

USE CASE

Multi-Jurisdiction Reviewer goPost™ Public Portal and Mini-Portlets

Multi-jurisdiction review organizations serving public agencies are able to leverage the benefits of transitioning from a traditional paper process and all the associated limitations to cloud-based e-PlanREVIEW® and goPost™ Public Portal to achieve full tracking and transparency, and a state-of-the-art intake process that allows each jurisdiction its own intake portal.

BACKGROUND / UNDERSTANDING

This is a best use case that outlines how a multi-jurisdiction reviewer (MJR) performing plan reviews can best perform to maximize efficiency, planning, tracking, and customer satisfaction. MJR's have historically operated with the traditional method of performing reviews using paper plan sets or a disjointed array of programs. The paper process had some limitations, such as the need for all plan sets to be delivered directly to the physical offices and for plan reviewers to perform all tasks in the office, as well. Over time, it has become clear that in order to maximize efficiency, a transition to an electronic model is the best option.

The onset of the COVID pandemic imposed a new level of challenges, both for intake and in-person collaboration. Fortunately, e-PlanSoft solutions fully accommodate every pandemic-driven challenge while improving productivity, efficiency, and customer satisfaction.

ABOUT e-PLANSOFT

e-PlanSoft™ develops industry-leading cloud-based electronic document review software that assists governmental agencies, construction and manufacturing industries, developers, and owners with their plan review, design review, product review, construction, and asset review management in real-time. www.eplansoft.com.

Challenges to Overcome:

- In person operations
- Multiple physical deliveries from multiple agencies
- Manual processes and tracking
- Paper-only review model

Key Benefits:

- Electronic intake portal
- Intake portlets
- Remote collaboration
- Transparent process
- Ease of submittals and document transfer

Solutions:

- Online portal
- Unique portlets for each jurisdiction
- User-friendly dashboard
- Convenient communications options
- On-demand electronic reports

SOLUTION

MJRs are in a unique position to leverage all the features available in e-PlanSoft™ products to achieve maximum improvements and benefits. Because they serve multiple jurisdictions, each who serve multiple applicants and internal projects, e-PlanSoft's industry-leading intake portal is the ideal solution to streamline otherwise convoluted submittal processes.

e-PlanSoft is a leading provider of cloud-based solutions that allow all stages of the plan intake and review processes to be performed from anywhere, at any time, and from any device with a secure internet connection.

e-PlanSoft's goPost Public Portal is the only intake portal on the market today that allows the user to set its own intake hours and also be configured to provide "mini-portlets," to give each customer/jurisdiction its own dedicated portal. For MJRs with a myriad of jurisdictions as clients, it can provide a "custom" experience for each. The customer then posts its portlet link to its own website, and each of its applicants or internal staff submits plans directly in the portlet. e-PlanSoft's current MJR clients report that this is one of the features that sets e-PlanSoft apart from all other leading solution providers on the market, and their customer satisfaction is consistently high.

Once a plan set is submitted, e-PlanSoft's PDF Scout™ Inspector Tool vets all incoming documents to ensure that they are valid, suitable for use, and free from unexpected inclusion, such as malware in the form of scripts, macros, or embedded objects. The user interface of goPost™ provides links for applicants to download submittal guidelines in PDF format, which eliminates any guesswork for the applicant. Scout accepts PDFs from virtually all major sources and rejects any attempted uploads that fall outside of accepted standards. In the event a document is rejected, the applicant receives immediate feedback, so they know the problem exists and that the document must be adjusted before it can be accepted and move into the plan review stage. Scout is a key utility in the e-PlanSoft suite that saves significant time, as it eliminates the possibility of wasted time from an unsuitable file lingering idly in queue only to be returned to the applicant before it can begin the review process.

e-PlanREVIEW (EPR), the cloud-based electronic plan review offered by e-PlanSoft rounds out the suite with its leading-edge patented functionality that enables project participants to collaborate concurrently and in real-time from any location. EPR allows full configurability to provide the best functionality for each organization. Role-based permissions allow all project participants spanning multiple departments to have anytime access, and permissions appropriate to their role. EPR's robust markup tools and standardized comments library further augment efficiency, by minimizing the time reviewers spend accessing their most commonly used tools and comments.

The full suite of e-PlanSoft solutions maximizes efficiency, productivity, convenience, and customer satisfaction.

RESULTS

The transition to e-PlanSoft enables MJRs to overcome operational restrictions forced by the pandemic and to improve efficiency and convenience at the same time. The web-based aspect of the solutions allow distancing mandates to be easily accommodated, as staff can work from home, or even on different floors in their office – they are not limited to working in close proximity.

The use of goPost and its mini-portlets creates an excellent applicant experience. Each jurisdiction is given its own mini-portlet link, creating the feel of a custom portal from the agency's website. From the applicant's perspective, plans are submitted through their jurisdiction's website in a straightforward and uncomplicated action. Applicants can apply for permits, upload and submit plans for review, manage document versioning, access reviewer comment reports, and download deliverable packages, which can be either reviewed plans that require corrections or approved plan sets, and receive automated emails when their project's workflow status changes in EPR. Further bolstering the experience, applicants have full access to goPost online 24X7, and can create and manage an unlimited number of permit application projects.

Intake staff at the jurisdictions have the option to utilize goPost™ to evaluate incoming submittals made by applicants, including whether incoming documents meet their own submission criteria, and either accept or communicate deficiencies back to the applicant. When ready, intake staff will 'accept' goPost™ projects and push files over to EPR for processing. This online upload through the goPost portal reduces the plan review processing times by eliminating the need for physical trips to drop off and pick up plans as well as the storage associated with hard copies.

The submittals then flow directly to the MJR and into EPR in a single seamless action. Once in EPR, the reviewer can communicate directly with applicants with comments, stamps, and recommendations. The uninterrupted flow creates a smooth process for applicants and reviewers alike.

goPost's powerful dashboard allows MJR staff to view all projects from all applicants on-demand. Views can be filtered and sorted to see all statistical information on one, some, or all projects and portals from the MJR's own goPost portal. This full transparency allows the MJR to track projects and view every stage of every project, as desired. MJRs will experience a highly useful tool in capturing a full overview of all projects in the system and makes managing projects and due dates much more efficient. MJRs also rely on the easy access to the full history of each project, which is instrumental in managing questions as they come in from applicants and contributes to applicant satisfaction.

Far and away, MJR clients will find that the solutions will make all aspects of the intake and review process easier and less time-consuming. And, as a result of the automated processes and streamlined workflows, they are better able to manage their customer-base.