



City of Portland, Oregon
Bureau of Development Services
ITAP

INFORMATION TECHNOLOGY ADVANCEMENT PROJECT www.portlandoregon.gov/bds

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ITAP CAC Members

MEETING NOTES

Today's Date: 1/13/16

Prepared by: Donah Baribeau

Participants	Organization	Present	Absent	Participants	Organization	Present	Absent
Keith Skille, Chair	GBD Archite		X	Rebecca Sponsel	BDS/ITAP	X	
Rob Humphrey, Vice-Cha	Faster Permit	X		Ross Caron	BDS/ITAP		X
Linda Bauer	PVNA		X	Richard Appleyar	BDS/ITAP	X	
Jennifer Kimura	VLMK	X		Kim Freeman	BDS/ITAP	X	
John Brooks	VLMK	X		Lisa Gill	BDS/ITAP		X
Josh Lighthipe	KPFF	X		Donah Baribeau	BDS/ITAP	X	
Rick Michaelson	Inner City Properties	X					
Brian Shelden	Port of Portla	X		Chris Wier	PBOT	X	
Diane Mason	Tri County Temp Contro	X		Kevin Martin	BPS		X
				Terry Carpenter	Water	X	
				Jim Hanson	Fire		X
Clifford Smith	Case Assoc.			Nan Stark	BPS		X
				Elisabeth Reese Cadigan	BES		X
				Glenn Raschke	Parks		X

This meeting was a work session to discover what requirements are needed by customers for the customer portal. A list of questions was sent to members in advance. The first topic discussed was question 3. *Which jurisdictions have better submittal processes? Which jurisdictions have processes that are not user friendly? Can you provide examples of why?*

Gresham

What works well?

- If you only have a few attachments there aren't any problems.
- Small jurisdiction so it's easy to reach someone quickly.
- Can go right into the amended form without having to fill out other paperwork.

What doesn't work?

- Have to call the jurisdiction to let them know when they are done with a process.
- Have to load pages individually.
- When making a revision to plans the file names have to be exact.
- Navigation is not intuitive.
- Customers have experienced issues with versioning when responding to checksheets.
- Doesn't work with Chrome (only works with Microsoft and specific versions)

- Large projects with many addresses requires putting every address on the plan and then every address gets checksheeted if there's something wrong so you end up with duplicate checksheets when it could have been addressed in one item.
- Can only download one discipline at a time instead of an entire checksheet (only site development items or planning & zoning items, but not both). Cannot copy because of locked cells. Download should be exportable and sortable.
- Each customer has to sign in separately. If contact signed in originally, that's the same person who needs to sign in for revisions, etc. Might need a common sign in.
- Response is in a little box where you cannot see the entire message.

Hillsboro

What works well?

- Smaller jurisdiction means the customer gets better customer service

What doesn't work?

- Customer has to fill out a new revision form instead of just amending the one already there.
- Customer has to download forms and then upload them back into the system which can take a couple days for the jurisdiction to see.
- When making a revision to plans the file names have to be exact.

Vancouver: Looks like it will be a great system. Same components of the system as Portland. No CAC members have utilized online submittal process yet.

West Linn: Sometimes it will only give a customer the mechanical or electrical.

State system: (Lake Oswego)

What works well?

- Can easily find a project and all associated files (plan review).
- Can get receipts.
- Can download the checksheet again.
- Can pay online.

General thoughts and comments

- Project coordinator may not be able to do his/her work because there are too many different rules for each jurisdiction and may impact who uploads the information. This could create issues if things aren't sent to the correct person.
- Customers want beefed up customer service.
- Maybe in the first year after go-live, a phone call would be better than email and easier to explain the processes or what is needed; especially when an error has occurred that the applicant customer needs to correct.
- When uploading a new replacement file it would be nice to be able to pick the one from a drop down list that it replaces. There would be less confusion about what the exact name is.
- Training session with Gresham might be a good idea to see how their system works. Can look at ProjectDox separately.

Question 4: *What is most important for the ITAP online submission system to provide to you?*

- Enhanced customer service that is easily accessible and available immediately—someone who can override things, not a tech person who will get to it in a couple days. Progress needs to occur.
- A cut to the chase version. If a customer is a frequent flyer and knows all the basics, is there some way to get past the longer version of online permitting?
- Time estimates would be great to add when the permit application process is completed. When will I get this permit? Approximate times are fine.
- A confirmation that attachments have been uploaded correctly (not just that the data has been received). “Your application has been successfully submitted.” Don’t want the application sitting in the queue for a few days and then be told the attachments are not correctly uploaded.
- What about electronic signatures and digital signatures? Digital is legal. Can also sign a hard copy for the files.
- Varied document types, not just pdf. Need to clearly communicate what is acceptable.
- Prescreen: There is a new SFR process where Life Safety is happening before all other reviews and the prescreen check. It is holding up all other bureaus for prescreen, thus creating a longer timeline. Want predictability, use a checklist with requirements.
- More transparency with PBOT. Match the system with the processes.
- Deferred submittals—same person has to submit them all.