DSD Permit Processing Updates

Mar. 30, 2022

Development Services

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
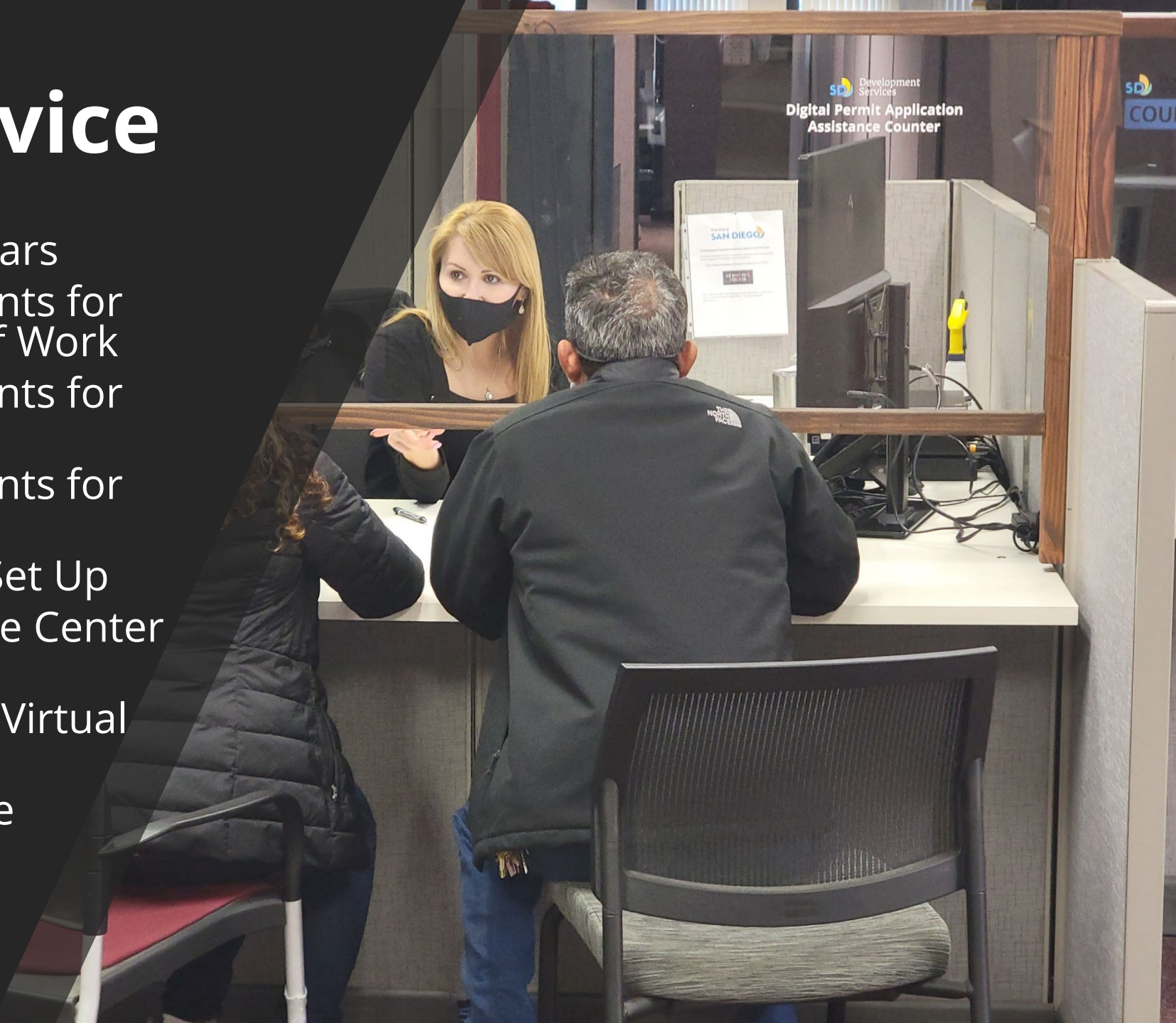 - Adapt to new requirements (e.g. SB9, CSLB)

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
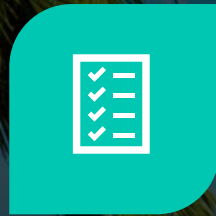
Enhancing Accela Q1-2022

Bugs/Tickets: Opened vs Closed				
Year	**Month**	**Opened**	**Active**	**Closed**
2021	12	168	19	99
2022	1	152	225	185
2022	2	127	57	204
2022	3	33	58	11

Enhancing Accela Q1-2022

5 NEW OR UPDATED PROCESSES ADDED
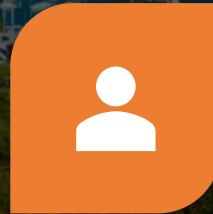
5 ENHANCEMENT FOR ALL RECORD TYPES

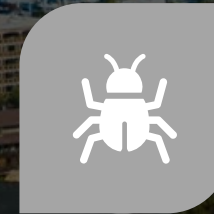**6 NEW REPORTS FOR CUSTOMERS AND STAFF**

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

Enhancing Accela Q1-2022

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**

Topic For Discussion

- Contacts
- Express/Expedite/Standard
- Rapid Review
- Forms and Scout Validation
- Sheet Numbering
- Missing Document Names
- Historical Package

Q & A
and
Next Steps