

# JURISDICTION ADMINISTRATOR USER'S GUIDE

Detailed guide to configuring, managing, processing, and troubleshooting permit applications within MBP.

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## Contents

|  |    |
|--|----|
| MBP Resources and Links                            | 5  |
| Important Site Links                               | 5  |
| MBP Service Delivery Team                          | 5  |
| Conventions used in this Guide                     | 6  |
| Jurisdiction Administration Home Page              | 7  |
| Administrative Functions                           | 7  |
| Jurisdiction Dashboard                             | 9  |
| MBP Status Definitions                             | 9  |
| View Unpaid Invoices                               | 10 |
| Jurisdiction Dashboard Columns                     | 11 |
| Personalizing Jurisdiction Dashboard Grid Settings | 12 |
| Permit Details Page                                | 14 |
| Permit Details Containers                          | 14 |
| Permit Details Grid                                | 15 |
| Reviewing Plan Review Applications                 | 16 |
| Accepting an Application                           | 16 |
| Rejecting an Application                           | 17 |
| Accepting Documents                                | 18 |
| Invoicing Fees                                     | 19 |
| Adding an Invoice to an Issued OTC Permit          | 20 |
| Processing Paid Invoices                           | 21 |
| Changing Jurisdiction Dashboard Status             | 21 |
| Uploading Files                                    | 22 |
| Resending Failed Applications                      | 24 |
| Changing Permit Numbers                            | 24 |
| Managing Permit Details                            | 25 |
| Managing Project Details                           | 25 |
| Managing Project Location                          | 26 |
| Managing Application Details                       | 26 |
| User Profiles                                      | 32 |

---

|   |    |
|---|----|
| Resetting an MBP User Account                                 | 32 |
| Contractor Accounts   | 33 |
| Search  | 33 |
| Verify Licenses   | 33 |
| Contractor Registration                                       | 34 |
| Adding a Jurisdiction to a Contractor's Account               | 36 |
| Customer Accounts   | 36 |
| Staff Accounts  | 37 |
| Creating a New Staff Account                                  | 37 |
| Setting User Levels   | 39 |
| Managing Jurisdiction Information in MBP                      | 40 |
| Using the Manage Menu   | 40 |
| Configuring Applications                                      | 41 |
| Customer Application Process and Selections                   | 42 |
| Application Integration                                       | 45 |
| Considerations when Configuring Applications:                 | 47 |
| Selecting Configuration Types                                 | 48 |
| Creating a Pre-Application Message:                           | 49 |
| Adding a Work Type/SKU  | 51 |
| Adding Supplemental Questionnaires                            | 55 |
| Adding Document Types   | 57 |
| Adding Submittal Information                                  | 58 |
| General Process Info Tab                                      | 59 |
| Cloning or Copying an Application Configuration               | 60 |
| Deleting an Application Configuration                         | 62 |
| Requesting New Items – Document Types, SKUs, and Bucket Types | 62 |
| Requesting New "Bucket" types                                 | 62 |
| Requesting New SKUs, Categories, and Documents                | 62 |
| Registered Basic Permit Applications                          | 63 |
| Configuring Registered Basics Settings                        | 63 |
| Considerations before Configuring Registered Basics settings: | 65 |
| Editing Base Plan Information                                 | 66 |

---

|   |     |
|---|-----|
| Configuring Registered Basics Permit Applications | 67  |
| Registered Basics Work Types/SKUs                 | 69  |
| Permit Fees                                       | 71  |
| Valuation/Range Tables—Overview                   | 72  |
| Creating or Editing Valuation or Range Tables     | 73  |
| Fee Codes—Overview                                | 77  |
| Creating and Using Fee Codes                      | 79  |
| Deleting Fee Codes                                | 83  |
| Assigning Fee Codes                               | 83  |
| Fee Maintenance—Increases, New Fees               | 87  |
| Managing Jurisdiction Information                 | 88  |
| Settings  | 88  |
| Jurisdiction Info                                 | 89  |
| Applications                                      | 90  |
| Inspections—Messaging                             | 91  |
| Holidays—Non-integrated Jurisdictions Only        | 92  |
| Registered Basics                                 | 92  |
| Jurisdiction Messages                             | 93  |
| SKU and Category Requests                         | 95  |
| Document Requests                                 | 97  |
| “Bucket” Type Requests                            | 99  |
| Request a New “Bucket” Type                       | 100 |
| Managing Supplementals                            | 101 |
| Creating New Questionnaires                       | 101 |
| Support Menu                                      | 105 |
| Email Notifications                               | 107 |
| Reports   | 111 |
| MyBuildingPermit Metrics                          | 111 |
| Exports   | 112 |
| Other Reports                                     | 113 |
| Managing Addresses                                | 114 |
| MBP Jurisdiction Integration                      | 115 |



|   |     |
|---|-----|
| How Data Transfers and Displays         | 116 |
| Integration Points                      | 116 |
| Skills and Resources Needed             | 117 |
| Terminology Used                        | 117 |
| Application Process Flows               | 118 |
| Helpful Information and Troubleshooting | 120 |
| Frequently Asked Questions              | 121 |

## MBP Resources and Links

### Important Site Links

**Admin** site: Jurisdictions can configure applications, manage jurisdiction settings, and access their Jurisdiction Dashboard to review and manage plan review applications.

**ePermit** site: Customers can apply for permit applications, as well as view and manage submitted plan review applications.

- **Production** sites are live, fully functioning sites.
- **Staging** sites are used by MBP support staff and jurisdictions for testing, training, and researching reported issues. Anything entered in staging will not transfer to production.

| Site Name                                | URL   |
|--|---|
| Admin <b>Production</b>                  | <a href="https://admin.mybuildingpermit.com">https://admin.mybuildingpermit.com</a>                         |
| Admin <b>Staging</b>                     | <a href="https://adminstg2016.mybuildingpermit.com">https://adminstg2016.mybuildingpermit.com</a>           |
| ePermit (Apply) <b>Production</b>        | <a href="https://epermit.mybuildingpermit.com">https://epermit.mybuildingpermit.com</a>                     |
| ePermit (Apply) <b>Staging</b>           | <a href="https://epermitstg2016.mybuildingpermit.com">https://epermitstg2016.mybuildingpermit.com</a>       |
| MBP Home site                            | <a href="https://mybuildingpermit.com">https://mybuildingpermit.com</a>                                     |
| Status site                              | <a href="https://permitsearch.mybuildingpermit.com">https://permitsearch.mybuildingpermit.com</a>           |
| Status site <b>(Test)</b>                | <a href="https://permitsearchtest.mybuildingpermit.com/">https://permitsearchtest.mybuildingpermit.com/</a> |
| Inspection Scheduling site               | <a href="https://inspection.mybuildingpermit.com">https://inspection.mybuildingpermit.com</a>               |
| Inspection Scheduling site <b>(Test)</b> | <a href="https://inspectiontest.mybuildingpermit.com">https://inspectiontest.mybuildingpermit.com</a>       |

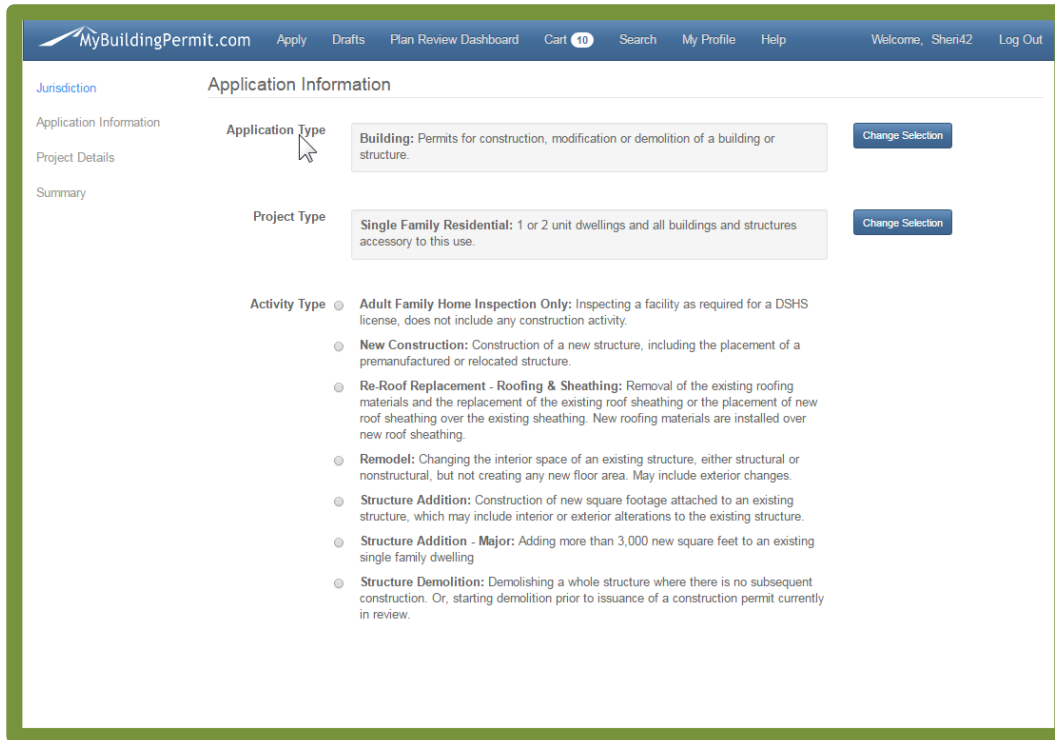
### MBP Service Delivery Team

The eGov Service Delivery Team (ESDT) is a team that supports the My Building Permit (MBP) program. The ESDT is made of the following team members/roles:

| Role  | Name           | Email  |
|---|----------------|--|
| <b>Product Manager</b>                                | Don Khuong     | <a href="mailto:dkhuong@bellevuewa.gov">dkhuong@bellevuewa.gov</a>     |
| <b>Senior Business Analyst; Subject Matter Expert</b> | Michele Miller | <a href="mailto:mrmiller@bellevuewa.gov">mrmiller@bellevuewa.gov</a>   |
| <b>Business Analyst</b>                               | Sarah Asher    | <a href="mailto:sasher@bellevuewa.gov">sasher@bellevuewa.gov</a>       |
| <b>MBP Lead Developer</b>                             | Roopa Lokanath | <a href="mailto:rlokanath@bellevuewa.gov">rlokanath@bellevuewa.gov</a> |
| <b>Developer</b>                                      | John Conrow    | <a href="mailto:jconrow@bellevuewa.gov">jconrow@bellevuewa.gov</a>     |
| <b>Developer</b>                                      | Paul Jones     | <a href="mailto:sjones@bellevuewa.gov">sjones@bellevuewa.gov</a>       |
| <b>Software Quality Assurance Analyst</b>             | Manju Nair     | <a href="mailto:mnair@bellevuewa.gov">mnair@bellevuewa.gov</a>         |

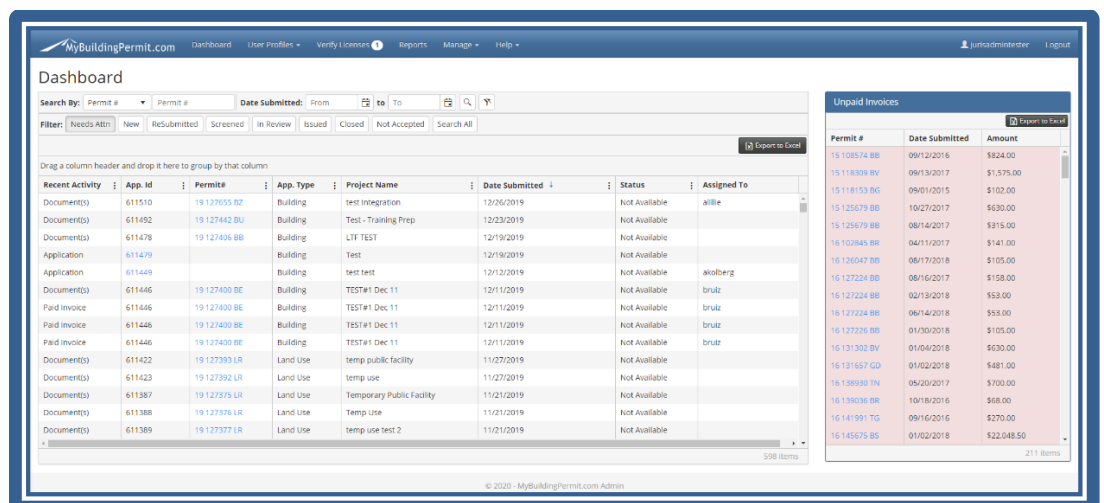
## Conventions used in this Guide

Pictures with a **green border** are **customer/applicant** screenshots.



The screenshot shows the 'Application Information' page. The 'Application Type' is 'Building: Permits for construction, modification or demolition of a building or structure.' The 'Project Type' is 'Single Family Residential: 1 or 2 unit dwellings and all buildings and structures accessory to this use.' The 'Activity Type' is 'Adult Family Home Inspection Only: Inspecting a facility as required for a DSHS license, does not include any construction activity.'

Pictures with a **blue border** are **jurisdiction administrative** screenshots.



The screenshot shows the 'Dashboard' page. It includes a search bar, a filter dropdown, and a table of recent activity. The table has columns for Recent Activity, App. Id, Permit #, App. Type, Project Name, Date Submitted, Status, and Assigned To. The table is sorted by Date Submitted (descending).

| Recent Activity | App. Id | Permit #     | App. Type | Project Name              | Date Submitted | Status        | Assigned To |
|-----------------|---------|--------------|-----------|---------------------------|----------------|---------------|-------------|
| Document(s)     | 611510  | 19 127655 02 | Building  | test integration          | 12/06/2019     | Not Available | allie       |
| Document(s)     | 611492  | 19 127442 BU | Building  | Test - Training Prep      | 12/23/2019     | Not Available |             |
| Document(s)     | 611478  | 19 127406 BB | Building  | LTE TEST                  | 12/19/2019     | Not Available |             |
| Application     | 611479  |              | Building  | Test                      | 12/19/2019     | Not Available |             |
| Application     | 611449  |              | Building  | test test                 | 12/12/2019     | Not Available | akosberg    |
| Document(s)     | 611446  | 19 127400 BE | Building  | TEST#1 Dec 11             | 12/11/2019     | Not Available | brutz       |
| Paid Invoice    | 611446  | 19 127400 BE | Building  | TEST#1 Dec 11             | 12/11/2019     | Not Available | brutz       |
| Paid Invoice    | 611446  | 19 127400 BE | Building  | TEST#1 Dec 11             | 12/11/2019     | Not Available | brutz       |
| Paid Invoice    | 611446  | 19 127400 BE | Building  | TEST#1 Dec 11             | 12/11/2019     | Not Available | brutz       |
| Document(s)     | 611422  | 19 127393 LR | Land Use  | temp public facility      | 11/27/2019     | Not Available |             |
| Document(s)     | 611423  | 19 127392 LR | Land Use  | temp use                  | 11/27/2019     | Not Available |             |
| Document(s)     | 611387  | 19 127375 LR | Land Use  | Temporary Public Facility | 11/21/2019     | Not Available |             |
| Document(s)     | 611388  | 19 127376 LR | Land Use  | Temp Use                  | 11/21/2019     | Not Available |             |
| Document(s)     | 611389  | 19 127377 LR | Land Use  | temp use test 2           | 11/21/2019     | Not Available |             |

598 Items

Unpaid Invoices

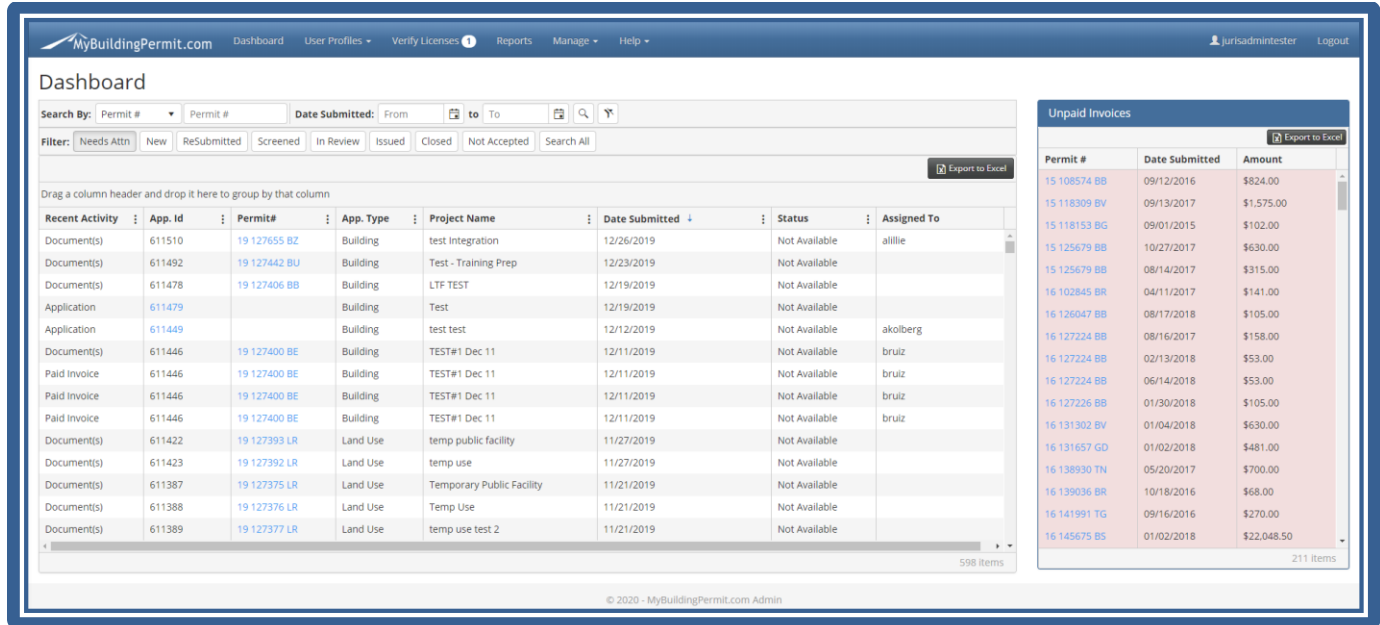
| Permit #     | Date Submitted | Amount      |
|--------------|----------------|-------------|
| 19 108574 BB | 09/12/2016     | \$824.00    |
| 19 118309 BV | 09/13/2017     | \$1,575.00  |
| 19 118153 BS | 09/01/2015     | \$102.00    |
| 19 125679 BB | 10/27/2017     | \$630.00    |
| 19 125679 BB | 08/14/2017     | \$315.00    |
| 19 102845 BR | 04/11/2017     | \$141.00    |
| 19 126047 BB | 08/17/2018     | \$105.00    |
| 19 127224 BB | 06/16/2017     | \$158.00    |
| 19 127224 BB | 02/13/2018     | \$53.00     |
| 19 127224 BB | 06/14/2018     | \$53.00     |
| 19 127226 BB | 01/20/2018     | \$105.00    |
| 19 131302 BV | 01/04/2018     | \$630.00    |
| 19 131657 GQ | 01/02/2018     | \$481.00    |
| 19 138036 BR | 05/20/2017     | \$700.00    |
| 19 138036 BR | 10/18/2016     | \$68.00     |
| 19 141991 TG | 09/16/2016     | \$270.00    |
| 19 145675 BS | 01/02/2018     | \$22,048.50 |

211 Items

© 2020 - MyBuildingPermit.com Admin

## Jurisdiction Administration Home Page

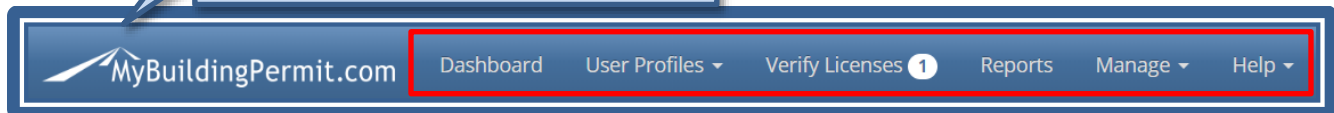
The [MBP Admin site](#) is used by jurisdictions to manage settings, staff users/accounts, configurations, and access the Jurisdiction Dashboard. The default homepage for MBP Admin will be the Jurisdiction Dashboard.



The screenshot shows the MyBuildingPermit.com Dashboard. The top navigation bar includes links for Dashboard, User Profiles, Verify Licenses (with a notification badge), Reports, Manage, and Help. The main content area is titled "Dashboard" and features a search bar with filters for Permit #, Date Submitted, and various application statuses (Needs Attn, New, ReSubmitted, Screened, In Review, Issued, Closed, Not Accepted). Below the search bar is a table with columns: Recent Activity, App. Id, Permit#, App. Type, Project Name, Date Submitted, Status, and Assigned To. The table lists various applications, including "test Integration", "Test - Training Prep", "LTF TEST", "Test", "test test", "TEST#1 Dec 11", "temp public facility", "temp use", "Temporary Public Facility", "Temp Use", and "temp use test 2". To the right of the main table is a section titled "Unpaid Invoices" with a table showing Permit #, Date Submitted, and Amount. The footer of the dashboard indicates "© 2020 - MyBuildingPermit.com Admin".

The **Menu bar** gives jurisdictions the ability to administer MBP through several functions:

**NOTE:** Clicking the MyBuildingPermit.com logo will redirect users to the Dashboard page from any other page and refresh the page.



The screenshot shows the MyBuildingPermit.com Menu bar. It includes the MyBuildingPermit.com logo and a series of navigation links: Dashboard, User Profiles, Verify Licenses (with a notification badge), Reports, Manage, and Help. The entire menu bar is highlighted with a red border.

## Administrative Functions

**Jurisdiction Dashboard** – The enhanced Search and Dashboard filters allow jurisdictions to review and manage plan review applications in the following application statuses: Needs Attention, New, ReSubmitted, Screened, In Review, Issued, Closed, and Not Accepted. "Failed" is no longer a status. Jurisdictions will see applications that fail integration by viewing the needs attention filter; failed application rows are highlighted red.

### Dashboard

Search By: Permit #  Permit #  Date Submitted: From  to To

Filter: **Needs Attn** New ReSubmitted Screened In Review Issued Closed Not Accepted

Drag a column header and drop it here to group by that column

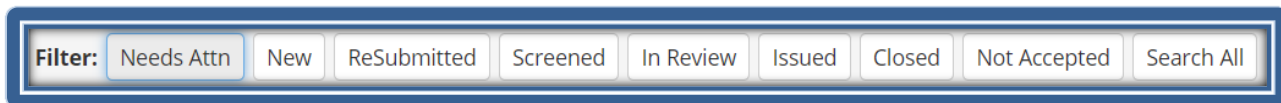
| Recent Activity    | App. Id | Permit#     | App. Type | Project Name | Date Submitted | Status        | Assigned To |
|--------------------|---------|-------------|-----------|--------------|----------------|---------------|-------------|
| Failed Integration | 611349  | ErrorNumber | Land Use  | test LQ      | 11/19/2019     | Not Available |             |

**NOTE:** applications that fail integration will be highlighted red and visible by viewing the needs attention filter.

- [User Profiles](#) – Manage Contractor accounts and licenses, Customer names and email addresses, and Staff accounts.
- [Verify Licenses](#) – Users can verify contractor licenses from the top Menu bar or by navigating through User Profile > Contractor > Verify Licenses. An indicator count will show the admin user when there are pending approvals.
- [Reports](#) – Export statistical reports with data on **Monthly Permits, Monthly Revenue, Applicants** and **All Permit Activity**. Access reports on **All Configurations, Full Product Catalog, Pre-Application Selections and Definitions**, and **Document Types**. We also provide **Inspections Reports**, and **Financial Reconciliation Reports** for the last seven days.
- [Manage](#) – Manage your **Applications**; configure **Fees, Settings**, and **Supplemental** application information; Support allows you to resend invoices or confirmation emails, remove unpaid invoices, etc.
- **Help** – Links to both Jurisdiction and Customer user guides.

## Jurisdiction Dashboard

The **Jurisdiction Dashboard** filters allow Jurisdiction staff to review and manage all plan review applications that are submitted. This is equivalent to the customer dropping off their application in person at the “front counter”.

A horizontal filter bar with a blue border. It contains a 'Filter:' label followed by buttons for 'Needs Attn', 'New', 'ReSubmitted', 'Screened', 'In Review', 'Issued', 'Closed', 'Not Accepted', and a 'Search All' button.

Jurisdiction staff reviews the permit application for completeness and decides to accept or reject it. The **Jurisdiction Dashboard** filters applications in the following statuses: Needs Attention, New, ReSubmitted, Screened, In Review, Issued, Closed, and Not Accepted. The filters default to **Needs Attn** as these are the applications that typically need immediate attention. To view other filter results, simply select another option.

## MBP Status Definitions

Each of the Jurisdiction Dashboard filters allow you to sort all plan review applications by their status.

### Needs Attention

The application requires some action. Application results for this filter may also appear in another filter/status. Check the *Recent Activity* column for a description of the activity needed.

**Note:** While the dashboard was designed for managing plan review permit types only, the Needs Attention filter may include documents that were uploaded onto OTC permits after they were issued.

### New/Submitted

The application has been submitted but has not yet been accepted or rejected by the jurisdiction. This status is system-assigned once the customer submits the application.

### ReSubmitted

Customer has made requested jurisdiction changes to a rejected/not accepted application and has resent the application for continued processing.

### Not Accepted

The application was not accepted by the jurisdiction. An email notification is sent from the jurisdiction to the project contact explaining why it was not accepted. The system assigns this status when the jurisdiction rejects an application. After necessary changes are made, the application must be resubmitted to continue the process.

### Screened

The application has been accepted by the jurisdiction, but submittal fees have not yet been paid. Plan review does not begin until these fees are paid. The system assigns this status once the jurisdiction accepts an application.

### In Review

Submittal fees have been paid and the application is in the review process. The jurisdiction manually assigns this status on the Jurisdiction Dashboard.

### Issued

The permit or approval has been issued and the final plans uploaded (if applicable). Revisions can still be submitted.

### Closed

The project has been completed in accordance with the approved plans and/or associated condition, the applicant cancelled the project, or the project was not resubmitted after being rejected. Revisions cannot be submitted. The jurisdiction manually assigns this status on the Jurisdiction Dashboard. Closed applications are removed from the Jurisdiction Dashboard after 180 days.

### Failed Integration

The system displays and highlights permits in the Needs Attn filter when a problem occurs during the permit generation and/or integration process (including file integration). The jurisdiction needs to resend the application, enter a permit number, or reaccept failed files.

### In Process

This is an interim status assigned by the system while the application is being processed from one status to another (i.e., *Submitted* to *Screened*).

## View Unpaid Invoices

You can choose to view or hide an Unpaid Invoices in a separate pane by clicking Unpaid Invoices on the Jurisdiction Dashboard. This allows you to choose the display of your Jurisdiction Dashboard to suit your workflow.



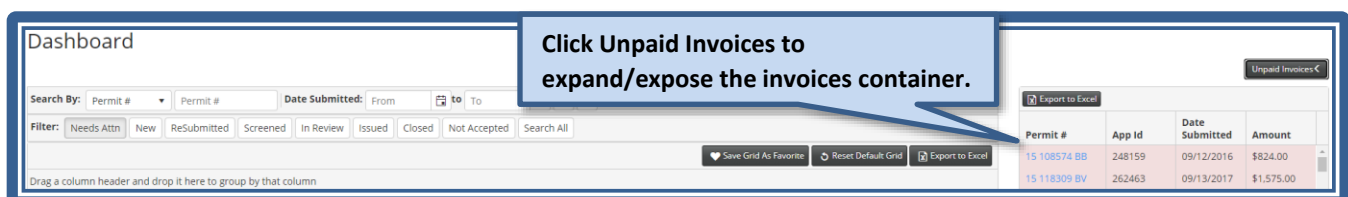
Dashboard

Search By: Permit #  Permit #  Date Submitted: From  to

Filter: Needs Attn New ReSubmitted Screened In Review Issued Closed Not Accepted Search All

Click Unpaid Invoices to collapse/hide the invoices container.

Unpaid Invoices >



Dashboard

Search By: Permit #  Permit #  Date Submitted: From  to

Filter: Needs Attn New ReSubmitted Screened In Review Issued Closed Not Accepted Search All

Click Unpaid Invoices to expand/expose the invoices container.

Unpaid Invoices <

| Permit #     | App Id | Date Submitted | Amount     |
|--------------|--------|----------------|------------|
| 15 108574 BB | 248159 | 09/12/2016     | \$824.00   |
| 15 118309 BV | 262463 | 09/13/2017     | \$1,575.00 |

Export to Excel

Save Grid As Favorite Reset Default Grid Export to Excel

Drag a column header and drop it here to group by that column

## Jurisdiction Dashboard Columns

Eight columns are displayed by default and contain key information for each application. The following image shows the order in which columns appear by default. Each user can define which columns appear, and the column order, and can restore the default grid settings at any time.

| Recent Activity | App. Id | Permit# | App. Type | Project Name | Date Submitted | Status | Assigned To |
|-----------------|---------|---------|-----------|--------------|----------------|--------|-------------|
|-----------------|---------|---------|-----------|--------------|----------------|--------|-------------|

Clicking on any column menu (3 vertical dots right of the column name) gives users the option to sort results by ascending or descending order, display more columns in their grid, and refine desired filter results.

| Recent Activity | App. Id | Permit# |
|-----------------|---------|---------|
| Document(s)     |         | 0124 FO |

- ↑ Sort Ascending
- ↓ Sort Descending
- Columns
- Filter

| Recent Activity    | App. Id | Permit# | App. Type |
|--------------------|---------|---------|-----------|
| Paid Invoice       |         |         |           |
| Paid Invoice       |         |         |           |
| Failed Document(s) |         |         |           |
| Paid Invoice       | 666450  | Invo    |           |
| Paid Invoice       | 666450  | Invo    |           |
| Paid Invoice       | 666450  | Invo    |           |
| Paid Invoice       | 666455  | E19-    |           |
| Paid Invoice       | 666455  | E19-    |           |

- ↑ Sort Ascending
- ↓ Sort Descending
- Columns
- Filter

- ☒ Recent Activity
- ☒ App. Id
- ☒ Permit#
- ☒ App. Type
- ☒ Project Name
- ☒ Date Submitted
- ☒ Status
- ☒ Assigned To
- ☐ Timestamp
- ☐ Project Type

### Recent Activity

This column displays activities that have occurred for a specific application. The activities listed require some action by the jurisdiction. Once the required action is completed, the activity no longer appears in the column.

Recent activity descriptions and actions required:

- **Application** – A customer has submitted a new application and the application requires review. Activity is removed when the application is either accepted or rejected.
- **Document(s)** – The applicant or delegate has uploaded documents that require review. Activity is removed when the document(s) have been accepted or deleted.
- **Failed Document(s)** – The document integration process failed when the document accept button was clicked. The integration issue must be fixed before proceeding. Activity is removed when the document integration is successful.
- **Failed Integration** – A problem occurred during the permit generation and/or integration process for the application. Any integration issue(s) must be fixed before proceeding. Activity is removed when the application is successfully resent, or a permit number is manually entered.



- **Paid Invoice** – The applicant or delegate paid an invoice from the MBP Cart. The Jurisdiction must mark the invoice as paid in MBP and their tracking system. Activity is removed when the *Clear Activity* button is clicked on the Invoices tab.
- **Resubmitted** – A customer has resubmitted a rejected application and it requires screening. Activity is removed when the application is either accepted or rejected.

**Permit #/App. ID**

This is the permit number or application ID assigned to the project. When an application is submitted (but not yet accepted), the application ID displays here. Once the application is accepted and integrated with jurisdiction's back end, the permit number displays. Each permit number and application ID is a hyperlink to the Project Details page. **Note:** ErrorNumber displays in this field if the integration process fails.

**Application Type**

Displays the type of permit application submitted (i.e., Building, Plumbing, Mechanical, etc.).

**Project Name**

This is the project name assigned by the applicant during the application process. This column is blank on OTC permits.

**Date Submitted**

This is the date the applicant submitted their application.

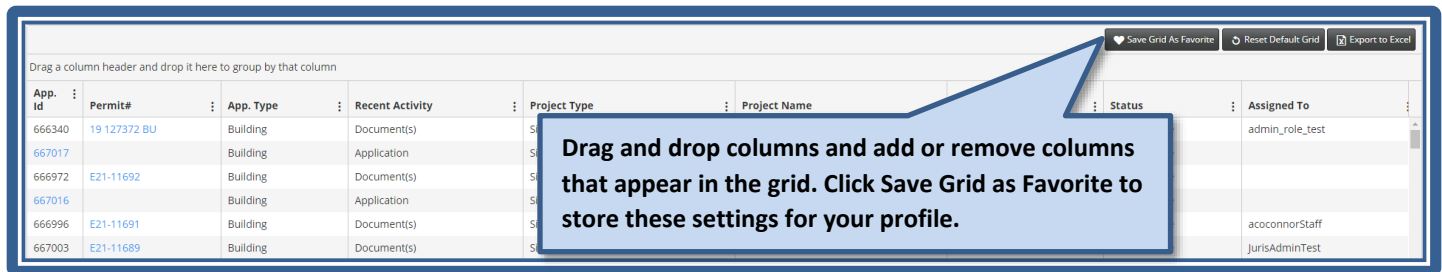
**Jurisdiction Status**

Displays the status assigned to the application in the jurisdiction tracking system. These statuses are displayed when available. Clicking on the jurisdiction status hyperlink opens the Permit Details page on the Permit Status site. **Note:** When a jurisdiction is not active on the Status Site or when a status has not yet been assigned, *Not Available* will display.

**Personalizing Jurisdiction Dashboard Grid Settings**

You can select the columns that appear on your Jurisdiction Dashboard Grid on the **Columns** sub-menu, by clicking the menu (3 vertical dots) in each column header. You can also drag and drop the columns to position them in the preferred layout for your workflow. Once you have personalized the Jurisdiction Dashboard Grid, you can save the grid layout as a favorite in your profile for the browser you are using.

## Saving Jurisdiction Dashboard Grid Settings as a Favorite



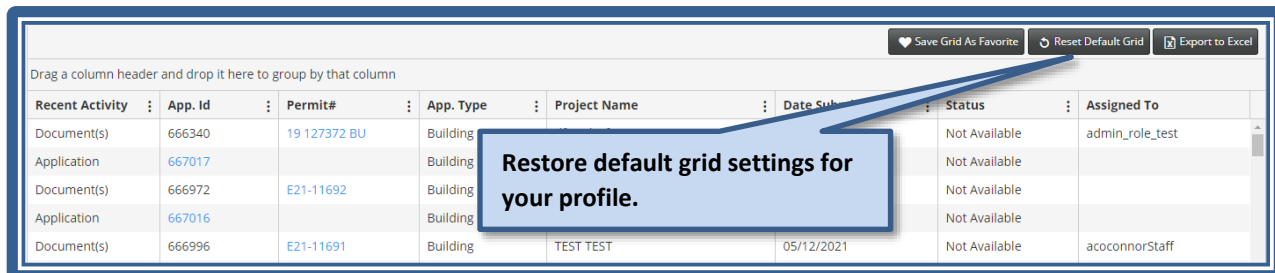
Drag a column header and drop it here to group by that column

Save Grid As Favorite Reset Default Grid Export to Excel

| App. Id | Permit#      | App. Type | Recent Activity | Project Type | Project Name | Status        | Assigned To     |
|---------|--------------|-----------|-----------------|--------------|--------------|---------------|-----------------|
| 666340  | 19 127372 BU | Building  | Document(s)     | S            |              | Not Available | admin_role_test |
| 667017  |              | Building  | Application     | S            |              | Not Available |                 |
| 666972  | E21-11692    | Building  | Document(s)     | S            |              | Not Available |                 |
| 667016  |              | Building  | Application     | S            |              | Not Available |                 |
| 666996  | E21-11691    | Building  | Document(s)     | S            |              | Not Available | acoconnorStaff  |
| 667003  | E21-11689    | Building  | Document(s)     | S            |              | Not Available | JurisAdminTest  |

Drag and drop columns and add or remove columns that appear in the grid. Click Save Grid as Favorite to store these settings for your profile.

## Resetting the Default Jurisdiction Dashboard Grid Settings



Save Grid As Favorite Reset Default Grid Export to Excel

Drag a column header and drop it here to group by that column

| Recent Activity | App. Id | Permit#      | App. Type | Project Name | Date Submitted | Status        | Assigned To     |
|-----------------|---------|--------------|-----------|--------------|----------------|---------------|-----------------|
| Document(s)     | 666340  | 19 127372 BU | Building  |              |                | Not Available | admin_role_test |
| Application     | 667017  |              | Building  |              |                | Not Available |                 |
| Document(s)     | 666972  | E21-11692    | Building  |              |                | Not Available |                 |
| Application     | 667016  |              | Building  |              |                | Not Available |                 |
| Document(s)     | 666996  | E21-11691    | Building  | TEST TEST    | 05/12/2021     | Not Available | acoconnorStaff  |

Restore default grid settings for your profile.

**Note:** Once saved, your saved Jurisdiction Dashboard Grid settings will be preserved for your profile and are specific to the browser. If you work with more than one browser (for example, both Edge and Chrome), you must set your preferred grid layout for each browser.

Clearing your browser's cookies will remove your saved grid and restore the default grid view. Update your browser settings to clear cookies less frequently if this is an issue on the MBP Admin Dashboard page. Otherwise, you'll configure your grid columns and resave this arrangement as a favorite after each time your page cookies are cleared.

## Permit Details Page

Provides details on the permit/application. Users are directed to this page when they click on the App. ID hyperlink in *New* or *ReSubmitted* statuses, or the Permit # hyperlink in *Screened*, *In Review*, *Issued*, or *Closed* statuses from the Jurisdiction Dashboard.

| Recent Activity | App. Id                | Permit # | Category   | Subcategory   | Date Submitted | Status        | Assigned To  |
|-----------------|------------------------|----------|------------|---------------|----------------|---------------|--------------|
| Application     | <a href="#">611449</a> |          |            |               | 12/12/2019     | Not Available | BellevueTech |
| Application     | <a href="#">611263</a> |          |            |               | 11/06/2019     | Not Available |              |
| Application     | <a href="#">611199</a> |          |            |               | 10/21/2019     | Not Available |              |
| Application     | <a href="#">611162</a> |          | Mechanical | LTF           | 10/10/2019     | Not Available |              |
| Application     | <a href="#">611129</a> |          | Building   | Test          | 10/04/2019     | Not Available |              |
| Application     | <a href="#">611058</a> |          | Building   | Test Projects | 09/13/2019     | Not Available |              |

Click the Permit #/App ID hyperlink to be directed to the Permit Details Page.

The Permit Details page contains detailed information for this permit:

**Permit Details**

Project Details

Permit Number: E21-11661

Assigned To: Unassigned

MBP Status: Screened

Permit Type: Plan Review

Project Name: Vintage House - Basement

Work Description: Test Basement remodel.

Jurisdiction Project Name:

Jurisdiction Status: Not Available

Submitted Date: 12/17/2020

**The Permit Details Containers help you manage relevant permit information.**

**The Permit Details Grid helps you manage the application through the permitting process.**

| Document Type                            | Date                  | Uploaded By | File Size | File Status | Notes to Customer       | Accept All                          | Delete All               |
|--|-----------------------|-------------|-----------|-------------|-------------------------|-------------------------------------|--------------------------|
| <a href="#">Site Plan</a>                | 3/12/2021 10:14:15 AM | sasher      | 0.03 (MB) | Submitted   | Reminder: Submit fin... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">Application</a>              | 12/17/2020 8:15:59 AM | System      | 0.27 (MB) | New         |                         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">Application Instructions</a> | 12/17/2020 8:15:56 AM |             |           |             |                         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">Supplementals</a>            | 12/17/2020 8:15:56 AM |             |           |             |                         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">Architectural Plan</a>       | 12/17/2020 8:15:36 AM |             |           |             |                         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

**Add a note to the customer (up to 200 characters), to appear on the customer dashboard.**

## Permit Details Containers

Admin, Staff, and Reviewers can view and manage **Project Details**, **Project Location**, **Application Details**, and **Project Contacts** information in the Permit Details Containers.

### Project Details

[Edit](#)

**Permit Number**  
E20-11644

**Assigned To**  
Unassigned

**MBP Status**  
Screened

**Permit Type**  
Plan Review

**Project Name**  
Test Permit Remodel

**Work Description**  
This is a test application.

**Jurisdiction Project Name**

**Jurisdiction Status**  
Not Available

**Submitted Date**  
8/21/2020

### Project Location

[Edit](#)

**Address** 3003 109TH AVE SE , BELLEVUE WA 98004

**Location Description**

### Application Details

[Regenerate](#)

**App ID:** 666791

**App. Type:** Building

**Project Type:** Single Family Residential

**Activity Type:** Remodel

**Scope of Work:** Residence

**Who Performs Work:** Contractor

### Contacts

[Email All Contacts](#) [Edit](#) [Export](#)

**Applicant Info**

**Username:** akruege4

**Name:** Amanda O'Connor

**Company:** City of Bellevue

**Email\*:**  [Edit](#)

**Phone:** (847) 431-1244

**Project Contact Info**

**Name:** Amanda O'Connor

**Company:** City of Bellevue

**Email:**  aoconnor@bellevuewa [Edit](#)

**Phone:** (847) 431-1244

**Contractor Info**

**Name:**

**Company:** The City of Bellevue TEST

**Email:**  [Edit](#)

**Phone:** (555) 555-5555 ext.( ) -

## Permit Details Grid

Jurisdiction staff can manage a permit application in the following ways:



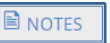

- View, upload, accept, and delete document **Files** on the permit.
- Create, edit, view, or cancel **Invoices** associated permit/application fees.
- View, add, edit, or export **Notes** authored by staff, reviewers, or administrators; an indicator will display the number of notes present on the given permit/app ID. These are internal notes and are not visible to the customer.
- View recent activities on this permit on the **Activity Log**.

 **FILES**

 **INVOICES**

 **NOTES**

 **ACTIVITY LOG**

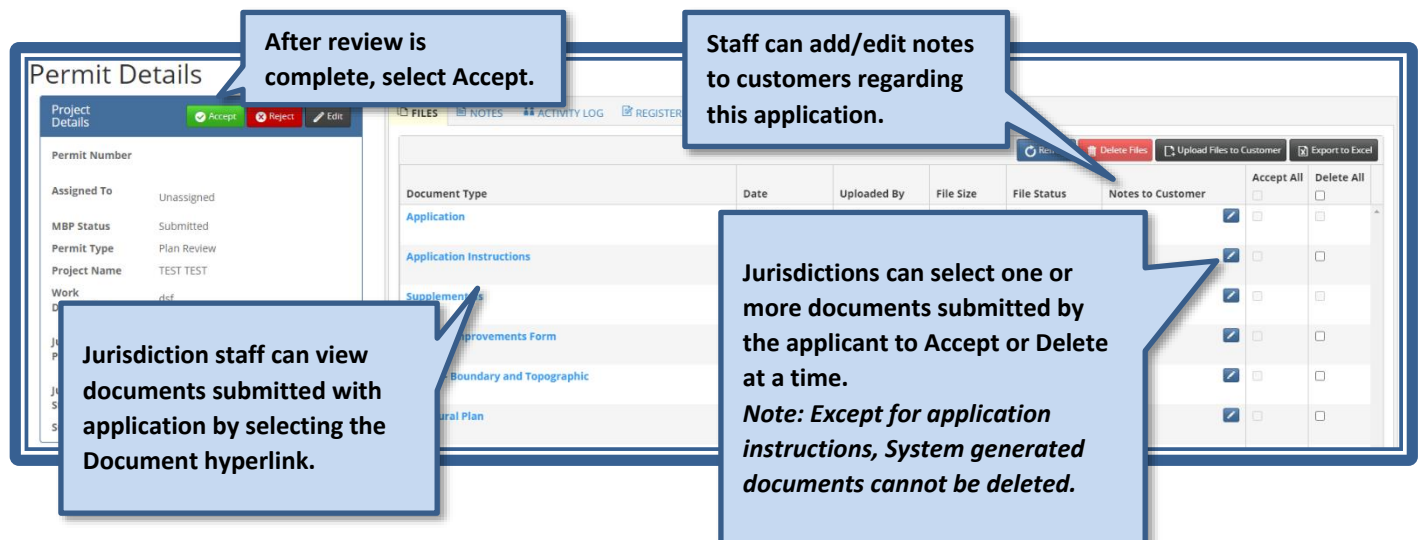
- The  **FILES** tab (Screened, In Review, Issued, or Closed status only), contains a PDF of the application, application instructions, uploaded files, and buttons to view, accept, or delete files (system generated files cannot be deleted, there is no delete button for these files).
- The  **INVOICES** tab (Screened, In Review, Issued, or Closed status only) is where invoices are created, viewed, marked as paid, and/or cleared.
- The  **NOTES** tab allows users to add, edit, and export internal notes and displays the note's author and timestamp. These notes are not visible to the customer.
- The  **ACTIVITY LOG** tab allows users to view actions and details taken on a permit and includes the ability to export the activity as a spreadsheet to Excel.

## Reviewing Plan Review Applications

When an applicant submits or resubmits an application requiring plan review, a system-generated email notification is sent to the jurisdiction with the following information included: Application Type and ID number, Project Name, Project Type, Activity Type, Scope of Work, and instructions and links to the Dashboard page. Log in to the [Jurisdiction Admin](#) site to access your Dashboard and review submitted plan review applications.

## Accepting an Application

1. Applications to be reviewed can be found under the Needs Attention or New/Submitted tab.
2. Click on the linked Permit#/APP ID to view the Application Details page.
3. Review application information and files to determine whether the application meets screening requirements:



**Permit Details**

Project Details: Permit Number, Assigned To (Unassigned), MBP Status (Submitted), Permit Type (Plan Review), Project Name (TEST TEST), Work (pdf).

**Callouts:**


- After review is complete, select Accept.** (Points to the 'Accept' button)
- Staff can add/edit notes to customers regarding this application.** (Points to the 'Notes to Customer' field)
- Jurisdiction staff can view documents submitted with application by selecting the Document hyperlink.** (Points to the 'Document Type' list)
- Jurisdictions can select one or more documents submitted by the applicant to Accept or Delete at a time.**  
*Note: Except for application instructions, System generated documents cannot be deleted.* (Points to the 'Accept All' and 'Delete All' checkboxes)

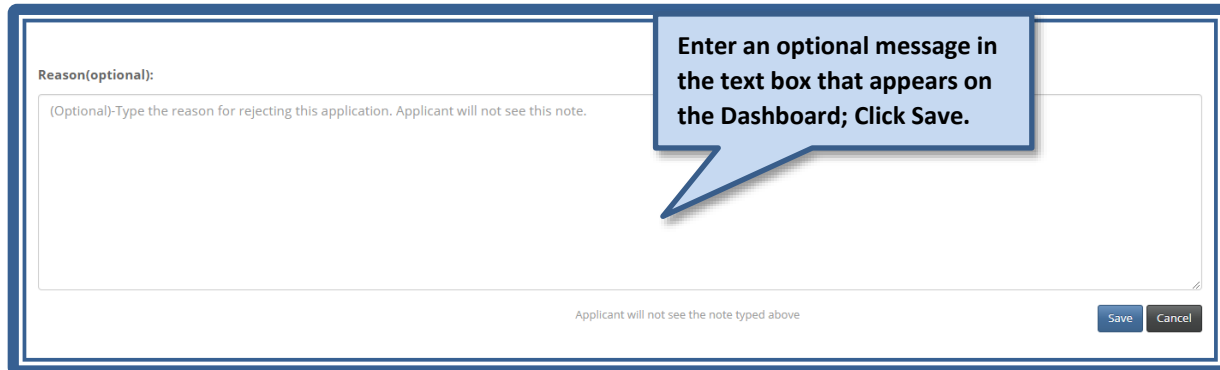
| Document Type            | Date | Uploaded By | File Size | File Status | Notes to Customer | Accept All                          | Delete All               |
|--------------------------|------|-------------|-----------|-------------|-------------------|-------------------------------------|--------------------------|
| Application              |      |             |           |             |                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Application Instructions |      |             |           |             |                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplements              |      |             |           |             |                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Improvements Form        |      |             |           |             |                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Boundary and Topographic |      |             |           |             |                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Final Plan               |      |             |           |             |                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

4. The status of the application changes to **In Process**. The system will process the application and assign a permit number.
5. When the processing is complete, the status of the application is changed to **Screened** and the permit can be viewed in the **Screened** filter results.

**Note:** If processing fails, the status of the application will display in the Needs Attn filter results. Failed applications will be highlighted red to indicate the admin user must attempt to refresh and reprocess the application.

## Rejecting an Application

1. If an application does not meet screening requirements, click the red  button.



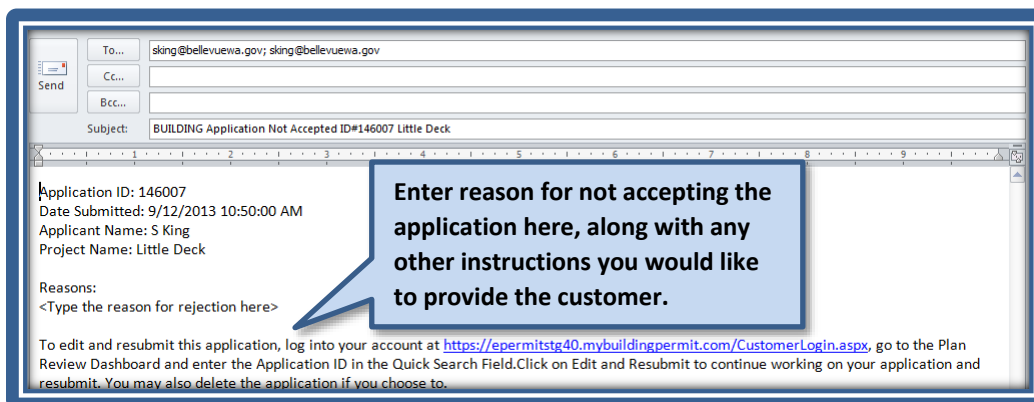
Reason(optional):

(Optional)-Type the reason for rejecting this application. Applicant will not see this note.

Applicant will not see the note typed above

Save Cancel

2. A draft email addressed to the applicant and project contact opens via the jurisdictions email program:



To...

sking@bellevuewa.gov; sking@bellevuewa.gov

Cc...

Bcc...

Subject: BUILDING Application Not Accepted ID#146007 Little Deck


Application ID: 146007  
Date Submitted: 9/12/2013 10:50:00 AM  
Applicant Name: S King  
Project Name: Little Deck

Reasons:  
<Type the reason for rejection here>

To edit and resubmit this application, log into your account at <https://epermitsg40.mybuildingpermit.com/CustomerLogin.aspx>, go to the Plan Review Dashboard and enter the Application ID in the Quick Search Field. Click on Edit and Resubmit to continue working on your application and resubmit. You may also delete the application if you choose to.

**Note:** If your jurisdiction has recently updated or changed your email service (i.e., upgrade to Office 365) you will need to select your email and relink the account and then the email should load automatically. If you run into any issues, please contact your IT department.

3. The status of the application is changed by the system to **Not Accepted** and the permit will display in the **Not Accepted** filter results.

 **REMINDER:** On a rejected application, the applicant can only make changes to the applicant information, description of works, project contact, supplemental question answers, and files uploaded. The pre-application selections (Application Type, Project Type, Activity Type, Scope of Work, Work Types, and Project Details) cannot be changed. When these selections are incorrect, an applicant will need to submit a new application to proceed.

## Accepting Documents

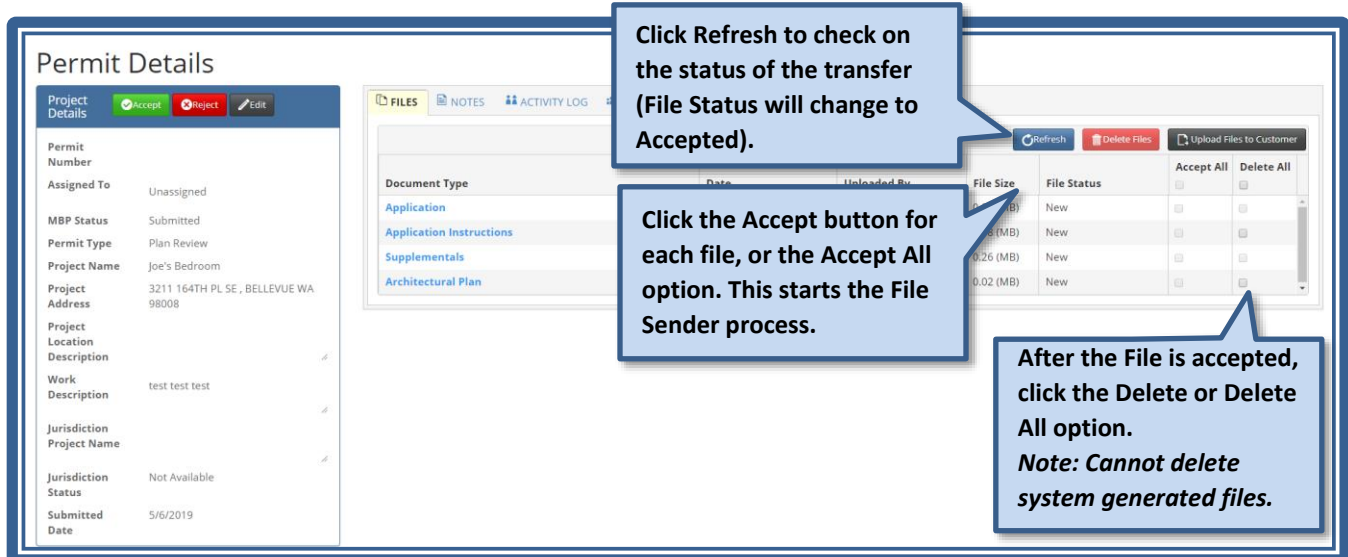
Once the application is accepted and a permit number is assigned, documents can be accepted. The permit displays in the **Needs Attention** filter results with a Recent Activity of *Document(s)* until the documents are accepted by the jurisdiction.

Accepting documents will vary depending on your jurisdiction's File Sender integration status:

- **Without File Sender integration** – Accepting documents clears *Document(s)* activity but files must be manually saved to a jurisdiction file location and then manually deleted from the Dashboard.
- **With File Sender integration** – Accepting documents initiates the electronic file transfer process and clears *Document(s)* activity. The files are automatically saved to a pre-determined jurisdiction file location and then must be manually deleted from the Dashboard.

### Steps to accept documents:

1. Open the Application Detail page from the **Needs Attention** or **Screened** tab by clicking on the hyperlinked Permit number.
2. A new window of the Permit Details opens and by default displays Files.



**Permit Details**

Project Details: Accept Reject Edit

Permit Number: [Blank]

Assigned To: Unassigned

MBP Status: Submitted

Permit Type: Plan Review

Project Name: Joe's Bedroom

Project Address: 3211 164TH PL SE, BELLEVUE WA 98008

Project Location Description: [Blank]

Work Description: test test test

Jurisdiction Project Name: [Blank]

Jurisdiction Status: Not Available

Submitted Date: 5/6/2019

**FILES** | NOTES | ACTIVITY LOG


Document Type: Application, Application Instructions, Supplementals, Architectural Plan

Click Refresh to check on the status of the transfer (File Status will change to Accepted).

Click the Accept button for each file, or the Accept All option. This starts the File Sender process.

After the File is accepted, click the Delete or Delete All option.  
**Note: Cannot delete system generated files.**

| File Size | File Status | Accept All               | Delete All               |
|-----------|-------------|--------------------------|--------------------------|
| 0.02 (MB) | New         | <input type="checkbox"/> | <input type="checkbox"/> |
| 0.26 (MB) | New         | <input type="checkbox"/> | <input type="checkbox"/> |
| 0.02 (MB) | New         | <input type="checkbox"/> | <input type="checkbox"/> |

 **NOTE:** If your jurisdiction is not integrated with File Sender, you will need to click on the Document File hyperlink to open the file and save a copy to a location within your district.

## Invoicing Fees

Once the application is accepted and a permit number has been assigned, invoices can be created and submitted for applicable permit fees for both Plan Review and Over the Counter permits.

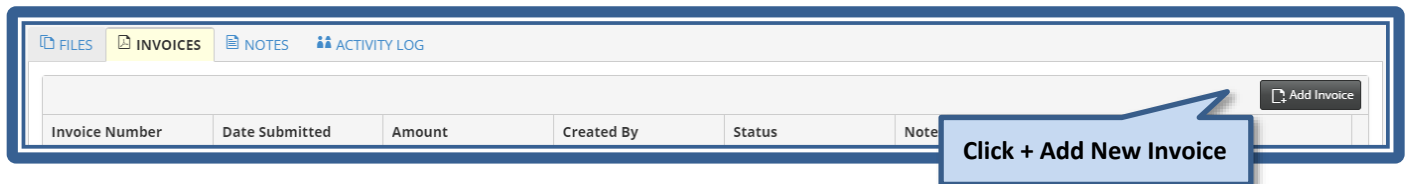
The process for creating invoices will vary slightly depending on the jurisdiction's integration status:

- **Non-integrated Jurisdictions** – Invoice fee line items must be manually entered.
- **Integrated Jurisdictions** – Invoice fees are pulled from the jurisdiction's permit tracking system and are selected to add to the invoice. Additional fees can still be manually entered.

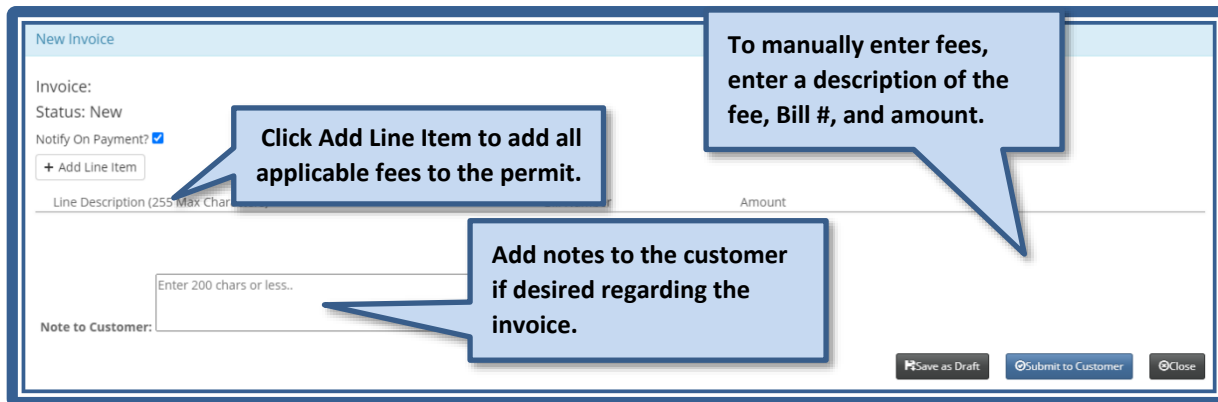
**Note:** You can add an invoice to an issued Over the Counter (OTC) permit if you need to charge additional fees after issuance. You must have the Application ID or Permit number and search for it in the Dashboard to access the Permit Details page. OTC permits do not save to the Jurisdiction Dashboard.

### Creating an invoice:

1. Open the Application Detail page from the **Screened** tab by clicking on the hyperlinked Permit number.
2. Navigate to the **Invoices** tab (available for Screened, In Review, Issued, and Closed statuses only):



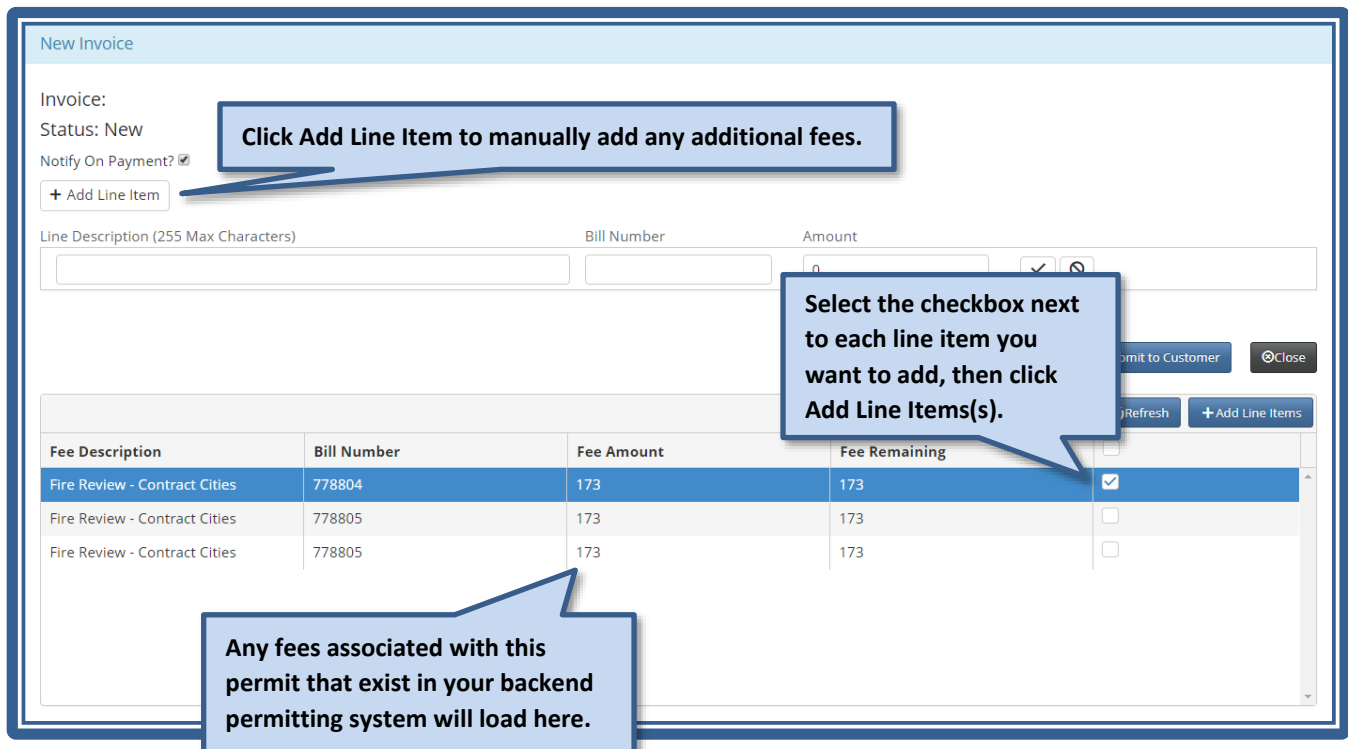
### Non-integrated jurisdictions:



The screenshot shows the 'New Invoice' form. It includes fields for 'Invoice:', 'Status: New', and a 'Notify On Payment?' checkbox. There is a '+ Add Line Item' button. Below this is a table with 'Line Description (255 Max Char)' and 'Amount' columns. At the bottom, there is a 'Note to Customer:' field with a character limit of 200. Three blue callout boxes provide instructions: one points to the '+ Add Line Item' button with the text 'Click Add Line Item to add all applicable fees to the permit.'; another points to the 'Note to Customer:' field with the text 'Add notes to the customer if desired regarding the invoice.'; and a third points to the 'Line Description' column with the text 'To manually enter fees, enter a description of the fee, Bill #, and amount.' At the bottom right of the form are three buttons: 'Save as Draft', 'Submit to Customer', and 'Close'.



## Integrated jurisdictions:



**New Invoice**

Invoice:  
Status: New  
Notify On Payment? ☒

[+ Add Line Item](#)

Click Add Line Item to manually add any additional fees.

Line Description (255 Max Characters) Bill Number Amount

Select the checkbox next to each line item you want to add, then click Add Line Item(s).

| Fee Description               | Bill Number | Fee Amount | Fee Remaining |                                     |
|-------------------------------|-------------|------------|---------------|-------------------------------------|
| Fire Review - Contract Cities | 778804      | 173        | 173           | <input checked="" type="checkbox"/> |
| Fire Review - Contract Cities | 778805      | 173        | 173           | <input type="checkbox"/>            |
| Fire Review - Contract Cities | 778805      | 173        | 173           | <input type="checkbox"/>            |

Any fees associated with this permit that exist in your backend permitting system will load here.

[Submit to Customer](#) [Close](#) [Refresh](#) [+ Add Line Items](#)

- Click the [Save as Draft](#) button to save the invoice and return to edit or submit the invoice later or click the [Submit to Customer](#) button to submit the invoice to the customer.
- Once submitted, a PDF of the invoice is saved on the Jurisdiction and Customer Dashboards on the [INVOICES](#) tab.
- Applicant, Project Contact, and any Delegates on the permit will receive an email notification that an invoice has been issued and requires payment.

## Adding an Invoice to an Issued OTC Permit

You can add an invoice to an issued Over the Counter (OTC) permit if you need to charge additional fees after issuance. You must have the Application ID or Permit number and search for it in the Jurisdiction Dashboard to access the Permit Details page. OTC permits do not save to the Jurisdiction Dashboard.

- On the Jurisdiction Dashboard, search for the App ID or permit number for the permit to which you want to add an invoice.
- Open the permit and click the Invoice tab on the Permit Details page.
- Follow the [Steps to Create an Invoice](#).

## Processing Paid Invoices

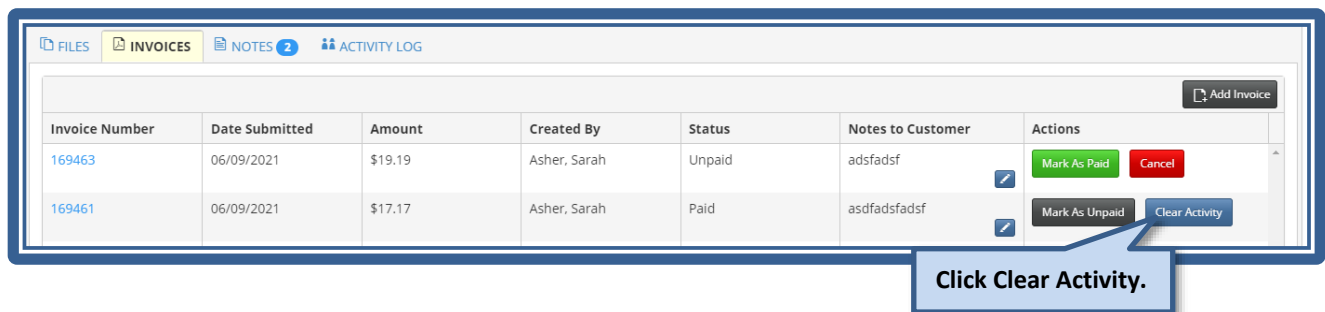
When an invoice is paid, either online through ePermit (the application site) or at the jurisdiction counter, the invoice needs to be marked as paid in the permit tracking system and updated on the Dashboard.

### Online Payments

Jurisdictions receive an email notification when an invoice is paid online. The application displays on the **Needs Attention** filter results with the activity of *Paid Invoice* until required actions are taken.

To clear this activity, follow these steps:

1. Update invoice status within the jurisdiction permit tracking system as necessary to mark fees as paid.
2. Open the Application Detail page from the **Needs Attention** filter by clicking on the hyperlinked permit number.
3. Navigate to the **Invoices** tab:

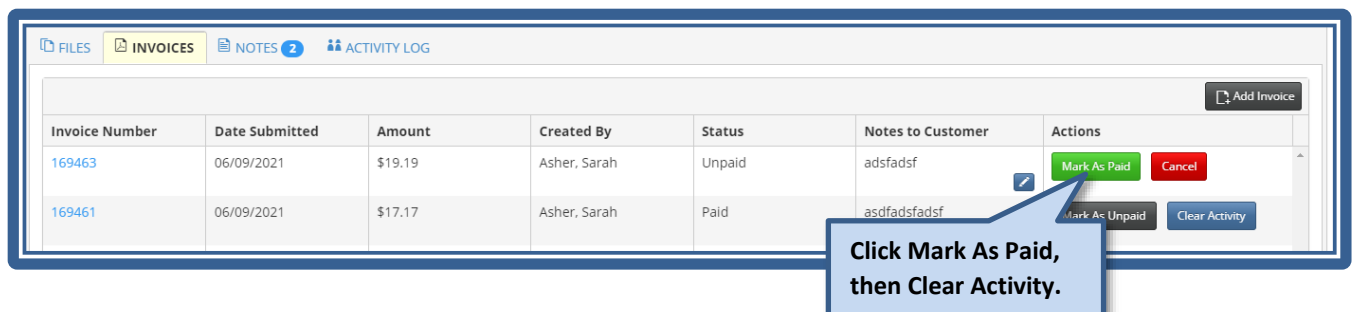


| Invoice Number         | Date Submitted | Amount  | Created By   | Status | Notes to Customer | Actions   |
|------------------------|----------------|---------|--------------|--------|-------------------|---|
| <a href="#">169463</a> | 06/09/2021     | \$19.19 | Asher, Sarah | Unpaid | adsfadsf          | <a href="#">Mark As Paid</a> <a href="#">Cancel</a>           |
| <a href="#">169461</a> | 06/09/2021     | \$17.17 | Asher, Sarah | Paid   | asdfsdfadsf       | <a href="#">Mark As Unpaid</a> <a href="#">Clear Activity</a> |

Click Clear Activity.

### Other Payment Methods

1. Open the Application Detail page from the **Screened** filter by clicking on the hyperlinked permit number.
2. Navigate to the **Invoices** tab:



| Invoice Number         | Date Submitted | Amount  | Created By   | Status | Notes to Customer | Actions   |
|------------------------|----------------|---------|--------------|--------|-------------------|---|
| <a href="#">169463</a> | 06/09/2021     | \$19.19 | Asher, Sarah | Unpaid | adsfadsf          | <a href="#">Mark As Paid</a> <a href="#">Cancel</a>           |
| <a href="#">169461</a> | 06/09/2021     | \$17.17 | Asher, Sarah | Paid   | asdfsdfadsf       | <a href="#">Mark As Unpaid</a> <a href="#">Clear Activity</a> |

Click Mark As Paid, then Clear Activity.

## Changing Jurisdiction Dashboard Status


At different stages throughout the review process, you will need to update the status of the permit in MBP. This can be done by editing the status on the Application Detail page. The following are times when the manual update of a status in MBP is required:

- After an invoice has been paid – Change from **Screened** to **In Review**
- After review is complete and permit has been issued – Change from **In Review** to **Issued**

**Note:** You can choose to change the permit status to Issued when you upload a document type of Issued Permit. See next section for details.

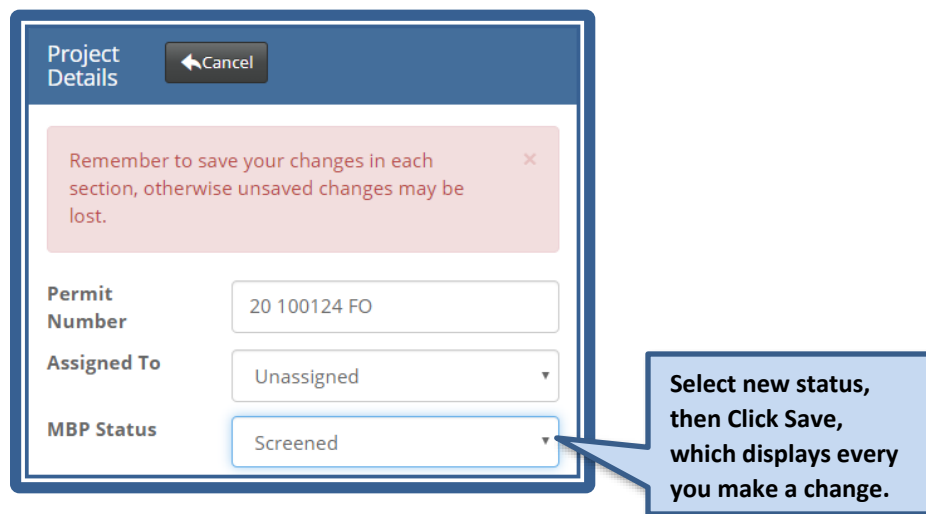
- When jurisdiction determines the permit can be officially closed – Change from **Issued** to **Closed**

**Note:** You can choose to have permits automatically moved from Issued to Closed. Contact the Service Delivery Team to enable this process.

 **REMINDER:** Once a permit is in a closed status in MBP it will be deleted in 180 days from the date of closure.

 Open the Permit Details page by clicking on the hyperlinked permit number.

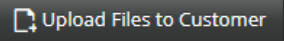
1. Click the  icon next to the Dashboard Status.



The screenshot shows a 'Project Details' form with a 'Cancel' button at the top. A red warning box states: 'Remember to save your changes in each section, otherwise unsaved changes may be lost.' The form contains three fields: 'Permit Number' with the value '20 100124 FO', 'Assigned To' with the value 'Unassigned', and 'MBP Status' with the value 'Screened'. A blue callout box points to the 'MBP Status' dropdown menu with the text: 'Select new status, then Click Save, which displays every you make a change.'

## Uploading Files

Once the permit is in review, the jurisdiction and customer (applicant or delegate) can exchange files on the Dashboards to request or provide additional information, corrections, approvals, etc. Once plan review is complete and all required fees have been paid, the final documents (permit, approval, approved plans, etc.) are uploaded to the Jurisdiction Dashboard for the customer. When documents are added to the Jurisdiction Dashboard, an email notification is sent (see [Email Notifications](#) section for more details).

1. Open the Permit Details page by clicking on the hyperlinked permit number.
2. Click the  button. A form opens in the tab to add files:

Use this form to upload project files for permit 20 100124 FO

If uploading multiple files to customer, please make sure you are selecting the applicable document type for each file. You will be notified via email.  
\* - Indicates a required field.

Document Type \*

- Select Document Type--
- Select Document Type--
- Application Submittal Contact Letter
- Application With Comments
- Approval Letter
- Approved Deferred Submittal
- Approved Plans
- Approved Site Plan
- Business License Application
- Comment Response Letter
- Complete or Incomplete Application Letter
- Conditions Page
- Contract
- Contractor Information
- Decision
- Development Standards
- Document Waiver Instructions
- Drainage Modification or Waiver Form

**Select appropriate document type; then click Select File to attach applicable document from your local network drives.**

**Note: Only PDF documents 500 MB or less can be uploaded.**

Use this form to upload project files for permit E20-11644

customer, please make sure you are selecting the applicable document type for the file that you have selected to upload.

Document Type \*

File limits: 500MB, PDF only.

Select file...

(Approval Letter) ApprovalLetter\_TEST.pdf  
0.03 MB

Note to Customer:

(Issued Permit) IssuedPermit\_TEST.pdf  
0.03 MB

☐ Update MBP Status to "Issued"

Note to Customer:

**Repeat Steps 1 and 2 until all applicable files have been uploaded. Then click Submit to Customer.**

**Check the box to update the MBP status to "Issued" when you upload document type "Issued Permit."**

**Add an optional note to the customer, which will appear with the document on the customer and jurisdiction dashboards.**

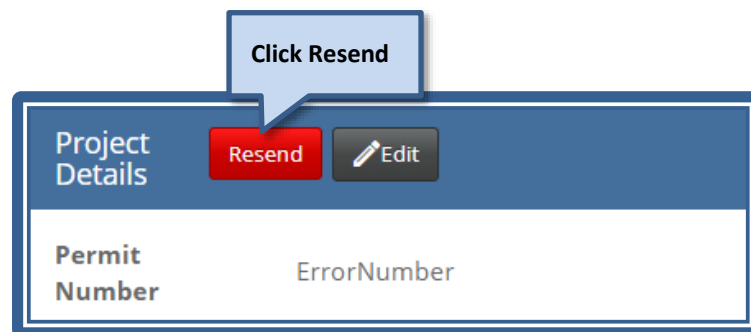
**If a file is uploaded in error, click "X" button to delete.**

Clear all Submit to Customer

## Resending Failed Applications

Both plan review and OTC applications may systematically fail while processing and are displayed under the **Failed** tab. Failures are generally due to integration or PDF generation issues. Once these issues have been resolved, these applications can be resent through the **Permit Details Page**.

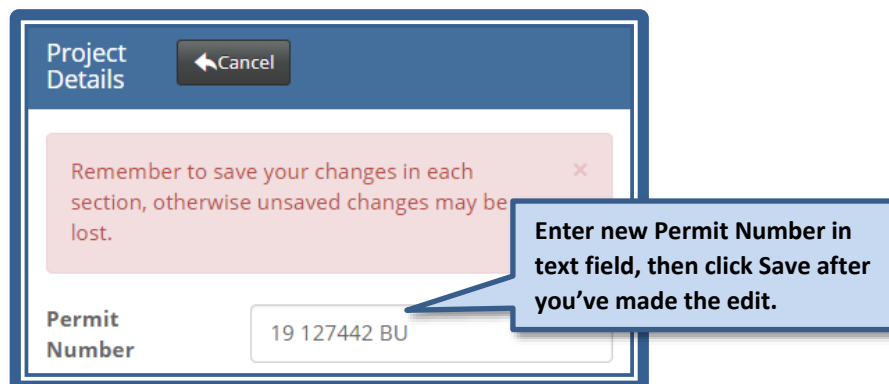
1. Open the Failed application Permit Details page from the **Needs Attn** filter by clicking on the hyperlinked word ErrorNumber (displays in the Permit #/App. ID field); select **Resend**:



## Changing Permit Numbers

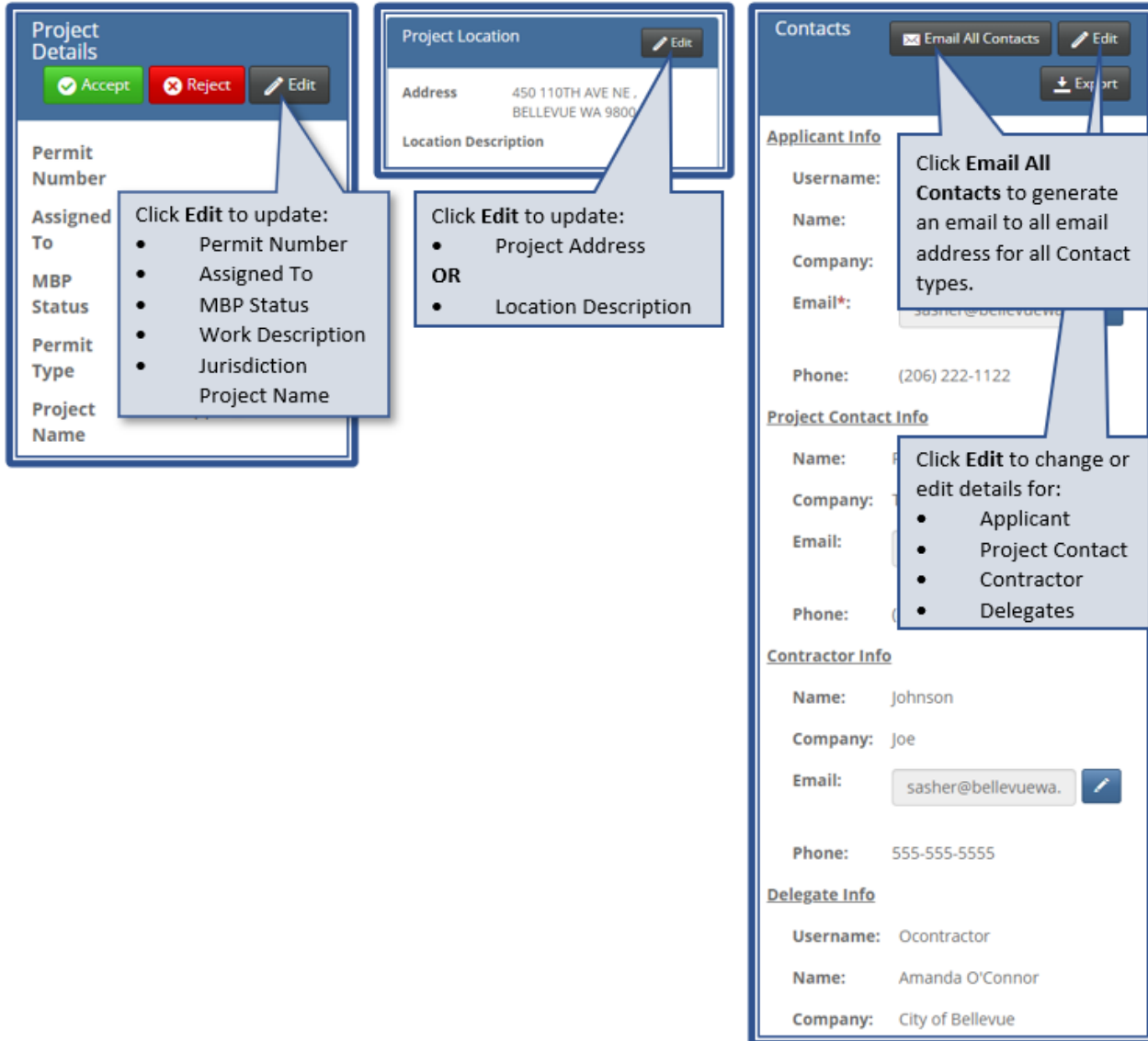
The permit number on the Jurisdiction Dashboard can be edited if necessary. Generally, this is done at the request of the jurisdiction, to match the permit number in the jurisdiction permit tracking system.

1. Open the Permit Details page and click on the  icon:



## Managing Permit Details

Permit and application details can be managed on the Permit Details page, including **Project Details**, **Project Location**, **Application Details**, and **Contacts**.



**Project Details**

Accept Reject Edit

Permit Number

Assigned To

MBP Status

Permit Type

Project Name

Click **Edit** to update:

- Permit Number
- Assigned To
- MBP Status
- Work Description
- Jurisdiction
- Project Name

**Project Location**

Address 450 110TH AVE NE, BELLEVUE WA 98005

Location Description

Click **Edit** to update:

- Project Address
- OR
- Location Description

**Contacts**

Email All Contacts Edit Export

**Applicant Info**

Username:

Name:

Company:

Email\*: sasher@bellevuewa.gov

Phone: (206) 222-1122

**Project Contact Info**

Name:

Company:

Email:

Phone:

Click **Edit** to change or edit details for:

- Applicant
- Project Contact
- Contractor
- Delegates

**Contractor Info**

Name: Johnson

Company: Joe

Email: sasher@bellevuewa.gov

Phone: 555-555-5555

**Delegate Info**

Username: Ocontractor

Name: Amanda O'Connor

Company: City of Bellevue

## Managing Project Details


You can update the following Project Details. The fields marked with an asterisk can be modified in the Project Details container:

- **\*Permit Number** – update the permit number, if necessary to reconcile with backend permitting system
- **\*Assigned To** – assign the permit or application to a staff member to manage
- **\*MBP Status** – set the status of the permit
- **Permit Type** – Identifies whether the permit requires Plan Review

- **Project Name** – this displays the customer-assigned name for the project, which appears on the Jurisdiction Dashboard and the permit documents
- **\*Work Description** – the customer’s description of work to be performed
- **\*Jurisdiction Project Name** – the project name, as saved in the jurisdiction’s backend permitting system
- **\*Jurisdiction Status** – the permit status as saved in the backend permitting system
- **Submitted Date** – the date on which the permit was originally submitted

### Managing Project Location


You can manage either the Address or the Project Location, depending on which type of location information is saved with the application. Project Location is only used when a physical address is not available (for example, some Right-of-Way or Special Events applications).

**Project Location** 

**Address** 450 110TH AVE NE , BELLEVUE WA 98004

**Location Description**

Click Edit to search for a new address OR to change the Location Description.

**Project Location** 

**Address**

**Location Description**


The SE Corner of Main and Maple streets

✓
✕

39/150

### Managing Application Details

You can regenerate an application at any time. Click the Regenerate button to generate another copy of the original application. This will appear on the Customer Dashboard of the applicant.

**Application Details** 

**App ID:** 824434

**App. Type:** Building

**Project Type:** Single-Family

**Activity Type:** Residential

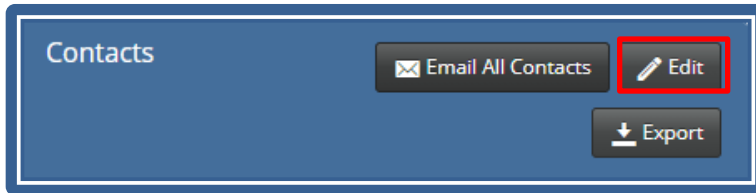
**Scope of Work:** Residence

**Who Performs Work:** Contractor

Click Regenerate to create a copy of the Application PDF.

## Managing All Contacts

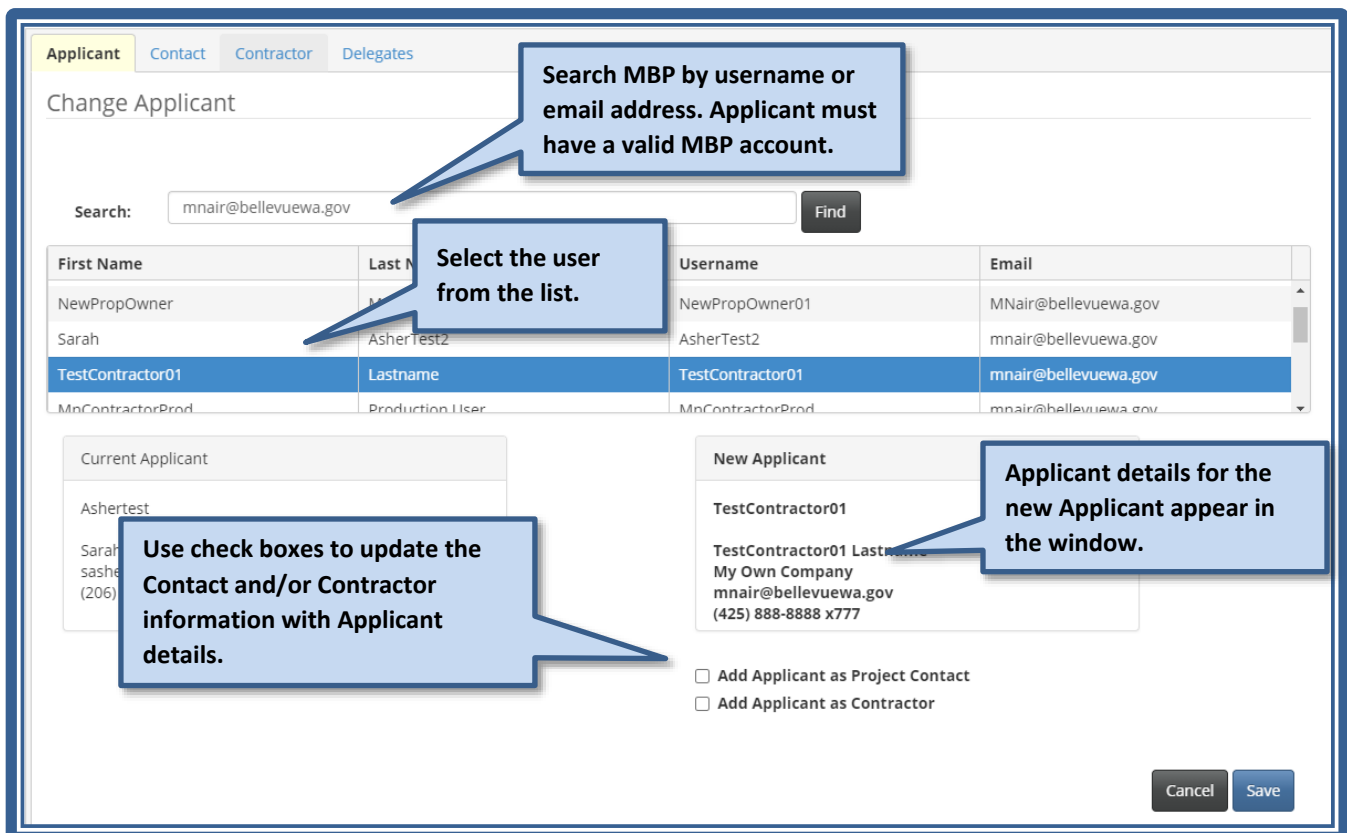
You can manage the details of all Contact types via the Contacts container on the Permit Details page. You can access Contact Management by clicking Edit on the Contacts container.



## Managing Applicants

Applicants have full access to managing all aspects of the application/permit. You can change the applicant on an application or permit, under the following conditions:

- The applicant must be an MBP user and must provide the MBP username or email address.
- Each application / permit must have an applicant. You can “swap” one applicant for another but cannot save an application / permit without a designated applicant.
- Changes to applicants are recorded on the Activity Log on the Jurisdiction Dashboard.



The image shows the 'Change Applicant' form. It includes a search bar with the text 'mnair@bellevuewa.gov' and a 'Find' button. Below the search bar is a table of users. A callout points to the search bar: 'Search MBP by username or email address. Applicant must have a valid MBP account.' Another callout points to the table: 'Select the user from the list.' The table has columns for First Name, Last Name, Username, and Email. The row for 'TestContractor01' is highlighted. Below the table, there are two sections: 'Current Applicant' and 'New Applicant'. The 'Current Applicant' section shows 'Ashertest' and 'Sarah sasher (206)'. A callout points to these sections: 'Use check boxes to update the Contact and/or Contractor information with Applicant details.' The 'New Applicant' section shows 'TestContractor01' and 'TestContractor01 Lastname My Own Company mnair@bellevuewa.gov (425) 888-8888 x777'. A callout points to this section: 'Applicant details for the new Applicant appear in the window.' At the bottom, there are two checkboxes: 'Add Applicant as Project Contact' and 'Add Applicant as Contractor'. At the bottom right, there are 'Cancel' and 'Save' buttons.

| First Name              | Last Name       | Username                | Email                       |
|-------------------------|-----------------|-------------------------|-----------------------------|
| NewPropOwner            |                 | NewPropOwner01          | MNair@bellevuewa.gov        |
| Sarah                   | AsherTest2      | AsherTest2              | mnair@bellevuewa.gov        |
| <b>TestContractor01</b> | <b>Lastname</b> | <b>TestContractor01</b> | <b>mnair@bellevuewa.gov</b> |
| MnContractorProd        | Production.User | MnContractorProd        | mnair@bellevuewa.gov        |

**Current Applicant**

Ashertest

Sarah sasher (206)

**New Applicant**

TestContractor01

TestContractor01 Lastname My Own Company mnair@bellevuewa.gov (425) 888-8888 x777

☐ Add Applicant as Project Contact

☐ Add Applicant as Contractor

Cancel Save



## Managing Project Contacts

Project Contacts serve as the primary contact for the application/permit. Note the following:

- Project Contacts have no access to the application/permit and cannot manage or pay invoices on the permit.
- Project Contacts do not need to be MBP users.
- If the Project Contact needs access to the application/permit, they must be added as a Delegate (Delegates must be MBP users).
- Changes to Project Contacts are recorded on the Activity Log on the Jurisdiction Dashboard.

Applicant
Contact
Contractor
Delegates

Edit Project Contact

Fields marked with \* are required.

☐ Save Applicant as Project Contact

Company Name:
The City of Bellevue TEST

\*First Name:
Professional

\*Last Name:
Tester

\*Email Address:
test@test.gov

\*Phone Number:
(425) 452-4444

Phone Extension:

Address Number:
1234

Street Name or PO Box:
567th

Apartment or Suite Number:

City:
Edmonds

State:
WA

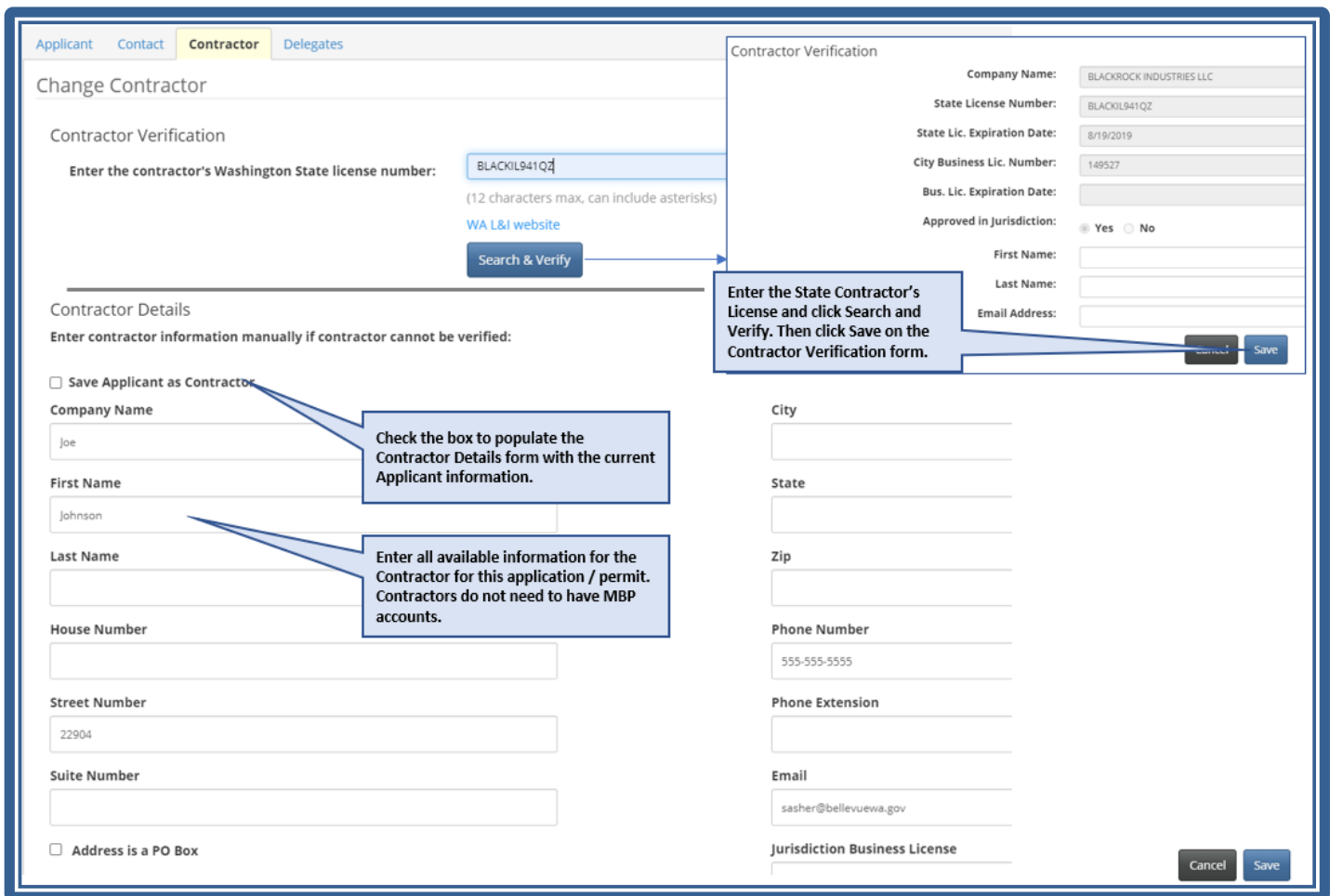
Use the check box to update the Project Contact information with current Applicant information.

Enter all available Project Contact information. First Name, Last Name, Email Address, and Phone Number are required fields.

## Managing Contractors

You can manage Contractor information for the application/permit either by searching for them in MBP, or by entering their information in a text form.

- Contractors have no access to the application/permit and cannot manage or pay invoices on the permit.
- Contractors do not need to be MBP users.
- If the Contractor needs access to the application/permit, they must be MBP users and then be added as a Delegate (Delegates must be MBP users).
- Changes to Contractors are recorded on the Activity Log on the Jurisdiction Dashboard.



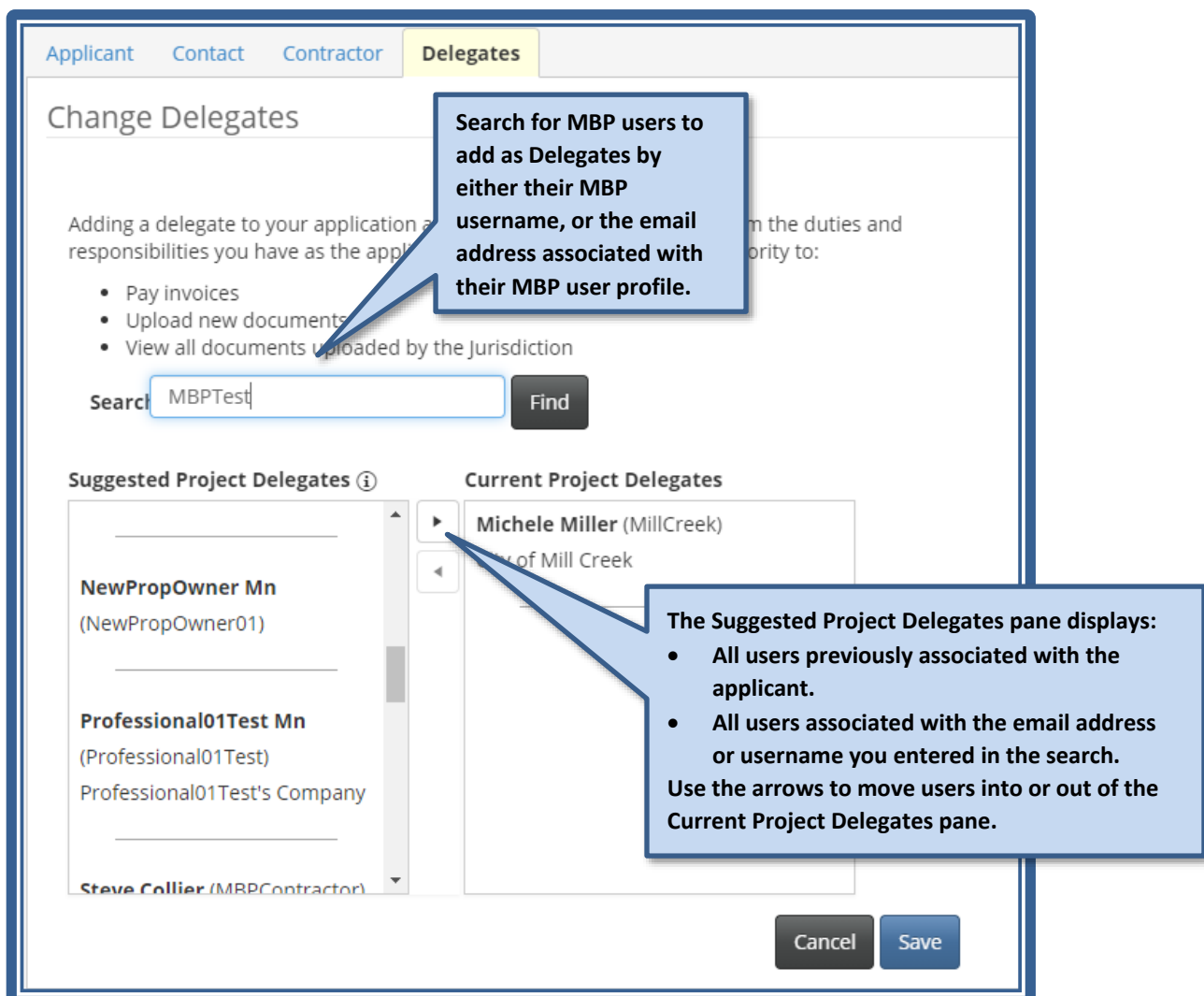
The screenshot shows the 'Change Contractor' form with the following sections and callouts:

- Contractor Verification:**
  - Field: Enter the contractor's Washington State license number:  (12 characters max, can include asterisks)
  - Link: [WA L&I website](#)
  - Button: **Search & Verify** (Callout: Enter the State Contractor's License and click Search and Verify. Then click Save on the Contractor Verification form.)
- Contractor Details:**
  - Text: Enter contractor information manually if contractor cannot be verified:
  - Checkbox: ☐ Save Applicant as Contractor
  - Fields: Company Name (Joe), First Name (Johnson), Last Name, House Number, Street Number (22904), Suite Number.
  - Checkbox: ☐ Address is a PO Box
  - Callout: Check the box to populate the Contractor Details form with the current Applicant information.
  - Callout: Enter all available information for the Contractor for this application / permit. Contractors do not need to have MBP accounts.
- Contractor Verification (Right Panel):**
  - Fields: Company Name (BLACKROCK INDUSTRIES LLC), State License Number (BLACKIL941QZ), State Lic. Expiration Date (8/19/2019), City Business Lic. Number (149527), Bus. Lic. Expiration Date, Approved in Jurisdiction (Yes/No).
  - Fields: First Name, Last Name, Email Address.
  - Buttons: **Cancel**, **Save**.
- Other Fields (Bottom Right):**
  - City, State, Zip, Phone Number (555-555-5555), Phone Extension, Email (sasher@bellevuewa.gov), Jurisdiction Business License.
  - Buttons: **Cancel**, **Save**.

## Managing Delegates

Delegates can be added to applications/permits during the application process and can be added or removed by Jurisdiction Administrators or Staff. Delegates have the same level of access to the permit as the Applicant, and can pay invoices, upload documents, manage Contacts and view all communications with the jurisdiction. Delegates can be managed as follows:

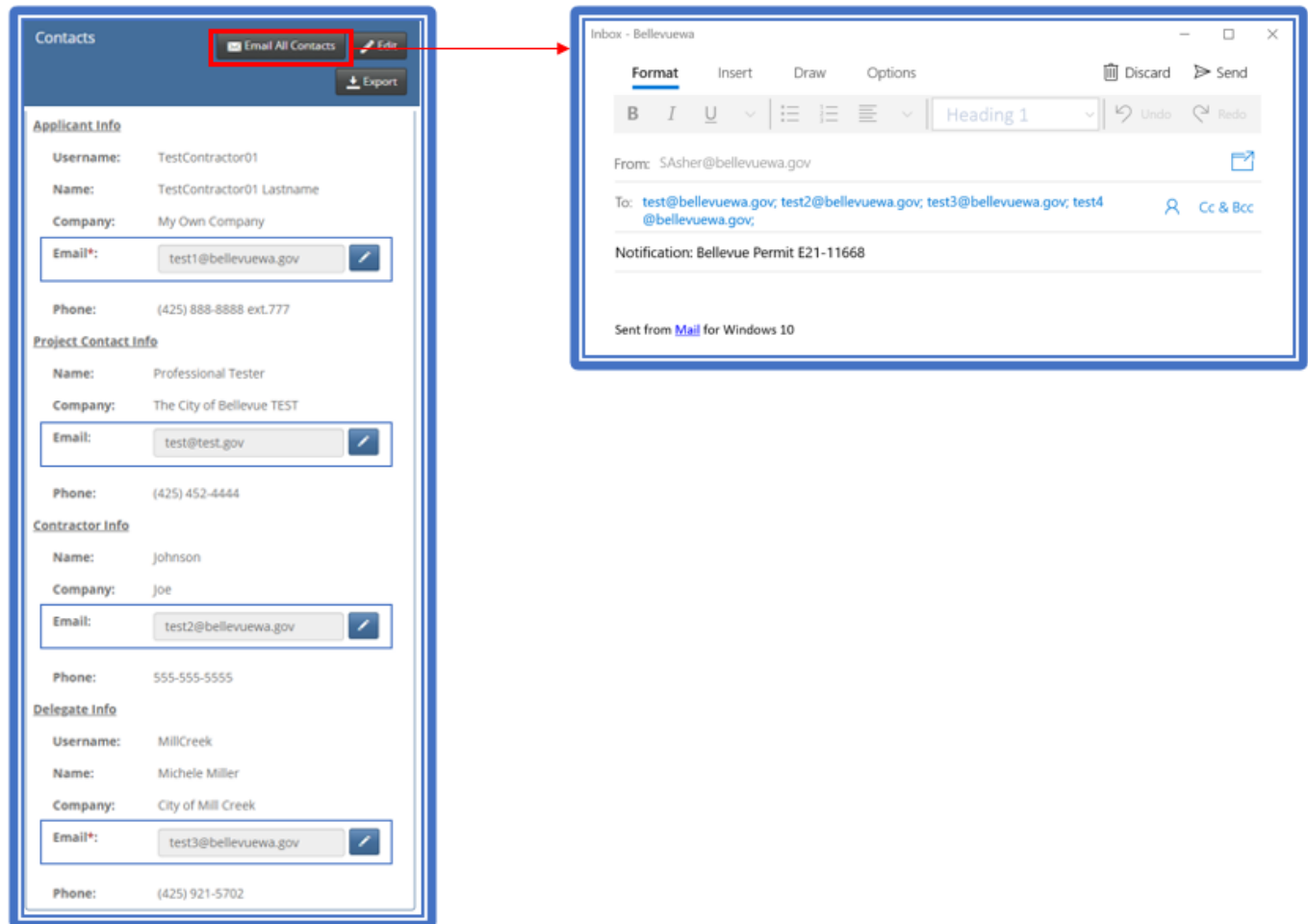
- Delegates must have valid MBP accounts.
- Delegate username or email are required to add them to the application/permit.
- There is no limit on the number of Delegates on an application/permit.
- Changes to Delegates are recorded on the Activity Log on the Jurisdiction Dashboard.



The screenshot shows the 'Change Delegates' interface. At the top, there are tabs for 'Applicant', 'Contact', 'Contractor', and 'Delegates'. The 'Delegates' tab is selected. Below the tabs, the title 'Change Delegates' is displayed. A text box explains: 'Adding a delegate to your application and the responsibilities you have as the applicant. You can assign the delegate the duties and responsibilities you have as the applicant. Select the delegate from the list below and click the Add button.' Below this, a list of permissions is shown: 'Pay invoices', 'Upload new documents', and 'View all documents uploaded by the Jurisdiction'. A search bar contains the text 'MBPTest' and a 'Find' button. Below the search bar, there are two panels: 'Suggested Project Delegates' and 'Current Project Delegates'. The 'Suggested Project Delegates' panel lists three users: 'NewPropOwner Mn (NewPropOwner01)', 'Professional01Test Mn (Professional01Test) Professional01Test's Company', and 'Steve Collier (MBPContractor)'. The 'Current Project Delegates' panel lists one user: 'Michele Miller (MillCreek)'. A callout box points to the search bar and says: 'Search for MBP users to add as Delegates by either their MBP username, or the email address associated with their MBP user profile.' Another callout box points to the 'Suggested Project Delegates' panel and says: 'The Suggested Project Delegates pane displays: All users previously associated with the applicant. All users associated with the email address or username you entered in the search. Use the arrows to move users into or out of the Current Project Delegates pane.' At the bottom right, there are 'Cancel' and 'Save' buttons.

### Sending an Email to All Project Contacts

You can generate an email to send to all project contacts. An email is generated that contains pre-populated email addresses for each contact type, a pre-populated subject line, and a blank message body. The email recipients can be modified, if needed, before the message is sent. A record of the email generation will appear in the Activity Log for the permit however, the Activity Log does not track whether the email was sent.

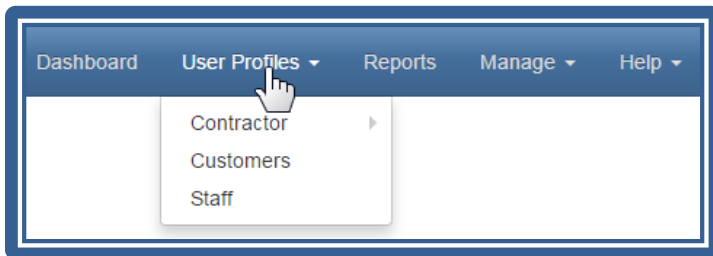


## User Profiles

The **User Profiles** menu allows you to search for and manage **Contractor**, **Customer**, and **Staff** accounts.

User Profile Search Tips:

- **Contractor** – Search by Company Name
- **Customer** – Search for an MBP user account by MBP username or email address
- **Staff** – Search for Jurisdiction Staff by username or email address



### Resetting an MBP User Account

User passwords for ePermit cannot be reset through the Admin site. Only the MBP user can reset their password. When the MBP user clicks Can't Access Your Account on the login screen, they will receive an email at the address that is associated with the email account saved in their MBP user profile.

A screenshot of the MyBuildingPermit.com Permitting Portal login page. The page has a light blue header with the text 'Welcome to the MyBuildingPermit.com Permitting Portal' and links to 'MBP Help' and 'MBP Contacts'. Below the header is a 'Log In' section with two input fields: 'User Name' and 'Password'. Both fields have a red border and a message below them: 'User Name is required.' and 'Password is required.' respectively. There is a blue 'Log In' button. Below the button are two links: 'New to MBP? Create an account' and 'Forgot User Name / Forgot Password'. The 'Forgot User Name / Forgot Password' link is highlighted with a red rectangle.

**NOTE:** User passwords for the Application portal (ePermit) *cannot* be reset through the Admin site. Users must use the link on the application Log In page: 'Can't access your account?'

## Contractor Accounts

Contractors must create an account in MBP using their company name and Unified Business Identifier (UBI) number. The MBP system connects to the WA Department of Labor and Industries (LNI) web site to confirm each contractor's UBI and complete all pertinent information including State Contractor Licenses numbers for each contractor's profile. A Contractor must have a current valid Construction or Electrical contractor license number to obtain an **Over-the-Counter** (OTC) permit. Plan Review applications bypass the contractor validation *as the jurisdictions will complete the license verification during the review process.*

**Jurisdictions can perform the following actions to a Contractor Account:**

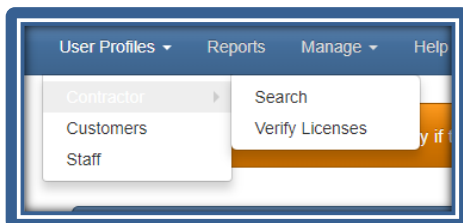
- Remove associated Company Users
- Add and Edit Jurisdiction/Local Business License information
- Add notes to their account
- Change the Status (Active or not)



**NOTE:** All Contractor Company address and license data comes from the LNI interface and cannot be modified. If the Contractor has changed anything on the LNI site that hasn't been updated in MBP, please contact MBP support.

## Search

USER PROFILES → Contractor → Search allows you to search for a contractor company in MBP using name, UBI#, Professional License#, or with Expiration Date Ranges.



## Verify Licenses

Allows Jurisdictions to verify a Contractor's local business license (if required). The counter on the **Menu bar** indicates how many new licenses need to be verified:



**Steps:**

1. Click on USER PROFILES → Contractor → Verify Licenses OR select 'View License Requests' on the Landing page.

**When done, click Update to Save changes. An email will be sent to the contractor.**

|        |        | Applied Date | Company Name              | License Number | Expiration Date | Approve? | Notes |
|--------|--------|--------------|---------------------------|----------------|-----------------|----------|-------|
| Update | Cancel | 5/17/2016    | HOLLENBECK EXCAVATING LLC | TEST123        | not required    | Pending  |       |
| Edit   |        | 6/2/2016     | CDM Constructors Inc      | TEST23         | not required    | Pending  |       |
| Edit   |        | 6/2/2016     | LEO SIDING                | test123        | not required    | Pending  |       |

**Indicate if Approved or not: Select Yes or No**

**Click Edit to make changes.**

## Contractor Registration

The following is information for registering as a contractor in case you need to assist a contractor registering on MBP. (More detailed information is on the MyBuildingPermit.com Help page [here](#)).

This process is used by licensed contractors to create an account on MyBuildingPermit.com. When registering a new company on MBP, state license validation is required, and some jurisdictions require local business licenses as well before a licensed contractor can submit a permit application.

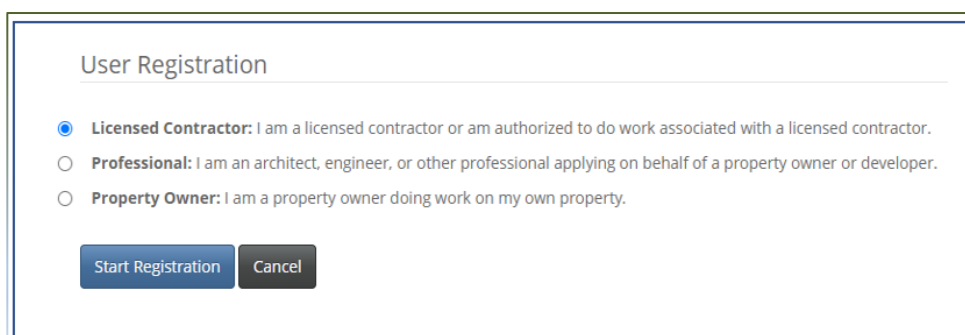



**NOTE:** A company UBI may only be registered one time with MBP; however, there can be multiple user accounts associated with a single company.

## Registering a Licensed Contractor Account

Accounts are created only in the ePermit (permit application) site. Contractors must log in to the ePermit site to create their accounts.

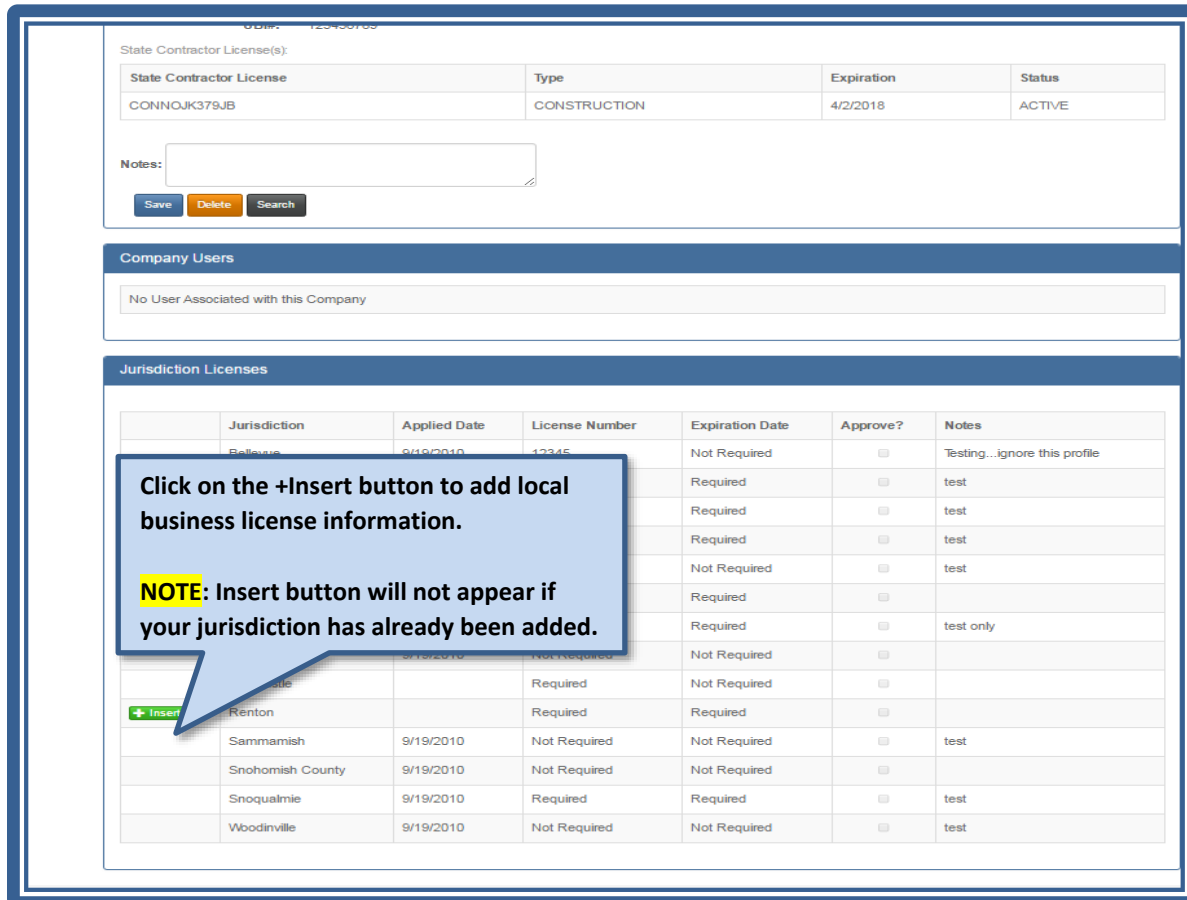
1. Click Create an Account on the MyBuildinPermit.com Login Page.
2. On the User Registration page, select Licensed Contractor.
3. Enter WA State UBI number and click Search.
4. Complete the Contractor Registration.
5. Verify Company Information and enter Phone Number.
6. Enter Jurisdiction License information (must enter at least 1).
7. Enter User Account Information.
8. Complete Review and Certify.
9. Exit the Registration Process or Register with another Company.





## Adding a Jurisdiction to a Contractor's Account

Find the company through a Contractor Search on the Admin site (User Profiles → Contractor → Search).



State Contractor License(s):

| State Contractor License | Type         | Expiration | Status |
|--------------------------|--------------|------------|--------|
| CONNOJK379JB             | CONSTRUCTION | 4/2/2018   | ACTIVE |

Notes:

Save Delete Search

**Company Users**

No User Associated with this Company

**Jurisdiction Licenses**

|                 | Jurisdiction     | Applied Date | License Number | Expiration Date | Approve?                 | Notes                         |
|-----------------|------------------|--------------|----------------|-----------------|--------------------------|-------------------------------|
|                 | Bellevue         | 8/19/2010    | 12345          | Not Required    | <input type="checkbox"/> | Testing...ignore this profile |
|                 |                  |              |                | Required        | <input type="checkbox"/> | test                          |
|                 |                  |              |                | Required        | <input type="checkbox"/> | test                          |
|                 |                  |              |                | Required        | <input type="checkbox"/> | test                          |
|                 |                  |              |                | Not Required    | <input type="checkbox"/> | test                          |
|                 |                  |              |                | Required        | <input type="checkbox"/> |                               |
|                 |                  |              |                | Required        | <input type="checkbox"/> | test only                     |
|                 |                  |              |                | Not Required    | <input type="checkbox"/> |                               |
|                 |                  |              |                | Not Required    | <input type="checkbox"/> |                               |
| <b>+ Insert</b> | Renton           |              | Required       | Required        | <input type="checkbox"/> |                               |
|                 | Sammamish        | 9/19/2010    | Not Required   | Not Required    | <input type="checkbox"/> | test                          |
|                 | Snohomish County | 9/19/2010    | Not Required   | Not Required    | <input type="checkbox"/> |                               |
|                 | Snoqualmie       | 9/19/2010    | Required       | Required        | <input type="checkbox"/> | test                          |
|                 | Woodinville      | 9/19/2010    | Not Required   | Not Required    | <input type="checkbox"/> | test                          |

**Click on the +Insert button to add local business license information.**

**NOTE:** Insert button will not appear if your jurisdiction has already been added.

## Customer Accounts

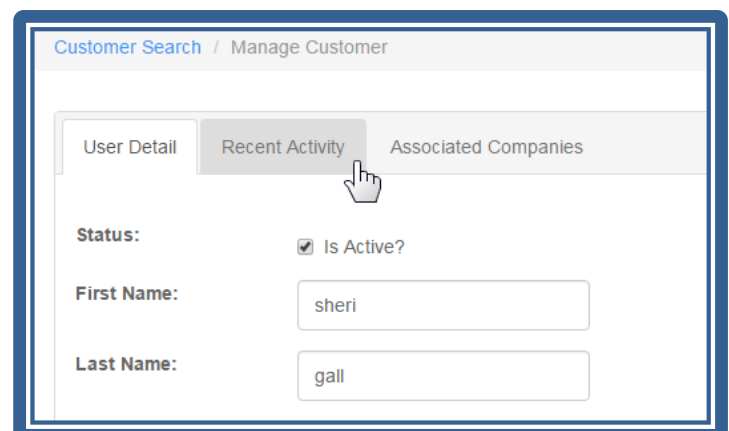
USER PROFILES → Customers allows you to search accounts by either a Username or Email address.

You can:

- Change Status – Active or not
- Edit Names and Email Address

**And if they are a Contractor Company:**

- See Recent permit activity and Associated Companies




Customer Search / Manage Customer

User Detail Recent Activity Associated Companies

**Status:** ☒ Is Active?

**First Name:**

**Last Name:**

 **REMINDER:** Passwords **cannot** be reset by Admin. They must use the “Forgot Username / Forgot Password” on the Log In screen.

## Staff Accounts

Allows you to search your jurisdiction’s users and modify:



- Status
- Names
- Email
- Change staff User Levels (JurisdictionAdmin level only)
- Add a new staff account (JurisdictionAdmin level only)

## Creating a New Staff Account

1. Select USER PROFILES → Staff.



The screenshot shows the 'User Profiles' section of the application. A search bar contains 'sgalloway' and a 'Search' button. A '+ New' button is next to it. A callout points to the search bar: 'First, search for user to be added to make sure no profile already exists.' Another callout points to the '+ New' button: 'If no results found, click +New to add.' Below the search bar, there are radio buttons for 'Status: Active', 'Inactive', and 'Both'. A table lists user profiles with columns: User Name, First Name, Last Name, Email, Jurisdiction, Role, Created, and Active. Two profiles are shown: 'sgalloway' (Sheri Galloway, sgalloway@ecitygov.net, Bellevue, SystemAdmin, 10/14/2014 10:45:00 AM, True) and 'sgalloway-both' (Sheri Galloway, tjones@ecitygov.net, Bothell, SystemAdmin, 10/23/2015 9:16:00 AM, True). Each row has an 'Edit' button. A callout points to the 'Edit' button for 'sgalloway-both': 'You can Edit existing profiles.'

|   | User Name      | First Name | Last Name | Email                  | Jurisdiction | Role        | Created                | Active |
|---|----------------|------------|-----------|------------------------|--------------|-------------|------------------------|--------|
|  | sgalloway      | Sheri      | Galloway  | sgalloway@ecitygov.net | Bellevue     | SystemAdmin | 10/14/2014 10:45:00 AM | True   |
|  | sgalloway-both | Sheri      | Galloway  | tjones@ecitygov.net    | Bothell      | SystemAdmin | 10/23/2015 9:16:00 AM  | True   |

## Add/Edit Staff

[Staff Search](#) / [Add Staff](#)

Jurisdiction:

Status: ☒ Is Active?

First Name:

Last Name:

User Name:

Password:

Email:

User Level:

All new accounts have a default password of Welcome1.

Click Save to create profile.

Complete the following fields:

- First Name
- Last Name
- User Name (first letter of first name and last name)
- Email

Set the applicable User Level. Click the '?' for description of each level.

Select One  
Select One  
JurisdictionReviewer  
JurisdictionStaff  
JurisdictionAdmin  
Support  
SystemAdmin



**NOTE:** It is good practice to inactivate any Staff accounts for people no longer at your jurisdiction. Edit the staff profile and deselect the Active indicator under Status.

## Setting User Levels

Only Jurisdiction Administrators can set User Levels. Clicking the “?” next to the User Level will give you a pop-up with a description of what each level can access within MBP.

### Administrative Users

There are four user levels to choose from within MBP:

1. System Admin
2. Jurisdiction Admin
3. Jurisdiction Staff
4. Jurisdiction Reviewer

### System Admin

Application developers, application project leads, and support staff are assigned the user level of System Admin. These users have access to edit all applicable fields, as well as enter and save changes for all jurisdictions and customers within MBP.

### Jurisdiction Users

Jurisdiction administrative staff have the choice of three defined user levels:

1. Jurisdiction Admin
2. Jurisdiction Staff
3. Jurisdiction Reviewer

### Jurisdiction Admin

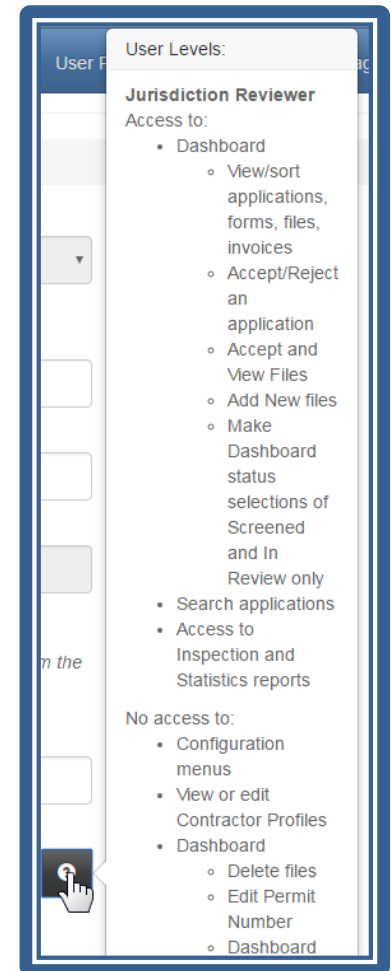
Users have the highest access and are engaged in creating and editing application configurations.

### Jurisdiction Staff

Users at this level have more limited access and are more engaged in the daily review and processing of OTC and plan review applications. **Note:** This user level has no access to configuration menus.

### Jurisdiction Reviewer

Users at this level have the most limited access. Like the Staff level, users are more engaged in the daily review and processing of OTC and plan review applications. **Note:** This user level has no access to configuration menus, cannot view/edit Contractor profiles, has limited Jurisdiction Dashboard access, and cannot create, edit, or delete invoices.



## Managing Jurisdiction Information in MBP

Use the Manage menu to configure and customize MBP for your jurisdiction. Most of these settings and items are managed by Jurisdiction Admins to control what choices and information an applicant has available, or needs to submit, during the application process.

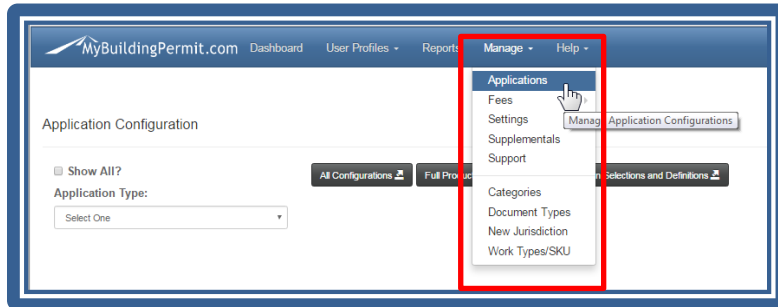
### Using the Manage Menu

Under **Manage** you will find the following menu options:

- [Applications](#) – Create new or modify existing application configurations which control the choices information required when applicants are applying for a permit.
- [Fees](#) – Fees for Over the Counter (OTC) applications must be configured in MBP. Plan Review applications will have invoices generated with fee information from your backend permitting system.
- [Settings](#) – Jurisdiction Information, Application Types you will accept on MBP, Inspection Information and Holidays (only if this information isn't available from your backend permitting system).
- [Supplementals](#) – Additional questions and information that can be added to any Application Configuration.
- [Support](#) – Where you can regenerate a permit pdf, email, remove unpaid invoices, and add delegates.

## Configuring Applications

Each jurisdiction sets up their own application configurations. There are two options for accessing the application configuration management page. From the Jurisdiction Admin site, use the **MANAGE** menu then select Applications:



Each Application Configuration can have the following components:

- [Application, Project, Activity and Scope Types](#) (aka the four “buckets”)— all four “buckets” and *at least 1* Work Type are **required** for each Application Configuration.
- [Pre-Application Message](#) – message that displays immediately after the four “buckets” are selected on the application page.
- [Work Types](#) – additional information for the permit which displays on the Project Details page (includes things like fixtures, heating source, materials used, quantities of items, etc.).
- [Supplementals](#) – additional questions or information you need from the applicant.
- [Document Types](#) – list of documents the applicant will need to upload with their application.
- [Submittal Info](#) – information the jurisdiction needs to tell the applicant pertinent to submitting this application type.
- [General Process](#) – information the jurisdiction needs to communicate to the applicant regarding the general permit application process such as contact information, timeframes, etc.

## Customer Application Process and Selections

As the customer progresses through the MBP Permit Application Process, each selection and piece of data they enter is determined by the jurisdiction. The jurisdiction “configures” their applications offered through MBP on the Jurisdiction Admin site using the **MANAGE → Applications** feature.

The options available under **Application Type, Project Type, Activity Type, and Scope of Work** (sometimes referred to as “buckets”) are configured by each jurisdiction based on what maps best to their backend permitting system configurations. MBP sends permit data to the jurisdiction’s backend permitting system and receives information back. The jurisdiction’s Web Service will take the mapped permit data and then insert it into the backend permitting system’s database.

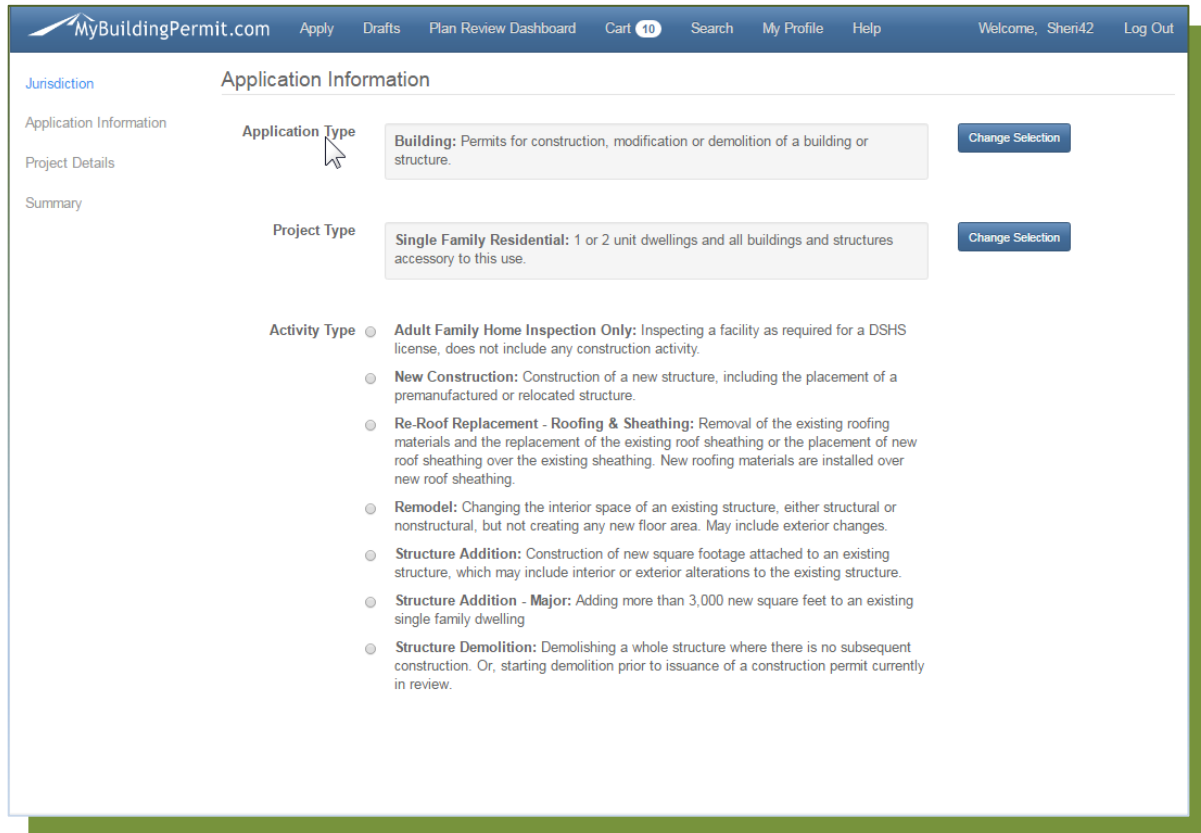
These “buckets” are for the applicant’s convenience, so they better understand which choices to make during the application process. Each type listed also contains a brief description/definition to assist the customer when making their selection.

The screenshots illustrate the application process flow:

- Screenshot 1:** Shows the 'Jurisdiction' dropdown menu with options: Burien, -- Select One --, Bellevue, Bothell, Burien, Issaquah. A mouse cursor is pointing at 'Bothell'.
- Screenshot 2:** Shows the 'Application Type' dropdown menu with options: Building: Permits for construction, modification or demolition of a building or structure; Clearing and Grading: Permits for land surface disturbance or tree and vegetation maintenance; Electrical: Permits for electrical equipment or systems. A mouse cursor is pointing at 'Building'.
- Screenshot 3:** Shows the 'Project Type' dropdown menu with options: Mixed Use: Residential and non-residential uses located within the same building and structures accessory to this use; Multifamily Residential: 3 or more unit dwellings and all buildings and structures accessory to this use. A mouse cursor is pointing at 'Mixed Use'.
- Screenshot 4:** Shows the 'Activity Type' dropdown menu with options: Addition: Work associated with the construction of new square footage attached to an existing structure, which may include alterations to the existing structure; Alteration: Modifying an existing system resulting in a change to the original arrangement, use, or purpose. Does not include any new floor. A mouse cursor is pointing at 'Addition'.
- Screenshot 5:** Shows the 'Structure Type - Required' dropdown menu with options: Accessory Dwelling Unit - Attached, Accessory Dwelling Unit - Detached, Carport - Attached, Carport - Detached, Duplex, Garage - Attached, Garage - Detached, Other Structure, Shed or Outbuilding, Single Family Dwelling, Townhouse. A mouse cursor is pointing at 'Single Family Dwelling'.

Below is an example of the Activity Type options available to Bellevue applicants after they've selected an Application Type of Building, and Project Type of Single Family Residential:

Customer/Applicant Apply Screen



The screenshot shows the 'Application Information' section of the MyBuildingPermit.com application screen. The user is logged in as 'Sheri42'. The left sidebar shows 'Jurisdiction' as the active section, with 'Application Information', 'Project Details', and 'Summary' as sub-sections. The main content area is titled 'Application Information' and contains three sections: 'Application Type', 'Project Type', and 'Activity Type'. 'Application Type' is set to 'Building: Permits for construction, modification or demolition of a building or structure.' with a 'Change Selection' button. 'Project Type' is set to 'Single Family Residential: 1 or 2 unit dwellings and all buildings and structures accessory to this use.' with a 'Change Selection' button. 'Activity Type' is a list of radio buttons with the following options: 'Adult Family Home Inspection Only: Inspecting a facility as required for a DSHS license, does not include any construction activity.', 'New Construction: Construction of a new structure, including the placement of a premanufactured or relocated structure.', 'Re-Roof Replacement - Roofing & Sheathing: Removal of the existing roofing materials and the replacement of the existing roof sheathing or the placement of new roof sheathing over the existing sheathing. New roofing materials are installed over new roof sheathing.', 'Remodel: Changing the interior space of an existing structure, either structural or nonstructural, but not creating any new floor area. May include exterior changes.', 'Structure Addition: Construction of new square footage attached to an existing structure, which may include interior or exterior alterations to the existing structure.', 'Structure Addition - Major: Adding more than 3,000 new square feet to an existing single family dwelling', and 'Structure Demolition: Demolishing a whole structure where there is no subsequent construction. Or, starting demolition prior to issuance of a construction permit currently in review.'

Each of the options available under **Application Type, Project Type, Activity Type, and Scope of Work** were first agreed upon by the MBP committees. A formal request must be submitted to the MBP Project/Program manager to have a new one created.

After the first four “buckets” or types are selected by the applicant, the fifth “bucket” is Project Details. Each jurisdiction determines the information needed from the customer for each specific application. The Project Details page contains “work types” also referred to as “**SKU's**”. These are categorized into logical groups and can be radio buttons, check boxes, quantities, or text entries.



See the following example:

Bellevue Building, Single Family Residential, Re-Roof Replacement, Residence Application Configuration looks like this when the jurisdiction is configuring:

**Work Types Configuration Table:**

| Work Type Name                            | Category                             | SKU  | Fee Code | Review Req?              | Activate All?                       | Required?                |
|---|--------------------------------------|------|----------|--------------------------|-------------------------------------|--------------------------|
| With new Wood Shingle                     | What is the new roofing material? *  | 1101 |          | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| With new Asphalt Shingle                  | What is the new roofing material? *  | 1102 |          | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| With new Wood Shake                       | What is the new roofing material? *  | 1103 |          | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| With new Factory Coated Metal Roof Panels | What is the new roofing material? *  | 1104 |          | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Roof Rafters or Trusses 16" on center     | What is the existing roof structure? | 1201 |          | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

**Project Details Form (Customer/Applicant View):**

**Project Details**  
 BELLEVUE  
 Building / Single Family Residential / Re-Roof Replacement - Roofing & Sheathing / Residence

**What is the existing roofing material? - Required**

- ☐ Asphalt Shingle
- ☐ Clay, Cement or Slate
- ☐ Copper
- ☐ Factory Coated Metal Roof Panels
- ☐ Single Ply (PVC membrane)
- ☐ Torchdown/Hotmop
- ☐ Wood Shake
- ☐ Wood Shingle

**What is the new roofing material? - Required**

- ☐ Asphalt Shingle
- ☐ Clay, Cement or Slate
- ☐ Copper
- ☐ Factory Coated Metal Roof Panels
- ☐ Single Ply (PVC membrane)
- ☐ Torchdown/Hotmop
- ☐ Wood Shake
- ☐ Wood Shingle

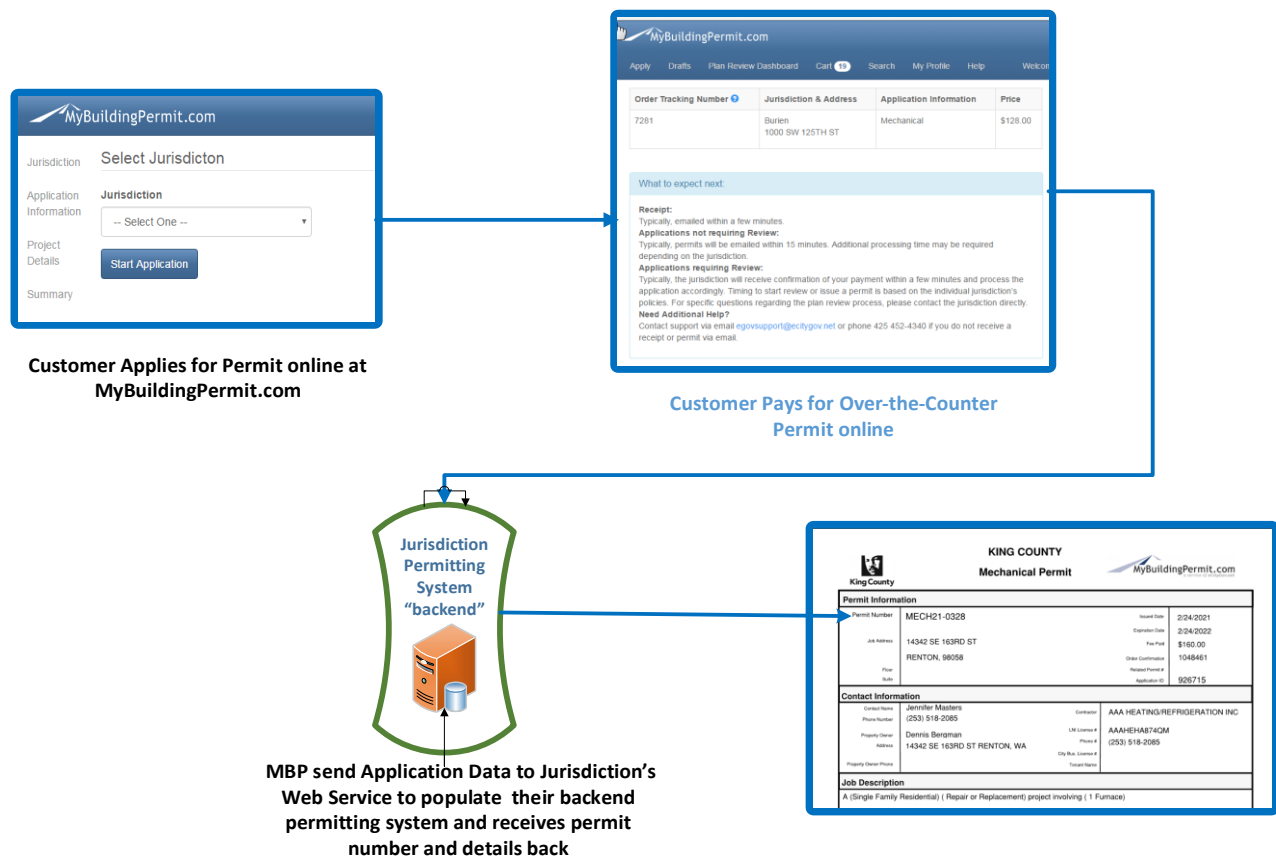
And looks like this to the Customer/Applicant:

## Application Integration

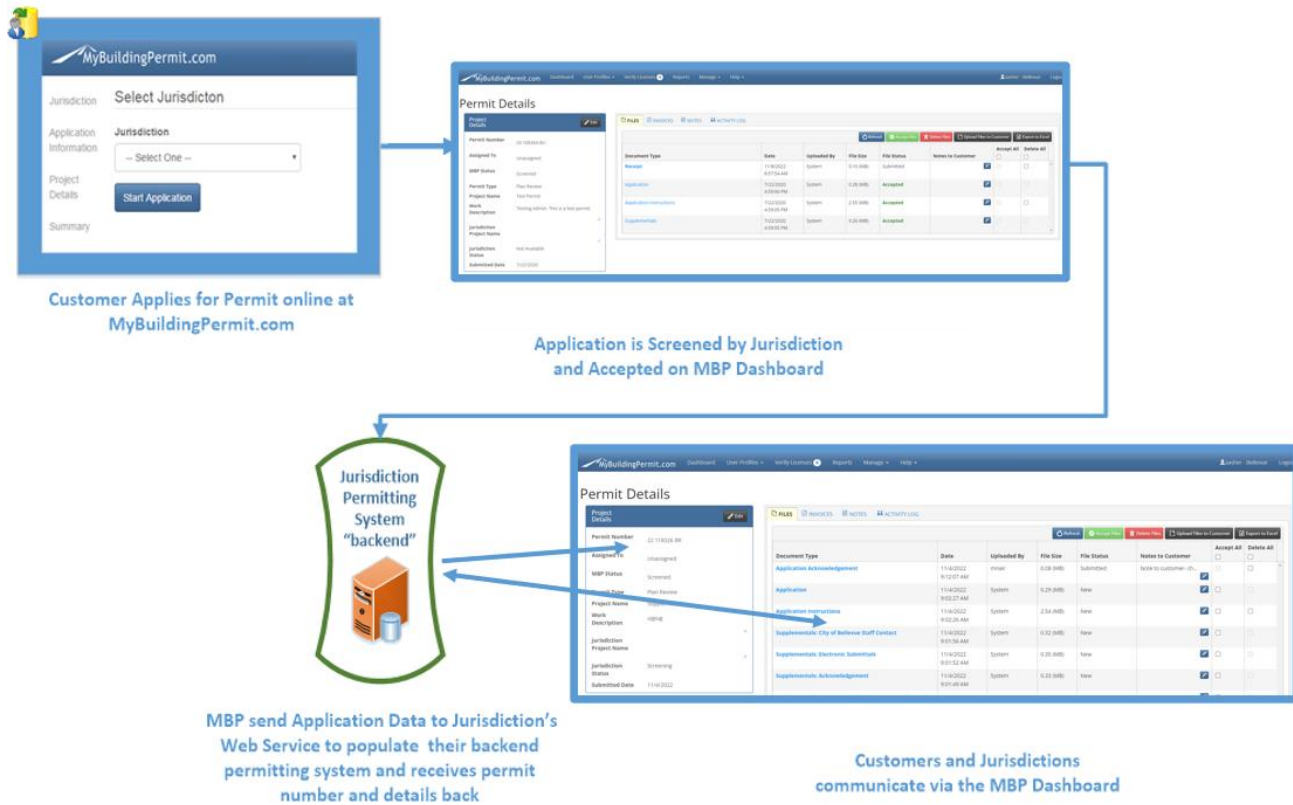
The Application Configuration, including the SKU detail and fees, will be included in the XML output from MBP that is sent to the jurisdiction via Web Services and must be *mapped* by you to your backend permitting systems. For more information on MBP integration process see the MBP Integration Section in this document as well as the [MBP Integration Guide](#).

### High level of how MBP Integrates with Jurisdiction Backend Permitting Systems

#### Over the Counter/Non-Plan Review



## Plan Review Permit



- An Application Configuration can be activated and/or each individual Work Type within the configuration can separately be designated as active or not. This allows you to set up Configurations and/or Work Types without making them visible on the applicant screen. This is beneficial for testing or preparing for rolling out new Applications in the future or when your permit fees change. You can configure everything and wait to activate it until you are ready for it to display for customers.
- You may configure multiple applications in MBP that map to a single location in your backend Permitting System. This will aid the applicant as they will have more than 1 way to get the correct permit.
- Consider the Customer/Applicant's thought process when applying. Contemplate how a typical customer would think and what information and options you need to provide to lead the customer to the correct permit.
- Think about your Jurisdiction's workflow and backend processes.
- Determine which permits can be obtained as Over the Counter/Non-Plan Review.
- Create a spreadsheet of your permit types and how they map to MBP "buckets", if Plan Review is required or not, fees for Over-the-Counters, etc.

[illegible]

## Selecting Configuration Types

For all application configurations you must first select one type from each of the four buckets:

**NOTE:** Select 'Show All?' to display *all* possible choices within each type. If not selected, you will see *only* choices you have already configured.

### APPLICATION Type

☐ Show All?

Application Type:

Select One

- Building [111]
- Clearing and Grading [6]
- Electrical [31]
- Fire [44]
- Land Use [38]
- Mechanical [15]
- Plumbing [15]
- Right-of-Way [7]
- Sign [8]
- Utilities [8]

The number in brackets next to the Application Type tells you how many configurations you already have for that type.

### PROJECT Type

Application Configuration

☒ Show All?

Application Type:

Building [111]

All Configurations

Full Product Catalog

PreApplication Selections and Definitions

Project Type:

Select One

- Mixed Use
- Multifamily Residential
- Nonresidential
- Single Family Condominium Unit
- Single Family Residential
- Single Family Residential Attached

### ACTIVITY Type

Reports Manage Help

All Configurations

Full Product Catalog

PreApplication Selections and Definitions

Project Type:

Single Family Residential

Activity Type:

Select One

- Adult Family Home Inspection Only
- Conversion
- Deconstruction
- Demolition
- Establish a Registered Basic
- Expanded Work Hours
- Exterior Alteration
- Family Home Day Care Inspection Only
- Inspection Only

## SCOPE of Work

PreApplication Selections and Definitions

Activity Type:

Scope of Work:

- Select One
- Accessory Building
- Accessory Dwelling Unit
- Combination
- Commercial Coach
- Deck or Porch
- Detention Vault
- Duplex
- Factory Assembled Structure
- Foundation Only
- Manufactured Home
- Miscellaneous Structure

Once you have the “buckets” selected, use the page tabs to configure the following: Pre-Application Message, Work Types, Supplementals, Submittal Info, and General Process Info (see descriptions of each [here](#)).

PreApplication Msg. Work Types Supplementals Document Types Submittal Info. General Process Info.

## Creating a Pre-Application Message:

The Pre-Application message is for any information the jurisdiction wants to display *immediately* after the applicant selects the first four buckets. This message will be displayed in yellow on the customer application screen.

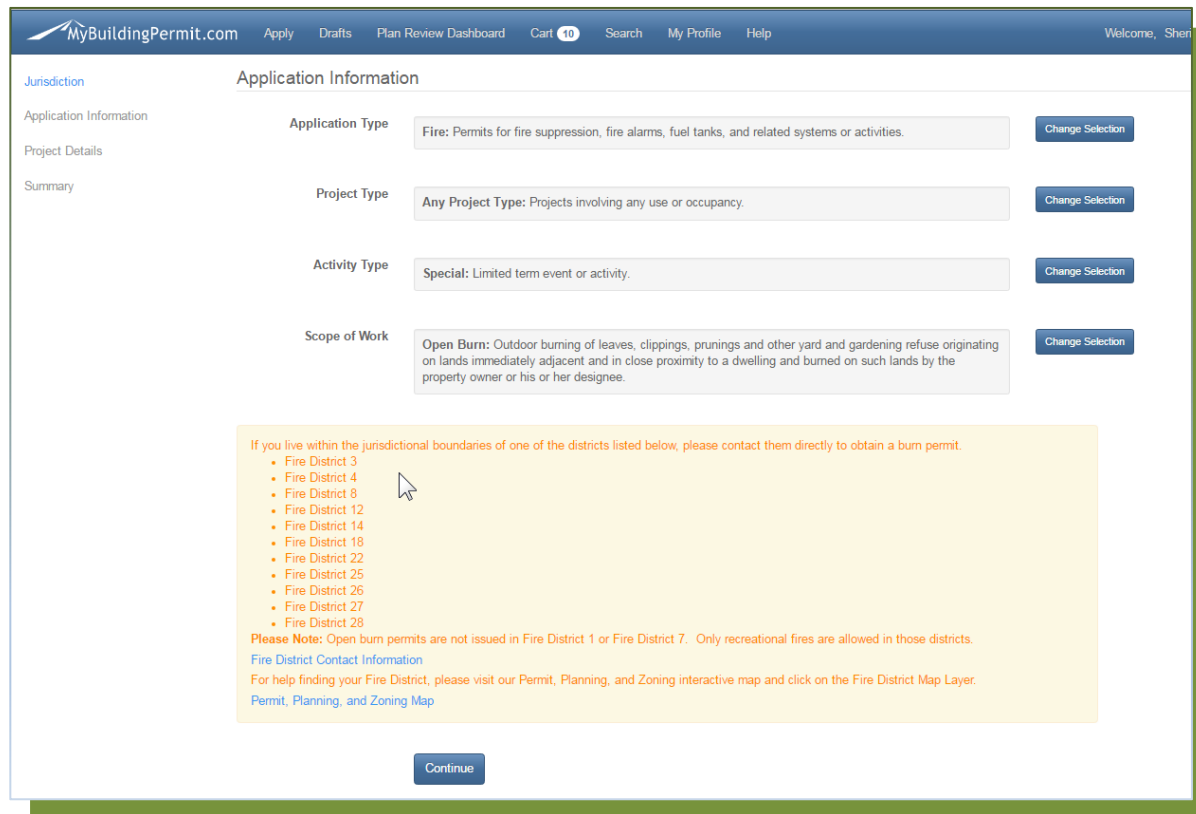
### Steps:

After selecting the applicable four buckets: Application Type, Project Type, Activity Type, Scop of Work, Click on the PreApplication Msg. tab:

The screenshot shows the 'Application Configuration' page. At the top, there are filters for 'Show All?', 'All Configurations', 'Full Product Catalog', and 'PreApplication Selections and Definitions'. Below these are dropdown menus for 'Application Type' (set to 'Fire [84]'), 'Project Type' (set to 'Any Project Type'), 'Activity Type' (set to 'Special'), and 'Scope of Work' (set to 'Open Burn'). There are checkboxes for 'Configuration Active?' and buttons for 'Clone' and 'Delete Configuration'. A tabbed interface shows 'PreApplication Msg.' as the active tab, with other tabs including 'Work Types', 'Supplementals', 'Document Types', 'Submittal Info.', and 'General Process Info.'. The 'PreApplication Msg.' tab contains a checkbox for 'Enable Pre-Application Message?' and a rich text editor for the message content. Below the editor is a checkbox for 'Stop Applicant from Proceeding?' and a 'Save' button. Five callout boxes provide instructions: 1. 'Click to enable the Pre-Application message.' points to the 'Enable Pre-Application Message?' checkbox. 2. 'Click if you want to stop applicant from proceeding with the application and display message instead.' points to the 'Stop Applicant from Proceeding?' checkbox. 3. 'Type message text in provided text box.' points to the rich text editor. 4. 'Click Save to keep changes to configuration.' points to the 'Save' button. 5. A tooltip states: 'The PreApplication Message will only display if checked.'

**NOTE:** Clicking the “Stop Applicant from Proceeding?” box will display the message and will not allow the applicant to continue or submit this specific application. This would be beneficial if your jurisdiction does not issue Electrical Permits and you need to refer the applicant to the WA Department of Labor and Industries. Not having Electrical in your application type selection could cause confusion and increase phone calls to your permit team. Instead, you can configure the Electrical permit with the Pre-Application message with instructions for the applicant on how to proceed.

Customer Application Screen: Example of a Pre-Application Message



The screenshot shows the 'Application Information' section of the MyBuildingPermit.com website. The page has a blue header with the logo and navigation links. The main content area is white with a green sidebar on the left. The 'Application Information' section contains four rows of information, each with a 'Change Selection' button:

- Application Type:** Fire: Permits for fire suppression, fire alarms, fuel tanks, and related systems or activities.
- Project Type:** Any Project Type: Projects involving any use or occupancy.
- Activity Type:** Special: Limited term event or activity.
- Scope of Work:** Open Burn: Outdoor burning of leaves, clippings, prunings and other yard and gardening refuse originating on lands immediately adjacent and in close proximity to a dwelling and burned on such lands by the property owner or his or her designee.

Below these rows is a yellow box containing a message:

If you live within the jurisdictional boundaries of one of the districts listed below, please contact them directly to obtain a burn permit.

- Fire District 3
- Fire District 4
- Fire District 8
- Fire District 12
- Fire District 14
- Fire District 18
- Fire District 22
- Fire District 25
- Fire District 26
- Fire District 27
- Fire District 28

Please Note: Open burn permits are not issued in Fire District 1 or Fire District 7. Only recreational fires are allowed in those districts.

[Fire District Contact Information](#)

For help finding your Fire District, please visit our [Permit, Planning, and Zoning interactive map](#) and click on the Fire District Map Layer.

[Permit, Planning, and Zoning Map](#)

At the bottom of the page is a 'Continue' button.

## Adding a Work Type/SKU

Work Types/SKU's are permit-type specific. This means you will see different choices for BUILDING permit types than with FIRE. The Work Types are displayed on the Project Details page during the application process and allow you to gather more specific information about the work that will be completed on a selected permit.

Each Work Type has a unique identifying number known as a **SKU** which will be sent to your backend permitting system via an XML text file with the SKU number, your jurisdiction short name (i.e. KL for Kirkland), and the permit type: KL\_MECH\_5476. Your Web Service integration will translate this to your backend system database.

Work Types/SKU's are also specific to each Application Type and associated with a particular Category. This determines how they will be organized on the Customer application screen.



Example of a Jurisdiction Application Configuration

Application Configuration

☐ Show All?

[All Configurations](#)
[Full Product Catalog](#)
[PreApplication Selections and Definitions](#)

**Application Type:**

**Project Type:**

**Activity Type:**

**Scope of Work:**

☒ Configuration Active?
 

[Clone](#)
[Delete Configuration](#)

[PreApplication Msg.](#)
[Work Types](#)
[Supplementals](#)
[Document Types](#)
[Submittal Info.](#)
[General Process Info.](#)

**Work Types**

[Export](#)
[+ Add](#)

| Work Type Name                    | Category              | SKU  | Fee Code               | Review Req?                         | <input type="checkbox"/> Activate All? | Required?                           |                        |
|-----------------------------------|-----------------------|------|------------------------|-------------------------------------|--|-------------------------------------|------------------------|
| Frequency of Burning              | Open Burn Information | 4855 | <a href="#">Assign</a> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>    | <input checked="" type="checkbox"/> | <a href="#">Delete</a> |
| Anticipated Duration of Each Burn | Open Burn Information | 4857 | <a href="#">Assign</a> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>    | <input checked="" type="checkbox"/> | <a href="#">Delete</a> |

Will show as this on the Customer Application Project Details Screen:

MyBuildingPermit.com
 Apply
 Drafts
 Plan Review Dashboard
 Cart 10
 Search
 My Profile
 Help
 Welcome, Sheri42
 Log Out

Jurisdiction
 Application Information
 Project Details
 Summary

**Project Details**

SNOHOMSH COUNTY
 Fire / Any Project Type / Special / Open Burn
 Expand All Collapse All
 Open Burn Information - Required
 

Text

\* Anticipated Duration of Each Burn

Text

\* Frequency of Burning

Continue

**Steps:**

Select the applicable four buckets: Application Type, Project Type, Activity Type, Scop of Work:

Application Configuration

☐ Show All?

**Application Type:** Fire [1] **Project Type:** Any Project Type **Activity Type:** Special **Scope of Work:** Sparklers

☐ Configuration Active?

**Work Types**

| Work Type Name           | Category | SKU | Fee Code | Review Req? | <input type="checkbox"/> Activate All? | Required? |
|--------------------------|----------|-----|----------|-------------|--|-----------|
| No Work Types configured |          |     |          |             |  |           |

Export + Add

Application Configuration

☐ Show All?

**Application Type:** Fire [84] **Project Type:** Any Project Type **Activity Type:** Special **Scope of Work:** Open Burn

☒ Configuration Active?

**Add Work Types**

Category: Event Date and/or Key Word Search Find Close

| Work Type Name          | Category   | SKU  | Fee Code | Req Review               | Is Active?               | Required                 |     |
|-------------------------|------------|------|----------|--------------------------|--------------------------|--------------------------|-----|
| Sparklers-Date of Event | Event Date | 4884 | None     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Add |
| Sparklers-Time of Event | Event Date | 4885 | None     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Add |

Click Add button for each Work Type to include in this configuration.

**NOTE:** Once a Work Type has been added it will be removed from the listing.

Application Configuration

☐ Show All? All Configurations Full Product Catalog PreApplication Selections and Definitions

Application Type:  Project Type:  Activity Type:  Scope of Work:

☒ Configuration Active? Clone Delete Configuration

PreApplication Msg. Work Types Supplementals Document Types Submittal Info. General Process Info.

Add Work Types Category:  and/or Key Word Search Find Close

| Work Type Name          | Category   | SKU  | Fee Code                          | Req Review               | Is Active?               | Required                 |                  |
|-------------------------|------------|------|-----------------------------------|--------------------------|--------------------------|--------------------------|------------------|
| Sparklers-Time of Event | Event Date | 4885 | <input type="text" value="None"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <span>Add</span> |

When all applicable Work Types have been added, Click Close to proceed.

**NOTE:** There is no need to select a Fee Code, or indicate if the type is Req Review, Active, or Required. These will be selected in the next steps.

Application Configuration

☐ Show All? All Configurations Full Product Catalog PreApplication Selections and Definitions

Application Type:  Project Type:  Activity Type:  Scope of Work:

☒ Configuration Active? Clone Delete Configuration

PreApplication Msg. Work Types Supplementals Document Types Submittal Info. General Process Info.

Export + Add

|                                   | Category              | SKU  | Fee Code            | Review Req?                         | <input type="checkbox"/> Activate All? | Required? |
|-----------------------------------|-----------------------|------|---------------------|-------------------------------------|--|-----------|
| Frequency of Burning              | Open Burn Information | 4855 | <span>Assign</span> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>    |           |
| Anticipated Duration of Each Burn | Open Burn Information | 4857 | <span>Assign</span> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>    |           |
| Sparklers-Date of Event           | Event Date            | 4884 | <span>Assign</span> | <input type="checkbox"/>            | <input type="checkbox"/>               |           |

Last edit date: 9/15/2016 4:01:00 PM by: sgalloway.

Newly added Work Types will be bold; hovering over the line will provide details of when it was added.

Indicate if the type requires review, is active, and if it is a required field.

For OTC/Non-Review configurations only, assign a Fee Code.

**NOTE:** Plan Review configurations will not use Fee Codes—jurisdictions will Invoice for any fees due.

**REMINDER:** When a Work Type is marked as Required on the configuration screen the categories will be marked with a Red Asterisk \*, which means an applicant must fill in at least one of the options in that category.

After a Fee Code has been added, hovering on the icon next to it will give additional details.

| Category              | SKU  | Fee Code               | Review | Required?                           |
|-----------------------|------|------------------------|--------|-------------------------------------|
| Open Burn Information | 4855 |                        |        | <input checked="" type="checkbox"/> |
| Open Burn Information | 4857 |                        |        | <input checked="" type="checkbox"/> |
| Event Date            | 4884 | BLDG - Reroof 11-25 sq |        | <input type="checkbox"/>            |

**Fee Code Detail**

Fee Code Name: BLDG - Reroof 11-25 sq

Effective Date: 2/18/2016

Fee Calc. Type: Flat

Amount: \$37

Percentage: 0%

Description: Reroof permits between 11 and 25 squares (1 square = 100 sq ft)

**NOTE:** See [FEE CODES](#) Section in this document for detailed instructions on creating Fee Codes.

## Adding Supplemental Questionnaires

Before you can add Supplementals to your configurations, you must create them in the system. Once they're saved, you can add them during the configuration process. For detailed information see [Managing Supplementals – Creating New Questionnaires](#).

You can provide additional information to the customer or gather supplemental details from the applicant using Supplemental configurations. Supplementals entered to a specific Application Configuration will display for the customer during the application process after they've entered the project details and all the contact information. You can utilize Supplementals to ask additional questions based on the entire Application Configuration, or limit to only display if a certain Work Type/SKU is selected by the applicant.

### Steps:

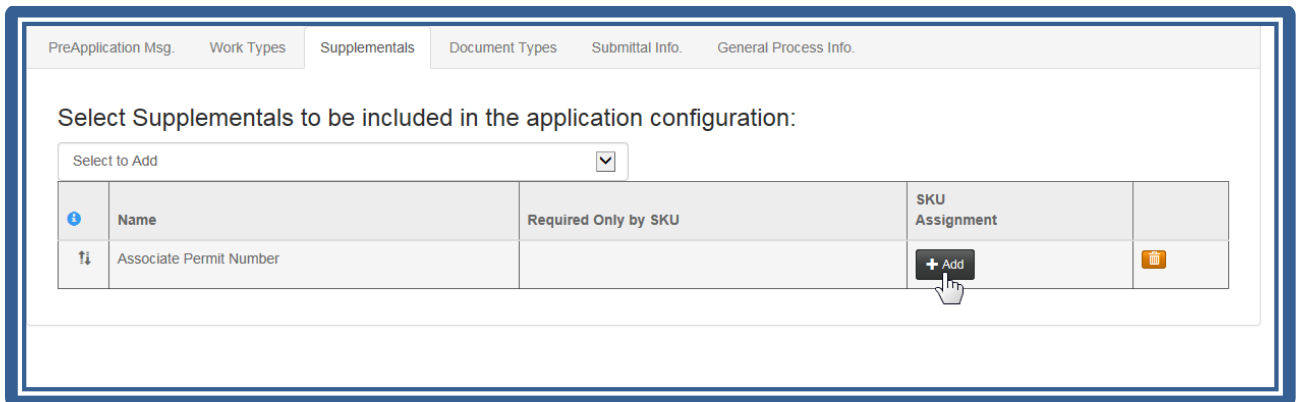
1. Select the applicable four buckets: Application Type, Project Type, Activity Type, Scop of Work.
2. Click on the **Supplementals** tab.
3. Click the **Select to Add** box and select the applicable pre-existing questionnaire you want to add.

Select Supplementals to be included in the application configuration:

Select to Add

- Associate Permit Number
- Associate Permit Number Copy
- Consumer Retail Fireworks Sales
- Fire Alarm Transmitter Only
- Fireworks Display
- Tanks and SEPA - SnoCo

4. If applicable, you can trigger this Supplemental questionnaire when *specific* SKUs are filled in on the customer's Application:



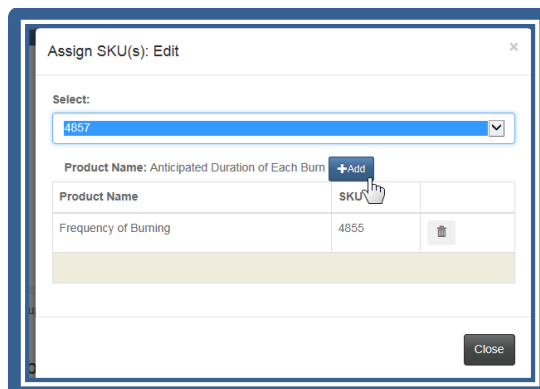
PreApplication Msg. Work Types Supplementals Document Types Submittal Info. General Process Info.

Select Supplementals to be included in the application configuration:

Select to Add ☐

|  | Name                    | Required Only by SKU | SKU Assignment |  |
|--|-------------------------|----------------------|----------------|--|
|  | Associate Permit Number |                      | + Add          |  |

- a. Click **+Add** button under SKU Assignment.
- b. Select appropriate SKU, click **Add**.



Assign SKU(s): Edit

Select:

4857

Product Name: Anticipated Duration of Each Burn +Add

| Product Name         | SKU  |  |
|----------------------|------|--|
| Frequency of Burning | 4855 |  |

Close

- c. You can add multiple SKUs to a Supplemental however, only the configured SKUs will appear in the drop-down list.
  - d. Click **Close**.
  - e. Use the **DELETE** Button to remove a SKU assignment.
5. If SKU assignment is **not** completed, this Supplemental will appear for this Application Configuration (Application Type, Project Type, Activity Type, Scop of Work) regardless of which SKUs/Work Types the customer fills in on the Project Details page.



**NOTE:** To create a new Supplemental questionnaire, use the the **MANAGE** Supplementals menu. See [Managing Supplementals – Creating New Questionnaires](#) for more details.

Example of a Customer Supplemental Screen

## Adding Document Types

For Plan Review applications, you can add Required and Optional/Additional **Document Types** which the applicant will upload with their applications. The Document Types list is a fixed list created by the MBP team. If you need a new Document Type created, submit a request on the Admin site under Manage > Settings > Document Request.


**Click the drop-down box "Select to Add" for a listing of available document types. Select the appropriate document and it will be added to your configuration.**

**You may set the document to be Required or Assign or Exempt it based on specific SKU's.**

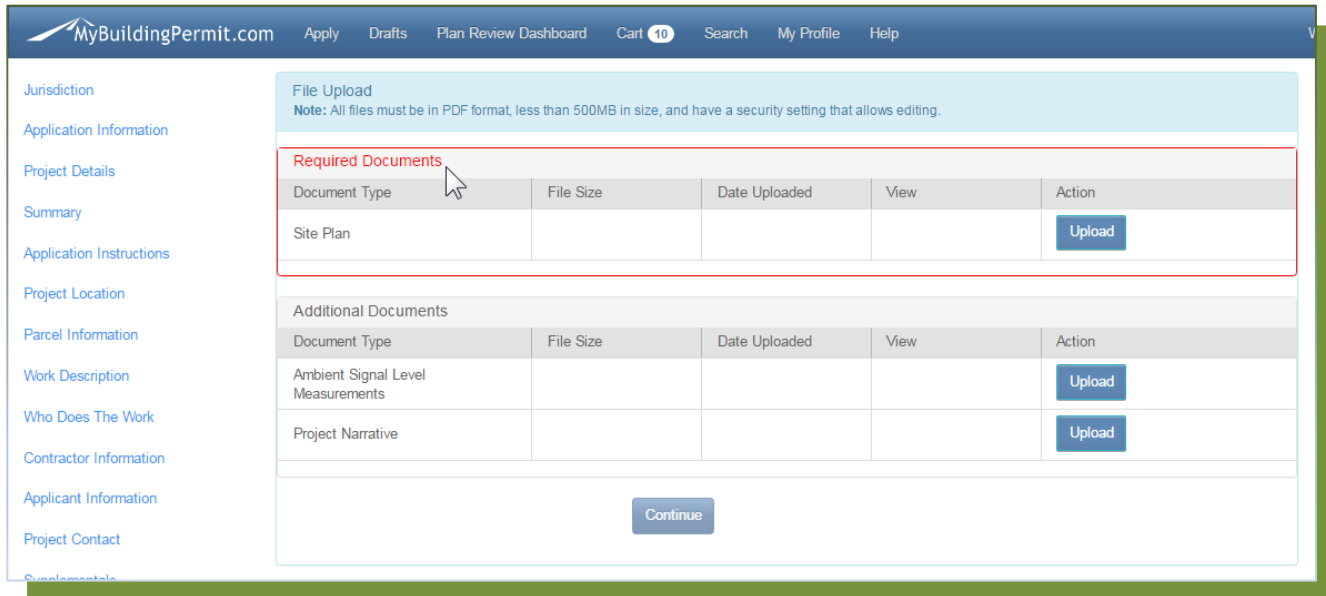
**You can change the order these documents display by using the arrows to drag and drop into the new order.**

**To remove a document type from the configuration, click the Trash icon.**

| Name              | Is Required?                        | Exception by SKU | Assign SKU                          |                                      |
|-------------------|-------------------------------------|------------------|-------------------------------------|--------------------------------------|
| Project Narrative | <input type="checkbox"/>            |                  | <input type="button" value="+Add"/> | <input type="button" value="Trash"/> |
| Site Plan         | <input checked="" type="checkbox"/> |                  | <input type="button" value="+Add"/> | <input type="button" value="Trash"/> |

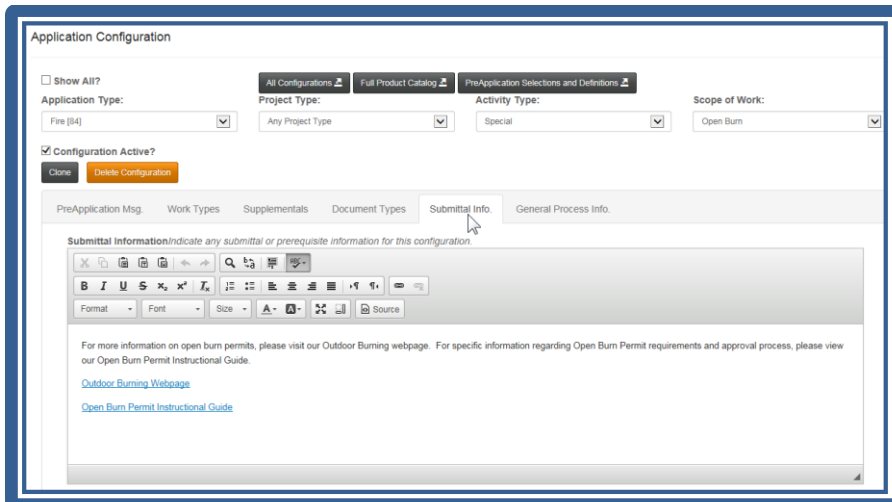
 **NOTE:** If a document is marked as required, SKU's assigned as exceptions will change it to optional. If a document is optional, SKU's assigned as exceptions will change it to required.


Example of a Customer Application File Upload Screen



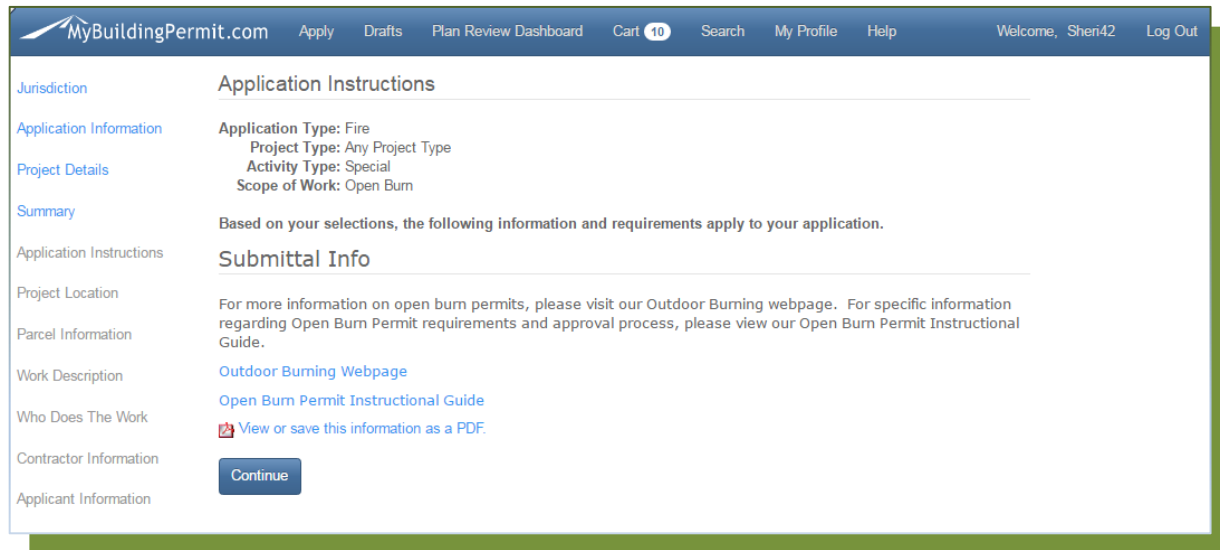
## Adding Submittal Information

Important information on submitting the Application, additional details to communicate to the applicant, and links to other documents and relevant information can be added to the Submittal Tab.



 **NOTE:** The information will appear on this application configuration only – it is **not** globally added to all applications.

Customer Application Instructions Screen – contains the Submittal Info from configuration



The screenshot shows the 'Application Instructions' screen on the MyBuildingPermit.com website. The left sidebar contains a navigation menu with links: Jurisdiction, Application Information, Project Details, Summary, Application Instructions (selected), Project Location, Parcel Information, Work Description, Who Does The Work, Contractor Information, and Applicant Information. The main content area is titled 'Application Instructions' and displays the following information:

- Application Type:** Fire
- Project Type:** Any Project Type
- Activity Type:** Special
- Scope of Work:** Open Burn

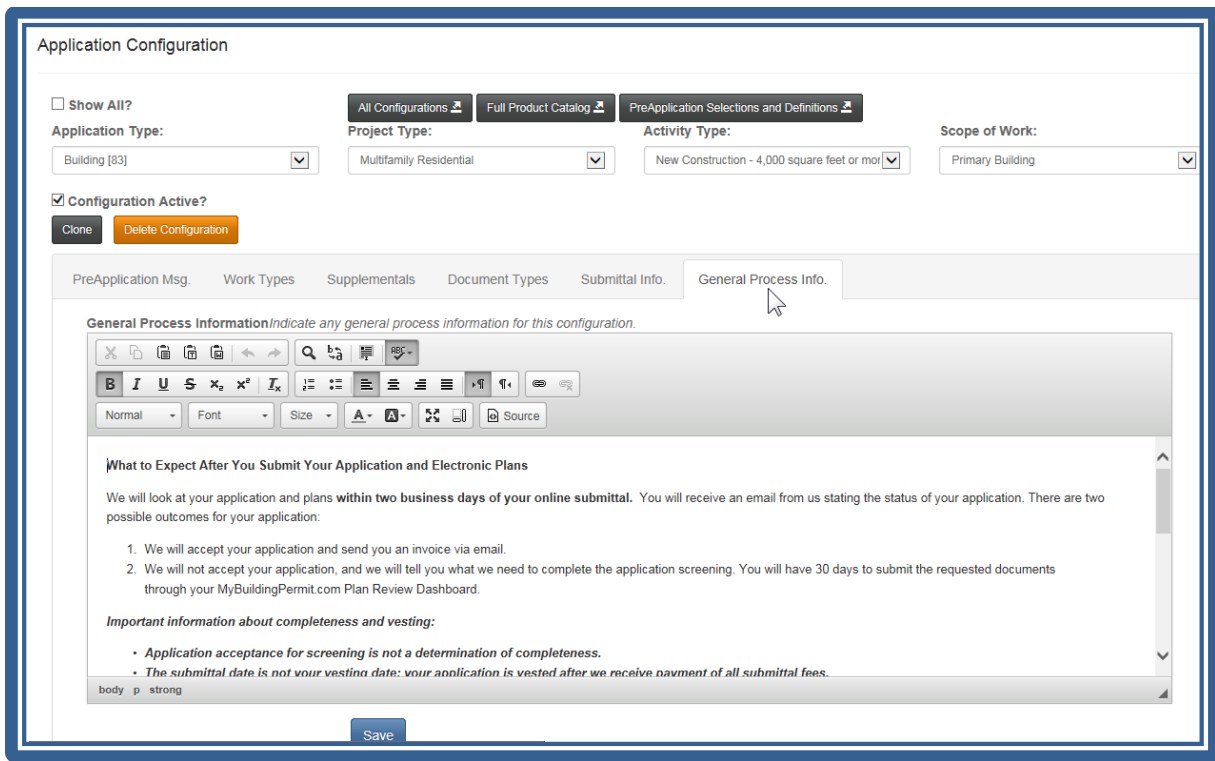
Below this, it states: 'Based on your selections, the following information and requirements apply to your application.'

The next section is titled 'Submittal Info' and contains the following text: 'For more information on open burn permits, please visit our Outdoor Burning webpage. For specific information regarding Open Burn Permit requirements and approval process, please view our Open Burn Permit Instructional Guide.'

Below the text are two links: 'Outdoor Burning Webpage' and 'Open Burn Permit Instructional Guide'. There is also a link that says 'View or save this information as a PDF' with a PDF icon. At the bottom of the main content area is a 'Continue' button.

## General Process Info Tab

Information on the General Process Tab will also show on the Application Instruction Screen when the applicant applies for this permit configuration. As with the Submittal Info, you may enter and format text and include hyperlinks to other documents.



The screenshot shows the 'Application Configuration' screen. At the top, there are tabs for 'All Configurations', 'Full Product Catalog', and 'PreApplication Selections and Definitions'. Below these are dropdown menus for 'Application Type' (Building [83]), 'Project Type' (Multifamily Residential), 'Activity Type' (New Construction - 4,000 square feet or more), and 'Scope of Work' (Primary Building). There is a checkbox for 'Configuration Active?' which is checked, and buttons for 'Clone' and 'Delete Configuration'.

Below the configuration options are tabs for 'PreApplication Msg.', 'Work Types', 'Supplementals', 'Document Types', 'Submittal Info.', and 'General Process Info.' (selected). The 'General Process Info.' tab is active, showing a text editor with the following content:

**General Process Information** *Indicate any general process information for this configuration.*

**What to Expect After You Submit Your Application and Electronic Plans**

We will look at your application and plans **within two business days of your online submittal**. You will receive an email from us stating the status of your application. There are two possible outcomes for your application:

1. We will accept your application and send you an invoice via email.
2. We will not accept your application, and we will tell you what we need to complete the application screening. You will have 30 days to submit the requested documents through your MyBuildingPermit.com Plan Review Dashboard.

**Important information about completeness and vesting:**

- Application acceptance for screening is not a determination of completeness.
- The submittal date is not your vesting date: your application is vested after we receive payment of all submittal fees.

At the bottom of the text editor is a 'Save' button.



Example of Submittal Info, Required Supplementals list and General Process Info on the Customer Application Screen

### Application Instructions

**Application Type:** Building  
**Project Type:** Single Family Residential  
**Activity Type:** Expanded Work Hours  
**Scope of Work:** None

Based on your selections, the following information and requirements apply to your application.

### Submittal Info

This application is a request for non-emergency work to be authorized outside of the hours of Monday - Friday, 7:00am to 6:00pm.

The following requests will not be granted:

- Sundays
- Legal holidays per [RCW 1.16.050](#)

Before continuing, be aware that at a minimum, the following conditions will apply:

- Residences within 300 feet; or, as otherwise determined by the City, will be notified by the contractor a minimum of 24 hours in advance a emergency contact name and phone number will be provided.
- Proposed work will not include hauling on local residential streets; and, construction traffic will be minimal (less than 10 trips per day).
- The contractor requesting Expanded Work Hours must not have received any construction violations form the City over the past 30 days.
- Construction must not require City inspection or resources; or, City inspections and/or resources have been confirmed.

### Required Supplementals

- Expanded Work Hours

[View Supplementals](#)

### General Process Info

**Appeals**

Appeal of this Decision will be pursuant to IMC 16.35.025

**Hold Harmless Agreement**

By continuing, you agree to save harmless the City of Issaquah as to any claim (including costs, expenses, and attorney's fees incurred in inves made by any person, including the undersigned, and filed against the City of Issaquah, but only where su

## Cloning or Copying an Application Configuration

Once you have an Application Configured, you may Clone it to another configuration. The Application Type must be the same (such as Building to Building), but the other 3 “buckets” may be different from the original.

The following components of the configuration will be copied to the new configuration:

Work Types, Supplementals, Document Types, Submittal Info and General Process Info. All the components can then be modified accordingly.

MyBuildingPermit.com Dashboard User Profiles Reports

### Application Configuration

☐ Show All?

**Application**

Building [83] Multifamily Residential

☒ Configuration Active?

Clone Delete Configuration

**From the *original* Application Configuration, click Clone.**

Application Configuration

**Clone From:**  
☐ Show All?  
 All Configurations Full Product Catalog PreApplication Selections and Definitions

**Application Type:** Building [83]

**Project Type:** Multifamily Residential

**Activity Type:** New Construction - 4,000 square feet or mor

**Scope of Work:** Primary Building

**Clone To:** Building [83]

Select the Project Type, Activity Type, and Scope of Work for the new Application Configuration.

**Clone From:**  
☐ Show All?  
 All Configurations Full Product Catalog PreApplication Selections and Definitions

**Application Type:** Building [83]

**Project Type:** Multifamily Residential

**Activity Type:** New Construction - 4,000 square feet or mor

**Scope of Work:** Primary Building

**Clone To:** Building [83]

Mixed Use

Adult Family Home Inspection Only

Accessory Building

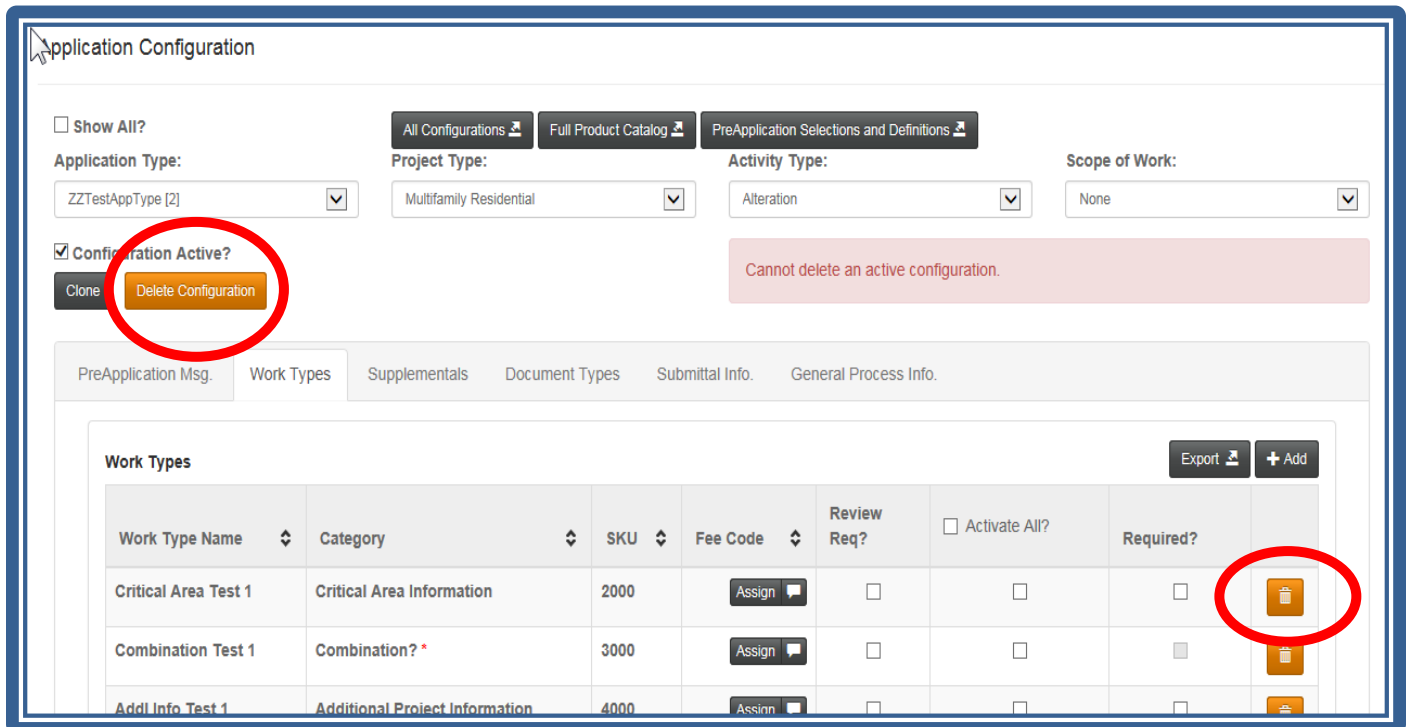
Click Proceed with Cloning to confirm and create new configuration.

Configuration Cloning was successful




When confirmation of successful cloning is received you can now open the new configuration and modify as needed.

## Deleting an Application Configuration

You must delete **all** the Work Type/SKU's from the configuration before you can delete the entire configuration. Use the trashcan icon on the right of each Work Type to remove that line. Once all the Work Types have been deleted, you may delete the Application Configuration using the orange Delete Configuration button next to the Clone button.



The screenshot shows the 'Application Configuration' interface. At the top, there are filters for 'Application Type' (ZZTestAppType [2]), 'Project Type' (Multifamily Residential), 'Activity Type' (Alteration), and 'Scope of Work' (None). Below these, there is a 'Configuration Active?' checkbox which is checked. A red circle highlights the 'Delete Configuration' button next to the 'Clone' button. A red message box states 'Cannot delete an active configuration.' Below this, there are tabs for 'PreApplication Msg.', 'Work Types', 'Supplementals', 'Document Types', 'Submittal Info.', and 'General Process Info.'. The 'Work Types' tab is selected, showing a table with columns: Work Type Name, Category, SKU, Fee Code, Review Req?, Activate All?, and Required?. The table contains three rows: 'Critical Area Test 1', 'Combination Test 1', and 'Addl Info Test 1'. A red circle highlights the trashcan icon in the rightmost column of the 'Critical Area Test 1' row.

| Work Type Name       | Category                       | SKU  | Fee Code | Review Req?              | Activate All?            | Required?                |   |
|----------------------|--------------------------------|------|----------|--------------------------|--------------------------|--------------------------|---|
| Critical Area Test 1 | Critical Area Information      | 2000 | Assign   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Combination Test 1   | Combination? *                 | 3000 | Assign   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Addl Info Test 1     | Additional Project Information | 4000 | Assign   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |

## Requesting New Items – Document Types, SKUs, and Bucket Types

Jurisdictions can request new Document types, Work Type/SKUs and “bucket” types to add more information to their configurations, or to create new configurations. Questions or assistance with best practices can be directed to the Program Committee members, or the eGov Service Delivery Team (see MBP contact list).

### Requesting New “Bucket” types

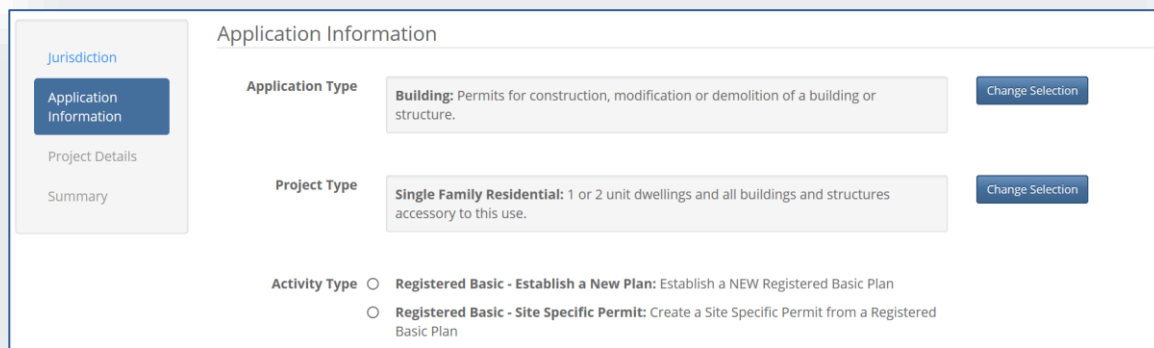
See the “Bucket Type Requests” section of this document for detailed instructions.

### Requesting New SKUs, Categories, and Documents

See the “SKU and Category Requests” section of this document for detailed instructions.

## Registered Basic Permit Applications

Registered Basic plans are utilized by contractor companies to build the same approved plan on multiple plats or lots. Establishing a Registered Basic plan with Jurisdictions who have them available within MBP allows a contractor company to have the “basic” or “registered” building plan set reviewed and approved for future use with Site-Specific permits.



The screenshot shows the 'Application Information' form. On the left is a sidebar with 'Jurisdiction', 'Application Information' (selected), 'Project Details', and 'Summary'. The main form has two sections: 'Application Type' with a dropdown set to 'Building: Permits for construction, modification or demolition of a building or structure.' and a 'Change Selection' button; and 'Project Type' with a dropdown set to 'Single Family Residential: 1 or 2 unit dwellings and all buildings and structures accessory to this use.' and a 'Change Selection' button. At the bottom, there are radio buttons for 'Activity Type': 'Registered Basic - Establish a New Plan: Establish a NEW Registered Basic Plan' (selected) and 'Registered Basic - Site Specific Permit: Create a Site Specific Permit from a Registered Basic Plan'.

Each Jurisdiction that accepts Registered Basic applications determines the requirements needed for submitting Registered Basic plans. These will include: the specific base plan information, available options, documents needed, and other requirements necessary for submittal and approval. The base plan and option data will carry over to the site-specific permit application from the approved Registered Basic plan.

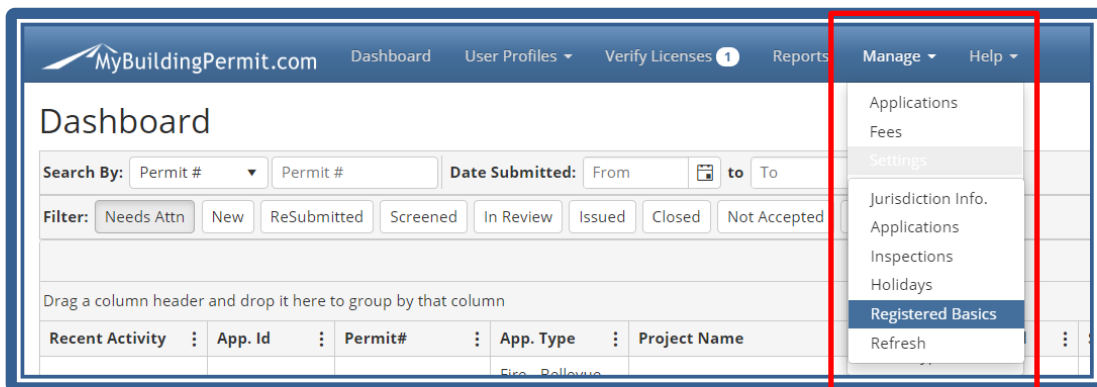
To enable use of Registered Basics in MBP, you must:

- Configure Jurisdiction Registered Basics Settings
- Create Registered Basics Application Configurations

## Configuring Registered Basics Settings

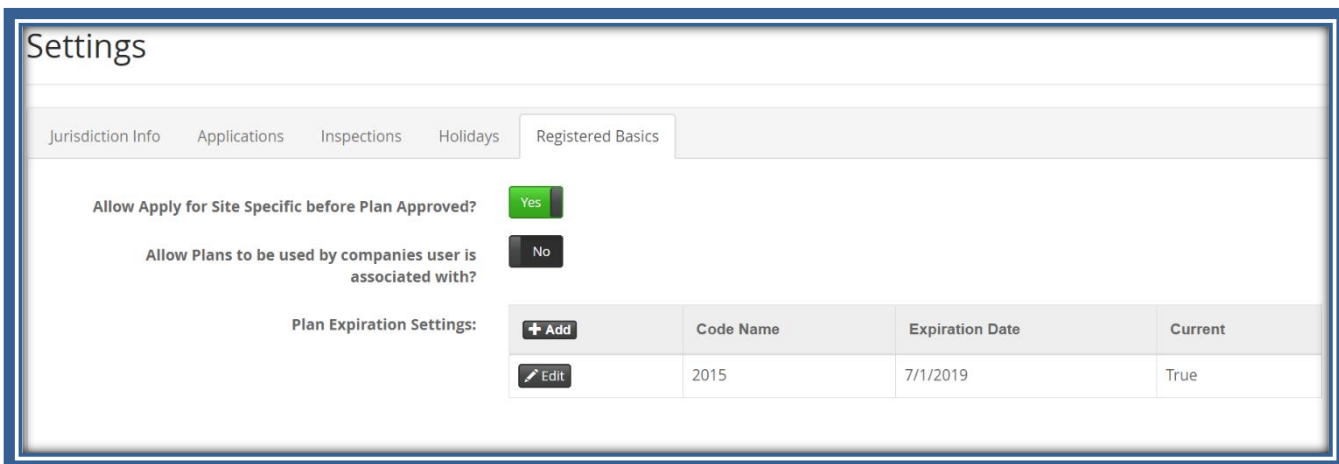
**Note:** Only a JurisdictionAdmin user role has access to manage a Jurisdiction’s settings.

1. Log in to the [Admin site](#), select Manage → Registered Basics:



The screenshot shows the MBP Admin site dashboard. The top navigation bar includes 'Dashboard', 'User Profiles', 'Verify Licenses', 'Reports', 'Manage', and 'Help'. The 'Manage' dropdown menu is open, showing options: 'Applications', 'Fees', 'Settings', 'Jurisdiction Info.', 'Applications', 'Inspections', 'Holidays', 'Registered Basics' (highlighted with a red box), and 'Refresh'. The dashboard below shows a search bar, filters, and a table with columns: 'Recent Activity', 'App. Id', 'Permit#', 'App. Type', and 'Project Name'.

2. Select the applicable settings:



Settings

Jurisdiction Info Applications Inspections Holidays Registered Basics

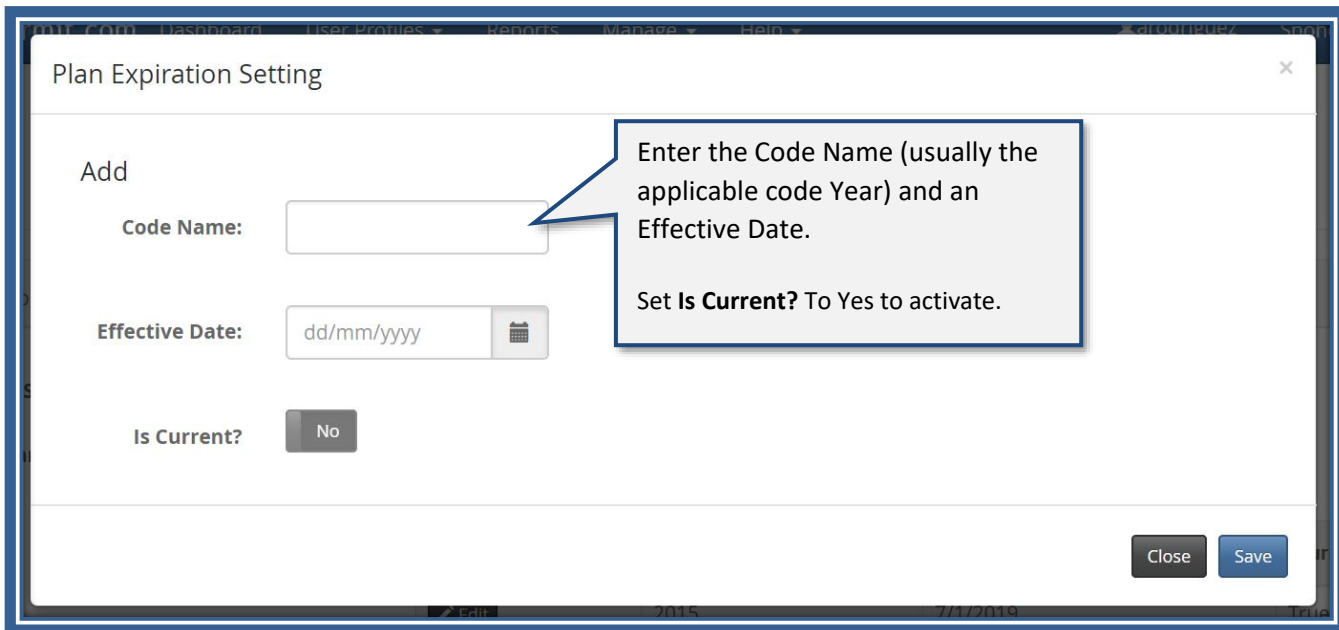
Allow Apply for Site Specific before Plan Approved? ☒ Yes

Allow Plans to be used by companies user is associated with? ☐ No

Plan Expiration Settings:

| <a href="#">+ Add</a> | Code Name | Expiration Date | Current |
|-----------------------|-----------|-----------------|---------|
| <a href="#">Edit</a>  | 2015      | 7/1/2019        | True    |


- **Allow Apply for Site Specific before Plan Approved?** – This setting allows/disallows a contractor to be able to apply for a Site-Specific permit before a Base Plan is approved.
  - **Allow Plans to be used by companies' user is associated with?** - This setting allows/disallows the sharing of basics plans across companies.
3. Click [+ Add](#) under Plan Expiration Settings to add current code cycle to the table:



Plan Expiration Setting

Add

Code Name:

Effective Date:  

Is Current?

Enter the Code Name (usually the applicable code Year) and an Effective Date.




Set **Is Current?** To Yes to activate.

[Close](#) [Save](#)

4. Click **Save** to proceed.

5. New code cycle is added to the Plan Expiration Settings table:

Plan Expiration Settings:

|   |           |                 |         |
|---|-----------|-----------------|---------|
| <b>+ Add</b>  | Code Name | Expiration Date | Current |
|    | 2015      | 7/1/2019        | True    |
|   | 2018      | 3/31/2019       | False   |

Click to Edit to update existing code cycles.

Click Delete to remove a code cycle.

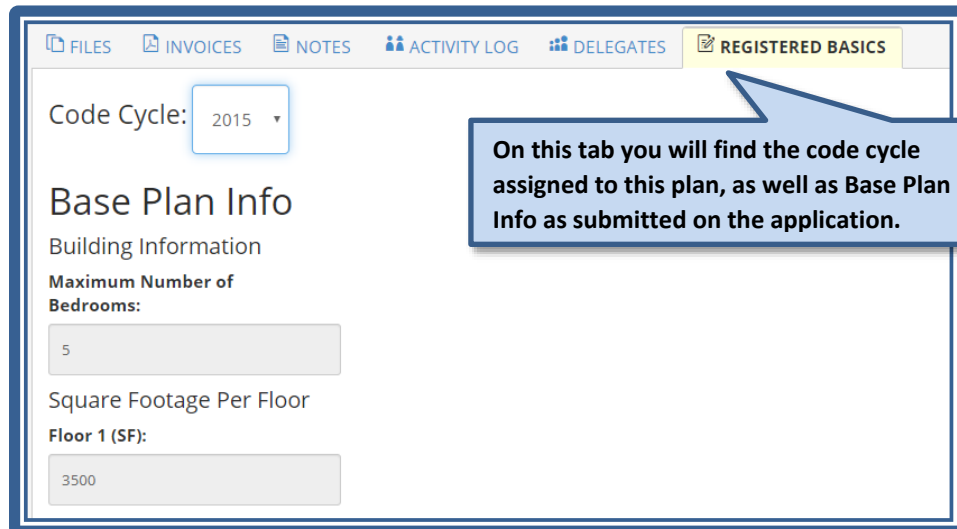
**Note:** You can only delete a code cycle if it has not been referenced on an open basic plan. The assigned code cycle will be added to all Base plan applications.

### Considerations before Configuring Registered Basics settings:

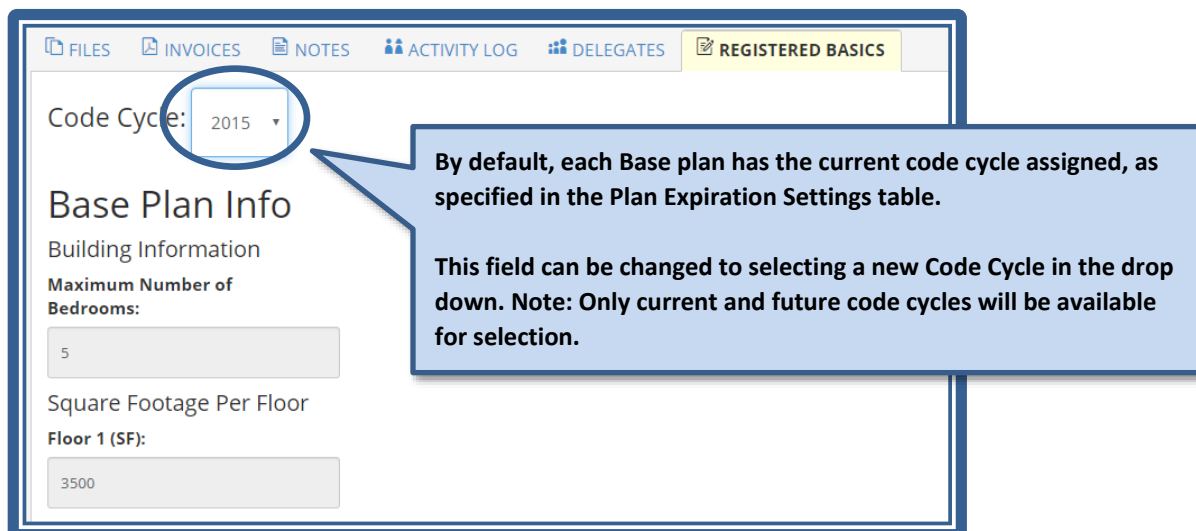
- Know whether your jurisdiction allows applying for site specific applications using plans that are accepted (not approved plans yet).
- Know whether your jurisdiction allows plans sharing among companies where user is associated with all of them.
- Come up with intuitive and easy Code Name. It is good idea to keep table rows count small and add code cycle only once it is close to its expiration date.

## Editing Base Plan Information

On the details page of a submitted application to Establish a New Plan, there is a Registered Basics tab:



The screenshot shows the 'REGISTERED BASICS' tab selected in the top navigation bar. Below the navigation bar, there is a 'Code Cycle:' dropdown menu with '2015' selected. The main section is titled 'Base Plan Info' and contains 'Building Information' fields: 'Maximum Number of Bedrooms' (input field with '5') and 'Square Footage Per Floor' (input field with '3500'). A callout box points to the 'REGISTERED BASICS' tab with the text: 'On this tab you will find the code cycle assigned to this plan, as well as Base Plan Info as submitted on the application.'



This screenshot is similar to the one above but includes a callout box pointing to the 'Code Cycle:' dropdown menu. The callout text reads: 'By default, each Base plan has the current code cycle assigned, as specified in the Plan Expiration Settings table. This field can be changed to selecting a new Code Cycle in the drop down. Note: Only current and future code cycles will be available for selection.'

**Note:** These fields on the Registered Basics tab can only be edited when the application is in the following MBP statuses: **New/Submitted, Not Accepted, Screened, and In Review.**

## Configuring Registered Basics Permit Applications

The process to configure an application to Establish a New Plan and Site-Specific permit is the same as any other application—see [here](#) for instructions. The following exceptions apply to a Registered Basic application:

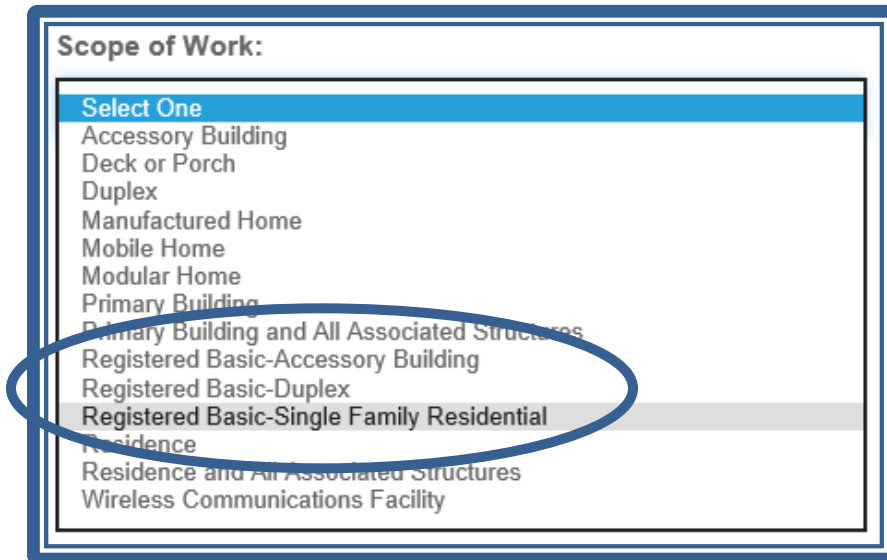
### Bucket selection will be:

- Application Type = Building
- Project Type = Single Family Residential or Multifamily
- Activity Type = One of two options:
  - Registered Basic – Establish a New Plan
  - Registered Basic = Site-Specific Permit

- Scope of Work = Choose one of these options:



- Registered Basic–Accessory Building
- Registered Basic–Duplex
- Registered Basic–Single Family Residential



The image shows a screenshot of a web application's 'Scope of Work' dropdown menu. The menu is titled 'Scope of Work:' and contains a list of options. The option 'Registered Basic-Single Family Residential' is selected and highlighted with a blue background. A blue oval is drawn around the selected option. The other options in the list are: 'Select One', 'Accessory Building', 'Deck or Porch', 'Duplex', 'Manufactured Home', 'Mobile Home', 'Modular Home', 'Primary Building', 'Primary Building and All Associated Structures', 'Registered Basic-Accessory Building', 'Registered Basic-Duplex', 'Residence', 'Residence and All Associated Structures', and 'Wireless Communications Facility'.

| Scope of Work                                     |
|---|
| Select One  |
| Accessory Building                                |
| Deck or Porch                                     |
| Duplex  |
| Manufactured Home                                 |
| Mobile Home                                       |
| Modular Home                                      |
| Primary Building                                  |
| Primary Building and All Associated Structures    |
| Registered Basic-Accessory Building               |
| Registered Basic-Duplex                           |
| <b>Registered Basic-Single Family Residential</b> |
| Residence   |
| Residence and All Associated Structures           |
| Wireless Communications Facility                  |

**NOTE:** You will need to update the XML mapping into your back-end system to accommodate these new application types.

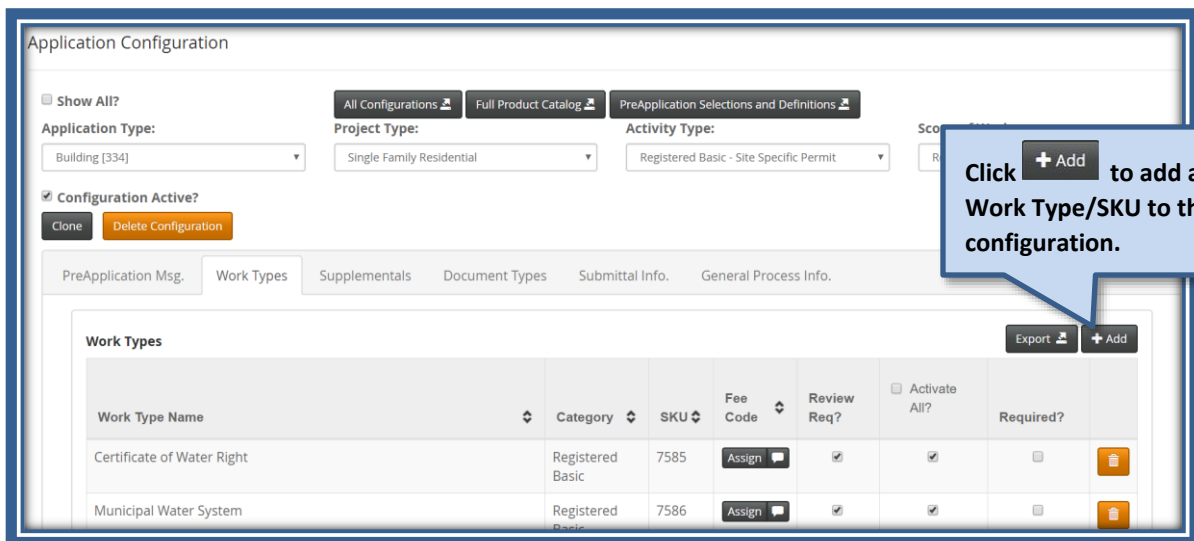
## Registered Basics Work Types/SKUs

Registered Basic Work Types are created to be used exclusively in Registered Basic permit application configurations. Existing, non-registered basic SKUs cannot be used in these application configurations.

To add a Registered Basic SKU to your Establish a New Plan or Site-Specific application configuration, do the following:

1. Log in to the Admin site as a JurisdictionAdmin user. Click Manage → Applications
  - Make your four bucket selections:
    - Application Type = Building
    - Project Type = Single Family Residential or Multifamily
    - Activity Type = One of two options:
      - Registered Basic – Establish a New Plan
      - Registered Basic = Site-Specific Permit
    - Scope of Work = Choose one of these options:
      - Registered Basic–Accessory Building
      - Registered Basic–Duplex
      - Registered Basic–Single Family Residential

2. Click on the Work Types tab:



Application Configuration

Show All? All Configurations Full Product Catalog PreApplication Selections and Definitions

Application Type: Building [334] Project Type: Single Family Residential Activity Type: Registered Basic - Site Specific Permit

Configuration Active? Clone Delete Configuration

PreApplication Msg. Work Types Supplementals Document Types Submittal Info. General Process Info.

Work Types

| Work Type Name             | Category         | SKU  | Fee Code | Review Req? | Activate All? | Required? |    |
|----------------------------|------------------|------|----------|-------------|---------------|-----------|----|
| Certificate of Water Right | Registered Basic | 7585 | Assign   | ☑           | ☑             | ☐         | 🗑️ |
| Municipal Water System     | Registered Basic | 7586 | Assign   | ☑           | ☑             | ☐         | 🗑️ |

Export + Add

Click + Add to add a new Work Type/SKU to the configuration.

3. Select Registered Basic under Category:

reApplication Msg. Work Types Supplementals Document Types Submittal Info. General Process Info.

**Add Work Types**

Category: Registered Basic

and/or Key Word Search Find Close

| Work Type Name             | SKU  | Fee Code | Req Review               | Is Active?               | Required                 |     |
|----------------------------|------|----------|--------------------------|--------------------------|--------------------------|-----|
| 1st or Main Floor          | 6273 | None     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Add |
| 1st or Main Floor Option 2 |      |          |                          |                          |                          |     |
| 1st or Main Floor Option 3 |      |          |                          |                          |                          |     |
| 2nd Floor Option 1         |      |          |                          |                          |                          |     |
| 2nd Floor Option 2         |      |          |                          |                          |                          |     |
| 2nd Floor Option 3         |      |          |                          |                          |                          |     |
| 3rd Floor Option 1         | 6275 | None     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Add |

**Select Registered Basic under Category search field.**

Then click **Find** to pull up a list of available SKUs to add. Note: Only SKUs that have not already been added to the configuration will appear.

## Permit Fees

MBP uses the Fee Codes and Valuation/Range Tables to calculate the permit fees for **Over the Counter (OTC) Non-Plan Review** applications. **Plan Review** application fees come from you invoicing the customer utilizing your back-end system fee calculations. For specific information on invoicing see the Plan Review Application Processing Document.

The fees that are calculated for a permit are included in the XML output from MBP that you will map to your backend permitting system. See MBP – Jurisdiction Integration Section in this document.



**NOTE:** Creating a spreadsheet of your permit configurations prior to setting them up and creating Fee Codes in MBP is very beneficial. Identify which configurations are Over-the-Counter (OTC) versus Plan Review (PR) as only OTC permits need a fee code. Also determine what fee type each should be: flat, calculated, valuation, etc. Once you have your configurations in a spreadsheet, you can configure them in MBP more easily.

Example:

| A  | B                  | C          | D                    | E                       | F | G | H | I | J | K | L | M | N | O |
|----|--------------------|------------|----------------------|-------------------------|---|---|---|---|---|---|---|---|---|---|
| 1  | MBP Fee Code Name  | Fee Type   | Formula / Percentage | Valuation / Range Table |   |   |   |   |   |   |   |   |   |   |
| 2  | Gas Piping         | Range      |                      | Gas Piping              |   |   |   |   |   |   |   |   |   |   |
| 3  | Mechanical Fixture | Calculated | 11                   |                         |   |   |   |   |   |   |   |   |   |   |
| 4  |                    |            |                      |                         |   |   |   |   |   |   |   |   |   |   |
| 5  |                    |            |                      |                         |   |   |   |   |   |   |   |   |   |   |
| 6  |                    |            |                      |                         |   |   |   |   |   |   |   |   |   |   |
| 7  |                    |            |                      |                         |   |   |   |   |   |   |   |   |   |   |
| 8  |                    |            |                      |                         |   |   |   |   |   |   |   |   |   |   |
| 9  |                    |            |                      |                         |   |   |   |   |   |   |   |   |   |   |
| 10 |                    |            |                      |                         |   |   |   |   |   |   |   |   |   |   |
| 11 |                    |            |                      |                         |   |   |   |   |   |   |   |   |   |   |

**Step 1:** Enter a new fee code name

**Step 2:** Select the Fee Type:  
**Calculated** – quantity times the dollar amount  
**Flat** – a fixed fee charged regardless of quantity  
**Percentage** – calculate a percentage  
**Range** – Uses the Table entered in the Value/Range Table Name to calculate the fee  
**Valuation** – Uses the Table entered in the Value/Range Table Name to calculate the fee

**Step 3:** Enter the formula / Percentage or the valuation/range table name. Valuation/range tables are created in the Valuation Range Tables tab

| A  | B            | C            | D       | E         | F          | G          | H         | I     | J | K | L | M | N | O | P | Q | R | S | T | U | V |
|----|--------------|--------------|---------|-----------|------------|------------|-----------|-------|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1  | Table List   |              |         |           |            |            |           |       |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 2  | Table Name   | Row          | Minimum | Maximum   | Base Rate  | Plus \$    | For Every |       |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 3  | Building Fee | Building Fee | 1       | 0         | 500        | \$26.45    | 0.00      | 0     |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 4  | Gas Piping   | Building Fee | 2       | 501       | 2,000      | \$26.45    | 3.30      | 100   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 5  |              | Building Fee | 3       | 2,001     | 25,000     | \$78.85    | 16.00     | 1,000 |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 6  |              | Building Fee | 4       | 25,001    | 50,000     | \$444.30   | 11.60     | 1,000 |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 7  |              | Building Fee | 5       | 50,001    | 100,000    | \$730.95   | 7.70      | 1,000 |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 8  |              | Building Fee | 6       | 100,001   | 500,000    | \$1,127.85 | 6.60      | 1,000 |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 9  |              | Building Fee | 7       | 500,001   | 1,000,000  | \$3,672.40 | 5.50      | 1,000 |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 10 |              | Building Fee | 8       | 1,000,001 | 99,999,999 | \$6,369.15 | 4.40      | 1,000 |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 11 |              | Gas Piping   | 1       | 1         | 5          | \$6.00     | 0.00      | 0     |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 12 |              | Gas Piping   | 2       | 6         | 99,999,999 | \$8.00     | 2.00      | 1     |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 13 |              |              |         |           |            |            |           |       |   |   |   |   |   |   |   |   |   |   |   |   |   |

**Step 1:** Add a new table name to the Table List

**Step 2:** Using the second table add any range tables you may require. Tables may be based on the permit valuation or the quantity of a SKU. In the examples provided, the Building Fee would be calculated by the permit valuation. If the valuation is between the row's minimum and maximum values, then it will take the base rate and add an extra amount (Plus \$) for every amount over the minimum. The gas piping example would be based on the amount the customer enters for gas piping. In this example the first 5 gas piping fixtures are a flat \$6, for every fixture over 5, they are charged an extra \$2.

The Row column is the row number for that particular table.

**Important:** You only need to enter valuations for fees related to Over-the-Counter permits. If your reroof permits are flat rate, then you may not even need to create a building fee table.

| A | B       | C              | D | E | F | G | H | I | J | K | L | M |
|---|---------|----------------|---|---|---|---|---|---|---|---|---|---|
| 1 | MBP SKU | Juris Fee Code |   |   |   |   |   |   |   |   |   |   |
| 2 |         |                |   |   |   |   |   |   |   |   |   |   |
| 3 |         |                |   |   |   |   |   |   |   |   |   |   |
| 4 |         |                |   |   |   |   |   |   |   |   |   |   |
| 5 |         |                |   |   |   |   |   |   |   |   |   |   |

This section can be used to help map SKUs with fees to your backend system. it is suggested that you export your configurations from MBP and filter the list to only permits which are OTC. From there filter down to only the SKUs which will have fees associated with them. The exact method you use to map fees in MBP to fees in your permit system is depending on your vendor webservices.

| A | B          | C | D | E | F | G |
|---|------------|---|---|---|---|---|
| 1 | Fee Types  |   |   |   |   |   |
| 2 | Calculated |   |   |   |   |   |
| 3 | Flat       |   |   |   |   |   |
| 4 | Percentage |   |   |   |   |   |
| 5 | Range      |   |   |   |   |   |
| 6 | Valuation  |   |   |   |   |   |
| 7 |            |   |   |   |   |   |

Don't edit this

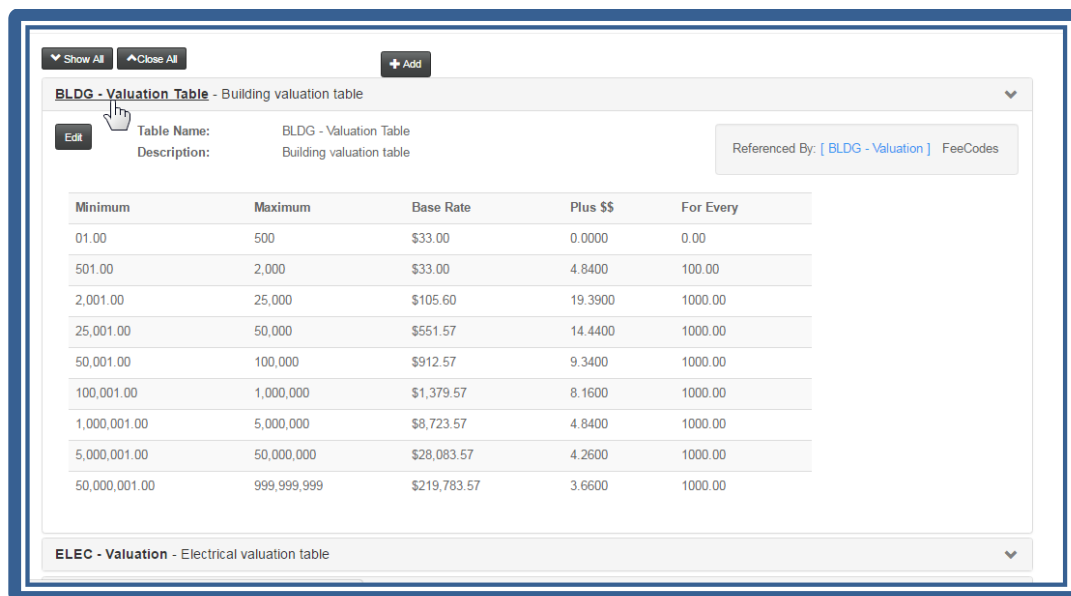
## Valuation/Range Tables—Overview

When fees are variable based on different project values or quantities, the Fee Code will need to reference a table. Valuation Tables are used for fees dependent on the dollar amount of the project or building valuation. Range tables are used when fees vary for different quantities.

Each jurisdiction can create their own valuation and ranges in tables, save them with meaningful names, and then create fee codes using these tables.

A valuation table or range table needs to be created prior to using it with a Fee Code. The Fee Code must be created before you can assign it to a Work Type in the Application Configuration.

Example of a Valuation Table (the Minimum and Maximums represent dollar ranges)

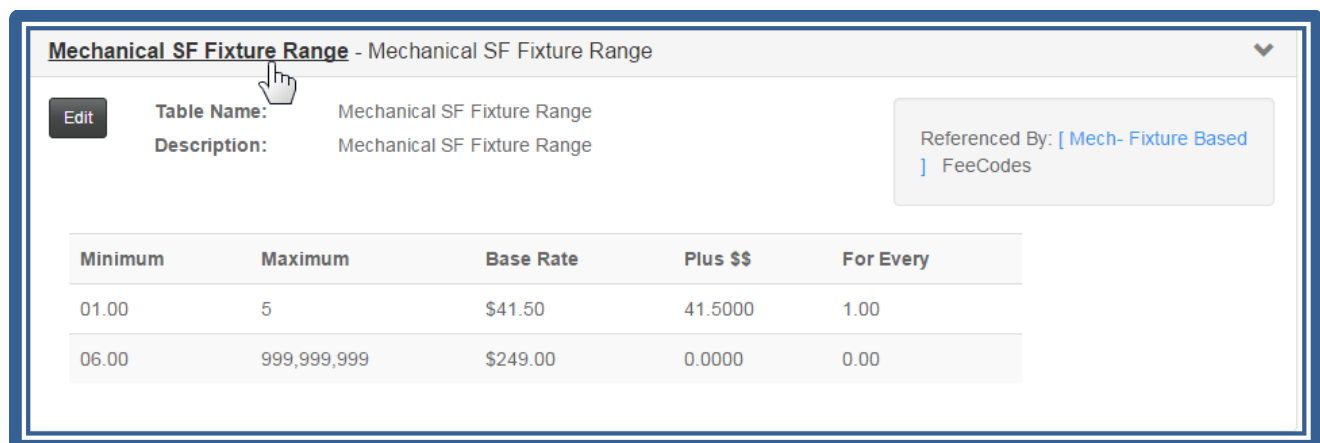


The screenshot shows a web interface for a 'BLDG - Valuation Table'. At the top, there are buttons for 'Show All', 'Close All', and '+ Add'. Below these, the table title 'BLDG - Valuation Table - Building valuation table' is displayed with a dropdown arrow. An 'Edit' button is next to the title. The table details show 'Table Name: BLDG - Valuation Table' and 'Description: Building valuation table'. To the right, it says 'Referenced By: [ BLDG - Valuation ] FeeCodes'. The main table has five columns: Minimum, Maximum, Base Rate, Plus \$\$, and For Every. It contains ten rows of data representing different valuation ranges.

| Minimum       | Maximum     | Base Rate    | Plus \$\$ | For Every |
|---------------|-------------|--------------|-----------|-----------|
| 01.00         | 500         | \$33.00      | 0.0000    | 0.00      |
| 501.00        | 2,000       | \$33.00      | 4.8400    | 100.00    |
| 2,001.00      | 25,000      | \$105.60     | 19.3900   | 1000.00   |
| 25,001.00     | 50,000      | \$551.57     | 14.4400   | 1000.00   |
| 50,001.00     | 100,000     | \$912.57     | 9.3400    | 1000.00   |
| 100,001.00    | 1,000,000   | \$1,379.57   | 8.1600    | 1000.00   |
| 1,000,001.00  | 5,000,000   | \$8,723.57   | 4.8400    | 1000.00   |
| 5,000,001.00  | 50,000,000  | \$28,083.57  | 4.2600    | 1000.00   |
| 50,000,001.00 | 999,999,999 | \$219,783.57 | 3.6600    | 1000.00   |

Below the main table, there is a section for 'ELEC - Valuation - Electrical valuation table' with a dropdown arrow.

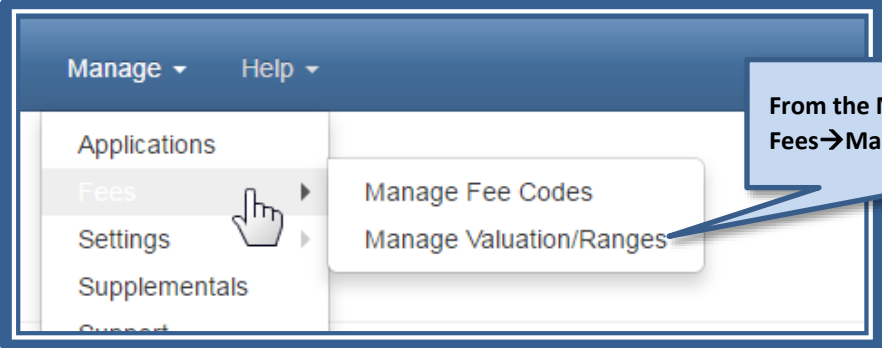
Example of a Range Table (the Minimum and Maximums represent quantity ranges)



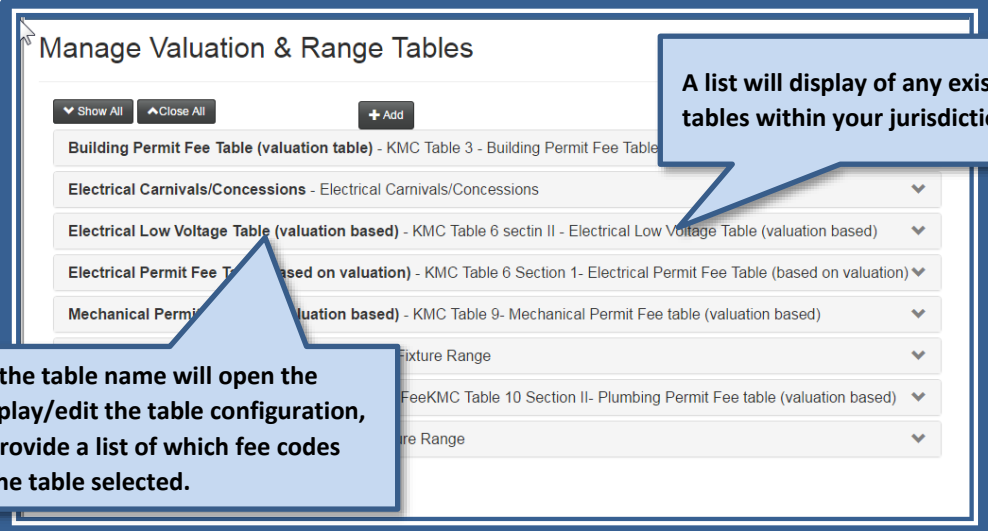
The screenshot shows a web interface for a 'Mechanical SF Fixture Range'. At the top, there is a title 'Mechanical SF Fixture Range - Mechanical SF Fixture Range' with a dropdown arrow. An 'Edit' button is next to the title. The table details show 'Table Name: Mechanical SF Fixture Range' and 'Description: Mechanical SF Fixture Range'. To the right, it says 'Referenced By: [ Mech- Fixture Based ] FeeCodes'. The main table has five columns: Minimum, Maximum, Base Rate, Plus \$\$, and For Every. It contains two rows of data representing different quantity ranges.

| Minimum | Maximum     | Base Rate | Plus \$\$ | For Every |
|---------|-------------|-----------|-----------|-----------|
| 01.00   | 5           | \$41.50   | 41.5000   | 1.00      |
| 06.00   | 999,999,999 | \$249.00  | 0.0000    | 0.00      |

## Creating or Editing Valuation or Range Tables

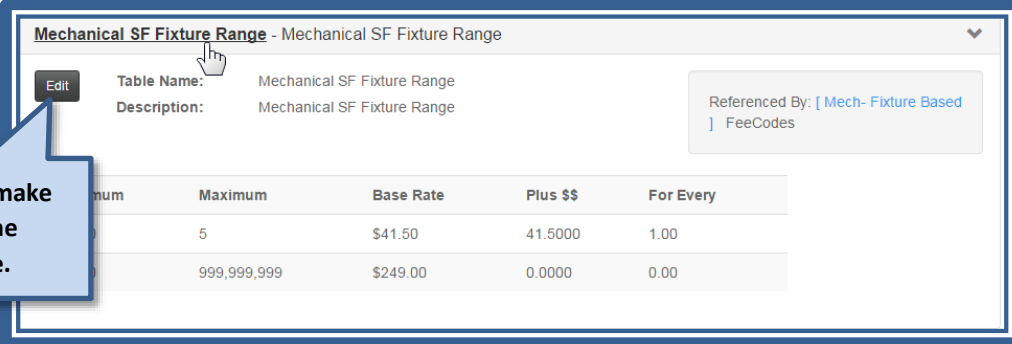


From the Manage menu, select Fees→Manage Valuation/Ranges.



A list will display of any existing tables within your jurisdiction.

Clicking on the table name will open the table to display/edit the table configuration, as well as provide a list of which fee codes reference the table selected.



Click Edit to make changes to the existing table.



















| Minimum | Maximum     | Base Rate | Plus \$\$ | For Every |
|---------|-------------|-----------|-----------|-----------|
|         | 5           | \$41.50   | 41.5000   | 1.00      |
|         | 999,999,999 | \$249.00  | 0.0000    | 0.00      |

Add Valuation or Range Table

Table Name:  
BLDG - Valuation Table 2018

Description:  
Building valuation table

**Edit the table name, description, or current columns in the table. You can also add new columns to the table.**

| <b>+ Add</b>  | Minimum       | Maximum        | Base Rate  | Plus \$\$ | For Every |
|---|---------------|----------------|------------|-----------|-----------|
|   | 1.00          | 500            | \$35.00    | 0.0000    | 0.00      |
|   | 501.00        | 2,000          | \$35.00    | 5.0900    | 100.00    |
|   | 2,001.00      | 25,000         | \$111.35   | 20.3700   | 1000.00   |
|   | 25,001.00     | 50,000         | \$579.86   | 15.1700   | 1000.00   |
|   | 50,001.00     | 100,000        | \$959.11   | 9.8200    | 1000.00   |
|   | 100,001.00    | 1,000,000      | \$1,450.11 | 8.5700    | 1000.00   |
|   | 1,000,001.00  | 5,000,000      |            | 5.0900    | 1000.00   |
|   | 5,000,001.00  | 50,000,000     |            | 4.4800    |           |
|   | 50,000,001.00 | 999,999,999.00 |            | 3.8400    |           |




**Click Close to exit the Table Edit screen.**

**Tables can be cloned or deleted.**

Close Save Clone Delete

**Don't forget to Save your changes.**

Manage Valuation & Range Tables

 Show All  Close All  Add

**Click +Add to create a new table.**

- Building Permit Fee Table (valuation table) - KMC Table 3 - Building Permit Fee Table (valuation table) ▼
- Electrical Carnivals/Concessions - Electrical Carnivals/Concessions ▼
- Electrical Low Voltage Table (valuation based) - KMC Table 6 section II - Electrical Low Voltage Table (valuation based) ▼
- Electrical Permit Fee Table (based on valuation) - KMC Table 6 Section 1- Electrical Permit Fee Table (based on valuation) ▼
- Mechanical Permit Fee table (valuation based) - KMC Table 9- Mechanical Permit Fee table (valuation based) ▼
- Mechanical SF Fixture Range - Mechanical SF Fixture Range ▼
- Plumbing Permit Fee table (valuation based) - FeeKMC Table 10 Section II- Plumbing Permit Fee table (valuation based) ▼
- Plumbing SF Fixture Range - Plumbing SF Fixture Range ▼

Add Valuation or Range Table

Table Name:

Description:

Description of Table

Close Save Clone Delete

Give the table a meaningful name and detailed description.

Click Save to proceed.

Add Valuation or Range Table

Table Name:

New Table for Testing

Description:

Fee Table for Testing Only

Enter New:

Minimum: 0.00 Maximum: 100

Base Rate: 5.00 Plus \$\$: 2.00

For Every: 10

Insert

Close Save Clone Delete

Complete the following fields to create the first column in the table:

- Minimum/Maximum values
- Base Rate
- For Every value
- Plus \$\$ (additional amount above the 'For Every' value)

Click Insert to add line to table.

Add Valuation or Range Table

Table Name:

New Table for Testing

Description:

Fee Table for Testing Only

|       | Minimum | Maximum | Base Rate | Plus \$\$ | For Every |
|-------|---------|---------|-----------|-----------|-----------|
| + Add | .00     | 100     | \$5.00    | 2.0000    | 10.00     |

Close Save Clone Delete

Click +Add to add additional lines to the table.

You can edit or delete existing lines as needed.

Click Clone to copy or duplicate the table.

The table can be deleted only if it is *not* referenced in any Fee Codes.

Click Save when table is complete.



Add Valuation or Range Table

Table Name:

Description:

Enter New:

Minimum:

Maximum:

Base Rate:

Plus \$\$:

For Every:

In the above example, if the applicant entered 120 as a quantity for a Work Type with a Fee Code using this table, the fee amount calculated would be:  $(100 * 5.00) + (2 * 2) = \$504$ .

\$5.00 each for the first 100 (equals \$500), then for each set of 10 thereafter (there would be 2 sets of 10), it would add \$2:  $(\$2 * 2 \text{ sets}) = \$4$ .

Example of a Fee Code using a Valuation Table

Effective Date:

Fee Calculation Type:

Amount (\$):

Value/Range Table Name:

Select One

Select One

BLDG - Valuation Table

ELEC - Valuation

FIRE - Sprinkler Range

MECH - Valuation

New Table for Testing

PLUMBING FIXTURES

test laura

Rounding:







Description:

Once the necessary table is created, it can be used within a Fee Code.

## Fee Codes—Overview

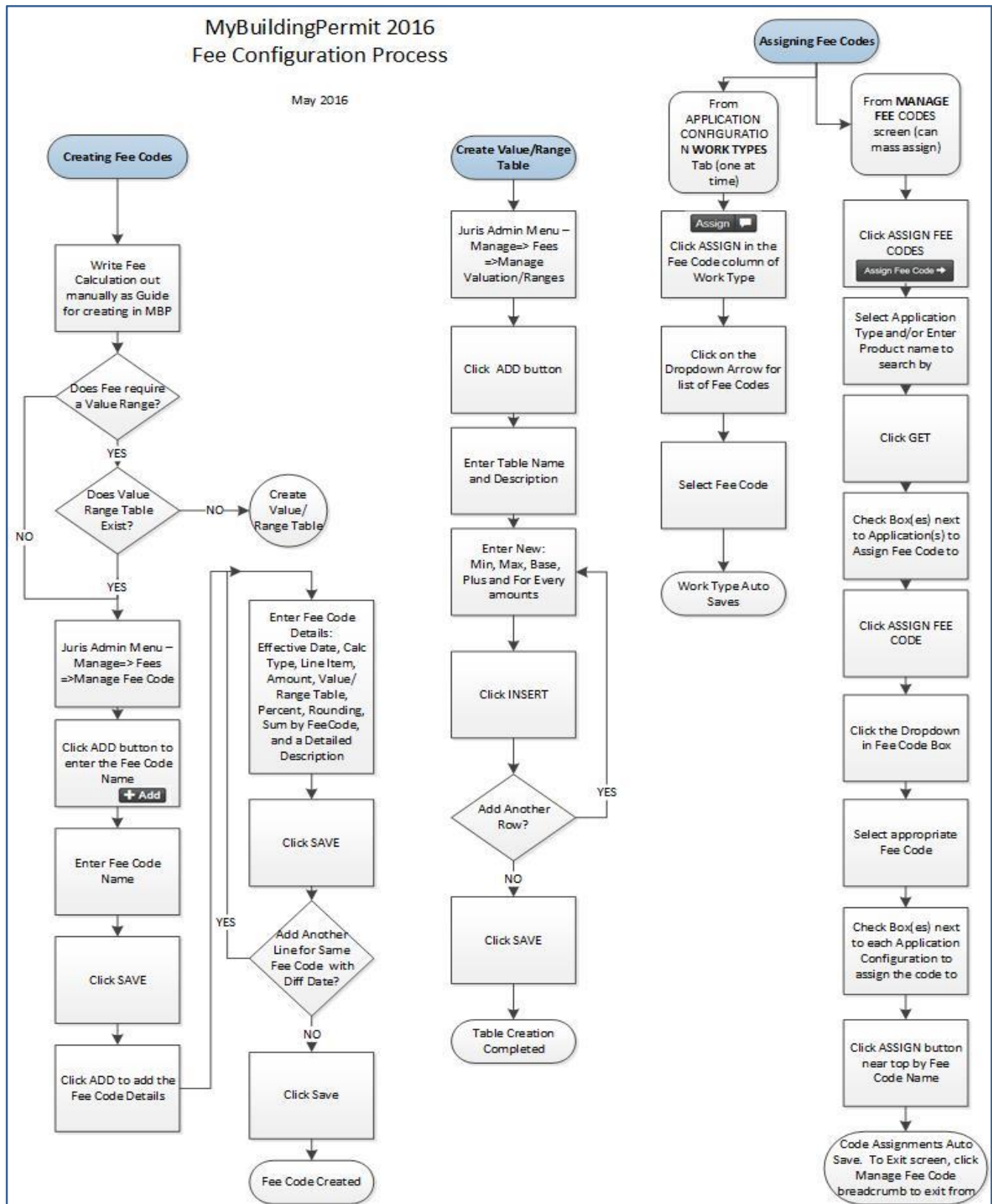
Fees Codes include the following information: Fee Code name, calculation type, dollar amount, valuation and range tables, screen name label in the Cart, rounding options, and a brief description. Fee codes are used instead of hard coded calculations to allow ease of modifications and adjustments when necessary.

Editing a single fee code will change the amount for every Application Configuration using this fee code. You also set an Effective Date which allows you to create Fee Codes prior to them going into effect. This is especially beneficial when your jurisdiction increases fees at the beginning of a new year or budget cycle.

| Manage Fee Codes   |                          |                      |           |  |  |                  |
|--|--------------------------|----------------------|-----------|--|--|------------------|
| Assign Fee Code(s)   |                          | Export Full List     |           | <input type="text" value="Search for Fee Code Name"/> <input type="button" value="Get"/> |  |                  |
| + Add  | Fee Code Name            | Fee Calculation Type | Amount \$ | Percent %  | Description  | # Configs. Using |
|   | BLDG - Demolition        | Flat                 | 41.00     | 0.00   | Building inspection fee for over-the-counter demolition              | 2                |
|   | BLDG - Reroof            | Flat                 | 206.00    | 0.00   | Building inspection fee for single family residential reroof permits | 1                |
|   | BLDG - State Bldg Code   | Flat                 | 4.50      | 0.00   | State Building Code Fee  | 5                |
|   | BLDG - Valuation         | Valuation            | 0.00      | 0.00   | 2016 Building Valuation Table  | 2                |
|   | ELEC - Pool Spa HT Sauna | Flat                 | 66.00     | 0.00   | Price per fixture for pool, spa, hot tub or sauna                    | 16               |
|  | ELEC - Carnivals         | Flat                 | 139.00    | 0.00   | Electrical inspection fee for carnivals, street fairs                | 3                |

When creating a Fee Code, it is important to name it with a logical, meaningful name so anyone in your jurisdiction will understand its use. A good naming convention is to have the Application Type plus a description of the fee:

- BLDG-Demolition
- MECH-Heating Valuation
- Permit-Technology Fee
- MECH-8dollars



## Creating and Using Fee Codes

MyBuildingPermit.com uses the Fee Codes, which are named calculations or amounts that could be fixed or based on a Table with a range. **Only Over the Counter (OTC) or Non-Plan Review permits use the Fee Codes.** Plan Review applications will have fees based on jurisdiction backend permitting system fees and generated through an invoice process.

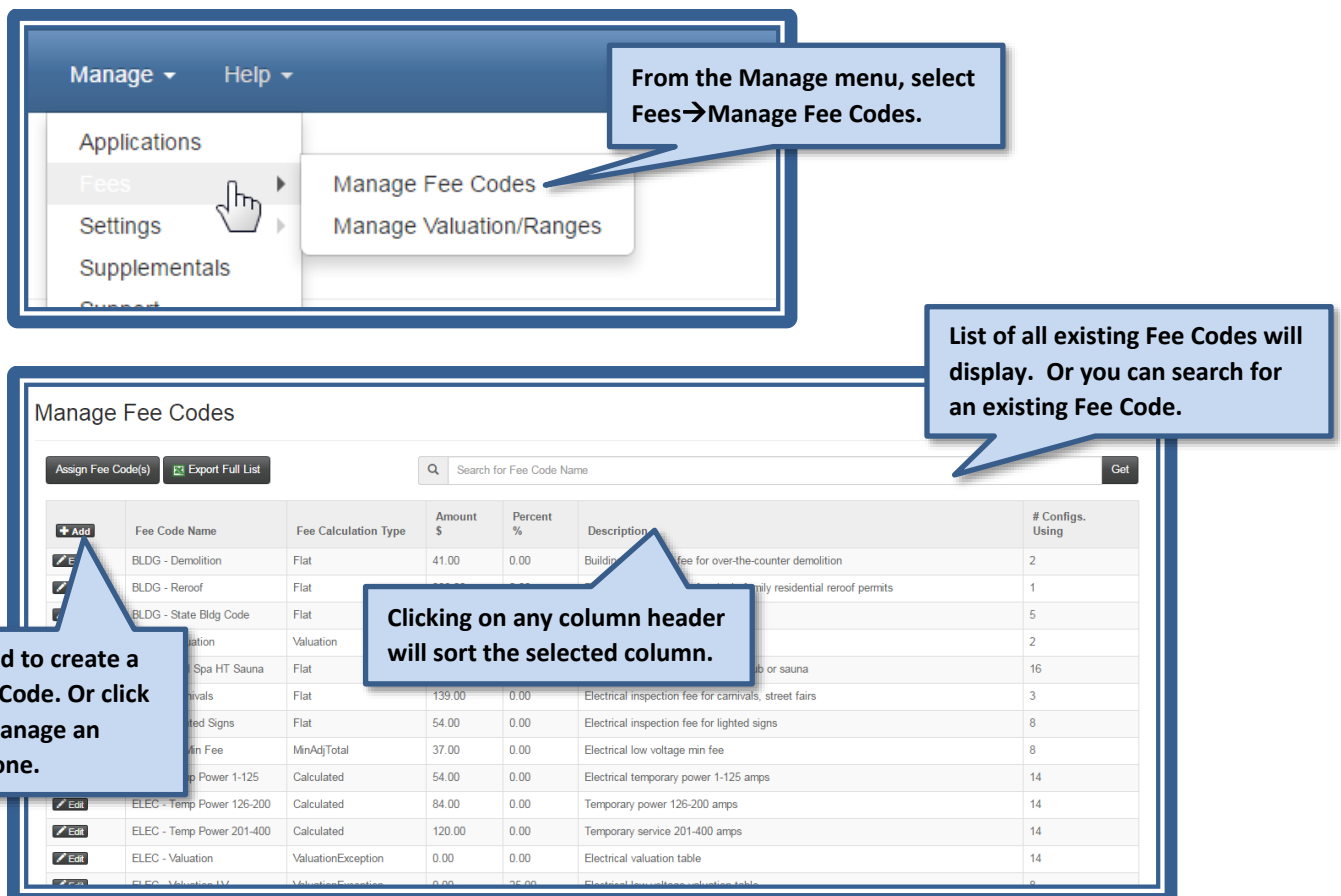
Fee Codes are assigned to Work Types that do **not** require Plan Review within an Application Configuration. (see [Configuring Applications](#))

You can assign Fee Codes while configuring your Applications, or from the **MANAGE** Fee Code screens. A single named Fee Code can have multiple calculations, each with a different “Effective Date”.

### Order for creating Fee related items:

1. [Create Valuation/Range Tables](#) (if needed)
2. Create Fee Code (see below)
3. Assign Fee Code to Work Type/SKU

### Steps for creating Fee Codes:



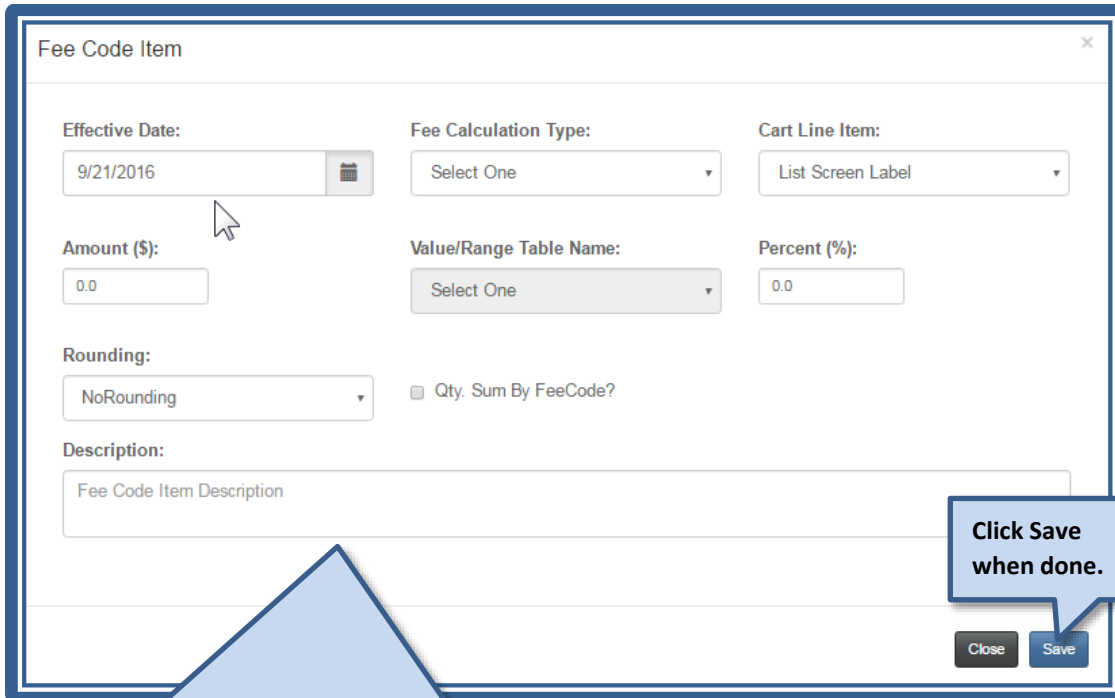
**From the Manage menu, select Fees→Manage Fee Codes.**

**List of all existing Fee Codes will display. Or you can search for an existing Fee Code.**

**Clicking on any column header will sort the selected column.**

**Click +Add to create a new Fee Code. Or click Edit to manage an existing one.**

|                                     | Fee Code Name             | Fee Calculation Type | Amount \$ | Percent % | Description   | # Configs. Using |
|-------------------------------------|---------------------------|----------------------|-----------|-----------|---|------------------|
| <input checked="" type="checkbox"/> | BLDG - Demolition         | Flat                 | 41.00     | 0.00      | Building fee for over-the-counter demolition          | 2                |
| <input checked="" type="checkbox"/> | BLDG - Reroof             | Flat                 |           |           | Building fee for family residential reroof permits    | 1                |
| <input checked="" type="checkbox"/> | BLDG - State Bldg Code    | Flat                 |           |           |   | 5                |
| <input checked="" type="checkbox"/> | BLDG - State Bldg Code    | Valuation            |           |           |   | 2                |
| <input checked="" type="checkbox"/> | Spa HT Sauna              | Flat                 |           |           | Electrical inspection fee for hot tub or sauna        | 16               |
| <input checked="" type="checkbox"/> | Carnivals                 | Flat                 | 139.00    | 0.00      | Electrical inspection fee for carnivals, street fairs | 3                |
| <input checked="" type="checkbox"/> | Lighted Signs             | Flat                 | 54.00     | 0.00      | Electrical inspection fee for lighted signs           | 8                |
| <input checked="" type="checkbox"/> | Min Fee                   | MinAdjTotal          | 37.00     | 0.00      | Electrical low voltage min fee                        | 8                |
| <input checked="" type="checkbox"/> | Temp Power 1-125          | Calculated           | 54.00     | 0.00      | Electrical temporary power 1-125 amps                 | 14               |
| <input checked="" type="checkbox"/> | ELEC - Temp Power 126-200 | Calculated           | 84.00     | 0.00      | Temporary power 126-200 amps                          | 14               |
| <input checked="" type="checkbox"/> | ELEC - Temp Power 201-400 | Calculated           | 120.00    | 0.00      | Temporary service 201-400 amps                        | 14               |
| <input checked="" type="checkbox"/> | ELEC - Valuation          | ValuationException   | 0.00      | 0.00      | Electrical valuation table                            | 14               |
| <input checked="" type="checkbox"/> | ELEC - Valuation          | ValuationException   | 0.00      | 0.00      | Electrical low voltage valuation table                | 8                |



**Complete the following fields:**

**Effective Date** = You may have more than one calculation or amount in any single Fee Code, each with their own effective date. The Fee Code with the most recent effective date will be used. This allows you to enter effective dates in the future (i.e., for yearly increases in fees).

**Calculation Type:**

- **Calculated** = Quantity times the dollar amount.
- **Flat** = Fixed fee charged regardless of quantity.
- **Percentage** = Calculates based on a percentage.
- **Range** = Uses the table entered in the Value/Range Table Name to calculate.
- **Valuation** = Uses the table entered in the Value/Range Table Name to calculate.

\*Other types of calculations such as Minimum and Maximum Adjusted Amounts can be created for your jurisdiction if needed.

**Cart Line Item** = Select how the fee will roll up and display in the Cart (based on Fee Calculation Types you have).

**Amount (\$)** = dollar amount for Calculated and Flat calculation types.

**Value/Range Table Name** = Indicate table to use if Range or Valuation calculation type selected. Note: The table needs to be created before the Fee Code can be created.

**Percent (%)** = Enter percent amount if Percentage calculation type selected.

**Rounding** = Indicate if you want the calculated amount to be rounded to the nearest cent (2 decimals) or nearest dollar.

**Qty Sum by FeeCode?** = Select if all items selected by the applicant with this same Fee Code should be counted together and then calculate the fee (i.e. fee applies to the total number of fixtures instead of each individual fixture).

**Description** = Add a detailed description for the code for reference.

Example of how Fee Codes display as line items in the Cart

| Select All               | Payment Types Accepted                          | Jurisdiction                 | Project Address  | Application Information | Total                 |               |
|--------------------------|---|------------------------------|------------------|-------------------------|-----------------------|---------------|
| <input type="checkbox"/> | <span>Credit Card</span>                        | Mill Creek                   | 4508 135TH PL SE | Mechanical              | \$10.00               | Delete Permit |
|                          |   |                              |                  |                         |                       |               |
|                          |   | Description                  | Quantity         | Unit Price              | Total Price           |               |
|                          |   | Exhaust Fan with duct - Bath | 1                | 10                      | 10                    |               |
|                          |   |                              |                  |                         | <b>Total: \$10.00</b> |               |
| <input type="checkbox"/> | <span>Credit Card</span><br><span>eCheck</span> | Bellevue                     | 450 110TH AVE NE | Mechanical              | \$26.00               | Delete Permit |
|                          |   |                              |                  |                         |                       |               |
|                          |   | Description                  | Quantity         | Unit Price              | Total Price           |               |
|                          |   | Exhaust Fan with duct - Bath | 1                | 26                      | 26                    |               |
|                          |   |                              |                  |                         | <b>Total: \$26.00</b> |               |
| <input type="checkbox"/> | <span>Credit Card</span><br><span>eCheck</span> | Bellevue                     | 450 110TH AVE NE | Mechanical              | \$34.00               | Delete Permit |
|                          |   |                              |                  |                         |                       |               |
|                          |   | Description                  | Quantity         | Unit Price              | Total Price           |               |
|                          |   | Exhaust Fan with duct - Bath | 1                | 26                      | 26                    |               |
|                          |   | Mechanical Issuance Fee      | 1                | 8                       | 8                     |               |
|                          |   |                              |                  |                         | <b>Total: \$34.00</b> |               |

Example of a FLAT Fee calculation – regardless of the quantity the applicant would enter, or the value of the work, any Work Type information entered that has this Fee Code assigned would be charged a flat \$41

Fee Code Item

Effective Date:

8/4/2015

Fee Calculation Type:

Flat

Cart Line Item:

Permit Fee

Amount (\$):

41.00

Value/Range Table Name:

Select One

Percent (%):

0.00

Rounding:

NoRounding

Qty. Sum By FeeCode?

Description:

Building inspection fee for over-the-counter demolition

Close

Save



**NOTE:** Newly updated data will have a darker shading and hovering over that line will display information on who and when it was last edited.

Example of a Fee code with multiple Effective Dates

Fee Code Name:

|  | Effective Date | Amount \$   | Percent % | Fee Calculation Type | ValuationRange Table | Description  |
|--|----------------|---|-----------|----------------------|----------------------|--|
|  |                |   |           |                      |                      |  |
|  | 1/1/2017       | \$210.00  | 0.00%     | Flat                 |                      | Building inspection fee for single family residential reroof permits |
|  | 8/5/2016       | Last edit date:9/21/2016 12:40:47 PM by: sgalloway. |           |                      |                      | Building inspection fee for single family residential reroof permits |

### Exporting your Fee Code List

To export a list of your Fee Codes details to an Excel spreadsheet, including the Name, Number of Application Configurations it is assigned to, Effective Date, Calc Type, Amount, etc., use the Export Full List button when you are in the Manage Fee Codes screen.

Manage Fee Codes




|  | Fee Code Name | Fee Calculation Type | Amount \$ | Percent % | Description   | # Configs. Using |
|--|---------------|----------------------|-----------|-----------|---|------------------|
|  |               |                      |           |           |   |                  |
|  | BMP Valuation | Valuation            | 0.00      | 0.00      | Building - Mechanical - Plumbing Valuation / Round to two decimal | 27               |
|  | Carnival      | Flat                 | 76.00     | 0.00      | Carnival Fee  | 1                |

Example of the Fee Code Export



|    | A         | B                    | C      | D                       | E              | F             | G              | H               | I      | J          | K                 | L           | M            | N                | O  | P              | Q         | R               | S          |
|----|-----------|----------------------|--------|-------------------------|----------------|---------------|----------------|-----------------|--------|------------|-------------------|-------------|--------------|------------------|--|----------------|-----------|-----------------|------------|
|    | FeeCodeId | Name                 | Jurisd | Configurations UsingCnt | FeeCode ItemId | EffectiveDate | FeeCalc TypeId | FeeCalcType     | Amount | Percentage | ValueRange CodeId | Rounding Id | AliasFees KU | QtySumB yFeeCode | Description                              | CreateDate     | CreatedBy | ModifiedDate    | ModifiedBy |
| 1  | 3150      | BMP Valuation        | 11     | 27                      | 1135           | 2/2/2016 0:00 | 17             | Valuation       | 0      | 0          | 1075              | 3           | 9991         | FALSE            | Building - Mechanical - Plumbing Valuat  | 2/2/2016 13:36 | jvoguee   |                 |            |
| 2  | 3142      | Carnival             | 11     | 1                       | 1127           | 2/2/2016 0:00 | 16             | Flat            | 76     | 0          |                   | 1           |              | FALSE            | Carnival Fee                             | 2/2/2016 12:05 | jvoguee   |                 |            |
| 3  | 3139      | Carnival Concessions | 11     | 1                       | 1124           | 2/2/2016 0:00 | 15             | Calculated      | 14     | 0          |                   | 1           |              | FALSE            | Carnival concession per item fee         | 2/2/2016 11:47 | jvoguee   |                 |            |
| 4  | 3145      | Demolition           | 11     | 2                       | 1130           | 2/2/2016 0:00 | 16             | Flat            | 110    | 0          |                   | 1           | 9991         | FALSE            | Demolition Permit Fee                    | 2/2/2016 12:52 | jvoguee   |                 |            |
| 5  | 3144      | Electrical -88       | 11     | 20                      | 1129           | 2/2/2016 0:00 | 15             | Calculated      | 88     | 0          |                   | 1           |              | FALSE            | All SFR Electrical with an \$88 fee      | 2/2/2016 12:29 | jvoguee   |                 |            |
| 6  | 3149      | Electrical Duplex    | 11     | 1                       | 1134           | 2/2/2016 0:00 | 16             | Flat            | 246    | 0          |                   | 1           |              | FALSE            | Electrical Duplex                        | 2/2/2016 13:11 | jvoguee   |                 |            |
| 7  | 3151      | Electrical Valuation | 11     | 23                      | 1136           | 2/2/2016 0:00 | 77             | ValuationExcept | 0      | 0          | 1076              | 1           | 9991         | FALSE            | Electrical Valuation no Rounding         | 2/2/2016 13:46 | jvoguee   | 4/8/2016 12:48  | jvoguee    |
| 8  | 3141      | Gas Pipe Only        | 11     | 3                       | 1126           | 2/2/2016 0:00 | 16             | Flat            | 64     | 0          |                   | 1           |              | FALSE            | Gas Piping Only - Flat fee               | 2/2/2016 11:59 | jvoguee   |                 |            |
| 9  | 3143      | Low Voltage RES      | 11     | 16                      | 1128           | 2/2/2016 0:00 | 15             | Calculated      | 79     | 0          |                   | 1           |              | FALSE            | Low Voltage Fee - Residential Only       | 2/2/2016 12:15 | jvoguee   |                 |            |
| 10 | 3147      | New Electrical / 6+  | 11     | 6                       | 1132           | 2/2/2016 0:00 | 16             | Flat            | 123    | 0          |                   | 1           |              | FALSE            | New Structure Electrical and 6+ circuits | 2/2/2016 13:03 | jvoguee   |                 |            |
| 11 | 3148      | ReRoof Duplex        | 11     | 2                       | 1133           | 2/2/2016 0:00 | 16             | Flat            | 220    | 0          |                   | 1           |              | FALSE            | RE-ROOF Duplex                           | 2/2/2016 13:09 | jvoguee   |                 |            |
| 12 | 3146      | ReRoof SFR           | 11     | 11                      | 1131           | 2/2/2016 0:00 | 16             | Flat            | 110    | 0          |                   | 1           |              | FALSE            | RE-ROOF Flat fee                         | 2/2/2016 12:56 | jvoguee   |                 |            |
| 13 | 3138      | SBOC Surcharge       | 11     | 13                      | 1123           | 2/2/2016 0:00 | 16             | Flat            | 4.5    | 0          |                   | 1           | 9992         | FALSE            | State Building Code Surcharge            | 2/2/2016 11:39 | jvoguee   |                 |            |
| 14 | 3152      | SFR M/P Fixtures     | 11     | 128                     | 1137           | 2/2/2016 0:00 | 18             | Range           | 0      | 0          | 1077              | 1           | 9991         | TRUE             | Residential Mechanical / Plumbing        | 2/2/2016 14:16 | jvoguee   | 3/23/2016 8:03  | scollier   |
| 15 | 3140      | Temp/React/MH        | 11     | 25                      | 1125           | 2/2/2016 0:00 | 15             | Calculated      | 59     | 0          |                   | 1           |              | FALSE            | Temp Service / Service Reactivation / Mo | 2/2/2016 11:53 | jvoguee   | 4/11/2016 14:45 | lblechen   |
| 16 |           |                      |        |                         |                |               |                |                 |        |            |                   |             |              |                  |  |                |           |                 |            |
| 17 |           |                      |        |                         |                |               |                |                 |        |            |                   |             |              |                  |  |                |           |                 |            |
| 18 |           |                      |        |                         |                |               |                |                 |        |            |                   |             |              |                  |  |                |           |                 |            |
| 19 |           |                      |        |                         |                |               |                |                 |        |            |                   |             |              |                  |  |                |           |                 |            |
| 20 |           |                      |        |                         |                |               |                |                 |        |            |                   |             |              |                  |  |                |           |                 |            |
| 21 |           |                      |        |                         |                |               |                |                 |        |            |                   |             |              |                  |  |                |           |                 |            |
| 22 |           |                      |        |                         |                |               |                |                 |        |            |                   |             |              |                  |  |                |           |                 |            |

## Deleting Fee Codes

The Fee Code *cannot* be deleted if it is assigned to any Work Types/SKU's (as noted in the # Configs. Using column). You must remove the Fee Code from all application configurations *before* an option to delete the Fee Code is available.

|   |                         |       |        |      |  |   |
|---|-------------------------|-------|--------|------|--|---|
|  | ELEC - Vehicle Charging | Flat  | 108.00 | 0.00 | Flat fee for electrical vehicle charging station   | 4 |
|  | ELEC - Work in ROW      | Flat  | 204.00 | 0.00 | Electrical inspection for work in the right of way | 0 |
|  | FIRE - Sprinkler Insp   | Range | 0.00   | 0.00 | Fire Sprinkler Inspection fee                      | 8 |

Once a Fee Code shows '0' under # Configs. Using column, a delete icon will appear next to the Edit button on the Fee Code.

|   |                         |      |        |      |                                 |  |
|---|-------------------------|------|--------|------|---------------------------------|--|
|  | ELEC - Vehicle Charging | Flat | 103.00 | 0.00 | Flat fee for electrical vehicle |  |
|  | ELEC - Work in ROW      | Flat | 204.00 | 0.00 | Electrical inspection for work  |  |

Click delete icon to remove Fee Code.

## Assigning Fee Codes

After the Fee Codes are created, they need to be **assigned** to Work Types/SKU's in the Application Configuration.

There are two ways to get into the ASSIGN FEE CODE functionality:


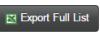















1. **MANAGE**=> Fees=>Manage Fee Codes then click the **ASSIGN FEE CODES** button.

Or

2. When Configuring the Application, Work Types Tab, use the **ASSIGN** button in the Fee Code column.

### Option #1:

From the MANAGE→Fees→Manage Fee Codes

| Manage Fee Codes  |                           |   |           |           |  |   |
|---|---------------------------|---|-----------|-----------|--|---|
|   |                           | <input type="text" value="Search for Fee Code Name"/> |           |           |  |  |
|    |                           | Calculation Type                                      | Amount \$ | Percent % | Description  | # Configs. Using  |
|    |                           |   | 41.00     | 0.00      | Building inspection fee for over-the-counter demolition              | 2   |
|    |                           |   | 206.00    | 0.00      | Building inspection fee for single family residential reroof permits | 1   |
|    |                           |   | 4.50      | 0.00      | State Building Code Fee  | 5   |
|    | BLDG - Valuation          | Valuation   | 0.00      | 0.00      | 2016 Building Valuation Table  | 2   |
|    | ELEC - Pool Spa HT Sauna  | Flat  | 66.00     | 0.00      | Price per fixture for pool, spa, hot tub or sauna                    | 16  |
|    | ELEC - Carnivals          | Flat  | 139.00    | 0.00      | Electrical inspection fee for carnivals, street fairs                | 3   |
|    | ELEC - Lighted Signs      | Flat  | 54.00     | 0.00      | Electrical inspection fee for lighted signs                          | 8   |
|    | ELEC - LV Min Fee         | MinAdjTotal   | 37.00     | 0.00      | Electrical low voltage min fee                                       | 8   |
|    | ELEC - Temp Power 1-125   | Calculated  | 54.00     | 0.00      | Electrical temporary power 1-125 amps                                | 14  |
|    | ELEC - Temp Power 126-200 | Calculated  | 84.00     | 0.00      | Temporary power 126-200 amps   | 14  |
|    | ELEC - Temp Power 201-400 | Calculated  | 120.00    | 0.00      | Temporary service 201-400 amps                                       | 14  |
|    | ELEC - Valuation          | ValuationException                                    | 0.00      | 0.00      | Electrical valuation table   | 14  |
|    | ELEC - Valuation LV       | ValuationException                                    | 0.00      | 0.00      | Electrical low voltage valuation table                               | 2   |

Click Assign Fee Code(s).



### Assign Fee Code(s)

[Manage Fee Code\(s\)](#) / [Assign Fee Code\(s\)](#)

Application Type:

All
Building [85]
Clearing and Grading [35]
Electrical [22]
Fire - Bellevue Contract Cities [80]
Fire [94]
Land Use [89]
Mechanical [14]
Plumbing [14]
Right-of-Way [56]
Sign [29]
Utilities - Bellevue Service Area [21]
Utilities [30]
ZZTestAppType [1]

**Search for the applicable WorkType/SKU(s) to assign.**

**You can search by a specific Application Type or keyword within the SKU.**

**Click Get to pull applicable SKU(s).**

Example of a completed search by Application Type:

### Assign Fee Code(s)

[Manage Fee Code\(s\)](#) / [Assign Fee Code\(s\)](#)

Application Type:

ZZTestAppType [2]

| Application Type | Product Name         | SKU  | Select All?                         |
|------------------|----------------------|------|-------------------------------------|
| TEST             | Add Info Test 1      | 4000 | <input type="checkbox"/>            |
| TEST             | Add Info Test 2      | 4001 | <input checked="" type="checkbox"/> |
| TEST             | Combination Test 1   | 3000 | <input checked="" type="checkbox"/> |
| TEST             | Combination Test 2   | 3001 | <input checked="" type="checkbox"/> |
| TEST             | Critical Area Test 1 | 2000 | <input type="checkbox"/>            |
| TEST             | Fixture Test 1       | 5000 | <input type="checkbox"/>            |
| TEST             | Fixture Test 2       | 5001 | <input type="checkbox"/>            |

Example of a completed search by a Keyword

### Assign Fee Code(s)

[Manage Fee Code\(s\)](#) / [Assign Fee Code\(s\)](#)

Application Type:

All

| Application Type | Product Name  | SKU  | Select All?                         |
|------------------|---|------|-------------------------------------|
| MECH             | Air Conditioner   | 5872 | <input checked="" type="checkbox"/> |
| MECH             | Air Handler   | 1479 | <input checked="" type="checkbox"/> |
| BLDG             | Fair Market Value of Construction Work                          | 9000 | <input type="checkbox"/>            |
| ELEC             | Fair Market Value of Electrical Work                            | 9002 | <input type="checkbox"/>            |
| MECH             | Fair Market Value of Mechanical Work                            | 9005 | <input type="checkbox"/>            |
| PLUM             | Fair Market Value of Plumbing Work                              | 9006 | <input type="checkbox"/>            |
| CLGR             | Fair Market Value of Work                                       | 9001 | <input type="checkbox"/>            |
| MECH             | The work does not involve ventilation for a nail or hair salon. | 5897 | <input type="checkbox"/>            |

Manage Fee Code(s) / Assign Fee Code(s)

Application Type: All

| Application Type | Product Name  | SKU  | Select All?                         |
|------------------|---|------|-------------------------------------|
| MECH             | Air Conditioner   | 5872 | <input checked="" type="checkbox"/> |
| MECH             | Air Handler   | 1479 | <input checked="" type="checkbox"/> |
| BLDG             | Fair Market Value of Construction Work                          | 9000 | <input type="checkbox"/>            |
| ELEC             | Fair Market Value of Electrical Work                            | 9002 | <input type="checkbox"/>            |
| MECH             |   | 9005 | <input type="checkbox"/>            |
| PLUM             |   | 9006 | <input type="checkbox"/>            |
| CLGR             | Fair Market Value of Work                                       | 9001 | <input type="checkbox"/>            |
| MECH             | The work does not involve ventilation for a nail or hair salon. | 5897 | <input type="checkbox"/>            |

Click Assign Fee Code to proceed once all selections have been made.

Hovering over the Product Name will give existing configuration information for each SKU.

Click the checkbox next to all applicable SKU(s) to link to a Fee Code.

After clicking the Assign Fee Code button, a listing of all configurations containing those previously selected SKU(s) will appear:

Assign Fee Code(s)

Manage Fee Code(s) / Assign Fee Code(s)

Record Count: 8

Fee Code: SFR M/P Fixtures

| Application Type | Project Type              | Activity Type         | Scope of Work | Fee Code         | Select All?                         |
|------------------|---------------------------|-----------------------|---------------|------------------|-------------------------------------|
| Mechanical       | Mixed Use                 | Repair or Replacement | None          | SFR M/P Fixtures | <input checked="" type="checkbox"/> |
| Mechanical       | Multifamily Residential   | Repair or Replacement | None          | SFR M/P Fixtures | <input checked="" type="checkbox"/> |
| Mechanical       | Multifamily Residential   | Repair or Replacement | None          | SFR M/P Fixtures | <input type="checkbox"/>            |
| Mechanical       | Nonresidential            | Repair or Replacement | None          | SFR M/P Fixtures | <input type="checkbox"/>            |
| Mechanical       | Single Family Residential | Repair or Replacement | None          | SFR M/P Fixtures | <input type="checkbox"/>            |
| Mechanical       | Single Family Residential | Repair or Replacement | None          | SFR M/P Fixtures | <input type="checkbox"/>            |
| Mechanical       | Single Family Residential | Repair or Replacement | None          | SFR M/P Fixtures | <input type="checkbox"/>            |
| Mechanical       | Single Family Residential | Repair or Replacement | None          | SFR M/P Fixtures | <input type="checkbox"/>            |

Click Assign to proceed once all selections have been made.

Select the appropriate Fee Code to assign to the selected configurations.

Click the checkbox next to all applicable configurations.

Note: Any time you see this icon, you can click to jump to that code or configuration.

**NOTE:** To remove a fee code, follow the same steps above but select 'No Fee Code' from the Fee Code drop-down list.

## Option #2

From the **MANAGE** → Applications

Application Type: Mechanical [16] Project Type: Single Family Residential Activity Type: Addition Scope of Work: None

☒ Configuration Active? Clone Delete Configuration

PreApplication Msg. Work Types Supplementals Documents

**Work Types** Export + Add

| Work Type Name          | Category                 | SKU  | Fee Code                            | Review Req?                         | <input type="checkbox"/> Activate All? | Required?                |               |
|-------------------------|--------------------------|------|-------------------------------------|-------------------------------------|--|--------------------------|---------------|
| Heater - Wood Stove     | Heaters                  | 1301 | <span>Assign</span>                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Water Heater      | Appliances and Equipment | 1501 | <span></span>                       | <input type="checkbox"/>            | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Stove or Cook Top | Appliances and Equipment |      | <span></span>                       | <input type="checkbox"/>            | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Barbeque          | Appliances and Equipment |      | <span></span>                       | <input type="checkbox"/>            | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Clothes Dryer     | Appliances and Equipment | 1504 | <span>Edit: SFR M/P Fixtures</span> | <input type="checkbox"/>            | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Log Lighter       | Appliances and Equipment | 1505 | <span>Edit: SFR M/P Fixtures</span> | <input type="checkbox"/>            | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas Log                 | Appliances and Equipment | 1506 | <span>Edit: SFR M/P Fixtures</span> | <input type="checkbox"/>            | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |

Select the four "buckets" for the configuration.

Click the Assign button in the Fee Code column on the applicable Work Type line.

Make sure SKU is active.

Application Type: Mechanical [14] Project Type: Single Family Residential Activity Type: Addition Scope of Work: None

☒ Configuration Active? Clone Delete Configuration

PreApplication Msg. Work Types Supplementals Document Types Submittal Info. General Process Info.

**Work Types** Export + Add

| Work Type Name          | Category                 | SKU  | Fee Code    | Review Req?              | <input type="checkbox"/> Activate All? | Required?                |               |
|-------------------------|--------------------------|------|-------------|--------------------------|--|--------------------------|---------------|
| Heater - Wood Stove     | Heaters                  | 1301 | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Heater - Wall Heater    | Heaters                  |      | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Heater - Unit Heater    | Heaters                  |      | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Heater - Floor Furnace  | Heaters                  |      | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Stove or Cook Top | Appliances and Equipment |      | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Barbeque          | Appliances and Equipment |      | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Clothes Dryer     | Appliances and Equipment | 1504 | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas - Log Lighter       | Appliances and Equipment | 1505 | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |
| Gas Log                 | Appliances and Equipment | 1506 | No Fee Code | <input type="checkbox"/> | <input checked="" type="checkbox"/>    | <input type="checkbox"/> | <span></span> |

To remove an assigned Fee Code, select 'No Fee Code'.

When Assign button is clicked a drop-down menu appears with all existing Fee Codes listed. Once selected the Fee Code will automatically be assigned to the SKU.



**REMINDER:** Only **Over-the-Counter** permits need Fee Codes assigned – Plan Review fees will come from your backend permitting system when you invoice.

## Fee Maintenance—Increases, New Fees

When your jurisdiction increases, changes, or adds new fees, you can create the codes and add them to your SKU's/Work Types ahead of time by setting the Effective Date to the appropriate future date (for instance 1/1/2018). You may also copy/clone Valuation/Range Tables and update the amounts – be sure to give the updated table a new descriptive name and reference it in the appropriate Fee Codes.

**Adding a new FEE Code with future expiration date** – you can copy an existing Fee Code, change the Effective Date to the future date and enter the new Amount. Anywhere this code is used, the new Amount will be in effect as soon as the Effective Date occurs.


Example of a Fee Code with two separate Effective Dates

### Add/Edit Fee Codes

Manage Fee Code(s) / Add/Edit Fee Code

Fee Code Name:  Update Cancel Delete

|                                     | Effective Date | Amount \$ | Percent % | Fee Calculation Type | ValuationRange Table | Description                      |
|-------------------------------------|----------------|-----------|-----------|----------------------|----------------------|----------------------------------|
| <span>+ Add</span>                  |                |           |           |                      |                      |                                  |
| <span>Edit</span> <span>Copy</span> | 1/1/2017       | \$15.50   | 0.00%     | Calculated           |                      | Carnival concession per item fee |
| <span>Edit</span> <span>Copy</span> | 2/2/2016       | \$14.00   | 0.00%     | Calculated           |                      | Carnival concession per item fee |

 **NOTE:** If you've created a new Valuation/Range Table that will be used with your new Fee Code, be sure to change the Table Name in the Fee Code setup as well.

***If fees are “hardcoded” or have special handling (such as complex electrical permit fees) send your new fee amounts to the MBP Support/Business Analyst to update. They will need to have a developer update the fees and you will need to thoroughly test in the Staging system before they will be entered into production.***

## Managing Jurisdiction Information

You can set jurisdiction-specific parameters for critical parts of the MBP system on the Manage > Settings menu. Most of these settings and items are managed by Jurisdiction Admin users who control what choices and information an applicant has available, or needs to submit, during the application process.

Under **Manage** you will find the following menu options:

**Applications** – Create new or modify existing application configurations which control the choices and information required when applicants are applying for a permit.

**Fees** – Fees for Over the Counter (OTC) applications must be configured in MBP. Plan Review applications will have invoices generated with fee information from your backend permitting system.

**Settings** – Jurisdiction Information, Application Types you will accept on MBP, Inspection Information and Holidays (only if this information isn't available from your backend permitting system).

**Supplementals** – Additional questions and information that can be added to any Application Configuration.

**Support** – Where you can regenerate a permit PDF, email, remove unpaid invoices, and add delegates.

## Settings

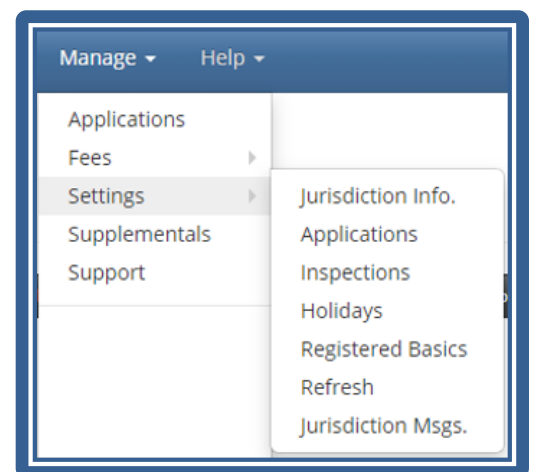
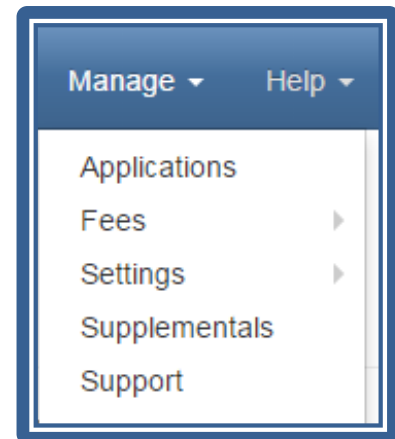
Jurisdictions can set up and edit specific information from the **MANAGE** → Settings menu on the Jurisdiction Admin site.

**Jurisdiction Info** – Website link, Contact Email, Credit Card limit, if Local Business License is required, if Business License Expiration Dates is Required, and if you are active MBP and show in the Jurisdiction list.

**Applications** – setting for which types of Permit/Applications you offer, and which will accept Plan Review applications, and if you OPT Out of any types with a message displayed.

**Inspections** – If you accept AM/PM inspection times, if the times come from the interface with the jurisdiction's backend permitting system, and the message displayed on the [Inspection Scheduling site](#).

**Holidays** – Set holiday schedule for [Inspection Scheduling site](#). For non-integrated jurisdictions' use only.



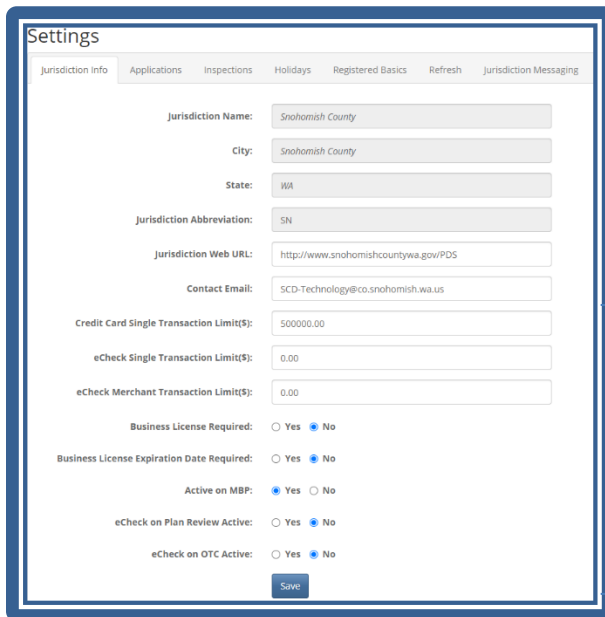
**Registered Basics** – If your jurisdiction accepts registered basic plans, this is where you set specific criteria for the plans.

**Refresh** – Initiate an address update.

**Jurisdiction Messages** – Build a library of messages to alert jurisdiction staff and customers of issues that are relevant to your jurisdiction.

## Jurisdiction Info

Control information specific to your jurisdiction through this tab:



The screenshot shows the 'Settings' page with the 'Jurisdiction Info' tab selected. The form contains the following fields and options:

- Jurisdiction Name: Snohomish County
- City: Snohomish County
- State: WA
- Jurisdiction Abbreviation: SN
- Jurisdiction Web URL: http://www.snohomishcountywa.gov/PDS
- Contact Email: SCD-Technology@co.snohomish.wa.us
- Credit Card Single Transaction Limit(\$): 500000.00
- eCheck Single Transaction Limit(\$): 0.00
- eCheck Merchant Transaction Limit(\$): 0.00
- Business License Required: ☐ Yes ☒ No
- Business License Expiration Date Required: ☐ Yes ☒ No
- Active on MBP: ☒ Yes ☐ No
- eCheck on Plan Review Active: ☐ Yes ☒ No
- eCheck on OTC Active: ☐ Yes ☒ No
- Save button

These are the only fields that can be modified: Jurisdiction URL; Contact Email; Transaction Limit.









You can also set business license requirements and if your jurisdiction is active on MBP.

## Applications

List of Application Types currently offered at your jurisdiction. Determines if application requires plan review or not.

Settings

Jurisdiction Info
Applications
Inspections
Holidays
Registered Basics
Refresh
Jurisdiction Messaging

| Application Type                | Code | Accepts Plan Review | NumDaysPer... | Opt Out | Opt Out Message | Modified Date          | Modified By |   |
|---------------------------------|------|---------------------|---------------|---------|-----------------|------------------------|-------------|---|
| Building                        | BLDG | true                | 365           | false   |                 | 5/22/2021 1:14:09 PM   | alillie     |  Edit  |
| Clearing and Grading            | CLGR | true                | 365           | false   |                 | 12/23/2019 12:22:26 PM | alillie     |  Edit  |
| Electrical                      | ELEC | true                | 365           | false   |                 | 5/22/2021 1:14:59 PM   | alillie     |  Edit  |
| Fire                            | FIRE | true                | 365           | false   |                 | 5/22/2021 1:15:05 PM   | alillie     |  Edit  |
| Fire - Bellevue Contract Cities | FRBC | true                | 365           | false   |                 | 5/22/2021 1:15:10 PM   | alillie     |  Edit  |
| Land Use                        | LAND | true                | 365           | false   |                 | N/A                    | N/A         |  Edit  |
| Mechanical                      | MECH | true                | 365           | false   |                 | 5/22/2021 1:15:16 PM   | alillie     |  Edit  |
| Natural Resources               | NTRL | true                | 365           | false   |                 | N/A                    | N/A         |  Edit |

Click Edit to make changes to any Application Type.

Application Type Setting

Application Type:

Building (BLDG)

# Days Permit Expire:

366

Accepts Plan Review:

☒

Opt Out:

☐

Opt Out Message:

B I [icon] [icon] [icon]

Close Save

Enter the following information:  
  
**# of Days Permit Expire** = The length of time a permit remains valid.  
**Accepts Plan Review** = When checked, the application will trigger plan review. If unchecked, application will be considered OTC.  
**Opt Out** = If selected a message will appear when customer selects this application type when applying.  
**Opt Out Message** = If Opt Out is selected, enter a message with additional details for the customer.

Example of an Opt Out message in Jurisdiction Settings:

|  | Application Type     | Code | Accepts Plan Review                 | Opt Out                             | Opt Out Message  | Modified Date        | Modified By |
|--|----------------------|------|-------------------------------------|-------------------------------------|--|----------------------|-------------|
|  | Building             | BLDG | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  | 5/11/2016 2:46:49 PM | keitht      |
|  | Clearing and Grading | CLGR | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |                      |             |
|  | Electrical           | ELEC | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Electrical permits are reviewed and issued by the Washington State Department of Labor and Industries. Many permits may be obtained <a href="#">online</a> . The closest L&I office is located in Bellevue:<br>616 120th Ave. NE Ste. C201<br>Bellevue, WA ( <a href="#">map</a> )<br>Ph: 425-990-1400 | 5/11/2016 3:19:51 PM | keitht      |
|  | Fire                 | FIRE | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  | 5/11/2016 2:47:05 PM | keitht      |

Example of an Opt Out message as displayed to customer:

Application Information

Application Type

Electrical: Permits for electrical equipment or systems.

Change Selection

Electrical permits are reviewed and issued by the Washington State Department of Labor and Industries. Many permits may be obtained [online](#). The closest L&I office is located in Bellevue:  
616 120th Ave. NE Ste. C201  
Bellevue, WA ([map](#))  
Ph: 425-990-1400

Back

## Inspections—Messaging

Settings

Jurisdiction Info
Applications
Inspections
Holidays

Allow AM/PM time selection:
Yes No

Inspection Dates provided by:
Jurisdiction

Inspection Message:

B I

To get an estimated inspection time, please call (425) 452-4570

Save


Include any jurisdiction specific messaging to display on the [Inspection Scheduling site](#).














## Holidays—Non-integrated Jurisdictions Only

Settings

Jurisdiction Info
Applications
Inspections
Holidays

Holiday Date:   Name of Holiday

| Holiday Date | Description            |  |
|--------------|------------------------|--|
| 12/26/2016   | Christmas Day          |  Delete   |
| 12/23/2016   | Christmas Eve          |  Delete   |
| 11/25/2016   | Thanksgiving           |  Delete   |
| 11/24/2016   | Thanksgiving           |  Delete   |
| 11/11/2016   | Veteren's Day          |  Delete   |
| 9/5/2016     | Labor Day              |  Delete   |
| 7/4/2016     | July 4th               |  Delete   |
| 5/30/2016    | Memorial Day           |  Delete   |
| 2/15/2016    | President's Day        |  Delete   |
| 1/18/2016    | Martin Luther King Day |  Delete  |
| 1/1/2016     | New Years Day          |  Delete |

**For non-integrated jurisdictions only:**  
Set Jurisdiction holiday schedule to update Inspection scheduling accordingly.

## Registered Basics



Settings

Jurisdiction Info
Applications
Inspections
Holidays
Registered Basics

Allow Apply for Site Specific before Plan Approved? ☒ Yes ☐ No

Allow Plans to be used by companies user is associated with? ☐ Yes ☒ No

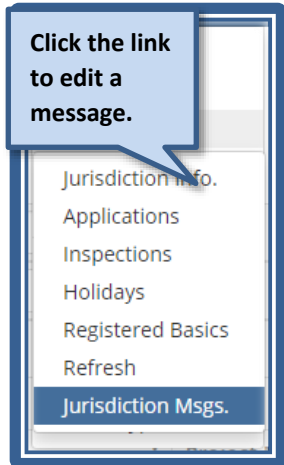
Plan Expiration Settings:

|  Add  | Code Name | Expiration Date | Current |
|--|-----------|-----------------|---------|
|  Edit | 2015      | 3/9/2020        | True    |

**Set criteria for how applicants can apply for site specific permits and expirations on Registered Basic plans.**

## Jurisdiction Messages

You can add messaging to several pages in MBP via the Jurisdiction Msgs. Sub-menu under Settings.



You can create new messages or edit existing ones and specify the pages and timing for the messages to display.

Click the link to edit a message.

View the Publish dates/times.

Add New Message.

Delete a message from the Message Library.

| Title   | Alert Type        | Author         | Publish Start Date/Time | Publish End Date/Time |  |
|---|-------------------|----------------|-------------------------|-----------------------|--|
| <a href="#">Updated Message</a>               | Warning - Yellow  | aoconnor       | 3/16/2021 12:19 PM      | 3/16/2021 2:00 PM     |  |
| <a href="#">Testing jurisdiction messages</a> | Danger - Red      | aoconnor       | 3/16/2021 12:19 PM      |                       |  |
| <a href="#">Test message</a>                  | Info only - Green | JurisAdminTest | 3/26/2021 5:00 PM       |                       |  |

Buttons: Add New Message, Delete

Existing messages appear in the Message Library, which allows you to store messages for re-use later. Click the hyperlink to edit any message in your message library.

You can create a new message and set it to be published at any future time and select the pages on which the message is to appear.

### Create Jurisdiction Message

**Title: \***

**Alert Type: \***

Select One

**Display On (select all that apply): \***

☐ Select All
☒ Customer Dashboard
☐ Invoice Detail
☐ Add Contractor
☐ Cancel Application
☒ Jurisdiction Dashboard
☐ Invoice Detail
☒ ePermit
☐ Select Jurisdiction
☐ Upload Files
☒ Inspection
☐ Inspection Scheduling
☒ PDFs
☐ Permit (Inspection Info)

**Message: \***

B
I
U
List-Group
List-Group
Link
Image

Enter your message, up to 1000 characters.

You have typed 0 of 3000 total allowed characters.

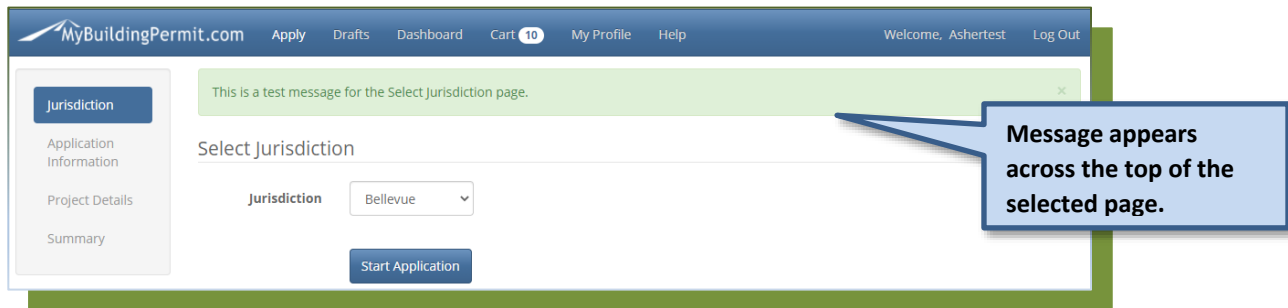
Save
Cancel

The Title only appears in the Jurisdiction Library. It is not published with the message.

Select the Alert type:  
Green – Info Only  
Yellow – Warning  
Red – Danger.

Set Publish Start and Publish End date and time to determine when the message will appear.

Select the pages on which you want the message to display. Some PDFs are also supported.



### Considerations for Jurisdiction Messaging

- There is no limit on the number of messages you can post on any page. Consider page layout and usability when determining the length of your message and the number of messages posted on a page. Messages that are too long, or where multiple messages are posted, can push the main page content down, and negatively impact page useability.
- There may be system-wide messages that were posted by the MBP team. System messages span the top of the page, and where they are configured to appear, will precede Jurisdiction messages.
- PDF messaging is unique to PDFs and cannot be included in Select All page actions. The message editor for the Permit Card/Inspection PDF does not support all rich text formatting. The following text formatting are not supported on the PDF:
  - Bulleted and numbered lists
  - Underlining
  - Formatting for hyperlinked text. The hyperlink is active, but the PDF does not display standard formatting (underlining and font color).
  - Copy/paste text from other applications. All messages should be natively typed in the message editor to avoid introducing encoded text.

**Note:** The eGov team can also add system-wide messaging to alert all users, across all MBP applications and all jurisdictions, of important or urgent information. Please contact eGov support if you feel that a System Message is necessary. System Messages will appear above any Jurisdiction Messages that are established for a page.

### SKU and Category Requests

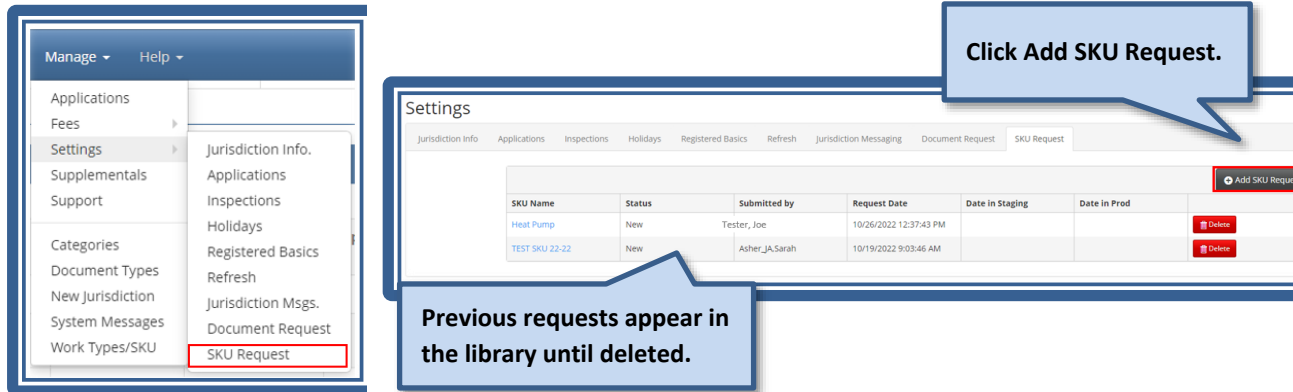
SKU (WorkType) and Category Requests can be made via MBP Admin under **Manage > Settings > SKU Request**. When the request is submitted, an email is generated and routed to MBP Support. Once received, the eGov Service Delivery Team team will review and implement the request in Staging. After the requestor approves that it is correctly implemented in Staging, BAs will implement them in the Production site and close the ticket.

### Prepare the SKU or Category Request

The following table describes the information required and the process by which you submit a request:

| Request Type     | Approval Required by...           | Request Submitted via...   | Information needed   |
|------------------|-----------------------------------|--|--|
| SKU Request      | <b>eGov Service Delivery Team</b> | SKU Request form (Admin > Manage > Applications > Settings > SKU Request form)<br>A support ticket and email are auto generated. | See information requested in form. At a minimum we need the following: <ul style="list-style-type: none"> <li>• Application Type(s)</li> <li>• SKU Name</li> <li>• Control Type</li> <li>• Category that SKU applies to</li> </ul> |
| Category Request | <b>eGov Service Delivery Team</b> | SKU request form, or submit via support ticket: <a href="mailto:egovsupport@ecitygov.net">(egovsupport@ecitygov.net)</a>         | See information requested in form. At a minimum we need the following: <ul style="list-style-type: none"> <li>• Application Type(s)</li> <li>• Category Name</li> </ul>  |

### View the Category / SKU Library



**Click Add SKU Request.**

**Previous requests appear in the library until deleted.**

| SKU Name       | Status | Submitted by   | Request Date           | Date in Staging | Date in Prod |                        |
|----------------|--------|----------------|------------------------|-----------------|--------------|------------------------|
| Heat Pump      | New    | Tester, Joe    | 10/26/2022 12:37:43 PM |                 |              | <a href="#">Delete</a> |
| TEST SKU 22-22 | New    | Asher_JA.Sarah | 10/19/2022 9:03:46 AM  |                 |              | <a href="#">Delete</a> |

## Complete The SKU Request Form

**SKU Request**

Fields marked with \* are required

SKU Name\*:

Status \*: New

Application Type \*: ☐ Plumbing  
☐ Mechanical  
☐ Electrical  
☐ Building  
☐ Right-of-Way  
☐ Sign  
☐ Utilities  
☐ Clearing and Grading  
☐ Fire  
☐ Land Use  
☐ Fire - Bellevue Contract Cities  
☐ Utilities - Bellevue Service Area  
☐ ZZTestAppType  
☐ Natural Resources  
☐ Special Use or Event

Category Name\*:

Required Category? \*: No

Control Type \*: QuantityBox

Description/Reason \*:

Requestor First & Last Name \*: Asher,Sarah

Requestor Email \*: SAsheer@bellevuewa.gov

Date in Staging:

Date in Prod:

Cancel Submit

**Enter the new Category or SKU name.**

**Select all Application Type(s) the Category or SKU will apply to.**

**For new Categories: Re-enter the new Category name.  
For new SKUs: Enter the Categories that the new SKU applies to.**

**Click Submit. A support ticket will be sent to BAs for review and processing.**

## Document Requests

Document Requests can be made via MBP Admin under **Manage > Settings > Document Request**. When the request is submitted, an email is generated and routed to MBP Support. Once received, the Service Delivery Team will review the request and implement the change in both Staging and Production and close the ticket.



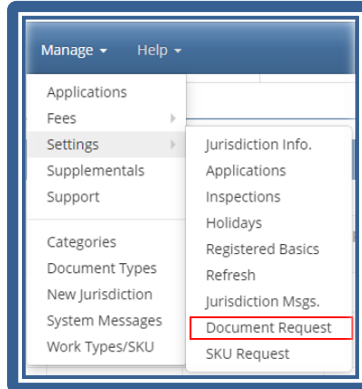
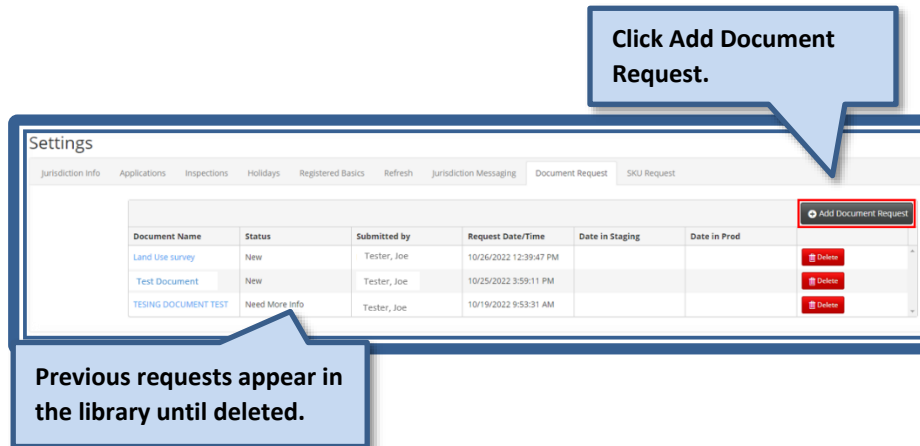
**NOTE:** To reduce potential duplicate Document and Work Types, we search current inventory lists of documents and SKUs to identify a similar, already existing match. In these instances, we will contact the original requestor to verify if we can use the existing type or if a new one is still needed.

### Prepare the Document Request

Gather the following information before submitting a Document Request.

| Request Type     | Approval Required by...           | Request Submitted via...   | Information needed  |
|------------------|-----------------------------------|--|---|
| Document Request | <b>eGov Service Delivery Team</b> | Document Request form (Admin > Manage > Applications > Settings > Document Request form)<br>A support ticket and email are auto generated. | See information requested in form.<br>At a minimum, we need the following: <ul style="list-style-type: none"> <li>Application Type(s)</li> <li>Document Name</li> </ul> |

### View the Document Library

The image shows the 'Settings' page with the 'Document Request' tab selected. A table displays previous requests. A callout box points to the 'Add Document Request' button. Another callout box points to the table, stating: 'Previous requests appear in the library until deleted.'

**Click Add Document Request.**

| Document Name         | Status         | Submitted by | Request Date/Time      | Date in Staging | Date in Prod |                        |
|-----------------------|----------------|--------------|------------------------|-----------------|--------------|------------------------|
| Land Use survey       | New            | Tester, Joe  | 10/26/2022 12:39:47 PM |                 |              | <a href="#">Delete</a> |
| Test Document         | New            | Tester, Joe  | 10/25/2022 3:59:11 PM  |                 |              | <a href="#">Delete</a> |
| TESTING DOCUMENT TEST | Need More Info | Tester, Joe  | 10/19/2022 9:53:31 AM  |                 |              | <a href="#">Delete</a> |

**Previous requests appear in the library until deleted.**

## Complete The Document Request Form

**Document Request**

Fields marked with \* are required

Document Name\*:

Status\*:

Application Type\*: ☐ Plumbing  
☐ Mechanical  
☐ Electrical  
☐ Building  
☐ Right-of-Way  
☐ Sign  
☐ Utilities  
☐ Clearing and Grading  
☐ Fire  
☐ Land Use  
☐ Fire - Bellevue Contract Cities  
☐ Utilities - Bellevue Service Area  
☐ ZZTestAppType  
☐ Natural Resources  
☐ Special Use or Event

Jurisdiction Only Document\*: ☐ Yes ☒ No

Does this document type already exist on other applications\*: ☐ Yes ☒ No

Description/Reason\*:

Requestor First & Last Name\*:

Requestor Email\*:

Request Date/Time:

Date in Staging:

Date In Prod:

**Enter the new Document name.**

**Select all Application Type(s) the Document will apply to.**

**Click Submit. A support ticket will be sent to BAs for review and processing.**

## “Bucket” Type Requests

Jurisdiction Administrators often need to add new application types or other attributes to MBP. These attributes are known as the four “buckets” in the MBP system. These buckets appear to the customer at the beginning of the Application process, on the Application Information page of the ePermit portal. The Service Delivery Team will first add new bucket types to Staging for testing by the jurisdiction before creating them in the PROD environment.

The following are the first four selections a customer makes when applying for a permit online, referred to as “Buckets”:



Application Information

Application Type

Clearing and Grading: Permits for land surface disturbance or tree and vegetation maintenance.

Project Type

Single Family Residential: 1 or 2 unit dwellings and all buildings and structures accessory to this use.

Activity Type

Plat Infrastructure: Work associated with the construction of a plat.

Scope of Work

Site Development: Improvements associated with development.

Continue

- Bucket #1: **Application Type**
  - Bucket #2: **Project Type**
  - Bucket #3: **Activity Type**
  - Bucket #4: **Scope of Work**
- We do not add/edit these buckets without Program Committee discussion.
- We can add to these buckets without Program Committee discussion.

## Request a New “Bucket” Type

The following table shows the information required and the process for “Bucket” type requests:

| Bucket Request Type                            | Approval Required by       | Request Submitted via  | Information Needed from Jurisdictions   |
|--|----------------------------|--|---|
| Application Type (1 <sup>st</sup> Bucket)      | Program Committee          | Support Ticket<br><a href="mailto:egovsupport@ecitygov.net">egovsupport@ecitygov.net</a> | Requires the following information: <ul style="list-style-type: none"> <li>• Application Type</li> <li>• Application Type Description (these appear to the Applicant)</li> </ul>                          |
| Project Type (2 <sup>nd</sup> Bucket)          | Program Committee          | Support Ticket<br><a href="mailto:egovsupport@ecitygov.net">egovsupport@ecitygov.net</a> | Requires the following information: <ul style="list-style-type: none"> <li>• Application Type</li> <li>• Project Type Name</li> <li>• Project Type Description (these appear to the Applicant)</li> </ul> |
| Activity Type Request (3 <sup>rd</sup> Bucket) | eGov Service Delivery Team | Support ticket<br><a href="mailto:egovsupport@ecitygov.net">egovsupport@ecitygov.net</a> | Requires the following information: <ul style="list-style-type: none"> <li>• Application Type</li> <li>• Activity Type name</li> <li>• Activity Type description</li> </ul>                               |

|   |                            |  |   |
|---|----------------------------|--|---|
| Scope of Work Requests (4 <sup>th</sup> Bucket) | eGov Service Delivery Team | Support ticket<br>( <a href="mailto:egovsupport@ecitygov.net">egovsupport@ecitygov.net</a> ) | Requires the following information: <ul style="list-style-type: none"> <li>• Application Type</li> <li>• Scope of Work name</li> <li>• Scope of Work description</li> </ul> |
|---|----------------------------|--|---|

## Managing Supplementals

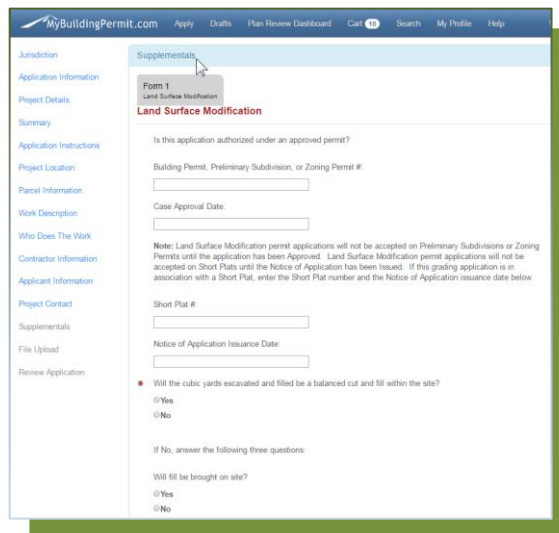
Before you can add Supplementals to your configurations, you must create them in the system. Once they're saved, you can add them during the configuration process. See Adding Supplemental Questionnaires for detailed instructions on adding Supplementals to a configuration.

## Creating New Questionnaires

**Supplementals** are a way a jurisdiction can request additional information or provide more detail to an applicant on Plan Review applications. Supplementals must be created first in the Jurisdiction Admin **MANAGE**→Supplementals menu, then assigned to an Application Configuration.

Questions within the Supplemental can have different types of answers, be set as required to be completed, put in specific order, and can also contain hyperlinks.

Example of a Customer Application Supplemental view



MyBuildingPermit.com Apply Drafts Plan Review Dashboard Cart Search My Profile Help

**Supplementals**

Form 1  
Land Surface Modification  
**Land Surface Modification**

Is this application authorized under an approved permit?

Building Permit, Preliminary Subdivision, or Zoning Permit #:

Case Approval Date:

Note: Land Surface Modification permit applications will not be accepted on Preliminary Subdivisions or Zoning Permits until the application has been Approved. Land Surface Modification permit applications will not be accepted on Short Plats until the Notice of Application has been issued. If this grading application is in association with a Short Plat, enter the Short Plat number and the Notice of Application issuance date below.

Short Plat #:

Notice of Application Issuance Date:

Will the cubic yards excavated and filled be a balanced cut and fill within the site?

☐ Yes  
☐ No

If No, answer the following three questions:

Will fill be brought on site?

☐ Yes  
☐ No

MyBuildingPermit.com Dashboard User Profiles Reports Manage Help




























jurisadmintester

**Configure Supplementals**

Jurisdiction: Bellevue Application Type: All

Applications  
Fees  
Settings  
**Supplementals**  
Support







**Click Manage → Supplementals to be taken to the Configure Supplementals screen.**

| + Add   | Name                                     | Jurisdiction | Application Type     | Used By Permit Types |
|---|--|--------------|----------------------|----------------------|
|    | A - Submittal Requirements               | Bellevue     | Mechanical           | 0                    |
|    | Acknowledgement                          | Bellevue     | Building             | 7                    |
|    | Acknowledgement                          | Bellevue     | Land Use             | 19                   |
|    | CLGR Permit TEST                         | Bellevue     | Clearing and Grading | 0                    |
|    | CLGR Permit TEST 2                       | Bellevue     | ZZTestAppType        | 0                    |
|    | Contractor and Subcontractor Information | Bellevue     | Building             | 7                    |
|    | Electrical Permit                        | Bellevue     | ZZTestAppType        | 14                   |
|    | Electrical Permit 2 TEST                 | Bellevue     | Electrical           | 0                    |
|    | Evaluate FAQ site                        | Bellevue     |                      | 0                    |

**Configure Supplementals**

Jurisdiction: Bellevue Application Type: Building

**Select the appropriate Application Type for which the supplemental will be used, then click +Add.**

| + Add   | Name  | Jurisdiction | Application Type |
|---|---|--------------|------------------|
|   | Acknowledgement                               | Bellevue     | Building         |
|   | Contractor and Subcontractor Information      | Bellevue     | Building         |
|   | New Single Family Home Additional Information | Bellevue     | Building         |

**Configure Supplementals**

Configure Supplementals / Add Supplemental

**Complete the Supplemental Name field and click Save.**

Supplemental Name:

Application Type: Electrical

Jurisdiction: Snohomish County

Last Updated: 0

Permit Types Using This Supplemental: 0

## Configure Supplementals

Configure Supplementals / Edit Supplemental

**Supplemental Name:** Utilities Completeness Checklist  
**Question Type:**  
**Jurisdiction:** Bellevue  
**Updated:** 11/18/2009 8:15:00 AM  
**Question Types Using This Supplemental:** 0

Click the +Add Question button to begin adding questions.

+ Add Question Delete Clone

### Question 1

Utilities Completeness Checklist for Single Family Addition (BR), Pool Combo (BP), & Spa with Plan R

Edit Delete

### Question 2

Is the property in City of Bellevue water service area?

☐ Yes  
☐ No

\* Required

Edit Delete

### Question 3

+ Add Question Delete Clone

### New Question

Enter question text.

Answer Type: Text - Single Line  
Choice - Checkboxes (Select Multiple)  
Choice - Drop Down List (Select One)  
Choice - Radio Buttons (Select One)  
Choice - Select List (Select Multiple)  
Choice - Yes/No (Select One)  
Label - No Response/Instruction  
Text - Multiline  
Text - Single Line

Select Answer Type from drop-down.

**New Question**

What is your favorite ice cream?

body p

Answer Type: [Choice - Checkboxes (Select Multiple)]

Choice Text

Vanilla

Chocolate

Required: ☐ Yes ☒ No

**Indicate if question requires a response or not. Click Save when done.**

**If a 'Choice' answer type is selected, enter a possible response, and click the blue '+' sign to add. Continue until all possible answers have been added.**

**Continue adding questions until questionnaire is complete.**

+ Add Question Delete Clone

**NOTE:** Use Answer Type 'Label – No Response/Instruction' is selected no answer is needed from the customer. This type is used to provide information only to the customer on the questionnaire.

**Application Configuration**

Show All?

Application Type: ZZTestAppType [2]

Project Type: Nonresidential

Activity Type:

Scope of Work:

Configuration Active?

Clone Delete Configuration

PreApplication Msg. Work Types **Supplementals**

**Once a supplemental is created it can then be added to an application configuration on the Supplementals tab to use during the application process.**

Select Supplementals to be included in the application configuration:

Select to Add

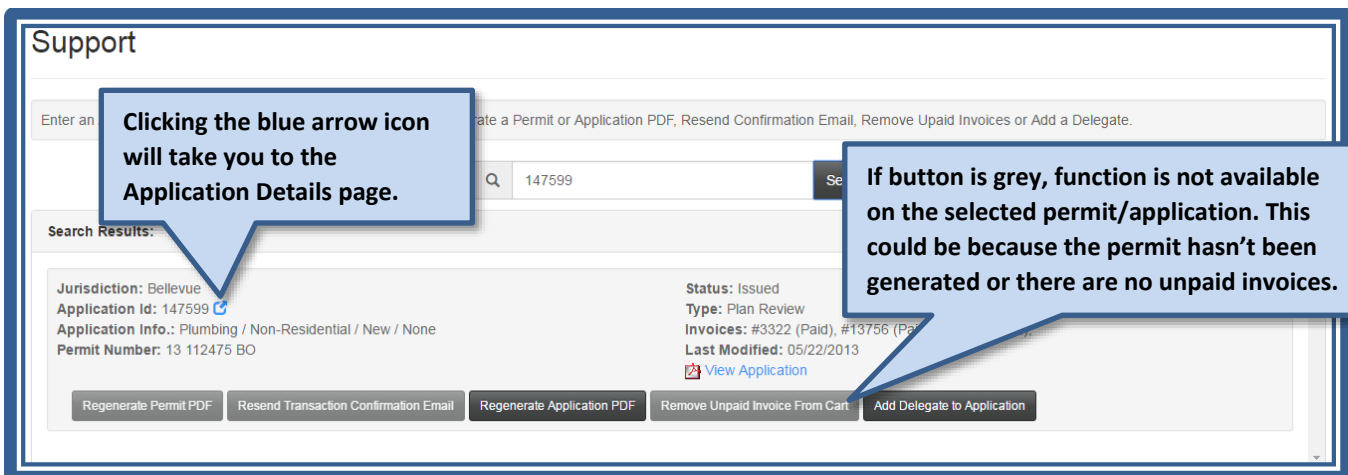
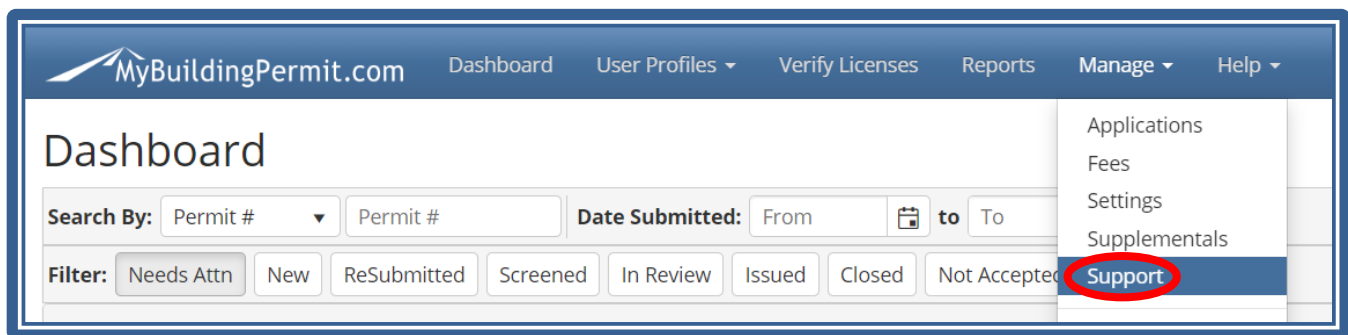
| Name                             | Required Only by SKU | SKU Assignment |
|----------------------------------|----------------------|----------------|
| Test Supplemental                | 3000,                | Edit           |
| Submittal Requirements TEST Copy |                      | Add            |


## Support Menu

The Support function is available to Jurisdiction and System Admins only. Searching by the Application ID, Permit, or Invoice number you can:

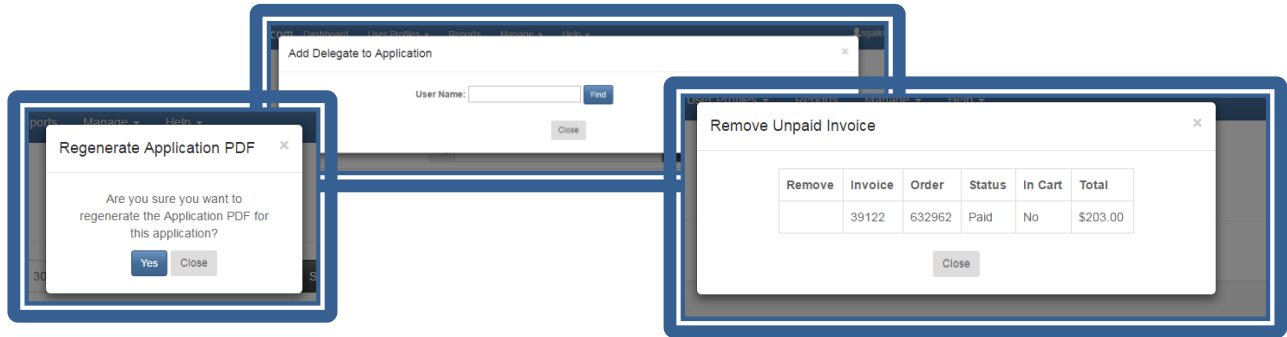
- Regenerate a Permit PDF.
- Resend the Transaction Confirmation email.
- Regenerate an Application PDF.
- Remove an unpaid invoice from a customer's cart.
- Add delegates to a customer's application.

To access the Support page, navigate to **MANAGE**→Support:



 **NOTE:** If you search for a permit and cannot find it, remember that Over-the-Counter permits are deleted from MBP 90 days following its date of issue. Any reprints for those permits will have to come from the jurisdiction's backend permitting system.

Examples of actions to take on the Support screen:



## Email Notifications

System generated email notifications are sent to customers and jurisdictions throughout the plan review process. Notifications are triggered by the following actions on the Jurisdiction Dashboard:

| Who                 | Action   | Email Subject            | Recipient                             |
|---------------------|--|--------------------------|---------------------------------------|
| Applicant           | Submits or resubmits a plan review application         | Application Confirmation | Applicant, Project Contact            |
| Applicant           | Submits or resubmits a plan review application         | New Application          | Jurisdiction                          |
| Jurisdiction        | Rejects a plan review application                      | Application Not Accepted | Applicant, Project Contact            |
| Jurisdiction        | Submits a new invoice                                  | Payment Due              | Applicant, Project Contact, Delegates |
| Applicant, Delegate | Pays an invoice  | Payment Confirmation     | Applicant                             |
| Jurisdiction        | Uploads documents                                      | New Document(s)          | Applicant, Project Contact, Delegates |
| Applicant, Delegate | Uploads documents                                      | New Document(s)          | Jurisdiction                          |
| Applicant, Delegate | Submits contractor information or cancellation request | New Document(s)          | Jurisdiction                          |

Below are examples of what email text is sent when the following actions are taken:

| Action                                     | Email Text   |
|--|--|
| New Documents Uploaded                     | One or more documents have been uploaded to this application. To clear the recent activity status on the application and remove the application from the <b>Needs Attention</b> tab on the Jurisdiction Dashboard, accept or delete the document(s).   |
| Invoice added to a Plan Review application | An invoice has been submitted to you for payment. Project Name: {0} Permit Number: {1} Invoice #: {2} Invoice Date: {3} Total Due: {4} For invoice details and to make a payment, please log into your account at <a href="https://epermit.mybuildingpermit.com/Login">https://epermit.mybuildingpermit.com/Login</a> , go to the <b>Jurisdiction Dashboard</b> , enter the Permit # in the <b>Quick Search Field</b> , then click on the <b>Invoice</b> tab. Please note the following: Your application may not be vested until all required submittal fees are paid. The approval documents will not be uploaded until all fees are paid. |
| Permit Issued and Plans Available          | Permit number {0} for the {1} project has been issued. The approved plans and issued permit are now available for you to download. Please  |

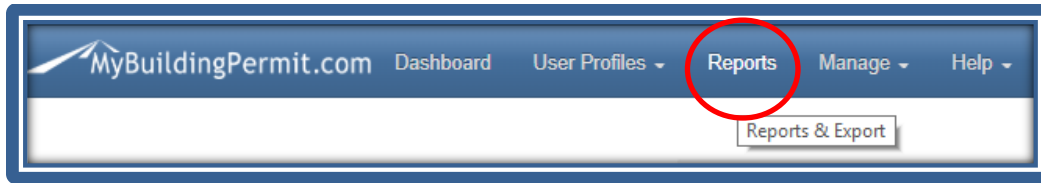


|   |   |
|---|---|
|   | have one hard copy set of the approved plans and the issued permit on-site prior to the first inspection. To download the plans and issued permit, log into your account at <a href="https://epermit.mybuildingpermit.com/Login">https://epermit.mybuildingpermit.com/Login</a> , go to the Jurisdiction Dashboard, click on the "Issued" tab, click on the "Permit #/App ID" link for the application, then click on the "Files" tab to view and download the documents.   |
| Comment Letter uploaded   | A review has been completed on your application and a comment letter has been uploaded. Additional information and/or revisions are needed to complete the review process. Further review of your project is on hold until the requested information and/or documents are received and accepted by the jurisdiction. To view your application and associated documents, please log into your account at <a href="https://epermit.mybuildingpermit.com/Login">https://epermit.mybuildingpermit.com/Login</a> , go to the Jurisdiction Dashboard, click on the "In Review" tab, click on the "Permit #/App ID" link for the application, then click on the "Files" tab. Please download the comment letter and/or other documents from the Dashboard. Follow the instructions in the comment letter regarding re-submitting plans or other information and the deadline for re-submittal. |
| Invoice cancelled   | A previously submitted invoice for this application has been cancelled. It contained an error or was otherwise incorrect. If you have questions, please contact the <a href='http://www.mybuildingpermit.com/Pages/contact-directory.aspx'>jurisdiction. Project Name: {0} Permit Number: {1} Invoice: {2} Invoice Date: {3} Total Due: {4}   |
| MyBuildingPermit.com registration approved                        | Thank you for your interest in MyBuildingPermit.com. You have been registered and can begin submitting applications. Your username is: {0}. To view or change your profile, log in to your account at <a href="https://epermit.mybuildingpermit.com/Login">https://epermit.mybuildingpermit.com/Login</a> and click My Profile.   |
| MyBuildingPermit.com registration (business license verification) | Thank you for your interest in MyBuildingPermit.com. Your registration will be reviewed by each jurisdiction to verify state and local licenses. You will receive an email from each jurisdiction when you are approved or if there is additional information required. Your username is: {0}. To view or change your profile, log in to your account at <a href="https://epermit.mybuildingpermit.com/Login">https://epermit.mybuildingpermit.com/Login</a> and click on My Profile.   |
| MyBuildingPermit.com registration (associated user account)       | {0} has created an account to use the {1} UBI # {2} company profile and has certified they are an authorized user. If this user should not be associated with this company, please contact <a href="mailto:egovsupport@ecitygov.net">egovsupport@ecitygov.net</a> .   |
| MyBuildingPermit request to reset password                        | Reset Your Password Click the link below to reset the password for the MyBuildingPermit account associated with MyBuildingPermit.com Password reset Please disregard this email if you don't want to reset  |

|   |   |
|---|---|
|   | your password. Note: The password-reset link above is valid for 30 minutes.   |
| MyBuildingPermit request to get username(s)           | Reset Your Password Please select the username for which you need a password reset. Then go to the link below: MyBuildingPermit.com Password reset. Please disregard this email if you do not want to reset your password.  |
| Application submitted                                 | Thank you for submitting an application to MyBuildingPermit.com. The Project Name is: {0} The Application ID number is: {1} The jurisdiction will screen your application for submittal within two business days. If additional information is required, you will receive a detailed request of the missing information. If your application is complete, you will receive an invoice for the required submittal fees. Upon payment a determination of completeness will be made, if required by the jurisdiction. Plan review will begin once your application is considered complete. To view the application and associated documents, log into your account at {2}, go to the <b>Jurisdiction Dashboard</b> and enter the Application ID in the <b>Quick Search field</b> . Thank you!  |
| New Application submitted (jurisdiction notification) | There is a new application to review. Application Type: Project Type: Activity Type: Scope of Work: Log into your admin account at {4}, review the application within 2 business days and do one of the following: Accept the application and submit an invoice to the customer for submittal fees. Reject the application and use the email template to notify the customer why the application was not accepted.  |
| MyBuildingPermit.com ePermit issued                   | Attached is your !!PermitType!! permit. Order Tracking Number: !!OrderNumber!! Permit Number: !!PermitNumber!! This permit authorizes only the work described in the "Job Description". No work is authorized outside the scope of this permit unless separate permits authorizing such work have been obtained. The application and permit are also available in your account. Log into your account at <ahref="https://epermit.mybuildingpermit.com/Default.aspx?utm_source=appPermitRecord&utm_medium=email" style="color: #004976;">https://ePermit.MyBuildingPermit.com/, go to "Search", then enter the permit # or order #. This information is kept in your account for 90 days after issuance. Inspections are required. You can view important <a style="color: #004976;" href="https://mybuildingpermit.com/sites/default/files/documentation/RequestInspection.pdf"> Inspection Information. You can cancel this permit by contacting the <a style="color: #004976;" href="https://mybuildingpermit.com/contact-us"> jurisdiction. Refunds will be processed in accordance with the applicable code(s). You can view important information about hiring a contractor, including the risks |

|                                       |  |
|---------------------------------------|--|
|                                       | and liabilities associated with hiring an unlicensed contractor at the <a style="color: #004976;" href="http://www.lni.wa.gov/IPUB/625-084-000.pdf">Washington Labor and Industries website  |
| MyBuildingPermit.com<br>ePermit Error | We are unable to process your permit application at this time. This may be due to a technical issue, or the jurisdiction may need to contact you to verify information. If you have not received your permit or a call within 1 business day, please contact the jurisdiction. |

## Reports



### MyBuildingPermit Metrics

Users can pull statistical data on MyBuildingPermit submitted applications. All reports can be exported for further analysis.

Statistical reports to be pulled include:

- **Monthly Permits** = Total number of permits submitted any given month by each jurisdiction, totaled by type of permit (OTC or Plan Review). Also includes total revenue collected through MBP.
- **Monthly Revenue** = Total revenue by permit (application type, work type, and occupancy type) and grouped by jurisdiction. Report can be filtered to a specific date range or jurisdiction.
- **Applicants** = Provides a historical record of each permit type (OTC or Plan Review) submitted by each applicant.
- **All Permit Activity Report** = Provides all permit activity for a given date range by jurisdiction.

Examples of statistical reports:

#### Monthly Permits Report

February 2018

# Summary Statistics

February 2018 Permits Summary

| Jurisdiction     | Total Permits | Total OTC | Total Plan Review | Total Revenue |
|------------------|---------------|-----------|-------------------|---------------|
| Bellevue         | 796           | 516       | 231               | \$327,423.00  |
| Bothell          | 150           | 57        | 90                | \$133,925.43  |
| Burien           | 103           | 98        | 5                 | \$11,456.68   |
| Issaquah         | 80            | 63        | 17                |               |
| Kennmore         | 33            | 30        | 3                 |               |
| King County      | 4             | 0         | 4                 |               |
| Kirkland         | 424           | 280       | 121               |               |
| Mercer Island    | 63            | 63        | 0                 |               |
| Mill Creek       | 84            | 58        | 24                |               |
| Newcastle        | 11            | 11        | 0                 |               |
| Renton           | 234           | 229       | 5                 |               |
| Sammamish        | 337           | 291       | 43                |               |
| Snohomish County | 475           | 298       | 168               |               |
| Snoqualmie       | 23            | 23        | 0                 |               |
| Woodinville      | 34            | 15        | 19                |               |

#### Applicants Report

Applicant Breakdown

| Applicant         | OTC Permits | Plan Review | All Permits | Revenue        |
|-------------------|-------------|-------------|-------------|----------------|
|                   | 0           | 96          | 96          | \$205,439.08   |
|                   | 1149        | 2247        | 3396        | \$3,617,122.03 |
| *, *              | 0           | 1           | 1           | \$432.00       |
| 10222 10TH LLC, * | 0           | 1           | 1           | \$334.00       |
|                   | 0           | 1           | 1           | \$334.00       |
|                   | 0           | 1           | 1           | \$1,014.30     |
|                   | 0           | 2           | 2           | \$508.00       |
|                   | 0           | 3           | 3           | \$2,360.00     |
|                   | 0           | 3           | 3           | \$1,267.00     |
|                   | 0           | 1           | 1           | \$346.00       |
| 4                 | 0           | 4           | 4           | \$786.53       |
| 36                | 0           | 36          | 36          | \$6,089.37     |

#### Monthly Revenue Report

From: January 2018  To: January 2018  Jurisdiction: All Jurisdictions

January 2018 Revenue

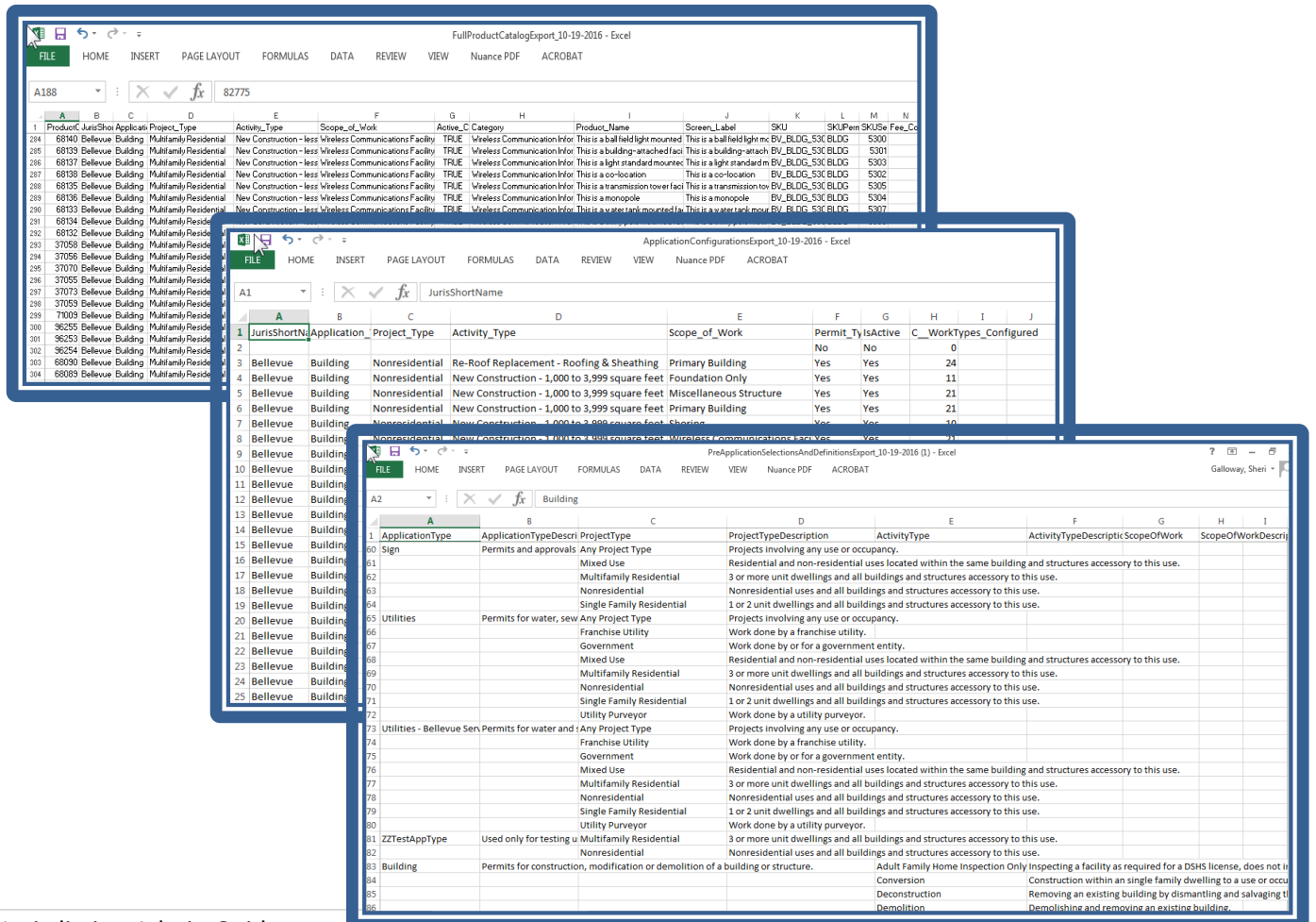
| Year | Month | Jurisdiction | Permit Type | Work Type                                     | Occupancy Type                 | Revenue     |
|------|-------|--------------|-------------|---|--------------------------------|-------------|
| 2018 | Jan   | Bellevue     | Building    | New Construction                              | Single Family Residential      | \$78,224.00 |
| 2018 | Jan   | Bellevue     | Building    | New Construction - 1,000 to 3,999 square feet | Nonresidential                 | \$1,649.00  |
| 2018 | Jan   | Bellevue     | Building    | Ro-Roof Replacement - Roofing & Sheathing     | Single Family Residential      | \$886.00    |
| 2018 | Jan   | Bellevue     | Building    | Remodel                                       | Single Family Condominium Unit | \$122.50    |
| 2018 | Jan   | Bellevue     | Building    | Remodel                                       | Single Family Residential      | \$14,432.00 |
| 2018 | Jan   | Bellevue     | Building    | Structure Addition                            | Single Family Residential      | \$16,079.50 |
| 2018 | Jan   | Bellevue     | Building    | Tenant Improvement                            | Nonresidential                 | \$24,559.00 |
| 2018 | Jan   | Bellevue     | Building    | Tenant Improvement - Initial Buildout         | Nonresidential                 | \$18,908.00 |
| 2018 | Jan   | Bellevue     | Electrical  | Addition                                      | Multifamily Residential        | \$398.00    |
| 2018 | Jan   | Bellevue     | Electrical  | Addition                                      | Nonresidential                 | \$3,726.00  |
| 2018 | Jan   | Bellevue     | Electrical  | Addition                                      | Single Family Residential      | \$977.00    |

## Exports

Jurisdictions can export a list of their existing application configurations and full product catalog list, as well as a list of the selections and definitions of the four “buckets”:

- **All Configurations** = Provides a jurisdiction specific list of all existing application configurations and indicates if the application is active and if it requires plan review. Also provides the total number of WorkType/SKUs associated with each configuration.
- **Full Product Catalog** = Provides more details about each application configuration—including details on each applicable SKU.
- **PreApplication Selection and Definitions** = A reference list of each bucket (Application Type, Project Type, Activity Type, Scope of Work) selection option and its corresponding description.
- **Document Types** = Provides a list of all Documents in the system, which can be referenced prior to requesting that new documents be added to the system.

Examples of exported reference lists:



**FullProductCatalogExport\_10-19-2016 - Excel**

| Product | JurisShortName | ApplicationType | ProjectType              | ActivityType   | Scope_of_Work | Active_C                     | Category                           | Product_Name                 | Screen_Label                       | SKU              | SKUPer | SKUs | Fee_Co |
|---------|----------------|-----------------|--------------------------|--|---------------|------------------------------|------------------------------------|------------------------------|------------------------------------|------------------|--------|------|--------|
| 68140   | Bellevue       | Building        | Multi-family Residential | New Construction - less Wireless Communications Facility | TRUE          | Wireless Communication Infor | This is a ball field light mounted | Wireless Communication Infor | This is a ball field light mounted | BV_BLDG_S3C BLDG | 5300   |      |        |
| 68139   | Bellevue       | Building        | Multi-family Residential | New Construction - less Wireless Communications Facility | TRUE          | Wireless Communication Infor | This is a building-attached light  | Wireless Communication Infor | This is a building-attached light  | BV_BLDG_S3C BLDG | 5301   |      |        |
| 68137   | Bellevue       | Building        | Multi-family Residential | New Construction - less Wireless Communications Facility | TRUE          | Wireless Communication Infor | This is a light standard mounted   | Wireless Communication Infor | This is a light standard mounted   | BV_BLDG_S3C BLDG | 5303   |      |        |
| 68138   | Bellevue       | Building        | Multi-family Residential | New Construction - less Wireless Communications Facility | TRUE          | Wireless Communication Infor | This is a co-location              | Wireless Communication Infor | This is a co-location              | BV_BLDG_S3C BLDG | 5302   |      |        |
| 68135   | Bellevue       | Building        | Multi-family Residential | New Construction - less Wireless Communications Facility | TRUE          | Wireless Communication Infor | This is a transmission tower       | Wireless Communication Infor | This is a transmission tower       | BV_BLDG_S3C BLDG | 5305   |      |        |
| 68136   | Bellevue       | Building        | Multi-family Residential | New Construction - less Wireless Communications Facility | TRUE          | Wireless Communication Infor | This is a monopole                 | Wireless Communication Infor | This is a monopole                 | BV_BLDG_S3C BLDG | 5304   |      |        |
| 68133   | Bellevue       | Building        | Multi-family Residential | New Construction - less Wireless Communications Facility | TRUE          | Wireless Communication Infor | This is a water well mounted       | Wireless Communication Infor | This is a water well mounted       | BV_BLDG_S3C BLDG | 5307   |      |        |

**ApplicationConfigurationsExport\_10-19-2016 - Excel**

| JurisShortName | ApplicationType | ProjectType | ActivityType   | Scope_of_Work                                 | Permit_Ty | IsActive | C_WorkTypes_Configured |
|----------------|-----------------|-------------|----------------|---|-----------|----------|------------------------|
| 2              | Bellevue        | Building    | Nonresidential | Re-Roof Replacement - Roofing & Sheathing     | No        | No       | 0                      |
| 3              | Bellevue        | Building    | Nonresidential | New Construction - 1,000 to 3,999 square feet | Yes       | Yes      | 24                     |
| 4              | Bellevue        | Building    | Nonresidential | Foundation Only                               | Yes       | Yes      | 11                     |
| 5              | Bellevue        | Building    | Nonresidential | New Construction - 1,000 to 3,999 square feet | Yes       | Yes      | 21                     |
| 6              | Bellevue        | Building    | Nonresidential | Miscellaneous Structure                       | Yes       | Yes      | 21                     |
| 7              | Bellevue        | Building    | Nonresidential | New Construction - 1,000 to 3,999 square feet | Yes       | Yes      | 21                     |
| 8              | Bellevue        | Building    | Nonresidential | Primary Building                              | Yes       | Yes      | 10                     |

**PreApplicationSelectionAndDefinitionsExport\_10-19-2016 (1) - Excel**

| ApplicationType | ApplicationTypeDescription | ProjectType  | ProjectTypeDescription   | ActivityType | ActivityTypeDescription   | ScopeOfWork | ScopeOfWorkDescription |
|-----------------|----------------------------|--|--------------------------|--------------|---|-------------|------------------------|
| 60              | Sign                       | Permits and approvals  | Any Project Type         |              | Projects involving any use or occupancy.  |             |                        |
| 61              |                            | Mixed Use  |                          |              | Residential and non-residential uses located within the same building and structures accessory to this use. |             |                        |
| 62              |                            | Multi-family Residential   |                          |              | 3 or more unit dwellings and all buildings and structures accessory to this use.                            |             |                        |
| 63              |                            | Nonresidential   |                          |              | Nonresidential uses and all buildings and structures accessory to this use.                                 |             |                        |
| 64              |                            | Single Family Residential  |                          |              | 1 or 2 unit dwellings and all buildings and structures accessory to this use.                               |             |                        |
| 65              | Utilities                  | Permits for water, sewer   | Any Project Type         |              | Projects involving any use or occupancy.  |             |                        |
| 66              |                            | Franchise Utility  |                          |              | Work done by a franchise utility.   |             |                        |
| 67              |                            | Government   |                          |              | Work done by or for a government entity.  |             |                        |
| 68              |                            | Mixed Use  |                          |              | Residential and non-residential uses located within the same building and structures accessory to this use. |             |                        |
| 69              |                            | Multi-family Residential   |                          |              | 3 or more unit dwellings and all buildings and structures accessory to this use.                            |             |                        |
| 70              |                            | Nonresidential   |                          |              | Nonresidential uses and all buildings and structures accessory to this use.                                 |             |                        |
| 71              |                            | Single Family Residential  |                          |              | 1 or 2 unit dwellings and all buildings and structures accessory to this use.                               |             |                        |
| 72              |                            | Utility Purveyor   |                          |              | Work done by a utility purveyor.  |             |                        |
| 73              | Utilities - Bellevue Ser   | Permits for water and sewer  | Any Project Type         |              | Projects involving any use or occupancy.  |             |                        |
| 74              |                            | Franchise Utility  |                          |              | Work done by a franchise utility.   |             |                        |
| 75              |                            | Government   |                          |              | Work done by or for a government entity.  |             |                        |
| 76              |                            | Mixed Use  |                          |              | Residential and non-residential uses located within the same building and structures accessory to this use. |             |                        |
| 77              |                            | Multi-family Residential   |                          |              | 3 or more unit dwellings and all buildings and structures accessory to this use.                            |             |                        |
| 78              |                            | Nonresidential   |                          |              | Nonresidential uses and all buildings and structures accessory to this use.                                 |             |                        |
| 79              |                            | Single Family Residential  |                          |              | 1 or 2 unit dwellings and all buildings and structures accessory to this use.                               |             |                        |
| 80              |                            | Utility Purveyor   |                          |              | Work done by a utility purveyor.  |             |                        |
| 81              | ZZTestAppType              | Used only for testing u  | Multi-family Residential |              | 3 or more unit dwellings and all buildings and structures accessory to this use.                            |             |                        |
| 82              |                            | Nonresidential   |                          |              | Nonresidential uses and all buildings and structures accessory to this use.                                 |             |                        |
| 83              | Building                   | Permits for construction, modification or demolition of a building or structure. |                          |              | Adult Family Home Inspection Only inspecting a facility as required for a DSHS license, does not include    |             |                        |
| 84              |                            | Conversion   |                          |              | Construction within a single family dwelling to a use or occupancy  |             |                        |
| 85              |                            | Deconstruction   |                          |              | Removing an existing building by dismantling and salvaging the  |             |                        |
| 86              |                            | Demolition   |                          |              | Demolishing and removing an existing building.  |             |                        |

## Other Reports

**Inspection Reports** = This report is only available for non-integrated jurisdictions. If you are integrated, Inspection data will be updated regularly through a Web Service.

Example of an Inspection Report:

| Inspection Reports - Burien |  |
|-----------------------------|--|
| Requested Inspection Date   | Report Link  |
| 10/19/2016                  | <a href="#">InspectionSummaryReport_20161019.pdf</a> |
| 10/19/2016                  | <a href="#">InspectionDetailReport_20161019.pdf</a>  |
| 10/18/2016                  | <a href="#">InspectionSummaryReport_20161018.pdf</a> |
| 10/18/2016                  | <a href="#">InspectionDetailReport_20161018.pdf</a>  |
| 10/17/2016                  | <a href="#">InspectionSummaryReport_20161017.pdf</a> |
| 10/17/2016                  | <a href="#">InspectionDetailReport_20161017.pdf</a>  |
| 10/14/2016                  | <a href="#">InspectionSummaryReport_20161014.pdf</a> |
| 10/14/2016                  | <a href="#">InspectionDetailReport_20161014.pdf</a>  |
| 10/13/2016                  | <a href="#">InspectionSummaryReport_20161013.pdf</a> |

- **Financial Reconciliation Reports** = A 7-day lookback of Jurisdiction Financial Reconciliations in .CSV and .RTF formats. This is the same report that is emailed daily to each jurisdiction.

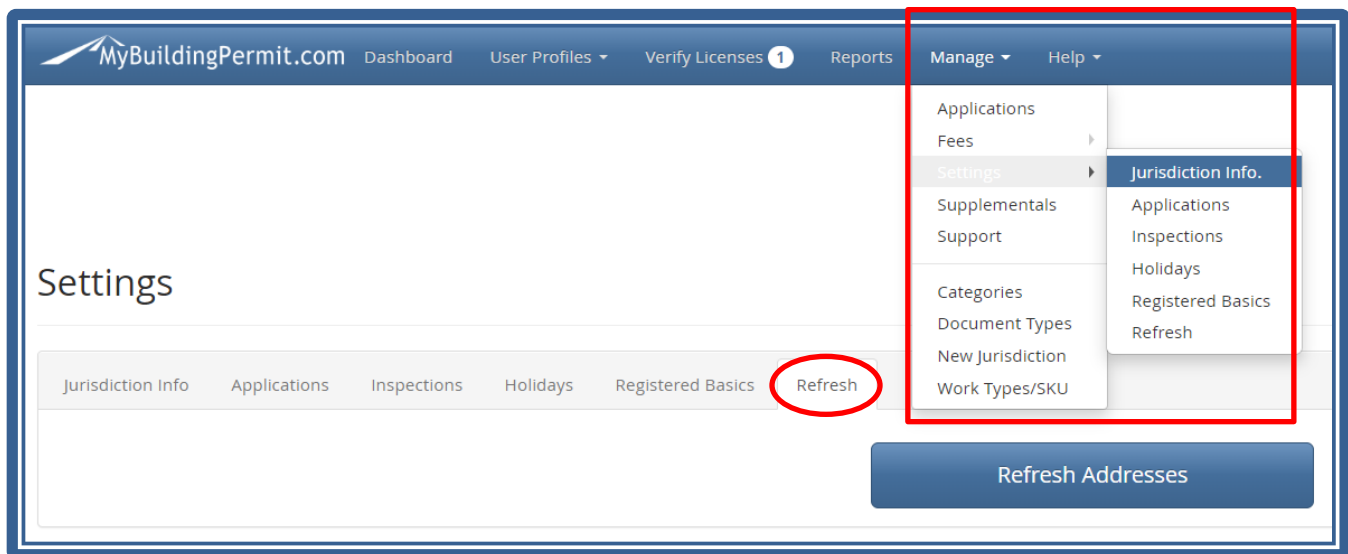
## Managing Addresses

Addresses and job locations within MyBuildingPermit (MBP) come directly from jurisdictions' backend permitting system via direct link to your source database. A process runs each night to pull information from your linked database view into the MBP address table.

To add or update an address in MBP, it must first be added or updated in your backend permitting system. The database view or table that is connected to MBP needs to be refreshed on the jurisdiction side before this update will be transferred to MBP's corresponding address table. It is recommended that this refresh be set up by your IT Department/Database manager as an automated process that runs on a regular basis (like a stored database procedure or server process).

Once the database view on your side is updated with the new address information, the update can then be pulled into MBP by either:

1. The nightly automated process; or
2. Manually selecting the 'Refresh Addresses' button from the **Refresh Tab** located under Jurisdiction Information submenu item located under Manage > Settings > Jurisdiction Info options.



## MBP Jurisdiction Integration

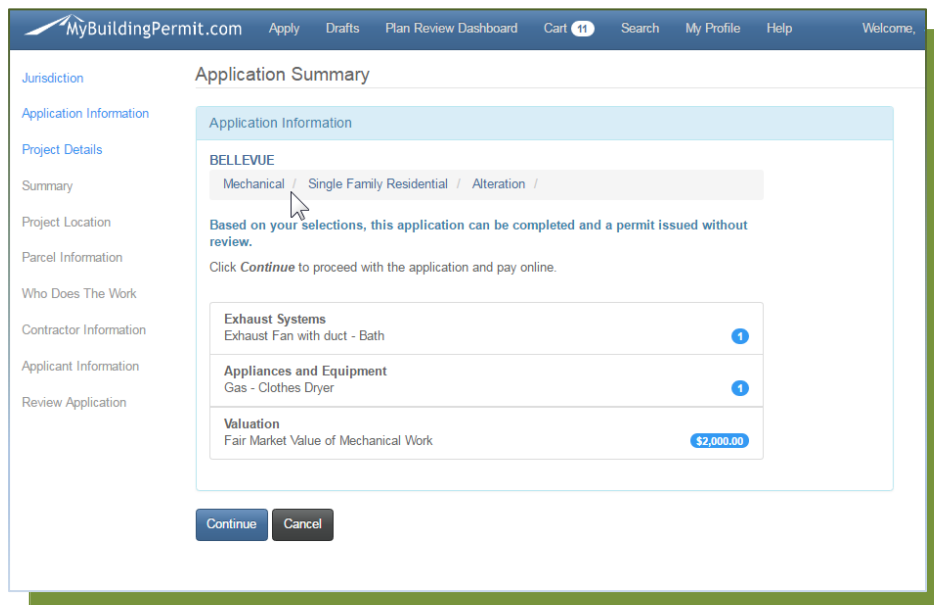
MyBuildingPermit.com sends permit application data to the member jurisdictions' permitting system (referred to as "backend permitting system") and then displays information from the backend such as status, activity, invoice data, etc.

When a customer applies for an **Over the Counter** (non-review) permit, or when a jurisdiction permit technician accepts a plan review application in MBP, MBP packages up the Application information into an XML document that is sent to the ***jurisdiction provided*** Web Service. This XML document is then parsed on the jurisdiction side and goes through a translation process to convert MBP terms into the Jurisdiction's specific backend permitting system terms. After the translation process occurs, the data can be inserted into the backend permitting system and the Web Service returns an XML file back to MBP that the insert was successful. MBP then makes a second call to the Web Service to receive the newly inserted permit number from the backend permitting system which MBP will insert on the Permit Card pdf.

Each jurisdiction's backend permitting system is the official 'system of record' and stores all application and permit data. This information is not stored in MBP, as it only connects to your backend to display the data.

It is ***the jurisdictions' responsibility*** to develop the Web Service to receive the permit application XML file sent by MBP in the format, parse that data, and insert it into your backend permitting system, send a response back to MBP, then send MBP the newly generated permit number. It is also the jurisdiction's responsibility to create and expose the necessary database views for MBP from which MBP pulls data.

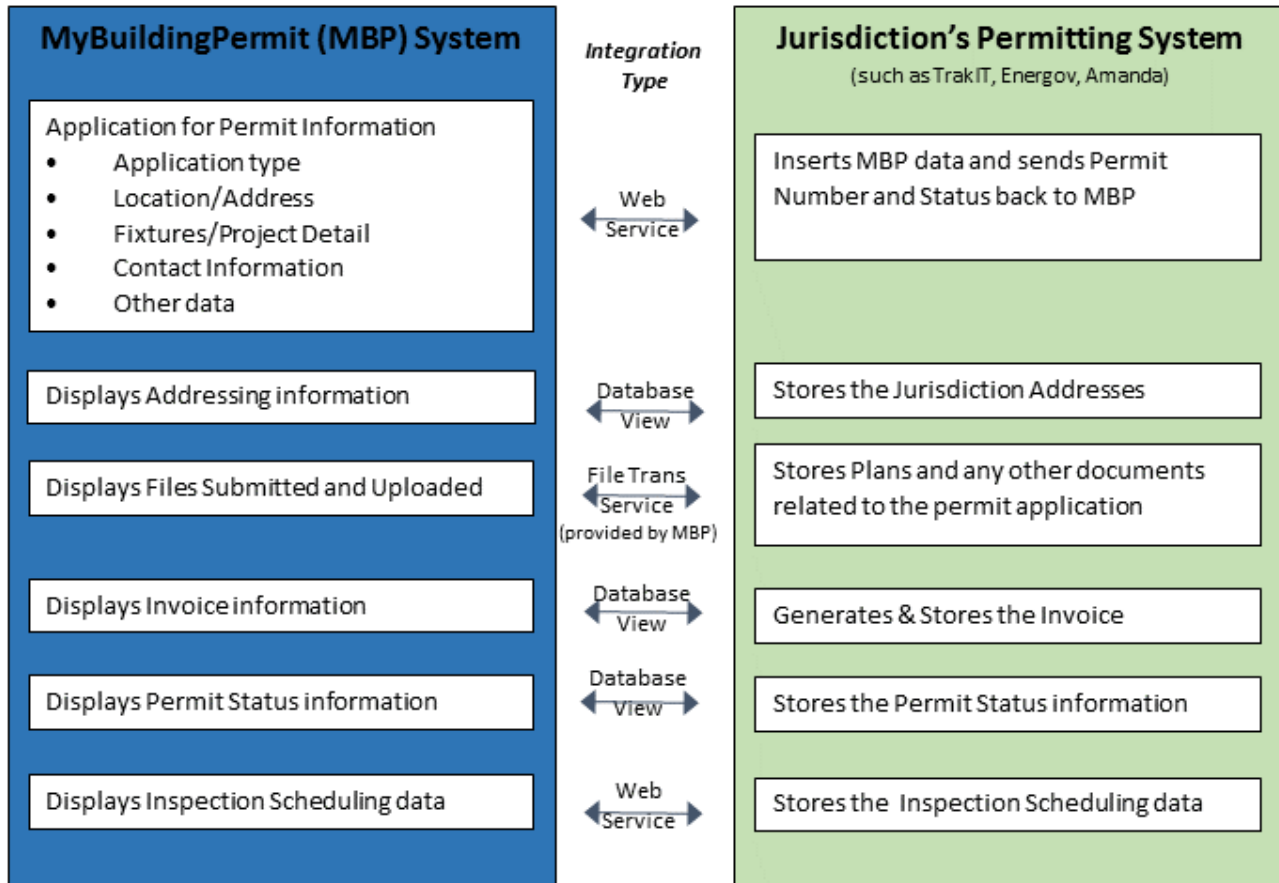
### MBP Customer Application Process – Application Summary Screen



The screenshot shows the 'Application Summary' screen in the MyBuildingPermit.com interface. The top navigation bar includes links for 'Apply', 'Drafts', 'Plan Review Dashboard', 'Cart' (with 11 items), 'Search', 'My Profile', 'Help', and 'Welcome'. A sidebar on the left lists navigation options: 'Jurisdiction', 'Application Information', 'Project Details', 'Summary', 'Project Location', 'Parcel Information', 'Who Does The Work', 'Contractor Information', 'Applicant Information', and 'Review Application'. The main content area is titled 'Application Summary' and contains a section for 'Application Information' for 'BELLEVUE'. It shows the project type as 'Mechanical / Single Family Residential / Alteration'. A message states: 'Based on your selections, this application can be completed and a permit issued without review. Click **Continue** to proceed with the application and pay online.' Below this, there are three summary items: 'Exhaust Systems' (Exhaust Fan with duct - Bath) with a blue '1' icon, 'Appliances and Equipment' (Gas - Clothes Dryer) with a blue '1' icon, and 'Valuation' (Fair Market Value of Mechanical Work) with a blue '\$2,000.00' icon. At the bottom are 'Continue' and 'Cancel' buttons.



## How Data Transfers and Displays



## Integration Points

| Component             | Method         | Notes  |
|-----------------------|----------------|--|
| Permit Creation       | Web Service    | Web Service <i>created by Jurisdiction</i> to consume the XML output from MBP  |
| Inspection Scheduling | Web Service    | Web Service <i>created by Jurisdiction</i> to consume the XML output from MBP  |
| File Transfer         | Web Service    | Web Service is <i>provided by MBP</i> – will need to have the path/location of where you want the file uploads from MBP to land. |
| Address Search        | Database View  | Expose a View in your permit database – MBP will connect via your IP Address, Database Username and Password                     |
| Invoicing             | Database View  | Expose Views in your permit database – MBP will connect via your IP Address, Database Username and Password                      |
| Status Site Data      | Database Views | Expose Views in your permit database – MBP will connect via your IP Address, Database Username and Password                      |

## Skills and Resources Needed

| Jurisdiction Responsibility   | Description of Skills Needed  |
|---|---|
| Develop asmx Web Service to receive MBP XML data, parse, translate, and insert into backend permitting system. Provide URL to Web Service to MBP staff. | Web Developer with Web Service and integration experience.  |
| Create translation document or spreadsheet to convert MBP data into backend system terminology and correct database fields.                             | Jurisdiction Business Analyst (SME) or Permit System Consultant with in-depth understanding of backend system database structure, permit process and fee structure. |
| Create database views with a read-only user account and provide details to MBP staff.   | Database Administrator or Permit System Consultant  |
| Set up MBP Application Configurations, Fee Codes, etc.  | Jurisdiction Permit Tech/Analyst (SME) with in-depth knowledge of jurisdiction permitting process, fee structure, business processes                                |
| Test end-to-end Permit Application process and verify integration into backend system is correct and permit number and status back to MBP is correct.   | Jurisdiction Permit Tech/Analyst (SME) with in-depth knowledge of jurisdiction permitting process, fee structure, business processes                                |

## Terminology Used

**Application Configuration** – MyBuildingPermit.com’s **structure for the permit application data** which is set up by the jurisdiction. Consists of: Application Type (such as Building, Mechanical), Project Type (such as Single Family, or Nonresidential), Activity Type (such as New, Addition), Scope of Work (such as Primary Building, Accessory Structure), Fixture and Component Details, Documents Required, Plan Review or Non-Plan Review, Fees, etc.

**Backend Permitting System** – the *Jurisdiction’s* permitting system (such as TRAKiT, Energov, Amanda)

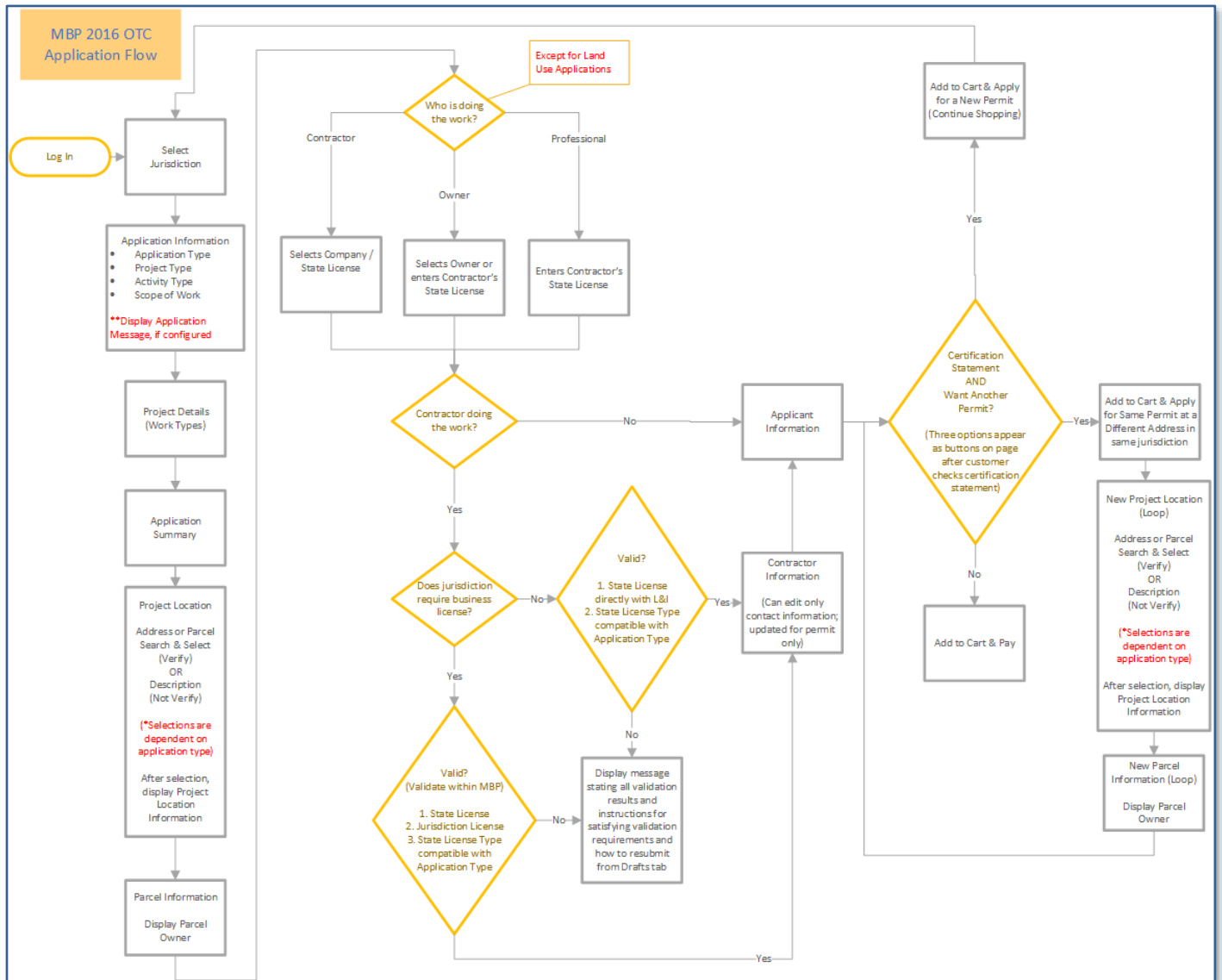
**Database View** – a **subset of read-only table data** in your backend database

**Web Service** - programming code that provides a method of **communication between two** electronic devices or applications over the internet. A request or response to a request that allows one application or program to remotely access or transfer data.

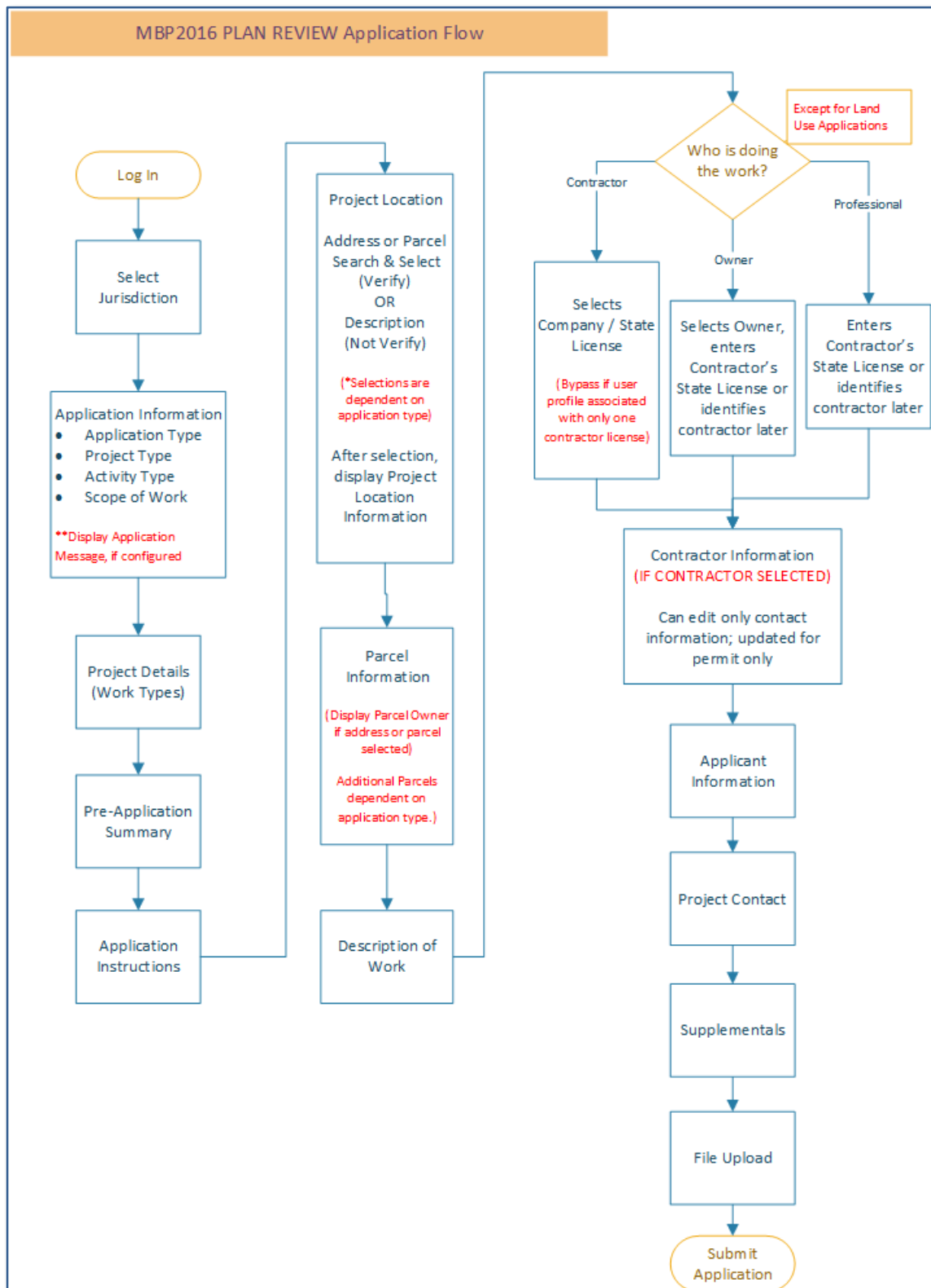
**XML** – the standardized **format of the data** that is sent from MBP to the backend permitting system via a Web Service

## Application Process Flows

### Over-the-Counter Permit Process Flow



**Plan Review Permit Process Flow**



## Helpful Information and Troubleshooting

Customers will be directed to the jurisdiction directly for help with the following:

- Find or add a new address within MyBuildingPermit.com.
- Determine if work requires a permit or which type to select.
- Request a refund.
- Update a local/city Business License.
- Request changes to a permit.
- Inquire about Permit fees.

**Technical Help**—Technical Assistance is available to jurisdiction staff and customers through the MBP Support desk. Examples of when to call the Support desk include MBP is offline, or an error is received when applying for a permit.

Support staff is available Monday through Friday, 7:00 AM to 5:00 PM Pacific Standard Time. Offices are closed on Federal Holidays.

**Email:** [eGovSupport@ecitygov.net](mailto:eGovSupport@ecitygov.net)

**Phone:** 425-452-4340

**Help Documents** for customers are available on MyBuildingPermit.com [Help page](#).

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## Frequently Asked Questions

### Q. Why is a permit paid for last night missing from my daily financial report?

- A. Each jurisdiction has a set cut-off time for including payment information on the daily financial report. For example, if your jurisdiction's cut-off time is 7:00 PM and the permit is paid for at 7:20 PM on a Wednesday it will not be included in Wednesday's report but will be included in Thursday's report. If you would like to change your jurisdiction's cut-off time for these daily reports, please submit a service request to [egovsupport@ecitygov.net](mailto:egovsupport@ecitygov.net).

### Q. Why is the Refresh Addresses job failing on the Admin site?

- A. Verify all columns are labeled correctly on your eGovSiteAddress view:

[DataSourceName]  
[DataSourceAddressID]  
[SiteParcelNbr]  
[SiteFrontNbr]  
[SiteFrontNbrFractional]  
[SitePreDirection]  
[SiteStreetName]  
[SiteStreetType]  
[SitePostDirection]  
[SiteUnitType]  
[SiteUnitBuilding]  
[SiteUnitNbr]  
[SitePostalCity]  
[SiteJurisdiction]  
[SiteState]  
[SiteZip]  
[SiteZipPlus4]  
[SiteBldgFirmName]  
[SiteXCoord]  
[SiteYCoord]  
[LastChangedDate]  
[SiteSubDivision]

If all columns are labeled as above, contact [egovsupport@ecitygov.net](mailto:egovsupport@ecitygov.net) to research further. If there is no issue on MBP side, jurisdiction's IT department will need to research on their end.

### Q. Why are no inspections listed under Today's Inspections? Why are users having trouble scheduling inspections?

- A. Contact [egovsupport@ecitygov.net](mailto:egovsupport@ecitygov.net) to verify there is no connection error between MBP and jurisdiction's Web Service. If there is no issue on MBP side, jurisdiction's IT department will need to research on their end.

### Q. I have not been receiving my MBP receipt emails. Is the problem on my end or yours?

- A. If no other jurisdiction has reported similar issues, it is most likely something that needs to be fixed on your end with your IT department. If you are in the process of or have recently migrated to Office 365 this could cause disruptions in emails being received. Please reach out to your jurisdiction's IT department to troubleshoot.

**Q. Who can edit the project contact information on a submitted application?**

- A. Contact the jurisdiction with the permit number, jurisdiction, and updated project contact information.

**Q. A contractor updated their license information on LNI, but it is not reflecting on MBP yet. How can I update the information?**

- A. A job runs each night that automatically pulls information from LNI and populates in MBP. If you need the information updated before the job has a chance to run, contact [egovsupport@ecitygov.net](mailto:egovsupport@ecitygov.net) to run the job manually to update the business license information.

**Q. An invoice was accidentally marked as Paid on the Jurisdiction Dashboard. How do I mark it as Unpaid again?**

- A. Jurisdiction Staff and Administrators can make this change on the Invoices tab of the Permit Details page for the permit.

**Why do I keep receiving a 'something bad happened' error message when trying to log in to the Admin site?**

- A. This happens when you are logged into multiple instances of the MBP application (i.e., Production and Staging at the same time). Log out of *all* application instances, clear cache, and close all browsers. Open a new browser session and log in again.

**Why do I keep getting 'search failed' response when I try to search for a permit on the admin site?**

- A. Sometimes the query takes a long time to complete and throws an error message. You can try to pull up an existing permit on the Jurisdiction Dashboard, then try searching again or contact [egovsupport@ecitygov.net](mailto:egovsupport@ecitygov.net) for assistance. He will have to run the query manually and then all future search queries should run with no issues.

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**How can I remove a failed document from my Jurisdiction Dashboard?**

- A. Email [egovsupport@ecitygov.net](mailto:egovsupport@ecitygov.net) to request to have the failed file removed from their Jurisdiction Dashboard.

**Why are reject emails not generating?**

- A. New install or upgrade on your computer possibly is interfering with allowing Outlook to open MailTo links. Have your IT department look at your computer to determine if this is the issue.

**We are receiving failed integration errors; Can you help diagnose the problem? What should we do to accept the applications after integration issues are resolved on our end?**

- A. We are not able to diagnose causes of integration failure since we don't have access to the jurisdiction's Web Service or any error logs. The most common reason that integration fails is due to a mapping issue between the data included in the XML and your back-end system. Try comparing as best you can a configuration that is working against the one that failed. Pay special attention to spelling, many integration failures are due to typos. Remember that SKU names and Types must match exactly.
- B. After integration issues have been resolved on the jurisdiction side, you can resend the failed permit through the Web Service to your permitting back-end system and update MBP with the actual permit number.

**Registered Basics: My Basic Plans aren't showing in the dropdown in staging?**

- A. Basic Plans must be accepted and approved in the Admin site to show up in your "library".

**Q. Is there a way to automatically change the MBP status of a permit to Closed?**

- A. Jurisdictions can request MBP permits in certain statuses be bulk moved to Closed status via an automated close job that runs at designated intervals. Jurisdictions just need to email MBP Service Delivery team the MBP statuses to be moved and the corresponding Jurisdiction status (i.e., MBP statuses are In Review and Issued; Jurisdiction status is Finalized or Closed) and indicate how often they would like the job to run (weekly, monthly, every 90 days, etc.).

**Q. How does the rounding function work on Fee Codes when Rounding is set to "ToTwoDecimal"?**

- A. When Rounding is set to "ToTwoDecimal", the Fee is rounded to a precision of 2 decimal places. For example: \$0.005 would round to \$0.01 but \$0.0025 would round to \$0.00.



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**Q. Why are there no SKUs to assign as an Exception by SKU for a Document Type (within application configuration setup)?**

- A.** When you click on Add to create an Exception by SKU and instead of a dropdown list of SKUs to select from you receive this message: All SKUs have been selected. This indicates there are no active SKUs associated with a specific application configuration. You will need to add or activate SKUs to proceed.

**Q. Why are credit card payments being made online through MBP for our jurisdiction failing?**

- A.** Usually when credit card payments are failing it is because there is an issue with the PayPal merchant account information we have on file. The most common reason is because of a change the PayPal password on file. Please notify us immediately if there are any changes to the Jurisdiction credit card information on file (i.e. expiration date, card number, etc.). Also, notify us if your PayPal password has expired/changed. **Note:** To avoid having to update your password please create an MBP only password on the account that does not expire.
- B.** If customers are reporting problems with credit cards, check for the following:
- PayPal only accepts two white spaces in the Name field on the card.
  - PayPal does not accept special characters (such as & and periods).

**Q. Why are inspection dates showing incorrectly on MBP's Inspection scheduling site?**

- A.** Inspection dates displayed on the Inspection scheduling site are provided by each Jurisdiction via a Web Service. MBP has no control over what dates are displayed as this depends on what dates are provided by the Web Service.

**Note:** For Jurisdictions that use TRAKiT, try these steps to resolve issues with inspection dates displaying incorrectly:

- Open TRAKiT WUM
- Select Agency Calendar under System Settings
- Verify Holidays, Weekends, and Closed dates are BLUE (make any necessary edits by clicking on the appropriate dates)
- Verify the box for "Validate Inspection Scheduled and Completed Dates with Work Dates Calendar" is selected and BLUE
- Click SET button
- Read notification pane and select OK
- Save settings at top Menu bar in upper right corner