket/OnBase Scans of C	Medium	Design	10/27/2022 11:07	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-35060	Calculate and display stabilized value	Medium	CCSF Final Review	10/21/2022 13:27	Phase 2 Release 2.x	ASR-1032	Platform	55
Story	ASR-34936	Access Notice of Assessed Value (NAV	Medium	Business Analysis	10/18/2022 10:49	Phase 2 Release 2.x	ASR-24226	Platform	13
Story	ASR-34662	Route Documents Submitted via the C	Medium	Business Analysis	10/12/2022 9:08	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-34413	Taxpayer To Submit an Amended Exe	Medium	Design	10/4/2022 12:34	Phase 2 Release 2.x	ASR-24226	Platform	21
Story	ASR-34331	Submit Request for Notification of Ind	Medium	Business Analysis	9/30/2022 16:50	Phase 2 Release 2.x	ASR-24226	Platform	8
Story	ASR-34012	261-D: Submit Service Members Civil	Medium	Design	9/20/2022 9:06	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-33988	System should provide the user with c	Medium	Business Analysis	9/19/2022 18:18	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-33163	Ability to Mass Discontinue Exemption	Medium	Business Analysis	8/22/2022 12:41	Phase 2 Release 2.x	ASR-19844	Platform	8
Story	ASR-31376	Update Exemptions Reporting Needs (	Low	Business Analysis	7/5/2022 12:07	Phase 2 Release 2.x	ASR-846	Platform	5
Story	ASR-30788	Hold Current Year Roll Correction in S	Medium	Business Analysis	6/27/2022 15:29	Phase 2 Release 2.x	ASR-19841	Platform	8
Story	ASR-30685	Job Monitoring Functionality for Inbou	Medium	Business Analysis	6/25/2022 15:57	Phase 2 Release 2.x	ASR-1881	Platform	13
Story	ASR-29734	Update Property Characteristics Cloni	Medium	Business Analysis	5/30/2022 9:25	Phase 2 Release 2.x	ASR-853	Platform	8
Story	ASR-29253	Update Functionality for Last Chance	Critical	Business Analysis	5/17/2022 14:30	Phase 2 Release 2.x	ASR-2050	Platform	8
Story	ASR-29147	Clone of Prior Year Institutional Annua	Medium	Business Analysis	5/13/2022 9:32	Phase 2 Release 2.x	ASR-19844	Platform	13
Story	ASR-24676	Lessors' Exemption Form Deadlines	Medium	Business Analysis	2/24/2022 13:19	Phase 2 Release 2.x	ASR-19844	Platform	5
Story	ASR-24520	Submit Lessors' Exemption Form (Onli	Medium	Business Analysis	2/22/2022 12:07	Phase 2 Release 2.x	ASR-23788	Platform	5
Story	ASR-24414	Updates for BOE 267FIR in System	Medium	Business Analysis	2/17/2022 18:39	Phase 2 Release 2.x	ASR-34958	Platform	13
Story	ASR-24301	Way to "Link to access plans" for Cost	Medium	Business Analysis	2/15/2022 13:09	Phase 2 Release 2.x	ASR-1033	Platform	8
Story	ASR-24143	Update the Cost Valuation Template (	Medium	Business Analysis	2/9/2022 15:31	Phase 2 Release 2.x	ASR-1033	Platform	8
Story	ASR-24035	Adjusted Transactions Sent to TU Sup	Medium	Design	2/7/2022 11:36	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-23815	Defer - Property History tab on Proper	Medium	Business Analysis	2/3/2022 10:02	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-23740	Create & Route Initial Calamity Valuat	Medium	Business Analysis	2/1/2022 9:57	Phase 2 Release 2.x	ASR-33944	Platform	3
Story	ASR-23567	OnBase - Create Calamity Statement v	High	Business Analysis	1/26/2022 11:07	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-23230	View AVM (Regression) Value During S	Medium	Business Analysis	1/13/2022 12:46	Phase 2 Release 2.x	ASR-1030	Platform	8
Story	ASR-23098	Submit Change in Ownership Stateme	Medium	Business Analysis	1/10/2022 10:11	Phase 2 Release 2.x	ASR-873	Platform	5
Story	ASR-23097	Submit Change in Ownership Stateme	Medium	Design	1/10/2022 10:06	Phase 2 Release 2.x	ASR-873	Platform	8
Story	ASR-22564	267-L1: Welfare Exemption Suppleme	Medium	Design	12/14/2021 9:33	Phase 2 Release 2.x	ASR-19844	Platform	3
Story	ASR-22561	267-H: Submit Supplemental Affidavit	Medium	Design	12/14/2021 9:31	Phase 2 Release 2.x	ASR-19844	Platform	13
Story	ASR-22425	502-D - Submit Change in Ownership S	Medium	Business Analysis	12/7/2021 12:37	Phase 2 Release 2.x	ASR-24226	Platform	3
Story	ASR-22424	Submit Change in Ownership Stateme	Medium	Business Analysis	12/7/2021 12:34	Phase 2 Release 2.x	ASR-24226	Platform	11
Story	ASR-22423	267-R: Welfare Exemption Supplemen	Medium	Design	12/7/2021 12:23	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22422	267-O: Welfare Exemption Supplemen	Medium	Design	12/7/2021 12:22	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22419	267-L3: Welfare Exemption Suppleme	Medium	Business Analysis	12/7/2021 12:17	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22418	267-L2: Welfare Exemption Suppleme	Medium	Business Analysis	12/7/2021 12:15	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22417	267-L1: Welfare Exemption Suppleme	Medium	Design	12/7/2021 12:13	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22416	267-L: Welfare Exemption Supplemen	Medium	Business Analysis	12/7/2021 12:11	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22414	267-H: Submit Supplemental Affidavit	Medium	Business Analysis	12/7/2021 12:03	Phase 2 Release 2.x	ASR-24226	Platform	13
Story	ASR-22095	Link & View Related Valuation Record	Medium	Business Analysis	11/23/2021 8:46	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-21706	Generate & Send Inspection PDF	Low	Business Analysis	11/4/2021 12:16	Phase 2 Release 2.x	ASR-19844	Platform	21
Story	ASR-21306	Create Property Event from Scanned	High	Business Analysis	10/14/2021 14:34	Phase 2 Release 2.x	ASR-869	Platform	8
Story	ASR-19886	New transaction to be created from a	Low	Business Analysis	9/15/2021 11:08	Phase 2 Release 2.x	ASR-877	Platform	21
Story	ASR-19828	Ensure Dates are Consistently Formatt	Low	Business Analysis	9/13/2021 14:37	Phase 2 Release 2.x	ASR-1881	Platform	13
Story	ASR-19658	Conduct 3-Way Valuation- Mills Act	Medium	Requirements Review	9/1/2021 15:25	Phase 2 Release 2.x	ASR-869	Platform	5
Story	ASR-19644	Apply Values to Working Roll when M	Medium	Business Analysis	8/31/2021 18:57	Phase 2 Release 2.x	ASR-869	Platform	13
Story	ASR-19642	Route Case to Mills Act Appraiser whe	Medium	Business Analysis	8/31/2021 18:36	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-19631	Send Notice for Builder's Exclusion Su	High	Business Analysis	8/30/2021 13:48	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-19156	Assessment Summary Screen - Hover	Medium	Business Analysis	8/17/2021 9:50	Phase 2 Release 2.x	ASR-2179	Platform	13
Story	ASR-18028	OnBase - Provide Supporting Docume	Medium	Business Analysis	7/22/2021 10:37	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-17775	Operational Reports- Phase 2 (inc TU,	Medium	Business Analysis	7/14/2021 17:03	Phase 2 Release 2.x	ASR-1881	Platform	34

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Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-16188	RP Property Screen Layout - Assessed	Medium	Business Analysis	6/14/2021 11:32	Phase 2 Release 2.x	ASR-860	Platform	8
Story	ASR-13492	Prevent TU Specialist from Using Tran	Medium	Business Analysis	4/19/2021 15:32	Phase 2 Release 2.x	ASR-873	Platform	8
Story	ASR-13489	Prop 58 Transfer for more than $1M F	Low	Business Analysis	4/19/2021 14:44	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-12825	Complete Tax Certificate Request	Medium	Business Analysis	4/8/2021 20:37	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-12824	Route Tax Certificate Case to Appraise	Medium	Business Analysis	4/8/2021 16:03	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-12774	Derive Category from Transaction Typ	Medium	Business Analysis	4/1/2021 17:40	Phase 2 Release 2.x	ASR-873	Platform	3
Story	ASR-12622	Community - View transaction history	Medium	Business Analysis	3/22/2021 14:28	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-11962	Option to select/deselect items that c	Medium	Business Analysis	1/26/2021 18:35	Phase 2 Release 2.x	ASR-1030	Platform	21
Story	ASR-11857	Run Automatic Valuation Method (AV	Medium	Design	1/19/2021 18:21	Phase 2 Release 2.x	ASR-1033	Platform	8
Story	ASR-11819	Select Cost Source and/or Comparable	Medium	Design	1/15/2021 16:43	Phase 2 Release 2.x	ASR-1033	Platform	8
Story	ASR-11817	Add Taxpayer Costs to Cost Database	Medium	Design	1/15/2021 14:10	Phase 2 Release 2.x	ASR-1033	Platform	5
Story	ASR-11814	Search and Display Comparables - Cos	Medium	Design	1/15/2021 13:35	Phase 2 Release 2.x	ASR-1033	Platform	13
Story	ASR-11801	Use Sales Comparison Approach for N	Medium	Design	1/14/2021 11:01	Phase 2 Release 2.x	ASR-1030	Platform	5
Story	ASR-11784	Calculate HAM Estimated Value - Com	Medium	Design	1/12/2021 10:47	Phase 2 Release 2.x	ASR-863	Platform	21
Story	ASR-11778	Indicate Builder's Exclusion Applies on	Medium	Design Review	1/11/2021 19:13	Phase 2 Release 2.x	ASR-864	Platform	3
Story	ASR-11701	Route Work Items for Completed New	High	Design	1/5/2021 9:13	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11531	Route Work Items for Lien Date New C	High	Design	12/17/2020 14:01	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11504	Upload Permit Information from Ports	High	Design	12/16/2020 11:55	Phase 2 Release 2.x	ASR-863	Platform	13
Story	ASR-11468	Principal Approves or Rejects Predicte	Medium	Design	12/11/2020 8:44	Phase 2 Release 2.x	ASR-1031	Platform	5
Story	ASR-11467	Route accepted Prop 8 work items to	Medium	Design	12/11/2020 8:11	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-11390	Create Output Reports Based on AVM	Medium	Design	12/7/2020 15:46	Phase 2 Release 2.x	ASR-1031	Platform	8
Story	ASR-11379	INTEGRATION: Send input files for AV	Medium	Business Analysis	12/4/2020 19:23	Phase 2 Release 2.x	ASR-1031	Platform	21
Story	ASR-11378	Close Prop 8 Work Item with AVM Val	Medium	Design	12/4/2020 18:53	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11377	Update Working Roll with AVM Value	Medium	Design	12/4/2020 18:48	Phase 2 Release 2.x	ASR-1031	Platform	13
Story	ASR-11373	Compare Approved AVM Value with F	Medium	Design	12/4/2020 16:36	Phase 2 Release 2.x	ASR-1031	Platform	13
Story	ASR-11372	Accept or Reject AVM Predicted Value	Medium	Design	12/4/2020 16:22	Phase 2 Release 2.x	ASR-1031	Platform	8
Story	ASR-11371	Send AVM Output Report to Standard	Medium	Design	12/4/2020 15:30	Phase 2 Release 2.x	ASR-1031	Platform	13
Story	ASR-11368	Determine In Which Threshold Range	Medium	Design	12/4/2020 14:58	Phase 2 Release 2.x	ASR-1031	Platform	5
Story	ASR-11366	Set Threshold Ranges and Action take	Medium	Design	12/4/2020 14:00	Phase 2 Release 2.x	ASR-1031	Platform	8
Story	ASR-11365	Set Criteria for Eligible AVM propertie	Medium	Design	12/4/2020 13:54	Phase 2 Release 2.x	ASR-1031	Platform	13
Story	ASR-11309	Create/Modify Prop 8 Reports - Updat	Low	Business Analysis	12/1/2020 12:54	Phase 2 Release 2.x	ASR-872	Platform	5
Story	ASR-11300	Release Work Items for Prop 8 Review	Medium	Design	11/30/2020 23:15	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11213	Generate and Send Denial Notice for L	High	Design	11/19/2020 10:59	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-11028	Notify Taxpayer of Homeowners' Exe	Medium	Design	11/6/2020 16:13	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-11026	Request Information From Taxpayer-	Medium	Design	11/6/2020 16:08	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-11024	Close Request for Homeowners' Exem	Medium	Design	11/6/2020 16:03	Phase 2 Release 2.x	ASR-846	Platform	5
Story	ASR-11021	Notify Taxpayer of Homeowners' Exe	Medium	Design	11/6/2020 15:37	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-11020	Routes Request to Remove Homeown	Medium	Design	11/6/2020 15:14	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11016	OnBase - Updates to Exemption Appro	Medium	Design	11/6/2020 14:56	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10984	Request Information From Taxpayer-	High	Design	11/4/2020 7:02	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10983	Notify Taxpayer of Homeowners' Exe	Medium	Design	11/4/2020 6:51	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10982	Notify Taxpayer of Homeowners' Exe	Medium	Design	11/4/2020 6:45	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10651	OnBase - Notify TU of New Informatio	Medium	Design	10/2/2020 17:04	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10589	Develop User Interface (UI) and Workf	Medium	Business Analysis	9/29/2020 11:22	Phase 2 Release 2.x	ASR-1881	Platform	8
Story	ASR-10547	Notices and Reports generation after	Medium	Business Analysis	9/25/2020 12:54	Phase 2 Release 2.x	ASR-19841	Platform	5
Story	ASR-10538	Notify Controller and TTX of Working	Critical	Design	9/25/2020 0:11	Phase 2 Release 2.x	ASR-19841	Platform	5
Story	ASR-10488	REPORTS - Review "In Review For Ann	Medium	Design	9/22/2020 23:57	Phase 2 Release 2.x	ASR-19841	Platform	5
Story	ASR-10194	Validate & Relate Assessors Parcel Nu	Medium	Business Analysis	9/9/2020 18:33	Phase 2 Release 2.x	ASR-1881	Platform	13
Story	ASR-9800	Route Valuation Report for Principal's	Medium	Design	8/20/2020 13:22	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-9772	Notify Exemption Staff Member On Pe	Medium	Business Analysis	8/19/2020 12:19	Phase 2 Release 2.x	ASR-2179	Platform	5
Story	ASR-9771	PLACEHOLDER: Sends report to BPP if	Medium	Business Analysis	8/19/2020 12:18	Phase 2 Release 2.x	ASR-2179	Platform	5
Story	ASR-9769	Create Professional Quality Valuation	Medium	Business Analysis	8/19/2020 12:16	Phase 2 Release 2.x	ASR-2179	Platform	13
Story	ASR-9768	Associate Final Value with Owner/Bus	Medium	Business Analysis	8/19/2020 12:15	Phase 2 Release 2.x	ASR-2179	Platform	8
Story	ASR-9765	PLACEHOLDER: Allocate Value Betwee	Medium	Business Analysis	8/19/2020 12:12	Phase 2 Release 2.x	ASR-2179	Platform	8
Story	ASR-9759	PLACEHOLDER: Principal Approve Asse	Medium	Business Analysis	8/19/2020 10:40	Phase 2 Release 2.x	ASR-2179	Platform	13
Story	ASR-9716	Review Valuation Report for Approval	Medium	Business Analysis	8/18/2020 0:47	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-9699	Review and Edit Valuation Report	Medium	Design	8/17/2020 0:31	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-9614	OnBase - Generate Request for Chang	Low	Design	8/10/2020 19:21	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-9467	Prop 58/193 Record, update ownershi	Low	Business Analysis	8/3/2020 12:51	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-9432	Re-assign transactions to TU specialist	Medium	Design	7/30/2020 13:51	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-9338	OnBase - Send 441d letter requesting	Low	Design	7/23/2020 13:18	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-9337	OnBase - Document and update Non-	Medium	Design	7/23/2020 12:46	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-8929	Clone Valuations from Existing Valuati	Medium	Design	7/6/2020 16:11	Phase 2 Release 2.x	ASR-1030	Platform	5
Story	ASR-8899	RP - SLA Management	Medium	Business Analysis	7/4/2020 22:58	Phase 2 Release 2.x	ASR-1881	Platform	13
Story	ASR-8898	BPP - SLA Management	Medium	Business Analysis	7/4/2020 22:58	Phase 2 Release 2.x	ASR-1881	Platform	8
Story	ASR-8873	OnBase - Send 441d letter requesting	Medium	Design	7/1/2020 16:55	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-8776	Taxpayer provides requested 441d inf	Medium	Design	6/26/2020 9:38	Phase 2 Release 2.x	ASR-24226	Platform	8
Story	ASR-8764	Re-Assigning Work Items to Appraiser	Medium	Business Analysis	6/25/2020 12:40	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-7207	Send Exemption Notice to Late Filers (	Low	Business Analysis	3/16/2020 7:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-6597	Populate Prior Year Values into Exemp	Medium	Business Analysis	1/27/2020 14:27	Phase 2 Release 2.x	ASR-23788	Platform	5
Story	ASR-6596	Exemption Form Validations (Phase 2)	Medium	Business Analysis	1/27/2020 14:22	Phase 2 Release 2.x	ASR-23788	Platform	5
Story	ASR-6450	Enter Unrelated Business Income Perc	Low	Design	1/10/2020 14:51	Phase 2 Release 2.x	ASR-19844	Platform	3
Story	ASR-6438	OnBase - Create 267F Denial Letter	High	Design	1/8/2020 10:13	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-6368	OnBase - Generate & Send Inspection	Low	Design	1/7/2020 11:43	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-6367	Route Exemption Statement & Exemp	Medium	Design	1/7/2020 11:17	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-5657	263-B: Submit Lessees' Exemption For	Medium	Business Analysis	11/22/2019 12:41	Phase 2 Release 2.x	ASR-19844	Platform	5
Story	ASR-5643	View Exemption Claims Online	Critical	Design	11/22/2019 9:14	Phase 2 Release 2.x	ASR-23788	Platform	3
Story	ASR-5045	Route to RP After TU On Bifurcated Ap	Low	Business Analysis	10/30/2019 14:48	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-4658	Group Proposed Assessment Notice b	Low	Design	10/9/2019 15:50	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-3764	Notify Controller of Working Roll Clos	Critical	Business Analysis	7/18/2019 20:16	Phase 2 Release 2.x	ASR-19841	Platform	13
Story	ASR-3754	PLACEHOLDER - Generate Quality Con	Low	Business Analysis	7/18/2019 20:16	Phase 2 Release 2.x	ASR-19841	Platform	5

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Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-3363	Send Appeal Agreement Letter	Low	Business Analysis	6/27/2019 10:50	Phase 2 Release 2.x	ASR-828	Platform	5
Story	ASR-3299	Route to Leasehold Improvement Tea	Medium	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-2379	Platform	8
Story	ASR-3290	Receive PI Notification if Non-Govt En	Low	Requirements Review	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1812	Platform	8
Story	ASR-3287	Perform Mass PI Declines	Medium	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1812	Platform	13
Story	ASR-3276	Route Leases < 35 Yrs on Government	Medium	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-3272	Request Information from Tenant- PI	High	Design	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1813	Platform	5
Story	ASR-3271	Request Information from Govt Agenc	High	Design	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1813	Platform	5
Story	ASR-3268	Generate and Send 1606 Information	Low	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1924	Platform	5
Story	ASR-3259	Route Appeal Work Items	High	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-3252	Manage Multiple Request for Info Tem	Medium	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1924	Platform	5
Story	ASR-3128	Community - View Current and Past Y	Low	Business Analysis	6/17/2019 10:49	Phase 2 Release 2.x	ASR-23788	Platform	3
Story	ASR-2998	Track Property Rents	Low	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-2997	OnBase - Receive Exemption Notice to	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2988	Create Tax Certificate Case in Commu	Medium	Design	6/14/2019 13:51	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-2987	Prioritize CIO Property Events with PM	High	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	3
Story	ASR-2965	Notify Appraiser to Work Parcel Mana	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	3
Story	ASR-2964	Route Case To Mapping Staff To Revie	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2950	Send Letter to Taxpayer to File Exclusi	Low	Design	6/14/2019 13:51	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2946	Send Notice for Reserved Parcels with	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-2939	Create & Route Parcel Management W	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2931	Create Work Item for PI Lease Re-eval	Medium	Design	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2921	Route Taxpayer Multiple Claim Respo	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2917	Prompt Taxpayer to Indicate Co-owne	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-23788	Platform	3
Story	ASR-2916	Prompt Taxpayer to Indicate County a	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2911	Notify Counties of Exemption	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2910	Identify if Taxpayer is on Final List	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2909	Identify Taxpayer Response	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2908	Scan and Enter Barcoded Letter	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2907	Display all Conflicting Exemption Claim	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2906	Generate and Send Multiple Claims Le	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2905	Send CD of Duplicates to Office Assist	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2904	Display and Send Homeowners and Di	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	8
Story	ASR-2901	DVET Online Submission Updates	Low	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-847	Platform	5
Story	ASR-2895	Reject DVET Claim and Notify Taxpaye	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2894	OnBase - Generate DVET Claim Issues	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2893	Route Disabled Vet Exemption	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2884	OnBase - Send Annual Notice to File L	Medium	Design	6/14/2019 13:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2882	Route Homeowners' Exemption Claim	Medium	Design	6/14/2019 13:12	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2879	Prevent Multiple Homeowners' Exem	Medium	Design	6/14/2019 13:12	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-2874	Enter Principal Place of Residence - M	Low	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2592	Link BPP and PI (Including Vessels and	Medium	Design	5/28/2019 19:06	Phase 2 Release 2.x	ASR-1813	Platform	5
Story	ASR-2473	Access Pre-populated Exemption Form	High	Business Analysis	5/16/2019 13:27	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-2465	OnBase - Notify when Additional Cala	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2464	Generate and Send Prop 8 Results	Low	Design	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2460	Track Purchase and Sale Dates of 60/1	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2459	Adjust Base Values - Eligibility	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	8
Story	ASR-2458	Reject 60 if previously received 110	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2457	Reject Prop 60/110 with Reason	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2456	Reject Prop 60/110 if Previously Recei	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2455	Submit Prop 110 Documentation	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2454	Reject 60/110 Above Threshold	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2453	Route 60/110 Claim if Multi Family Re	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2452	Route Approved Property to Principal	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2451	Document Market Value of New Prop	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2450	Notify Taxpayer of 60/110 Rejection	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2449	Review and Approve 60/110 Applicati	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2448	Determine Age/Disability Certification	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	3
Story	ASR-2447	Close Pending Application after 30	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	3
Story	ASR-2446	Confirm Prop 60/110 Information	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	3
Story	ASR-2445	Change 60/110 Application to Pending	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	3
Story	ASR-2444	Scan and Enter 60/110 Hard Copy For	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	8
Story	ASR-2443	Submit Prop 110	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2442	Submit Prop 60 (hard copy)	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2440	Login Access for other Counties	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-2437	Notify Taxpayer if Prop 8 Review Alrea	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2434	OnBase - Generate and Send Calamity	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2428	OnBase - Generate and Send Calamity	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2427	Notify Appraiser when Calamity Claim	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2423	Calculate Value per Acre for UA Applic	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-868	Platform	5
Story	ASR-2421	Update UA Applications Based on Find	Low	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-868	Platform	5
Story	ASR-2420	Review UA Applications	Low	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-868	Platform	5
Story	ASR-2419	Receive UA Applications	Low	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-868	Platform	5
Story	ASR-2414	Send Completed Calamity Information	Low	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2413	Send Supplemental Assessment Notic	Medium	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-1447	Route Changes to Recorder - 571L (Ph	Medium	Business Analysis	3/18/2019 17:11	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-1393	Identify Taxpayers with Real Property	Medium	Business Analysis	3/18/2019 17:11	Phase 2 Release 2.x	ASR-2050	Platform	5
Story	ASR-1117	Send Communication to Taxpayer - In	Medium	Business Analysis	3/13/2019 16:04	Phase 2 Release 2.x	ASR-828	Platform	5
Story	ASR-1099	Route Appeals	Medium	Business Analysis	3/13/2019 16:04	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-1094	Send Recalculated Assessment Propos	Medium	Business Analysis	3/13/2019 16:04	Phase 2 Release 2.x	ASR-828	Platform	5
Story	ASR-1086	Notify Recorder When Sale Price Varie	Low	Requirements Review	3/13/2019 14:06	Phase 2 Release 2.x	ASR-2379	Platform	8
Story	ASR-881	Calculate HAM Estimated Value - Lien	Medium	Design	3/12/2019 8:30	Phase 2 Release 2.x	ASR-863	Platform	13

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Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-356	OnBase - Send 441d letter requesting	Medium	Design	3/4/2019 13:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-350	Place holder - Report & Export on Con	Low	Business Analysis	3/4/2019 13:12	Phase 2 Release 2.x	ASR-2179	Platform	5
Story	ASR-349	Assign Real Property Valuations from	Low	Business Analysis	3/4/2019 13:12	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-345	Route Transaction (Change in Owners	High	Business Analysis	3/4/2019 13:12	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-344	Process Multiple Parcels in Transactio	High	Business Analysis	3/4/2019 13:12	Phase 2 Release 2.x	ASR-873	Platform	8
Story	ASR-334	Perform Valuation - 4 Methods	High	Requirements Review	3/4/2019 13:12	Phase 2 Release 2.x	ASR-2179	Platform	8
Story	ASR-322	Manage Transactions Work Queue	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-313	Determine Percent of Property Value	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-312	Route work items for Prop 8 Review t	Medium	Design	3/4/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-310	Upload BOE Prop 58/193 Report Actio	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-880	Platform	8
Story	ASR-309	Apply Prop 58/193 Full Exclusion - App	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-308	Send Prop 58 Denial Letter	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-307	Track Taxpayer Response to Prop 58	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-306	Generate and Send Prop 58 Form	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-304	Determine If Prop 58 Eligible	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-302	Enter Exclusion Changes	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-880	Platform	5
Story	ASR-301	Generate and Send Prop 58 Report	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-880	Platform	5
Story	ASR-300	Track Proposition 58 Limit	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-299	File Prop 58 Form Hard Copy - May no	High	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-298	Calculate Percent Excluded From Prop	High	Design	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-295	File Prop 58/193 (hard copy)	High	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-292	Route CIO on Individual Timeshare to	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	3
Story	ASR-287	OnBase - Notify Entity or Taxpayer of	High	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-274	OnBase - Populate Information in a LE	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-269	OnBase - Send LEOP Notice to Taxpay	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-262	Pre-Populate PCOR Forms	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-261	Route Prop 58 Recalculations for Appr	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-880	Platform	5
Story	ASR-260	OnBase - Document Critical Taxpayer	Medium	Design	3/4/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-259	Route Unrecorded Transaction to TU	Low	Backlog	3/4/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-243	Report - Enrolled Value vs. Reported V	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-873	Platform	5
Story	ASR-239	Document, fix and notify Recorder ind	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-873	Platform	3
Story	ASR-231	Track taxpayer response provided via	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-199	Review Construction Report	Low	Business Analysis	2/27/2019 19:36	Phase 2 Release 2.x	ASR-864	Platform	3
Story	ASR-38715	RP Security Model for External Users F	Medium	Business Analysis	1/13/2023 9:11	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38714	RP Security Model for Public Services	Medium	Business Analysis	1/13/2023 9:10	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38713	RP Security Model for Exemption Staff	Medium	Business Analysis	1/13/2023 9:08	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38712	RP Security Model for RP Community	Medium	Business Analysis	1/13/2023 9:05	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38711	RP Security Model for PI Staff Profile	Medium	Business Analysis	1/13/2023 9:04	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38710	RP Security Model for RP Staff Profile	Medium	Business Analysis	1/13/2023 9:00	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38709	RP Security Model for TU Staff Profile	Medium	Business Analysis	1/13/2023 8:58	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38708	RP Security Model for RP Business Ad	Medium	Business Analysis	1/13/2023 8:56	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38707	RP Security Model for System Admin F	Medium	Business Analysis	1/13/2023 8:51	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
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