Customer Consultations via AppointmentPlus "Questions Slips" Update

Process Improvement and Technology DRAC Subcommittee

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October 15, 2020

Agenda

- **Project Overview and Timeline**
  - Objective & Roadmap
  - Process Flow
  - Project Timeline / Dashboard
- **Customer Interface and Feedback Needs**
  - Webpage
  - Appointments Landing Page
- **Next Steps**

Problem, Opportunity & End State

- Problem or Opportunity
  - Customers do not have seamless ability to schedule a free, quick consultative session (15 minutes) to ask city experts.

- End State
  - Develop a Process / System intended to replicate the free, quick questions (15 minutes) sessions to answer customer questions we used to be able to offer at the Permit Center.

Implement a near/ intermediate-term solution while working on the longer-term solution

Customer Consultations via AppointmentPlus Project Dashboard

Milestones	Due Date	Status
Requirements / analysis complete	Sep 25	DONE (BDS)
Business Demo (BDS /IA Bureau's)	Oct 7	Oct 7 (DONE)
Configure Meetings (BDS)	Oct 2	DONE
Configure Meetings (IA Bureau's)	Oct 16	
User Acceptance Testing	Oct 12-Oct 23	Modified UAT Plans
GoTo Meeting license configuration	TBD	BTS Exception Required
Go / No Decision	Oct 26?	BTS Exception Required
Training	Oct 27-Nov 6	BTS Exception Required
Go Live	Nov 9/16?	BTS Exception Required

Key Requirements

Enable Customer to Self Schedule Appointments with City Staff 24X7

Inform customers how/whom to schedule consultations effectively

Reporting/ Analytics to evaluate meetings effectiveness

Minimize the administrative burden to manage meetings for city staff

Key Highlights:

1. Requirements inputs provided by Water Available, Water Quality Backflow, Fire and PBOT teams. Plan is to create, review and finalize meeting configurations by end of Oct 16.
2. Updated Project Plan incorporating IA Bureau deliverables completion dates but this is contingent upon BTS Exception Approval for GoTo Meeting Integration with AppointmentPlus.
3. UAT Plan = modifying UAT plans due to limited GoTo Meeting Licenses (2). UAT with individual teams versus holistic (need to reconfigure for every group).

Issue / Dependency Status:

1. BTS Exception for GoTo Meeting Integration with Appointment Plus impacting UAT Plans, Final Configurations, Go/No Decision, Go Live deliverables dates. Continue with the deliverables until the Exception Approved.
2. GoTo Meeting Integration with AppointmentPlus (Issue: Multiple simultaneous meetings from different group versus unique G2M license required per meeting). Short/Longer recommendations identified. One new update on this issue.

Key Dependencies

GoTo Meeting Integration Plug-In with AppointmentPlus – **BTS Exception Approval**

GoTo Meeting and AppointmentPlus Support for Integration Troubleshooting for BDS Use Case Scenario

Webpage in Development by Comms Team

> **Development Services is migrating to Portland.gov**
> You'll find pages on our new website and on our old website as we work on moving content to our new website. For Development Services information not yet migrated, visit our old website 🗗. City employees may also visit the Employee Portal 🗗.   ✕

⚠ **Unpublished draft**

Free Consultations About Construction and Development

Schedule a free 15-minute remote consultation with a construction and development expert. Talk with an expert about your project before you start. We are here to answer questions and help you with the permitting process.

Use our online scheduling system to **book a free 15-minute consultation**. We offer **video call and phone consultation with an expert** from one of our teams.

Book a free 15-minute consultation 🗗

Questions you might ask an expert:

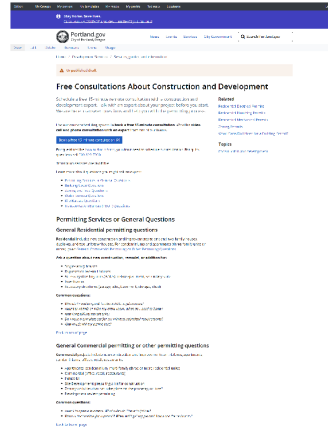### Related

Residential Electrical Permits

Residential Plumbing Permits

Residential Mechanical Permits

Zoning Permits

What Plans Do I Need for a Building Permit?

Topics

Construction and development

Appointment Landing Page

https://booknow.appointment-plus.com/ck0drn5k/

City of Portland
Online Scheduling System

Home   **Appointments**   Schedules & Admins

Welcome to the City of Portland Bureau of Development Services online appointment system, where you can schedule time for your next service.

Appointment Locator

Select consultation topic

[Select consultation topic ▼]

- Select consultation topic
- Permitting Services/General Questions
- Building Code Questions
- Zoning or Tree Code Questions
- Water Bureau Questions
- Fire Bureau Questions
- Transportation Questions

Book a 15 minute video call or phone consultation with the City of Portland if you have questions about:

Permitting Services/General Questions:

- **General Residential Permitting**: Select for general questions related to Single Family Residences, Accessory Dwelling Units, Duplexes, Townhomes, Garages, and/or Accessory Structures that are new or being remodeled.
- **General Commercial/Other Permitting**: Select for general questions related to Commercial (office, retail, restaurants), Industrial, Multi-Family (three or more residential units), or Site Development, Zoning, or Development Review permitting.
- **Trade Permits**: Select for general questions related to Mechanical, Electrical, and/or Plumbing permits in either Residential or Commercial structures.
- **Sign Permits:** Select for general questions related to Sign permits. Types of signs include freestanding, monument, projecting, awnings, fascia/wall, painted wall/adhered, marquee, and others.
- **Addressing:** Select for general questions related to addressing of both residential and commercial structures, including Accessory Dwelling Units, Multi-Family structures, Tenant Improvements, Offices, etc

Building Code Questions:

- **Building – Residential**: Select for questions about building code (Oregon Residential Specialty Code) requirements related to single family homes, duplexes, townhomes, or accessory dwelling units that are new, being remodeled, or additions to these building types.
- **Building – Commercial**: Select for questions about building code (Oregon Structural Specialty Code) requirements related to commercial, industrial or multi-family (three or more residential units) buildings.
- **Mechanical Engineering:** Select for questions about mechanical code (Oregon Mechanical Specialty Code) requirements related to HVAC systems or energy requirements for commercial, industrial or

Next Steps

- **Customer Interface and Feedback Needs**
    - Webpage
    - Appointments Landing Page
- **Requesting Feedback on both area's**
- **Participation in User Testing?**
- **Feedback / Communications:**
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