



**TECHNOLOGY, TRAINING &
CONTINUOUS IMPROVEMENT**

Easier Uploads Demo Share Out

DRAC Process Improvement Technology Subcommittee
June 15, 2023

Presenter: Lila Pigott, Digital Business Services Supervisor
Technology, Training, and Continuous Improvement Division, BDS



Bureau of
Development
Services



Preliminary Idea –
Starting point for
conversations during
working sessions

Project Scope

Easier Uploads for Single PDF Corrections

Replaces HCP Anywhere



Easier Uploads: Benefits

1. Elimination of HCP Anywhere pain points

- a. Staff must create link
- b. Links expire
- c. If link expired, customer must request new link, staff must create new link
- d. Staff must delete files after they are processed
- e. Staff must delete link when done

2. Providing customer confirmation of what was submitted

3. Continuing to have City manage review windows

- a. Not automated after first review cycle
- b. Allows permit technicians to apply complex logic to whether uploads are allowed

1. Providing transparency

- a. Customers can view and download checksheets
- b. Customers can see status of each review

2. Reducing confusion

- a. Same location (DevHub) to request permit, see permit status, see review status, and upload corrections
- b. Removes need for customer to go to PortlandMaps

3. Meeting some of HB2415 requirements

4. Automating some communication, and storing in AMANDA instead of individual Outlook mailboxes, for example:

- a. Customer is allowed to upload
- b. Thank you for uploading
- c. There was an issue with the upload



Project Objectives Overview

Project Need

Project Outcomes



Project Need

Project Need

- **Customers want** a corrections process that:
 - Does not rely on emails to/from staff
 - Does not have expiring links
 - Confirms uploads happened
- **Staff want:**
 - A streamlined process which reduces manual intervention
 - Replacement of the HCP Anywhere temporary fix, with an improved solution for Single PDF corrections

Without this project, there are these **problems:**

- Projects are delayed when **links expire**, and process must be repeated to get an upload link
- Customers have a **different method** to submit corrections (email, HCP Anywhere) vs. apply for a permit (DevHub)
- Customers are **not sure if plans were successfully uploaded**
- Customers report that **plans get “lost”**



Project Outcomes and Benefits

- For Customers,
 - Links to upload corrections do not expire
 - Transparency – ability to download City’s checksheets
 - Transparency – ability to confirm corrections uploaded
 - DevHub becomes a more complete tool, no need to separately use HCP Anywhere
- For Permitting Staff,
 - Removes time spent creating, emailing, deleting HCP Anywhere links
 - Fewer calls from customers wondering if/when corrections were uploaded
- For Management / Reporting / Performance Measurement,
 - Automating first review window may allow customers to submit corrections sooner



Phase 1 Timeline Check-in





Customer Demos Feedback

- Demoed a rough draft of DevHub updates on 6/8 and 6/12
 - 6/8 – Jill Cropp, Dave Peticolas, Jack Barnes (connection through Holloway), and Sean Green
 - 6/12 – Suzannah Stanley
- Primary Takeaways
 - Overall pleased with this improvement
 - Easy online access to checksheets will be great
 - Provided very helpful recommendations
 - Reorganize sections and buttons to feature where the customer needs to take action
 - Include upload history for reference
 - Button language ideas
 - Add goal review dates and possibly other dates to make clear when corrections are received
 - Provided helpful feedback on automated emails to customers



Feedback – Search Page

Search Page

We shared we will be adding ability to search by Permit/Application Number and Address to this page

- **Request:** Add Permit Number to search results
- **Recommendation:** Move Permit / Application Number search to top of list
- Discussed the complexity of how to accommodate batch permits – the tech team is problem solving around this

Portland, Oregon
Welcome to the official web site of the City of Portland, Oregon

[Home](#)
[Logout](#)
[Account Information](#)
[View / Pay Fees](#)
[My Bills](#)
[Upload Corrections](#)
[Permit His](#)

Find Your Permit

Submit required documents and plan sheet updates to an existing building permit during the review process.

To begin, enter the IVR Number of your permit and click on "Search"

IVR Number

[Search](#)

Results				
IVR	Type	Address	Description	
4772139	Residential 1 & 2 Family Permit - Single Family Dwelling	7462 SE 51ST AVE	SINGLE PDF: NEW SINGLE FAMILY RESIDENCE/ 2-STORY/ 1-GARAGE/ FLAT LOT/ COMPLEX ***TRADE PERMITS ET, PT AND MT SEPARATE***	Select



Feedback – Corrections/Details Page

- **Request:** Add goal review date
- **Request:** Add last updated date by line, helpful on PortlandMaps
- **Request:** When items switch to corrections received would like to know the date for that change
- **Request:** Time/Date stamp for submissions with document name, would prefer document access too
- **Recommendation:** Reorganize to have visual queue for customer to identify what they need to work on and move the Upload Documents section under Checksheet section
- **Recommendation:** Count of what still needs attention
- **Request:** Make name an email link like PortlandMaps and make phone number easy to call through touch devices
- **Recommendation:** Collapse the sections that don't require customer action
- **Request:** Would like a better status than Checksheet when a reviewer cannot do their review because it's depended on another review
- **Request:** Add section for uploads history

Checksheets / Unresolved

Type	Status	Staff Contact	Documents
Water Available	Checksheet	Spoon, Kari Ann 503-823-6988	Water Bureau Review Checksheet(560) (2022-04-21)
Trans - Street Systems Review	Checksheet	Riley, Christian 503-823-7139	Transportation Development Checksheet(580) (2022-03-03)
Structural Review	Checksheet	Malekzadeh, Roza 503-823-7626	

Corrections Received / Open

Approved / Resolved

Not Required

Uploaded Documents

Document (PDF only)	Description
Sample Document.pdf	Information about this document that a tech might need to have.

Upload

Cancel Submit



Feedback – Communication/Auto Emails

- Automated email to applicant customer notifying them when the permit is eligible for uploads
 - Automation driven by mandatory review lines being in specific statuses – Checksheet, Approved, Not Required
 - Consensus that an automated email would be valuable for customers. Some customers prefer to go check vs get notified, but they can ignore the email.
- Automated email to applicant customer notifying them when they can request to upload
 - Automation driven by permit goal dates
 - Consensus that an automated email would be valuable for customers. Some customers prefer to go check vs get notified, but they can ignore the email.
- Automated email to applicant upon submission could include list of document names that were in the submission. Would this be helpful?
 - Yes, and would prefer a section to be added to the Details page that lists a history of what was uploaded when.



Next Steps

Provide the following information to attendees:

- Detailed notes
- List of requests and recommendations that came up during the demos
 - Items will be categorized into what we believe we can deliver in this current project, what would need to wait for a future iteration, and what is out of scope for this project.
 - Categorized list of items as ‘need to have’ and ‘nice to have’ from our perspective and a request for you to provide feedback if you feel our categorization is not accurate.



Questions?