

**LICENSES AND SERVICES AGREEMENT
AMENDMENT NO. 2**

This Amendment No. 2 to Contract No. K-1718-77 is between the City of Norman, Oklahoma, a municipal corporation, (hereinafter referred to as the "Client") and Tyler Technologies, Inc., (hereinafter referred to as the "Tyler").

WITNESSETH:

WHEREAS, the parties entered into Contract No. K-1718-77, pursuant to which Client retained Tyler to license the software products and perform the services set forth in accordance with the relevant project documents, including Tyler's Investment Summary and Contract No. K-1718-77 approved on December 19, 2017 ("Project"); and

WHEREAS, Contract No. K-1718-77 was for a total amount of \$2,373,769.00.

WHEREAS, Contract No. K-1718-77 was amended February 26, 2019, increasing the contract amount by \$47,616 for a revised contract amount of \$2,421,385, pursuant to which Tyler was retained to provide additional professional services for installation, configuration, data conversion, training, and project management of Enterprise Resource Planning (ERP) and Municipal Management Software ("Amend. 1"), as set forth in the relevant project documents, including Amend. 1 and its attached Investment Summary.

WHEREAS, the Client requires various additional services from Tyler, necessitating a second amendment to Contract No. K-1718-77, adding services at an additional cost of \$40,000.00, for a new contract price of \$2,461,385; and

NOW, THEREFORE, the parties desire to amend Contract No. K-1718-77 as follows:

- I. The Project shall be amended to include and accommodate Vendor's provision of the items and services described in Exhibit A hereto ("Services");
- II. The Services shall be provided at a total cost of \$40,000.00;
- III. The Services shall be completed by October 2021, unless otherwise mutually agreed by the parties in writing; and

Contract No. K-1718-77 shall only be amended as required to give full force and effect to these amendments. All other terms of Contract No. K-1718-77, including Amend. 1, shall remain in full force and effect.

[The remainder of this page intentionally left blank]

IN WITNESS WHEREOF, the CITY and the ORGANIZATION have executed this Agreement.

DATED this ____ day of _____, 2021.

CITY OF NORMAN, OKLAHOMA
("Customer")

By: _____
Mayor Breea Clark

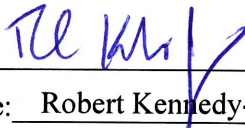
ATTEST:

By: _____
Brenda Hall, City Clerk

Approved as to form and legality this ____ day of _____, 2021.

City Attorney

TYLER TECHNOLOGIES, INC.

By:  ^{3 Rkj} 4/23/2021
Name: Robert Kennedy-Jensen
Title: Director of Contracts

ATTEST:

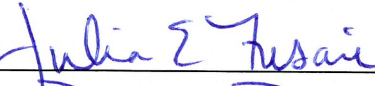
By: 
Title: Director, Benefits & Payroll

Exhibit A

Tyler Technologies Development Client Sign-Off	
Client Name	City of Norman, OK
Modification Description	Round life insurance in \$10,000 increments
Reference Number	MUN-389953
Document Date	4/1/2021
Sign-Off Required By	4/30/2021
Modification Cost	\$40,000
Minimum Version	2021.3
Availability Date	Fall 2021

Please acknowledge the [Delivery considerations](#) at the end of this document.

Following this Tyler Technologies Development Client Sign Off is a Client Specification for the City of Long Beach, CA (Client) review and approval. The modification will be entered into our Work Order system with the noted delivery date if approved by the above Sign-Off Required By date. If the modification is not approved within this timeframe, the Delivery Expectation will be adjusted to fit into the development schedule at a later date as determined by the Product Manager.

Tyler will invoice the Client fees for this modification 50% upon Client submittal of this signed Client Specification and the remaining 50% upon delivery of the modification to the Client.

In order to begin programming these changes, Client authorization is required. For authorization please print, sign and date the bottom of this letter and return it along with a **copy of Purchase Order**:

Via US Mail: Tyler Technologies, MUNIS ERP Division
ATT: Jillian Pulsifer
One Tyler Drive
Yarmouth, ME – 04096

Via Email: munis.dev@tylertech.com

Please add the Reference Number to your Purchase Order Form.

Important note: Omissions at this point will result in reprogramming and any desired changes to the processes will be considered an Enhancement Request that will result in additional cost and that will be delivered at a later date determined by the Product Manager.

Contacts	Title	For	Phone	Email
Jillian Pulsifer	Senior Software Engineering Manager	Sign-off	800-772-2260 x4149	munis.dev@tylertech.com

Printed Name

Signature

Date



City of Norman, OK

Munis Payroll Development Specification

Reference# MUN-389953

April 1, 2021

1 Table of contents

Contents

1	Table of contents.....	2
2	Business Requirements	2
3	Proposed modifications.....	2
3.1	Deduction and Benefit Master	2
3.2	Benefit Master	4
3.3	Employee Deductions.....	5
3.4	Insurance Update	7
4	Delivery considerations	7

2 Business Requirements

The City of Normal, OK requires the ability to calculate life insurance policy coverage amounts based on employee salaries rounded to the next \$10,000 for a subset of their employees. Munis needs to be able to calculate the correct insurance coverage amount both when the insurance deduction is added to eligible employees and when said employees are recalculated through the Insurance Update process. This cannot be an all-or-nothing change to the rounding increment, as this requirement does not impact all employees who receive life insurance calculated as a function of their salary.

3 Proposed modifications

3.1 Deduction and Benefit Master

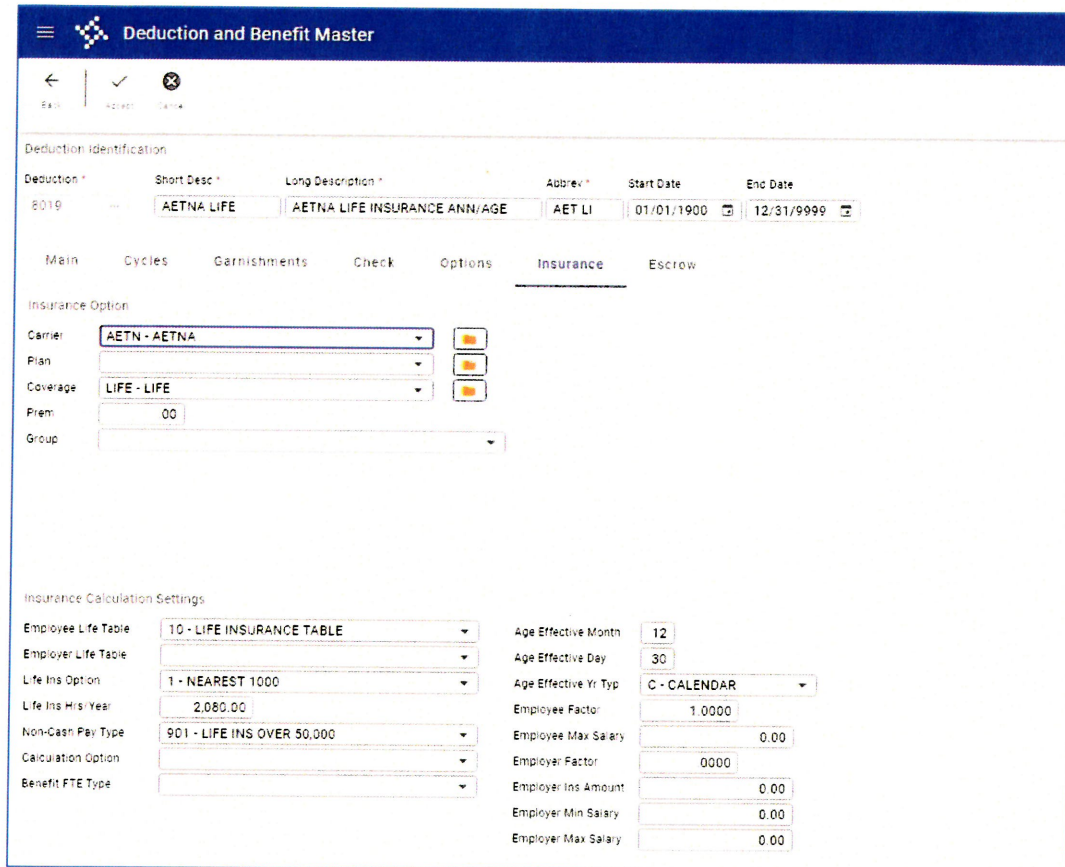
A new field will be added to the Insurance Tab of the Deduction and Benefit Master which will allow users to define the increment used when calculating life insurance amounts based on employee salary, and the Life Ins Option field will be modified to reflect the fact that the increment is defined in this new field. Historically the increment for rounding has been fixed to \$1,000 for Life Ins Options 1, 2, 4, 5, and 8 as shown here:

City of Norman, OK

Munis Payroll Development Specification

Reference# MUN-389953

April 1, 2021



Deduction and Benefit Master

Back | Add | Cancel

Deduction Identification

Deduction *	Short Desc *	Long Description *	Abbrev *	Start Date	End Date
8019	AETNA LIFE	AETNA LIFE INSURANCE ANN/AGE	AET LI	01/01/1900	12/31/9999

Main | Cycles | Garnishments | Check | Options | **Insurance** | Escrow

Insurance Option

Carrier: AETN - AETNA

Plan:

Coverage: LIFE - LIFE

Prem: 00

Group:

Insurance Calculation Settings

Employee Life Table	10 - LIFE INSURANCE TABLE	Age Effective Month	12
Employer Life Table		Age Effective Day	30
Life Ins Option	1 - NEAREST 1000	Age Effective Yr Typ	C - CALENDAR
Life Ins Hrs/Year	2,080.00	Employee Factor	1.0000
Non-Cash Pay Type	901 - LIFE INS OVER 50,000	Employee Max Salary	0.00
Calculation Option		Employer Factor	0.0000
Benefit FTE Type		Employer Ins Amount	0.00
		Employer Min Salary	0.00
		Employer Max Salary	0.00

Deduction and Benefit Master – Current State

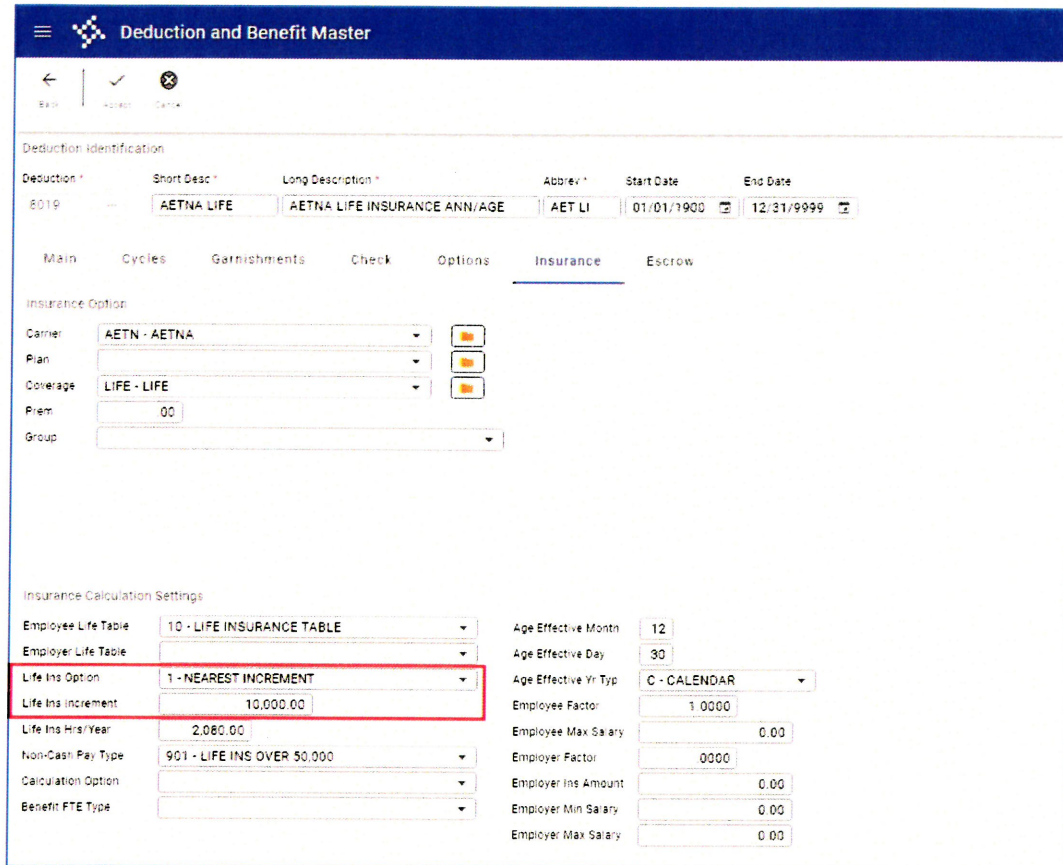
The new field Life Ins Increment field will be added below the Life Ins Option field and will contain the life insurance increment, defined in dollars. The Life Ins Option field text will also be modified to reflect the fact that the increment is no longer defined by the Life Ins Option field.

City of Norman, OK

Munis Payroll Development Specification

Reference# MUN-389953

April 1, 2021



Deduction and Benefit Master

Back | Add | Cancel

Deduction Identification

Deduction *	Short Desc *	Long Description *	Abbrev *	Start Date	End Date
6019	AETNA LIFE	AETNA LIFE INSURANCE ANN/AGE	AET LI	01/01/1900	12/31/9999

Main | Cycles | Garnishments | Check | Options | **Insurance** | Escrow

Insurance Option

Carrier: AETN - AETNA

Plan:

Coverage: LIFE - LIFE

Prem: 00

Group:

Insurance Calculation Settings

Employee Life Table	10 - LIFE INSURANCE TABLE	Age Effective Month	12
Employer Life Table		Age Effective Day	30
Life Ins Option	1 - NEAREST INCREMENT	Age Effective Yr Typ	C - CALENDAR
Life Ins Increment	10,000.00	Employee Factor	1.0000
Life Ins Hrs/Year	2,080.00	Employee Max Salary	0.00
Non-Cash Pay Type	901 - LIFE INS OVER 50,000	Employer Factor	0.0000
Calculation Option		Employer Ins Amount	0.00
Benefit FTE Type		Employer Min Salary	0.00
		Employer Max Salary	0.00

Deduction and Benefit Master – Proposed Changes

3.2 Benefit Master

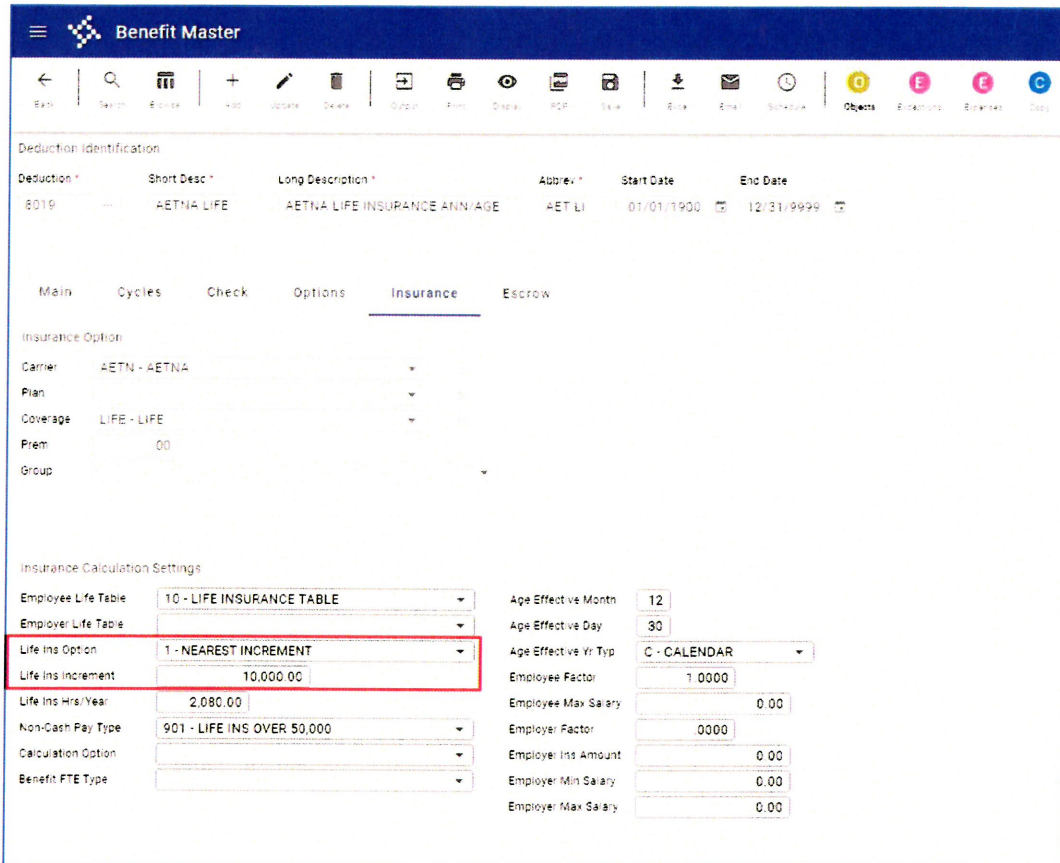
The same adjustments to the Insurance tab of the Deduction and Benefit Master defined in section 3.1 will be applied to the Insurance tab of the Benefit Master as well.

City of Norman, OK

Munis Payroll Development Specification

Reference# MUN-389953

April 1, 2021



The screenshot shows the 'Benefit Master' application interface. At the top, there is a navigation bar with a hamburger menu and the title 'Benefit Master'. Below this is a toolbar with various icons for actions like Back, Search, Filter, Add, Update, Delete, Output, Print, Display, PDF, Save, Back, Email, Schedule, Objects, Edit, and Copy. The main content area is titled 'Deduction Identification' and displays a table with columns: Deduction #, Short Desc, Long Description, Abbrev, Start Date, and End Date. A single record is shown with Deduction # 8019, Short Desc AETNA LIFE, Long Description AETNA LIFE INSURANCE ANNUAL, Abbrev AET LI, Start Date 01/01/1900, and End Date 12/31/9999. Below the table, there are tabs for Main, Cycles, Check, Options, Insurance, and Escrow. The 'Insurance' tab is selected. Under the 'Insurance Option' section, there are dropdowns for Carrier (AETNA - AETNA), Plan, Coverage (LIFE - LIFE), and Group. The 'Insurance Calculation Settings' section contains several fields: Employee Life Table (10 - LIFE INSURANCE TABLE), Employer Life Table, Life Ins Option (1 - NEAREST INCREMENT, highlighted with a red box), Life Ins Increment (10,000.00, highlighted with a red box), Life Ins Hrs/Year (2,080.00), Non-Cash Pay Type (901 - LIFE INS OVER 50,000), Calculation Option, and Benefit FTE Type. On the right side of this section, there are input fields for Age Effective Month (12), Age Effective Day (30), Age Effective Yr Typ (C - CALENDAR), Employee Factor (1.0000), Employee Max Salary (0.00), Employer Factor (0.0000), Employer Ins Amount (0.00), Employer Min Salary (0.00), and Employer Max Salary (0.00).

Benefit Master

3.3 Employee Deductions

The Insurance tab of Employee Deductions will also be updated to reflect the changes defined in Section 3.1.

Whenever a new Employee Deduction record is added for a Life Insurance deduction that uses Deduction Calc Code 15, 16, 19, or 20, the calculated insurance amount will be based on the rounding option selected in the Life Ins Option field combined with the increment defined in the Life Ins Increment field.

For example, in the below example, employee #30000 earns an annual salary of \$41,600. Their life insurance is calculated using Life Ins Option 2 – NEXT INCREMENT, with a Life Ins Increment amount of \$10,000. Their life insurance coverage therefore rounds up to the nearest \$10,000, for a coverage amount of \$50,000.

City of Norman, OK
Munis Payroll Development Specification
Reference# MUN-389953
April 1, 2021

Employee Job/Salary

Employee Identification

Employee *	SSN	Last Name	First Name	Mt.	Suffix	Status
36000	810-23-1238	SHEEN	NORMAN			A - ACTIVE

Main	Cycles/Other	Next Change	Civil Service
------	--------------	-------------	---------------

Job Class *	X001	LABORER	Calc Code	02	Hours/Day	8.00
Summary Job Class			Num Pays *	26.000	Hours/Year	2088.00
Position *	0		Days/Year *	261.00	Days/Period	0
Pay Type *	101	BASE HOURLY TIME	Sched Hours *	86.00	Factor	1.0000
Effective Date *	09/27/2012	to 12/31/9999	Pay Basis	F	Remain	26.000
<input checked="" type="checkbox"/> Primary Job Position			Compa-Ratio	160.00		
Position Start/End *	02/01/2005	/ 12/31/9999	Off-Step Frozen	N - No		
Location *	X135 - POINT		Pay Status	A - ACTIVE		
Group/Bu *	10 - NON UNION					
Status	FT - FULL TIME					
Risk Code	5000	ADMINISTRATION SERVICES				
Pay Start/End *	02/01/2005	/ 12/31/9999				
Pay Freq *	B - BIWEEKLY					
Grade/Step						
Allocation	0					

Pay Amounts		
FTE % *	1.0000	Recurring Pay
Hourly Rate	20.0000	20.0000
Daily Rate	159.3870	159.3870
Period Pay	1.600.00	1.600.00
Annual Pay	41.600.00	41.600.00
Remaining	41.600.00	
Reference	41.600.00	

Employee Job/Salary

Employee Deductions

Back | Accept | Cancel

Employee Identification

Employee *	SSN	Last Name	First Name	MI	Suffix	Status
30000	810-23-1238	SHEEN	NORMAN			A - ACTIVE

Deduction *	Loc	Group	BU	10
8019 AETNA LIFE INSURANCE ANNUAGE	135	Group BU		10

Main Cycles **Insurance** Health Insurance Escrow Garnishments COBRA

Life Insurance

Insurance Table	10 - LIFE INSURANCE TABLE	
Life Insurance Option	2 - NEXT INCREMENT	
Enrollment Date		Coverage End Date 12/31/9999
Employee Hourly Rate	20.0000	Employee Hours 2,080.00
Employee Ann. Salary	41,600.00	
Employee Factor	1.0000	Employer Factor 0000
Employee Ins. Amt.	50,000.00	Employer Ins. Amt. .00
Spouse Ins. Amt.		

Employee Deductions

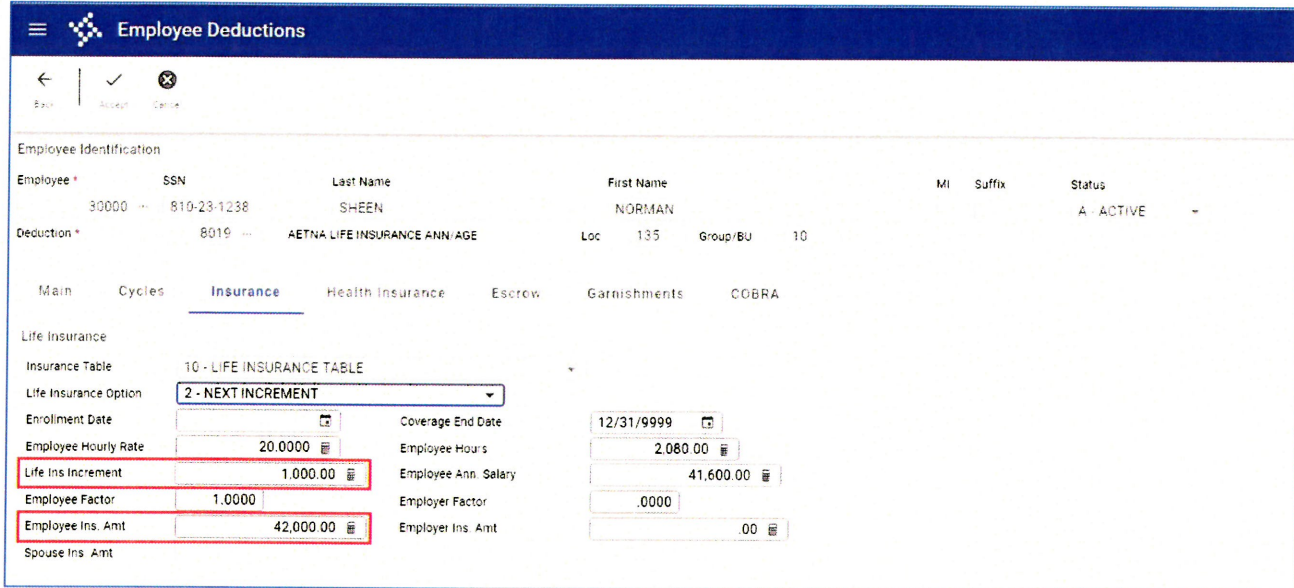
City of Norman, OK

Munis Payroll Development Specification

Reference# MUN-389953

April 1, 2021

If the same deduction instead used a Life Ins Increment of \$1,000, the coverage amount would calculate by rounding up to the nearest \$1,000 for a coverage amount of \$42,000.



Employee Deductions

Employee Identification

Employee #	SSN	Last Name	First Name	MI	Suffix	Status
30000	810-23-1238	SHEEN	NORMAN			A - ACTIVE

Deduction # 8019 AETNA LIFE INSURANCE ANN/AGE Loc 135 Group/BU 10

Main Cycles **Insurance** Health Insurance Escrow Garnishments COBRA

Life Insurance

Insurance Table 10 - LIFE INSURANCE TABLE

Life Insurance Option 2 - NEXT INCREMENT

Enrollment Date Coverage End Date 12/31/9999

Employee Hourly Rate 20.0000 Employee Hours 2,080.00

Life Ins Increment 1,000.00 Employee Ann. Salary 41,600.00

Employee Factor 1.0000 Employer Factor .0000

Employee Ins. Amt 42,000.00 Employer Ins. Amt .00

Spouse Ins. Amt

Employee Deductions

3.4 Insurance Update

The Insurance Update program will be updated to reflect the changes to insurance calculations resulting from this enhancement.

For example, if the Life Ins Increment is set to \$10,000 and the same employee receives a 10% pay increase to \$45,760, the Insurance Update program will recognize that the employee's salary still falls within the same \$10,000 increment and the employee's insurance coverage amount will remain the same at \$50,000. If however the employee were to receive a 25% increase to \$52,000, the program will recognize that the employee has cross the increment threshold and will raise their insurance coverage amount to \$60,000.

4 Delivery considerations

This modification will be delivered in version 2021.3. In order to use the new functionality associated with this modification the Client must upgrade to version 2021.3 which will be generally available in October 2021.