



## Online Permitting Options for Local Governments

### Why use online permitting?

Local governments are increasingly turning to online permitting solutions to save time, improve customer service, and track data more efficiently. An online permitting system can significantly reduce time and expense for contractors and citizens who would otherwise need to schedule in-person appointments. Local governments can also reduce the time required to review, track, and approve permits. An online system can improve record-keeping and archiving processes, provide automated notifications for enhanced customer service, reduce the risk of human error, and improve staff efficiency and coordination across departments. A fully online system would enable all aspects of the permit process – application submittal, plan review, fee payment and delivery of approved permits via email or a website - within a short period of time.

### What are the features of online permitting software?

The primary distinguishing features of different online permitting software options include:

- ▶ **Customizable and Automated Reports.** Allows staff to create report templates tailored to their department's needs and to automatically populate these reports with information stored in the permitting database.
- ▶ **Government Management Modules.** Optional modules may be added to the basic permitting module to allow multiple government functions to work seamlessly under a single software system. Modules may include asset management, planning, financial management, licensing, and code compliance.
- ▶ **Fee Calculation & Payment.** Fees may be calculated automatically based on pre-programmed pricing factors, allowing staff to easily determine fees. Fees may be invoiced and paid online with a credit card.
- ▶ **Geographic Information System (GIS) Integration.** May include build-in GIS functions that allow viewing, manipulation, and creation of maps and property parcel information.
- ▶ **Inter-Departmental Tracking.** Allows staff to track the status of permit application or plan review across departments. Staff can track which individuals or departments have approved documents and which have not.
- ▶ **Automated Document Distribution.** Allows staff to flag a document for review by another staff person. When staff log in to the system they will be notified that a document is awaiting their review.
- ▶ **Automated Reminders.** Automatically notifies staff of assigned tasks and approaching deadlines.
- ▶ **Online Application Submittal & Tracking.** Allows the public to submit the permit application and supporting documents (Word documents, spreadsheet files, PDFs, CAD files, images, etc) and to check on the status of their permit application over the internet 24/7. Once submitted, the documents are stored in the system database, awaiting staff review.
- ▶ **Web Interface.** Allows staff and/or the public to view and submit data to the system over the internet. Some software is entirely web-based so that staff perform all their tasks through the system website, while others use the web interface primarily for public access to the system. The website may be hosted by the jurisdiction or the system vendor, depending on the IT capability of the jurisdiction to maintain the server software and hardware.
- ▶ **Legacy Database Options.** Software vendors may be able to convert data in a jurisdiction's existing database to the new system or create an interface that allows the new system to access data from the old system.

## How much will conversion to online permitting cost?

The cost of implementing an online permitting system depends on a variety of factors including the size of the jurisdiction and volume of permits to be reviewed, the degree of customization and number of specialized features desired, and the compatibility of the jurisdiction's existing hardware and software with the new system. Costs may include software licensing fees, initial set-up and training costs, the cost of converting existing documents to the new system, and annual maintenance or servicing costs. A jurisdiction may also need to purchase additional hardware (larger or dual computer monitors or new server) or software (new operating system, ArcGIS, or electronic document review software). Depending on the jurisdiction's internal information technology expertise, a third party may need to be contracted to customize the online permit portal to ensure that it is compatible with the jurisdiction's website, existing software, and permitting processes.

## Which e-permitting software is most appropriate for my jurisdiction?

In evaluating different software options, jurisdictions should consider the following:

- ▶ **Vendor Demos.** Most vendors offer free demonstrations of their software. When viewing these demos it is important to understand which features are included in the base price and which features will cost extra to implement. Ask which features require the purchase of external software or additional hardware. Be sure to understand the level of customization that is included or whether the jurisdiction must hire a third party for customization and integration with the jurisdiction's existing system. Ask how the system data will be stored and whether or not it can be easily exported in a usable format to support possible future transition to different systems.
- ▶ **Contract Negotiation.** Many online permitting software vendors do not offer a fixed price for their product, but offer a range of prices depending on the specific needs of the customer. When comparing quotes from different vendors, be sure to understand the cost breakdown and the scope of work to be provided. Jurisdictions may decide to issue a Request for Proposals for a basic system that offers only the essential features as well as an advanced system that includes desired optional features.
- ▶ **Customer Testimonials.** It is important to get user feedback from other jurisdictions who have a similar budget and are working in a similar market as your jurisdiction. Ask about unexpected costs or delays, staff user experience, public user experience, set-up and training, and ongoing product support.

## What are the software vendor options?

In general, there are two categories of software used for e-permitting:

- ▶ **Electronic Document Review (EDR).** This category of software allows for electronic review and markup of documents. Jurisdictions may use EDR software without an online platform as a first step in switching to paperless permitting. Applicants would simply email their completed permit application, and permit staff would use the EDR software to review, mark up, stamp, and email the approved permit documentation back to the applicant. Alternatively, EDR software can be used in conjunction with an online platform to integrate both the document review and management tasks into a fully electronic permitting process,
- ▶ **Online Platforms.** This category of software represents the web-based portal between jurisdiction staff and their constituents. The software allows permit applicants to log in, upload permit application documents, make payments online, track permit status, download approved permits, and request inspections. Jurisdiction staff can use the portal to store documentation, manage internal permit workflow, coordinate between departments, communicate with applicants, and allow mobile access for field staff. The ability to customize the portal interface and the number of additional features offered can vary between software vendors. Use of online platforms typically requires the purchase and use of an electronic document review software program, although some online platforms include integrated EDR software. Online platforms can either be linked to a jurisdiction's existing internal permit tracking system or it can be a stand-alone system that provides both the online interface and internal tracking.

The following list of online permitting solutions is presented as an example for local governments across Oregon and Washington. The list is not all-inclusive but represents a range of options currently being used by local jurisdictions.

	Vendor	Website	Description	Who uses it?
Online Platforms	Accela	accela.com	Software options range from very basic to highly customized solutions. Options include automated reports and customer messaging, workflow charts by permit type, a library of inspection types, mobile device apps, or web hosting.	Clackamas County, OR City of Hillsboro, OR
	Infor Public Sector (IPS)	infor.com	A purpose-built, flexible software solution with built-in government-specific features that can be integrated across governmental departments. Modules include financial and human capital management, permitting and billing, asset management, and call center portals.	City of Portland, OR
	Oregon Building Codes Division (BCD)	oregon-epermitting.info	Accela-based system designed for both large and small Oregon jurisdictions, offering users a consistent platform across jurisdictions. Features can be tailored to a jurisdiction's specific needs. BCD offers training and templates for advertising the system to contractors. E-permitting module available at no cost to Oregon jurisdictions; planning module available at additional cost.	Over 35 jurisdictions including: Lake Oswego, OR City of Milwaukie, OR Lincoln City, OR Jackson County, OR Lincoln County, OR Klamath County, OR
	My Building Permit	mybuildingpermit.com	Permit portal for jurisdictions in Washington, providing applicants with a consistent user experience. Designed to meet the needs of both small and large jurisdictions. Users can apply for all permit types, including over-the-counter and plan review, schedule inspections, track permit status, and pay for permits. Users can access dashboards to track permits and upload documents. Includes construction tip sheets, inspection checklists, templates, training, and links to construction code information.	Over 14 jurisdictions including: City of Bellevue, WA City of Kirkland, WA City of Burien, WA Snohomish County, WA City of Mercer Island, WA City of Issaquah City of Sammamish
	PermitTrax	bitcosoftware.com	Features include built-in GIS capabilities, reporting and data extraction, tools for inter-departmental communication, electronic plan review, and a mobile inspection application. Includes a module for online public access for permit submittal, payment, and status tracking. Customizable to fit jurisdiction's permit types and procedures. Interface is internet browser-based.	City of Edmonds, WA
	TRAKiT by CRW Systems	crw.com	Centralized database for building plans, drawings, business licenses, and other data. Optional modules for code enforcement, planning, public works, fire safety, and transportation.	City of Bellingham, WA
	Electronic Document	Bluebeam	bluebeam.com	Allows batch conversion of Microsoft Office files to PDF. Customizable PDF markup tools available that replicate pen and paper. Includes digital signatures, custom stamps, and an automatic compare documents feature.
ProjectDox		avolvesoftware.com/projectdox	Supports over 150 document formats, allows for upload of single or multiple files or folders, and supports unlimited users and projects on web-based system.	City of Portland, OR City of Hillsboro, OR
Adobe Acrobat Pro		adobe.com	Allows for electronic review and basic markup of PDF documents. Can create a customized stamp.	Clackamas County, OR

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