DSD Permit Processing Updates

Mar. 30, 2022
Quarterly Enhancements 2022

- March, June, September, December

- Priorities & Rankings
  - Improve functionality and operational efficiency
  - Enhance customer experience
  - Improve customer reports, notifications and invoicing
  - Eliminate/reduce system bugs
  - Adapt to new requirements (e.g. SB9, CSLB)
First, A Look Back at 2021

Accela Phase 2 Launch

- Standalone Permits (March)
- Building (July)
- Engineering (July)
- No More Paper Resubmittals (Nov)
- 5G (Nov)
- Discretionary (Dec)
Customer Service

- Hosted 30+ Customer Webinars
- Launched Virtual Appointments for Final Only and Completion of Work
- Launched Virtual Appointments for Signs
- Launched Virtual Appointments for MEPS and Demos
- Pilot Program for In-Person Set Up
- Opened the Customer Service Center 619-446-5000
- Created Customer Service IT Virtual Service
- Updating Intake and Issuance Timeline on the Website
Enhancing Accela Q1-2022

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>Opened</th>
<th>Active</th>
<th>Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>12</td>
<td>168</td>
<td>19</td>
<td>99</td>
</tr>
<tr>
<td>2022</td>
<td>1</td>
<td>152</td>
<td>225</td>
<td>185</td>
</tr>
<tr>
<td>2022</td>
<td>2</td>
<td>127</td>
<td>57</td>
<td>204</td>
</tr>
<tr>
<td>2022</td>
<td>3</td>
<td>33</td>
<td>58</td>
<td>11</td>
</tr>
</tbody>
</table>
Enhancing Accela Q1-2022

- 5 NEW OR UPDATED PROCESSES ADDED
- 5 ENHANCEMENT FOR ALL RECORD TYPES
- 6 NEW REPORTS FOR CUSTOMERS AND STAFF
- 10 ENHANCEMENTS FOR BUILDING
- 4 ENHANCEMENTS FOR ENGINEERING
- 1,300 IT TICKETS SUBMITTED BY DSD STAFF
- AUTO TEST SCRIPT TO FIND SYSTEM BUGS
Enhancing Accela Q1-2022

New or Updated Processes:
• EVCS – Done
• SB9 – Done
• Spectrum Act – Done
• Traffic Control - Done
• Transportation – Coming very soon
Enhancing Accela Q1-2022

Building:
✓ Actively Managed Building Project ACA Questionnaire - Done
✓ Add/Remove discipline to In Progress and Closed Review cycles - Done
✓ Default Stormwater tags for Building Projects - Done
✓ Workflow design to process No Plan/Final Only/Completion of Work Building Projects - Done
✓ Deferred, Fire Deferred, Construction Change – Done
✓ Entry and workflow enhancements – Done
✓ Auto route issue fixed - Done
✓ Expiration Rules – Done
✓ Mapping to Project and Permits - Done
✓ Tier Hold logic to hold off Inspections (Tier1,2,3) - Done
Enhancing Accela Q1-2022

Engineering:

- Final Only process for Engineering projects - Done
- Default Address for Right of Way Engineering Projects - Done
- Trust Account process for Engineering projects - Done
- Stamping process development for Engineering Projects – Done
- As Built/Mylars – Coming soon
Enhancing Accela
Q1-2022

All Record Types:
✓ Permit and Project relation mapping - Done
✓ Email Template communications - Done
✓ Additional Save Searches for workload management - Done
✓ Activities to communicate Action Items between Submittal, Reviews, and Finance. - Activities - Done
✓ Enhanced interface with Velosimo/EPR to auto-retry on failure. - Done
✓ Strengthen Workflow (e.g. block Reviewers from picking wrong statuses) - In Test
Enhancing Accela Q1-2022

New Reports & Communications:

- Project Issues by Discipline - Done
- Required Submittal - Done
- Payment Report to support the Refund process (DoF) - Done
- Project Workflow - Done
- Project Workflow History - Done
- Project Review Status – Done
- Communications at Sign-off and Ready for Issuance - TEST
- Workload Management – DEV
Enhancing Accela Q1-2022

Automated Test Scripts:
- All record types from ACA (except for PV, Fire Construction Change) - Done
- All record types from AA (except for Discretionary) - Done
- Payment from ACA - Done
Enhancing Accela
Q1-2022

Next Up:

- New record types: Q2 (April)
  - Zone History Letter
  - Individual Historical Resource Nomination
  - Mills Act Designation
  - No Fee Street Tree Permit
  - Preliminary Review
- Contacts intake (including CSLB validation) – Q2
- Additional Housing Attributes – ACA and AA
- Fees and Payment Dashboard – Internal AA
- Project Status Dashboard - Internal AA
- Workload Management Reports – Internal AA
- Cannabis Module – Q3
Yes, we can do more....

- New Enhancement Online Request Form
- SAP Water Interface for water/sewer payments
- PTS Conversion
- Enhanced to Hybrid (ready for conversion and also CC)
- Process for Records section in Accela
- EPR individual tool to check on Sheet Numbering (Similar to Scout)
- Okta single sign on for AA
Q & A
and
Next Steps