2023

JURISDICTION ADMINISTRATOR USER'S GUIDE

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

MyBuildingPermit.com
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Contents

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 **Production**	**https://admin.mybuildingpermit.com**
Admin **Staging**	**https://adminstg2016.mybuildingpermit.com**
ePermit (Apply) **Production**	**https://epermit.mybuildingpermit.com**
ePermit (Apply) **Staging**	**https://epermitstg2016.mybuildingpermit.com**
MBP Home site	**https://mybuildingpermit.com**
Status site	**https://permitsearch.mybuildingpermit.com**
Status site **(Test)**	**https://permitsearchtest.mybuildingpermit.com/**
Inspection Scheduling site	**https://inspection.mybuildingpermit.com**
Inspection Scheduling site **(Test)**	**https://inspectiontest.mybuildingpermit.com**

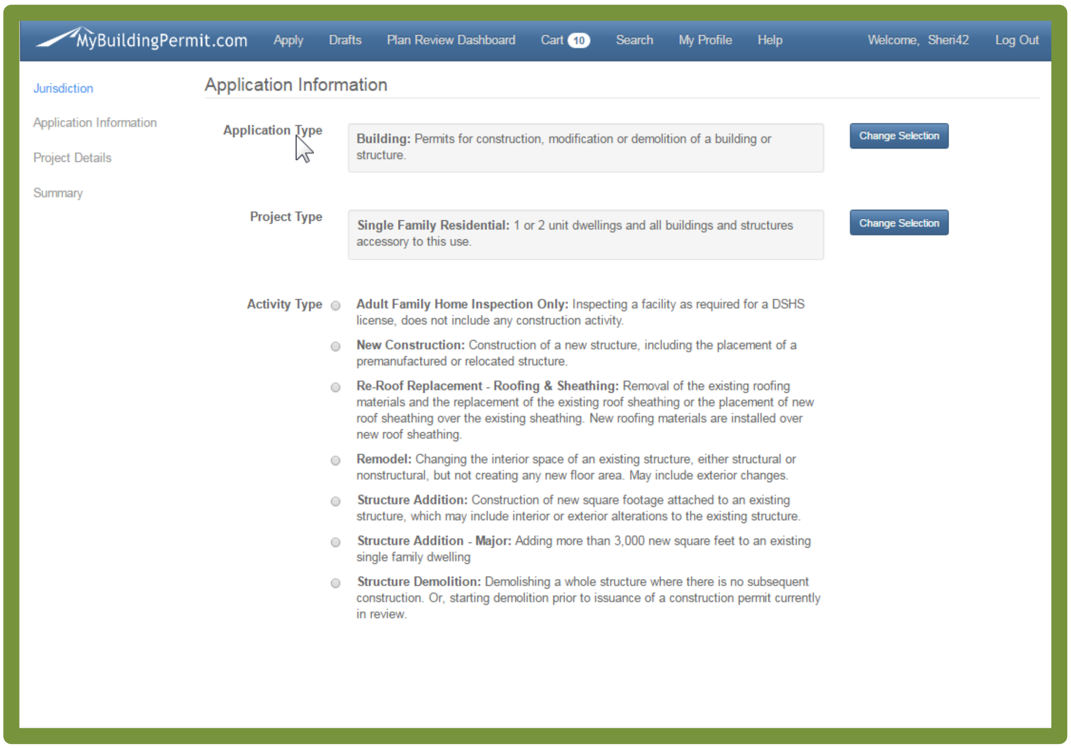
MBP Service Delivery Team

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:

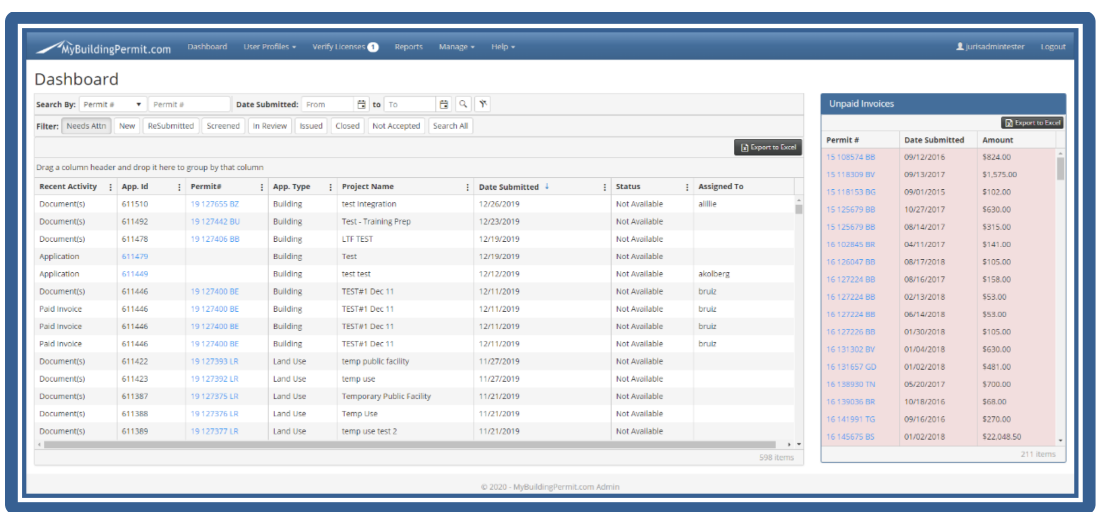
Role	Name	Email
Product Manager	Don Khuong	**dkhuong@bellevuewa.gov**
Senior Business Analyst; Subject Matter Expert	Michele Miller	mrmiller@bellevuewa.gov
Business Analyst	Sarah Asher	sasher@bellevuewa.gov
MBP Lead Developer	Roopa Lokanath	rlokanath@bellevuewa.gov
Developer	John Conrow	jconrow@bellevuewa.gov
Developer	Paul Jones	sjones@bellevuewa.gov
Software Quality Assurance Analyst	Manju Nair	mnair@bellevuewa.gov

Conventions used in this Guide

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

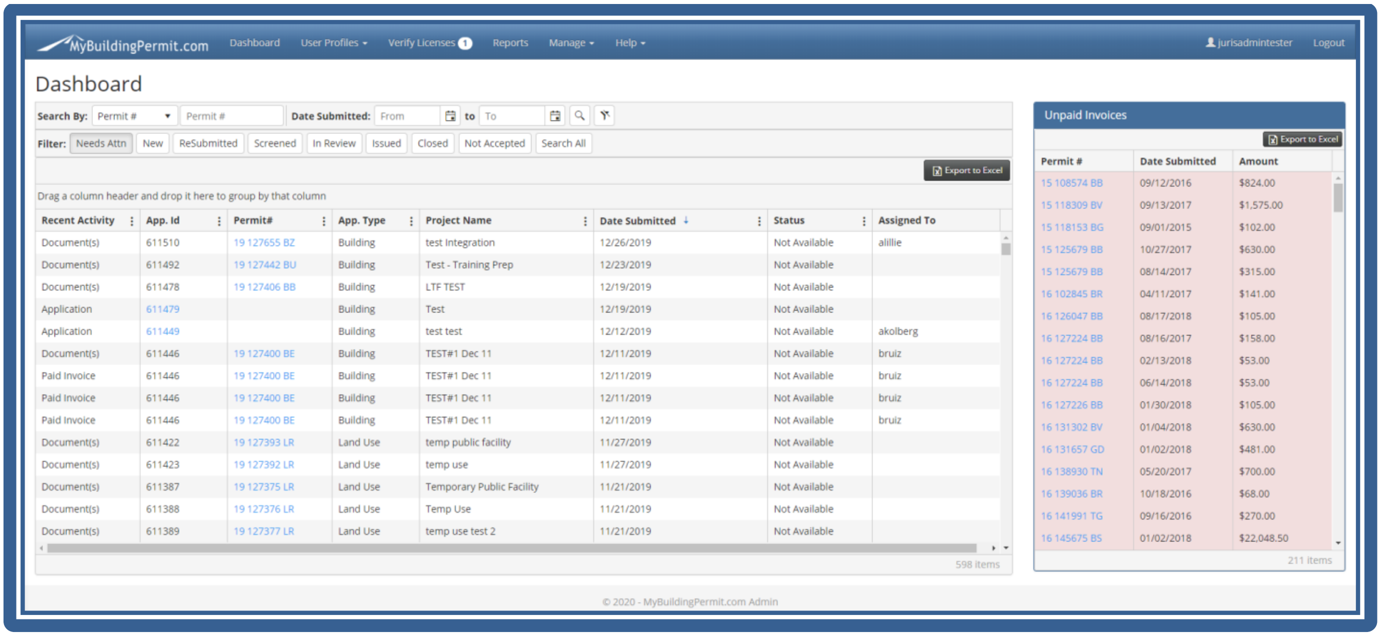


Pictures with a **blue border** are ***jurisdiction administrative*** screenshots.



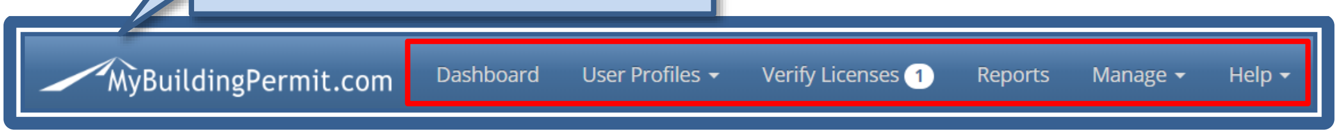
Jurisdiction Administration Home Page

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.



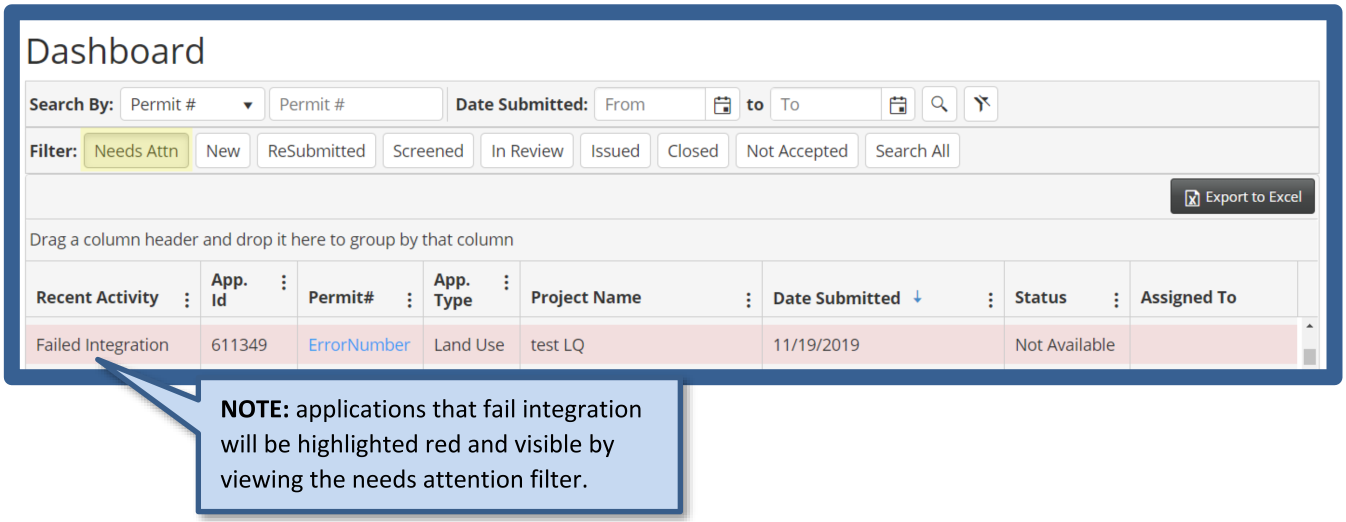
The **Menu bar** gives jurisdictions the ability to administer MBP through several functions:

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



Administrative Functions

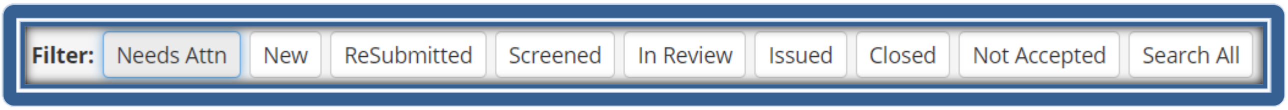
[Jurisdiction Dashboard]() – The enhanced Search and Dashboard filters allow jurisdictions to review and manage plan review applications in the following application statuses: Needs Attention, New, ReSubmitted, Screened, In Review, Issued, Closed, and Not Accepted. “Failed” is no longer a status. Jurisdictions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



- 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”.



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.

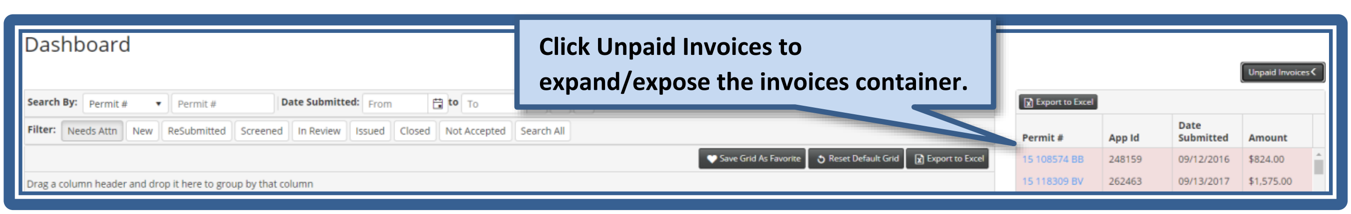
Closed
The project has been completed in accordance with the approved plans and/or associated condition, the applicant cancelled the project, or the project was not resubmitted after being rejected. Revisions cannot be submitted. The jurisdiction manually assigns this status on the Jurisdiction Dashboard.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

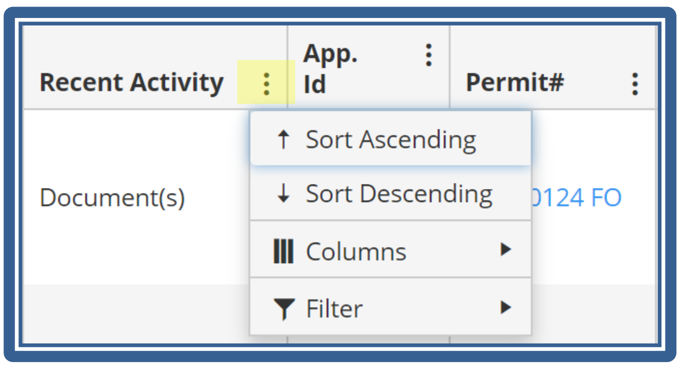
You can choose to view or hide an Unpaid Invoices in a separate pane by clicking Unpaid Invoices on the Jurisdiction Dashboard. This allows you to choose the display of your Jurisdiction Dashboard to suit your workflow.

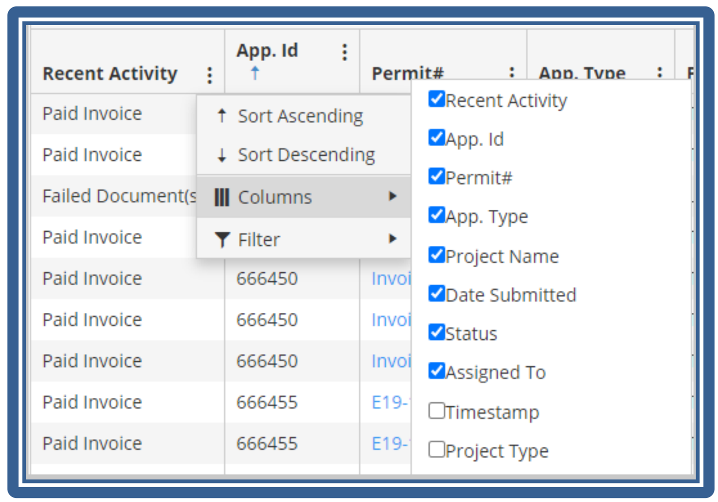


Jurisdiction Dashboard Columns

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.

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

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.

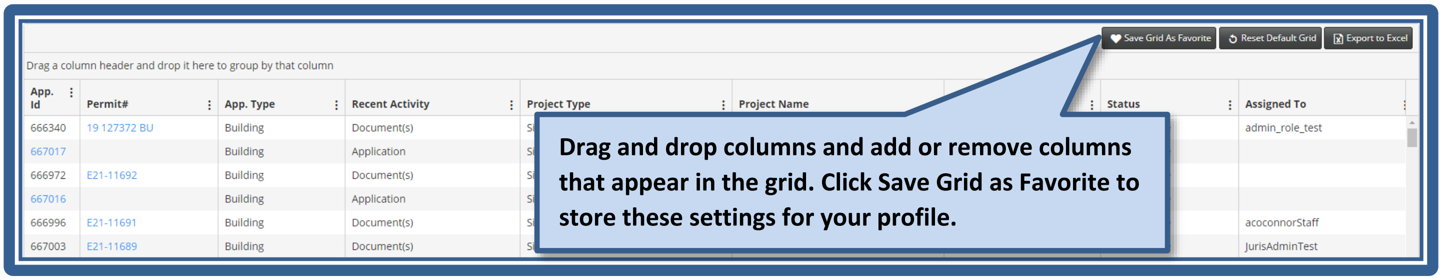
Jurisdiction Status

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.

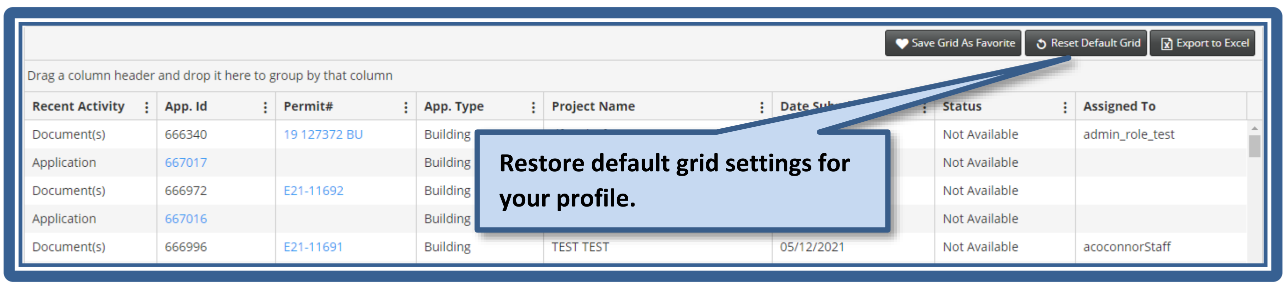
Personalizing Jurisdiction Dashboard Grid Settings

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



Resetting the Default Jurisdiction Dashboard Grid Settings

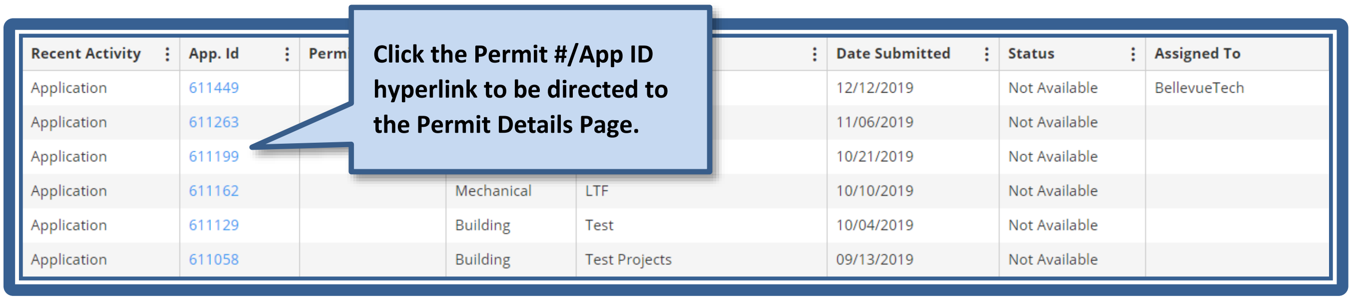


Note: Once saved, your saved Jurisdiction Dashboard Grid settings will be preserved for your profile and are specific to the browser. If you work with more than one browser (for example, both Edge and Chrome), you must set your preferred grid layout for each browser.

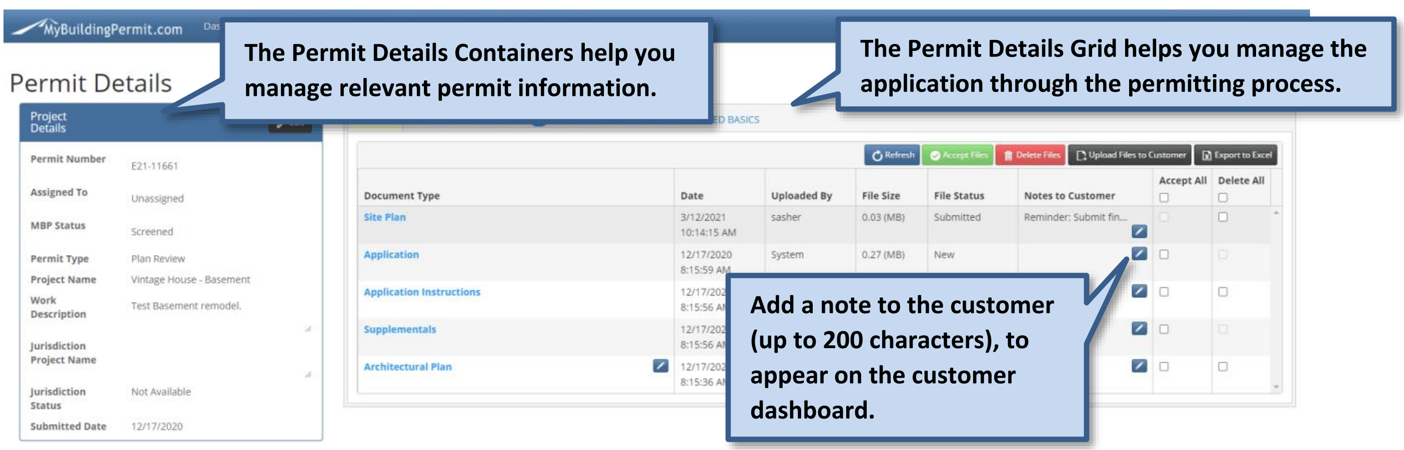
Clearing your browser's cookies will remove your saved grid and restore the default grid view. Update your browser settings to clear cookies less frequently if this is an issue on the MBP Admin Dashboard page. Otherwise, you'll configure your grid columns and resave this arrangement as a favorite after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

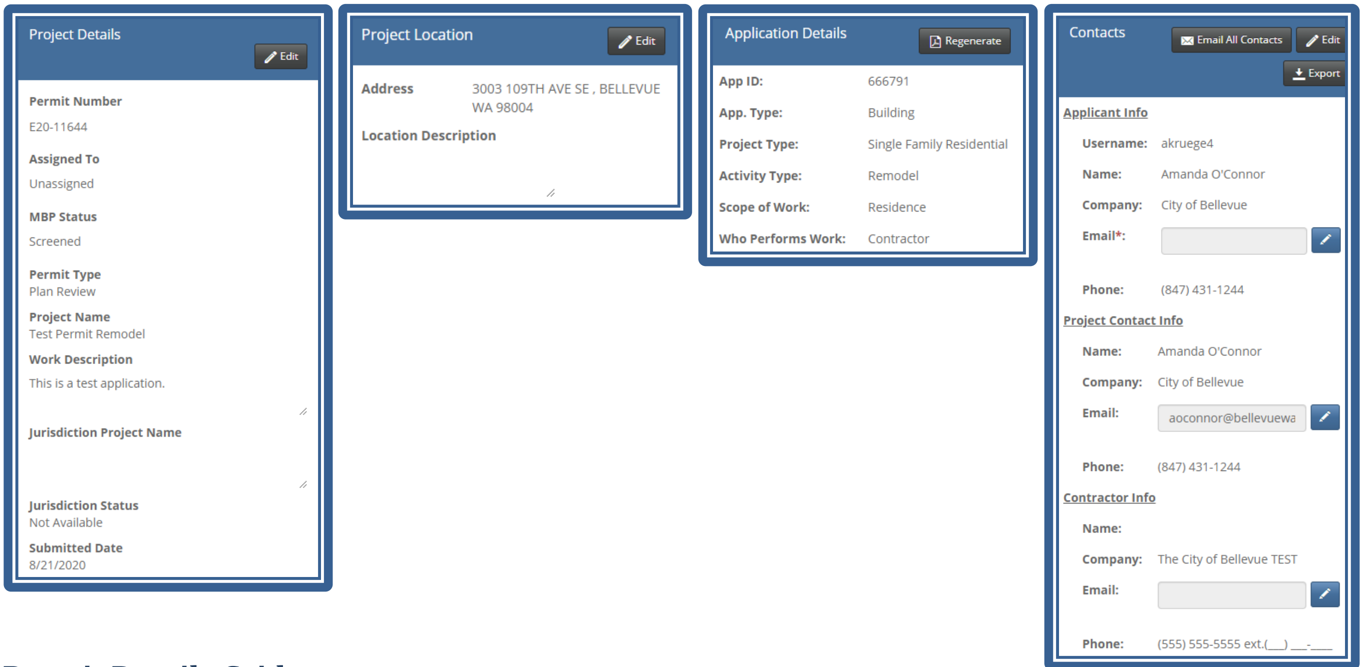


The Permit Details page contains detailed information for this permit:



Permit Details Containers

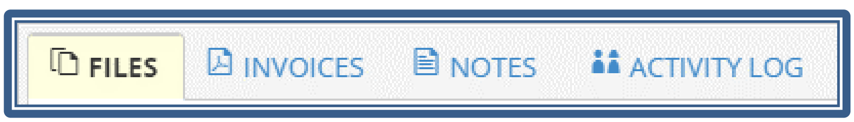
Admin, Staff, and Reviewers can view and manage **Project Details**, **Project Location**, **Application Details**, and Project **Contacts** information in the Permit Details Containers.



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**.



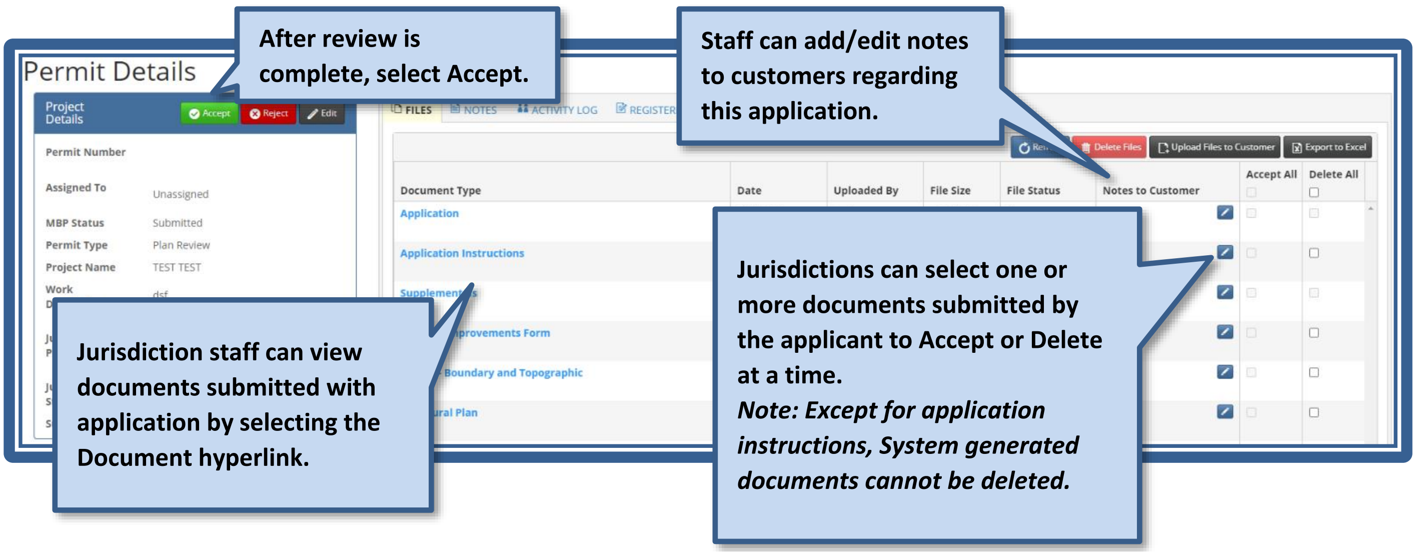
- The FILES tab (Screened, In Review, Issued, or Closed status only), contains a PDF of the application, application instructions, uploaded files, and buttons to view, accept, or delete files (system generated files cannot be deleted, there is no delete button for these files).
- The INVOICES tab (Screened, 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

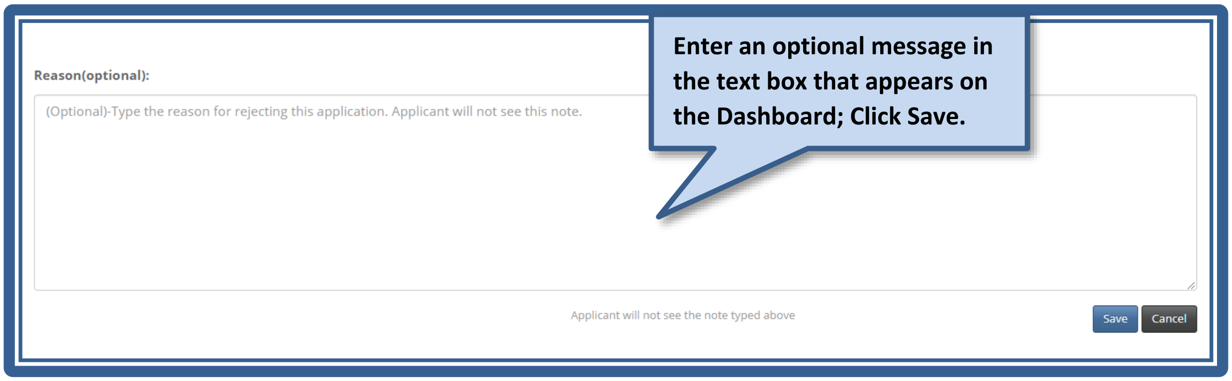
1. Applications to be reviewed can be found under the Needs Attention or New/Submitted tab.
2. Click on the linked Permit#/APP ID to view the Application Details page.
3. Review application information and files to determine whether the application meets screening requirements:



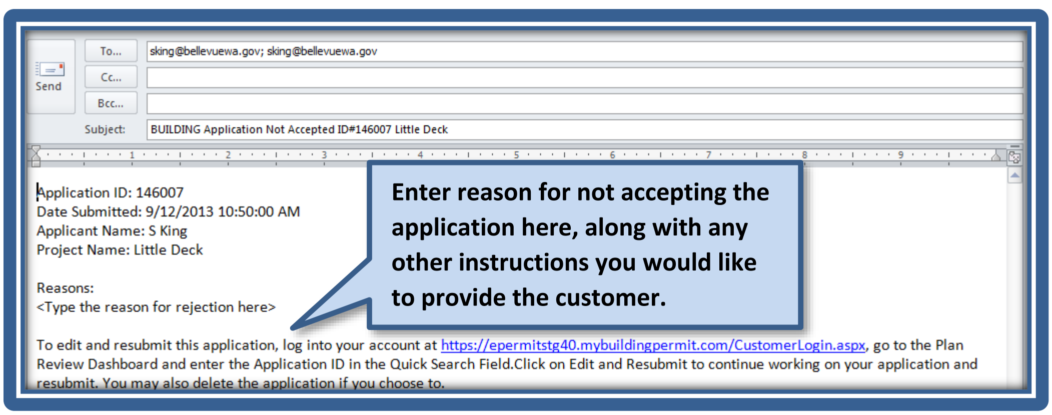
4. The status of the application changes to ***In Process***. The system will process the application and assign a permit number.
5. When the processing is complete, the status of the application is changed to ***Screened*** and the permit can be viewed in the ***Screened*** filter results.
   Note: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



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



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

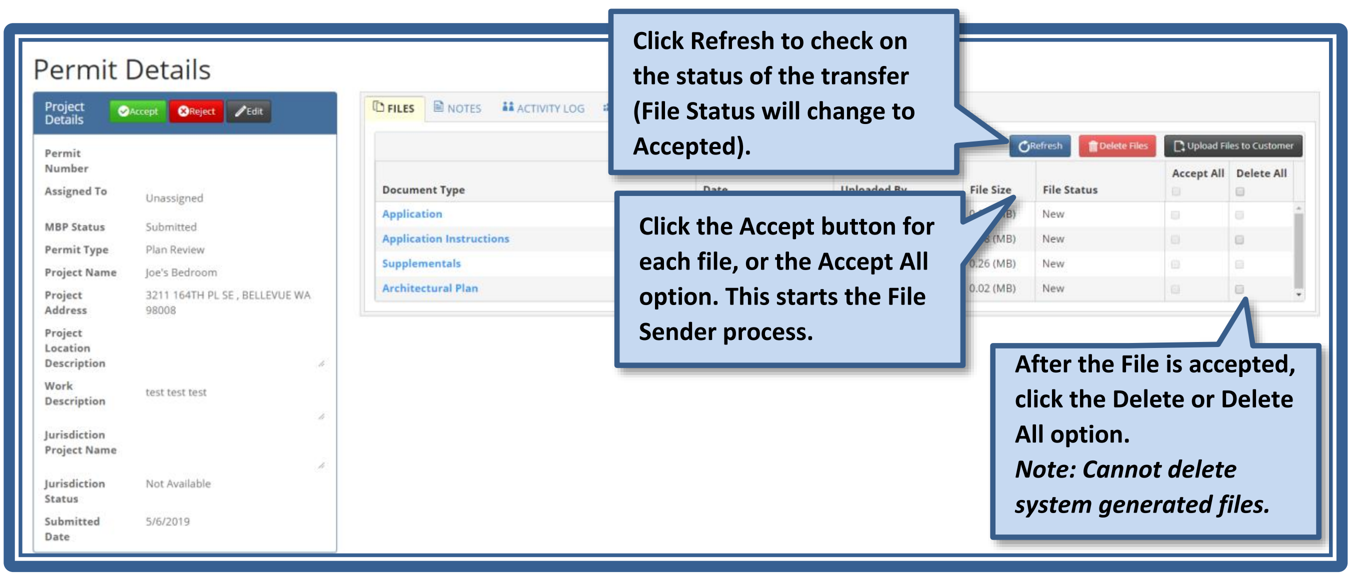
Once the application is accepted and a permit number is assigned, documents can be accepted. The permit displays in the ***Needs Attention*** filter results with a Recent Activity of *Document(s)* until the documents are accepted by the jurisdiction.

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.



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.

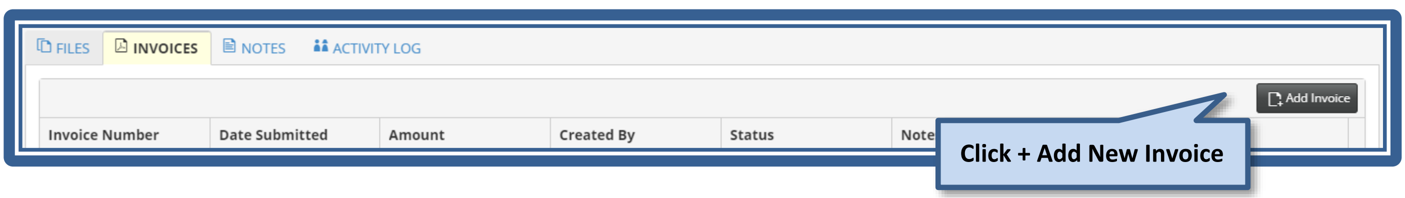
The process for creating invoices will vary slightly depending on the jurisdiction's integration status:

- **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.

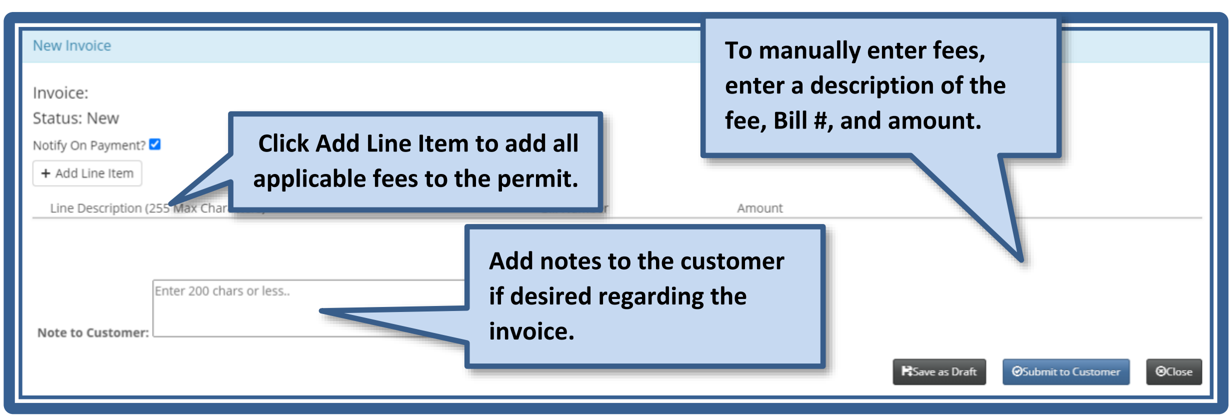
Note: You can add an invoice to an issued Over the Counter (OTC) permit if you need to charge additional fees after issuance. You must have the Application ID or Permit number and search for it in the Dashboard to access the Permit Details page. OTC permits do not save to the Jurisdiction Dashboard.

Creating an invoice:

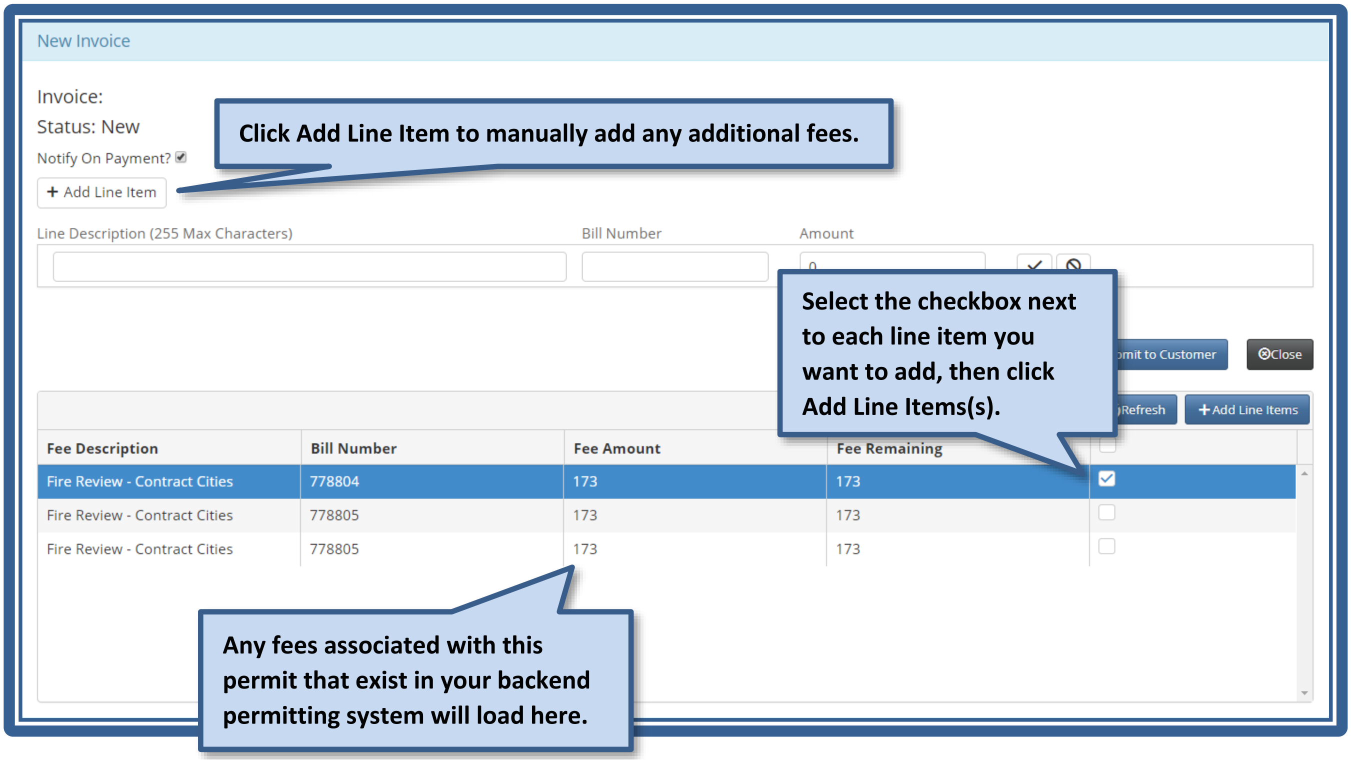
1. Open the Application Detail page from the ***Screened*** tab by clicking on the hyperlinked Permit number.
2. Navigate to the **Invoices** tab (available for Screened, In Review, Issued, and Closed statuses only):



Non-integrated jurisdictions:



Integrated jurisdictions:



3. 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.

4. Once submitted, a PDF of the invoice is saved on the Jurisdiction and Customer Dashboards on the **INVOICES** tab.

5. 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.

1. On the Jurisdiction Dashboard, search for the App ID or permit number for the permit to which you want to add an invoice.
2. Open the permit and click the Invoice tab on the Permit Details page.
3. Follow the Steps to Create an Invoice.

Processing Paid Invoices

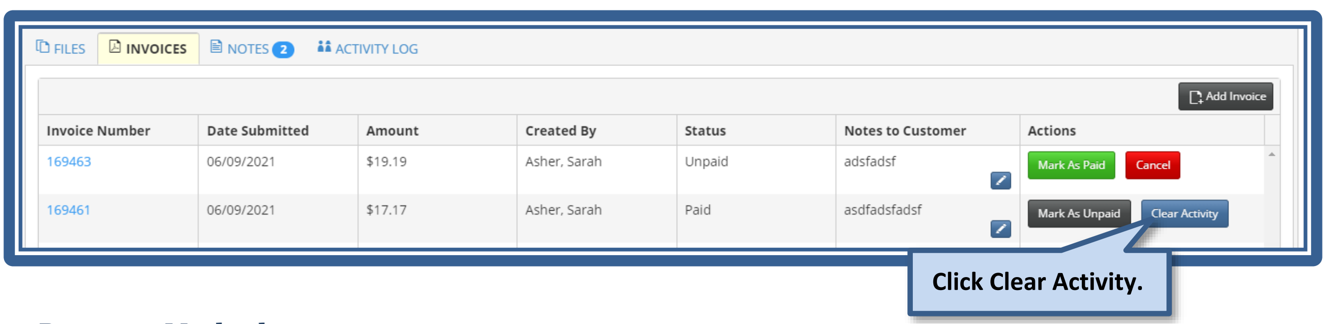
When an invoice is paid, either online through ePermit (the application site) or at the jurisdiction counter, the invoice needs to be marked as paid in the permit tracking system and updated on the Dashboard.

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.

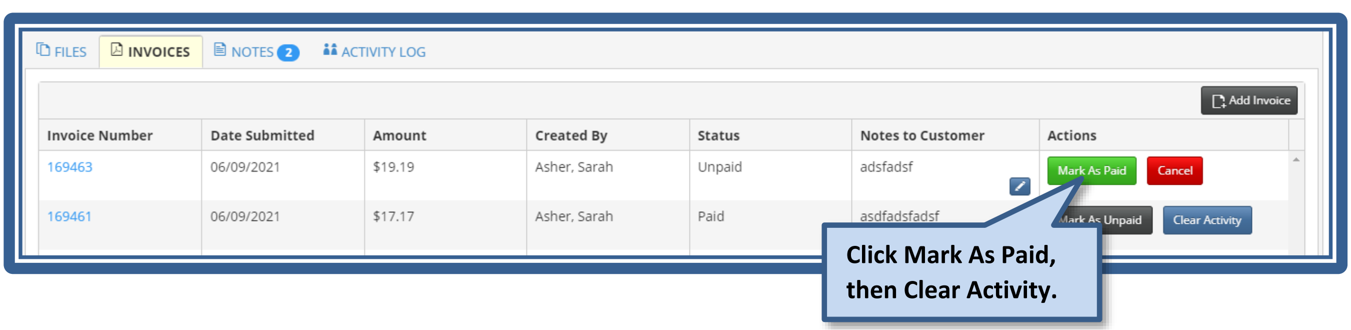
To clear this activity, follow these steps:

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:



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:



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:

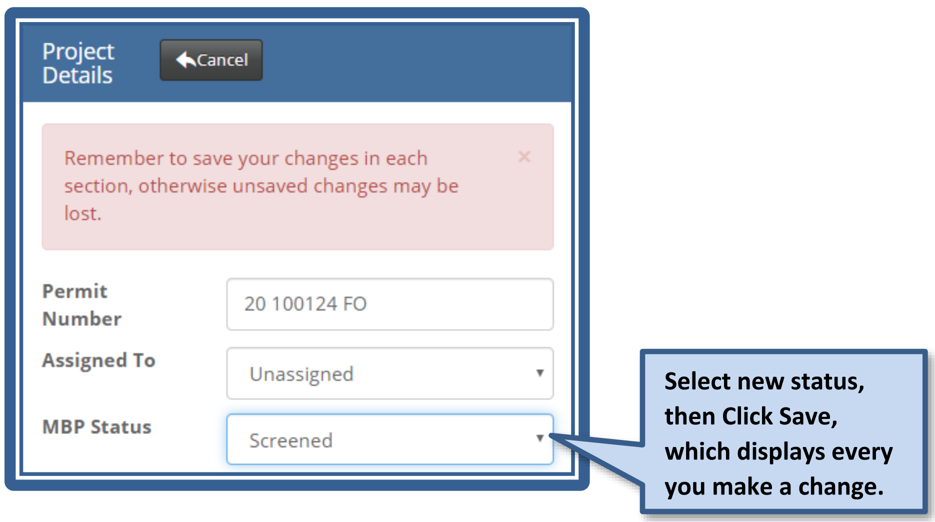
- After an invoice has been paid – Change from **Screened** to **In Review**
- After review is complete and permit has been issued – Change from **In Review** to **Issued**

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.

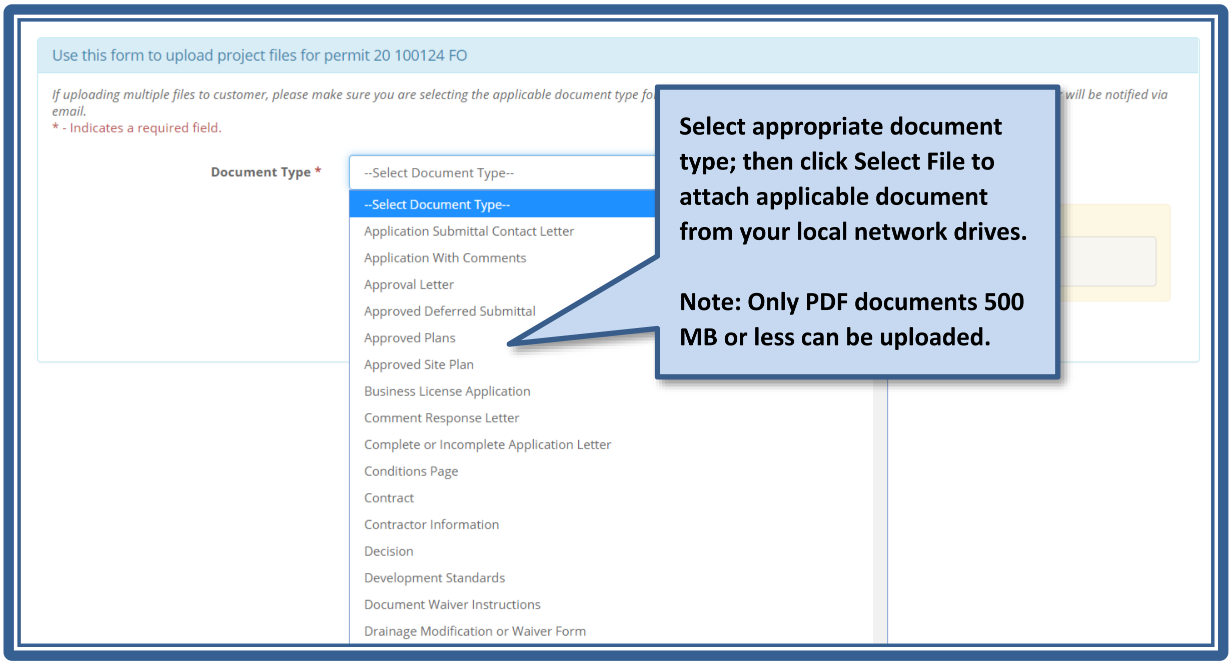
1. Click the Edit icon next to the Dashboard Status.

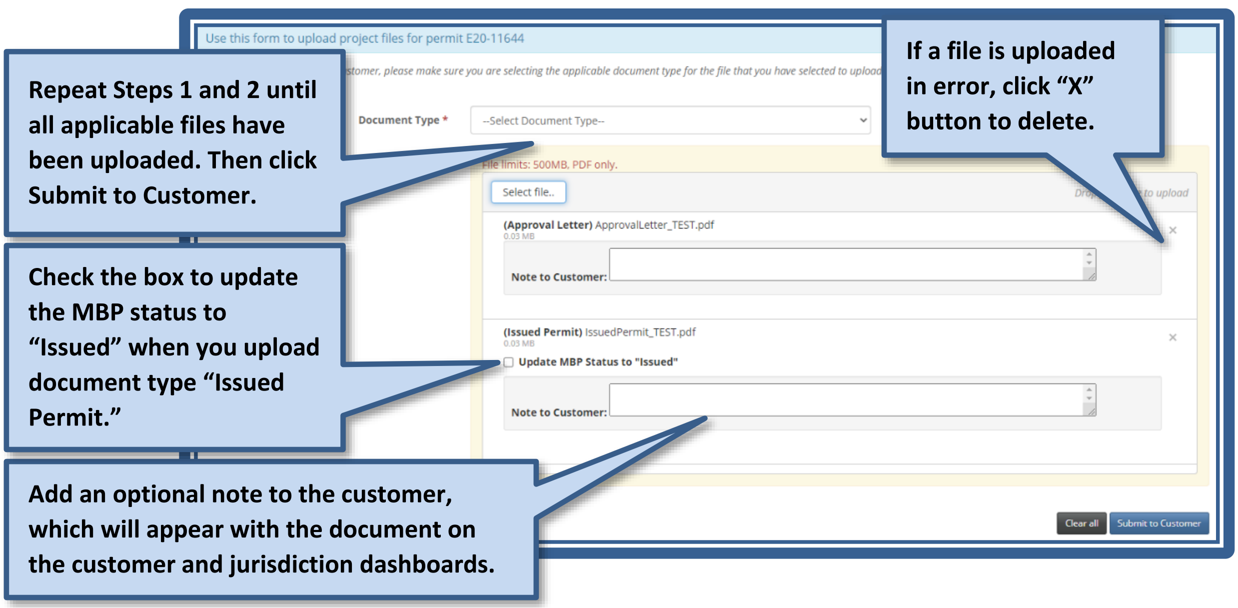


Uploading Files

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 Upload Files to Customer button. A form opens in the tab to add files:

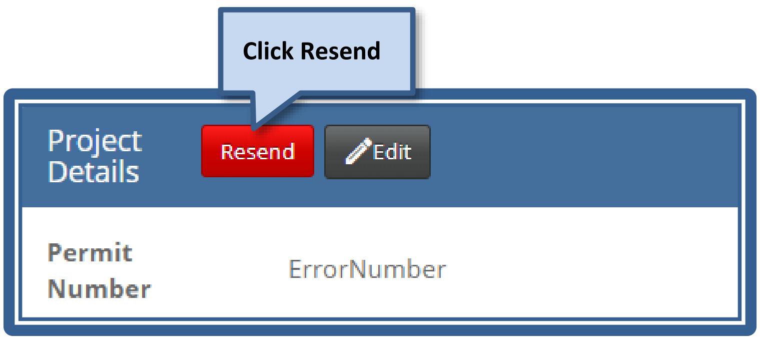

Use this form to upload project files for permit 20 100124 FO
If uploading multiple files to customer, please make sure you are selecting the applicable document type fo
will be notified via email.
* - Indicates a required field.
Document Type *
--Select Document Type--
--Select Document Type--
Application 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
stomer, please make sure you are selecting the applicable document type for the file that you have selected to upload
Document Type *
--Select 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:
Clear all
Submit 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.

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**.

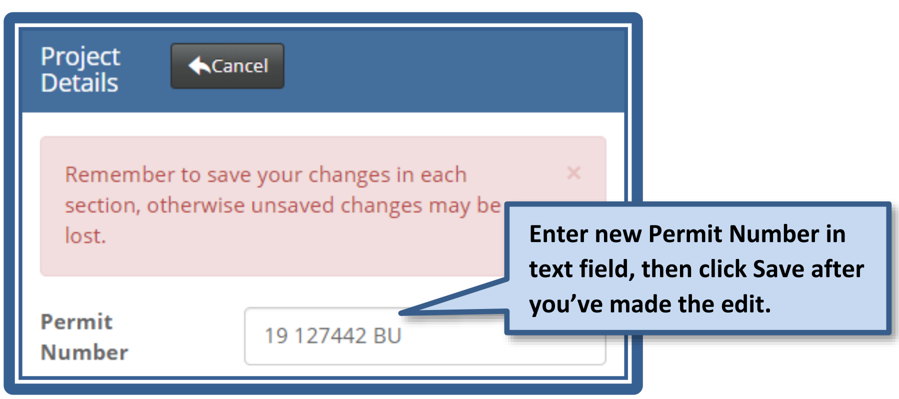
1. Open the Failed application Permit Details page from the ***Needs Attn*** filter by clicking on the hyperlinked word ErrorNumber (displays in the Permit #/App. ID field); select **Resend**:



Changing Permit Numbers

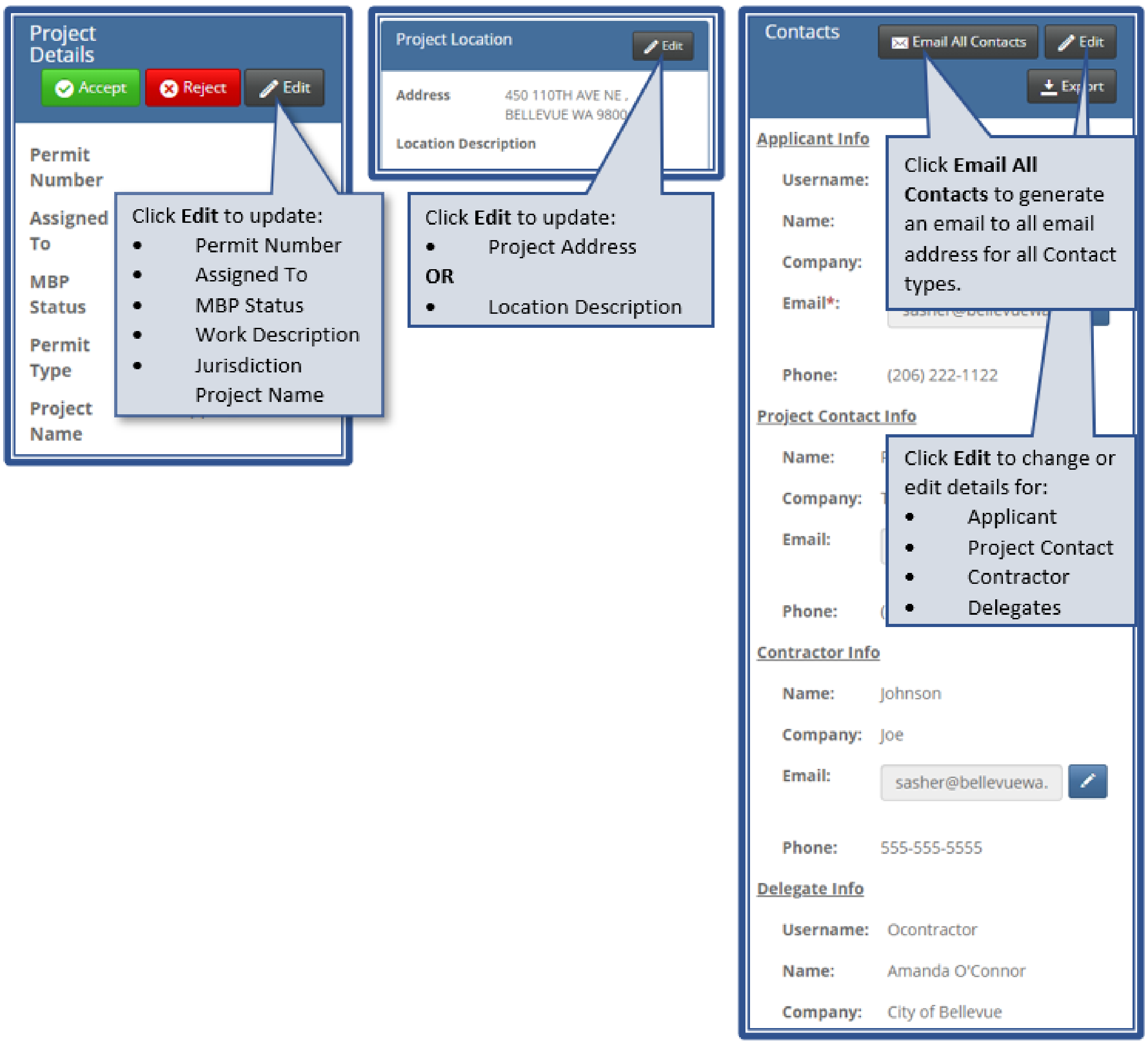
The permit number on the Jurisdiction Dashboard can be edited if necessary. Generally, this is done at the request of the jurisdiction, to match the permit number in the jurisdiction permit tracking system.

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**.



Managing Project Details

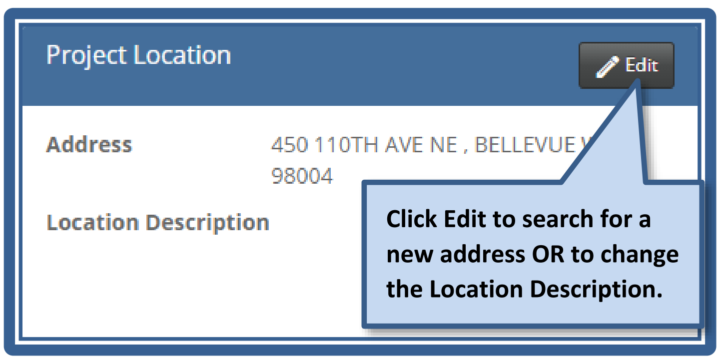
You can update the following Project Details. The fields marked with an asterisk can be modified in the Project Details container:

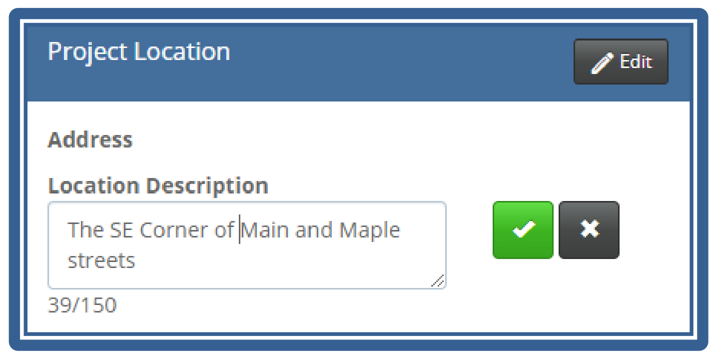
- ***Permit Number** – update the permit number, if necessary to reconcile with backend permitting system
- ***Assigned To** – assign the permit or application to a staff member to manage
- ***MBP Status** – set the status of the permit
- **Permit Type** – Identifies whether the permit requires Plan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

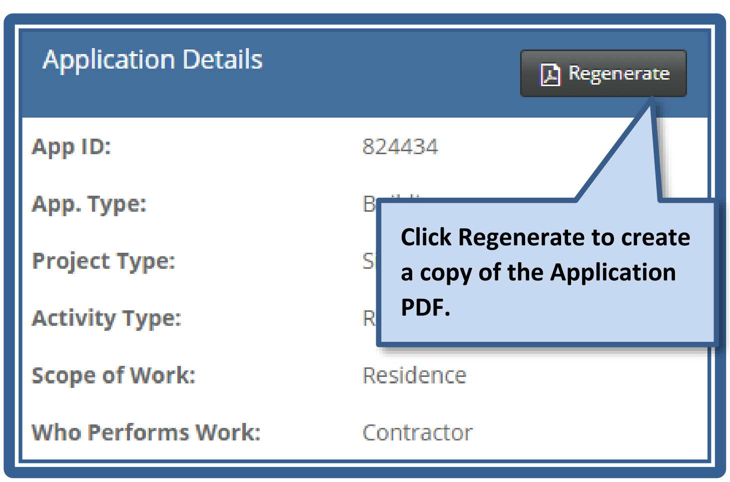
You can manage either the Address or the Project Location, depending on which type of location information is saved with the application. Project Location is only used when a physical address is not available (for example, some Right-of-Way or Special Events applications).





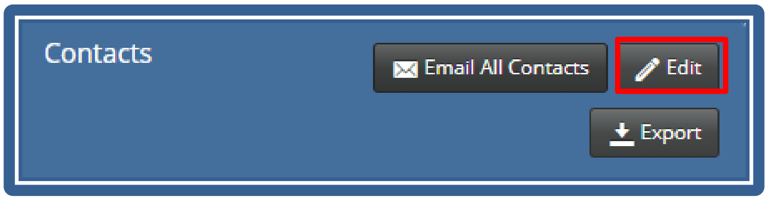
Managing Application Details

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.



Managing All Contacts

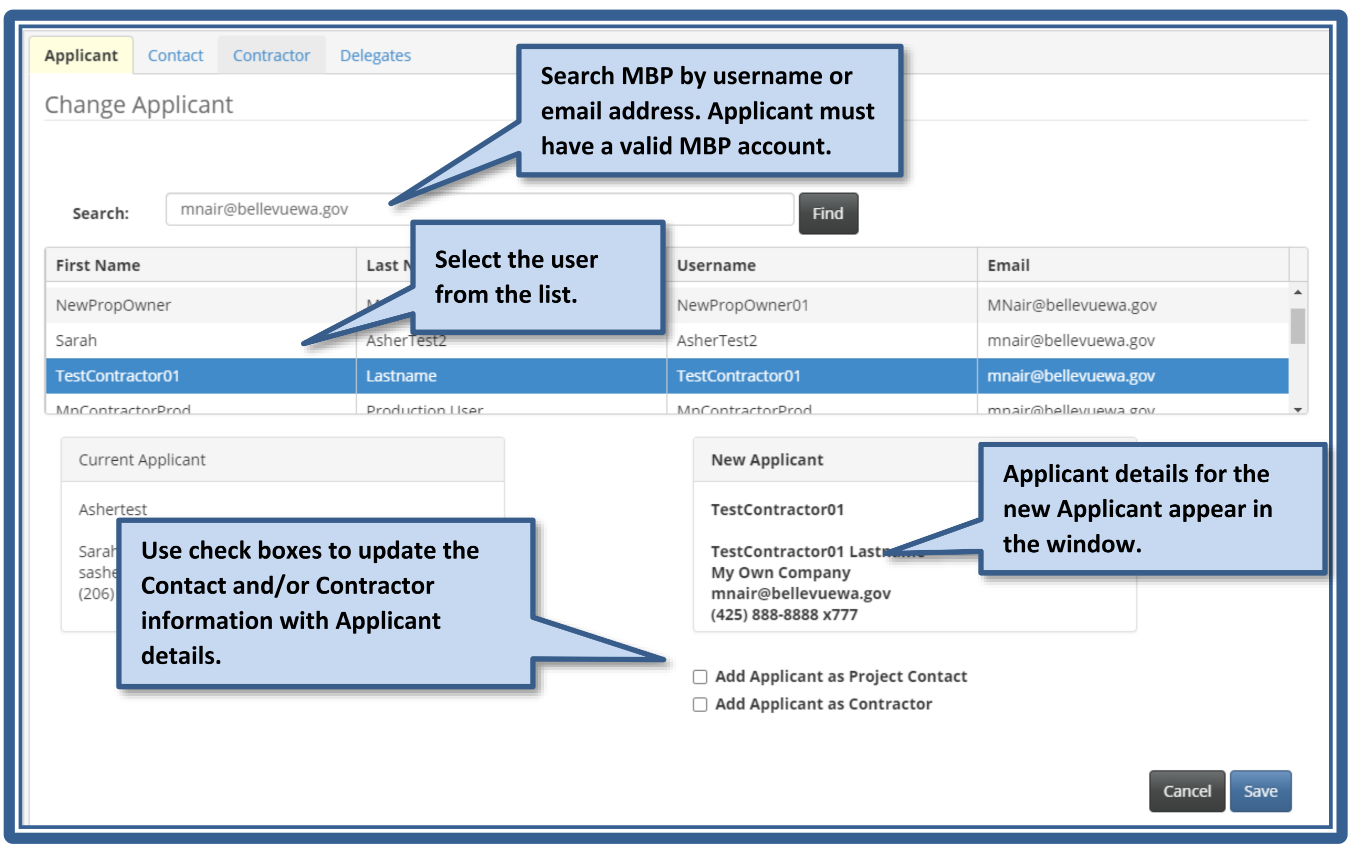
You can manage the details of all Contact types via the Contacts container on the Permit Details page. You can access Contact Management by clicking Edit on the Contacts container.



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:

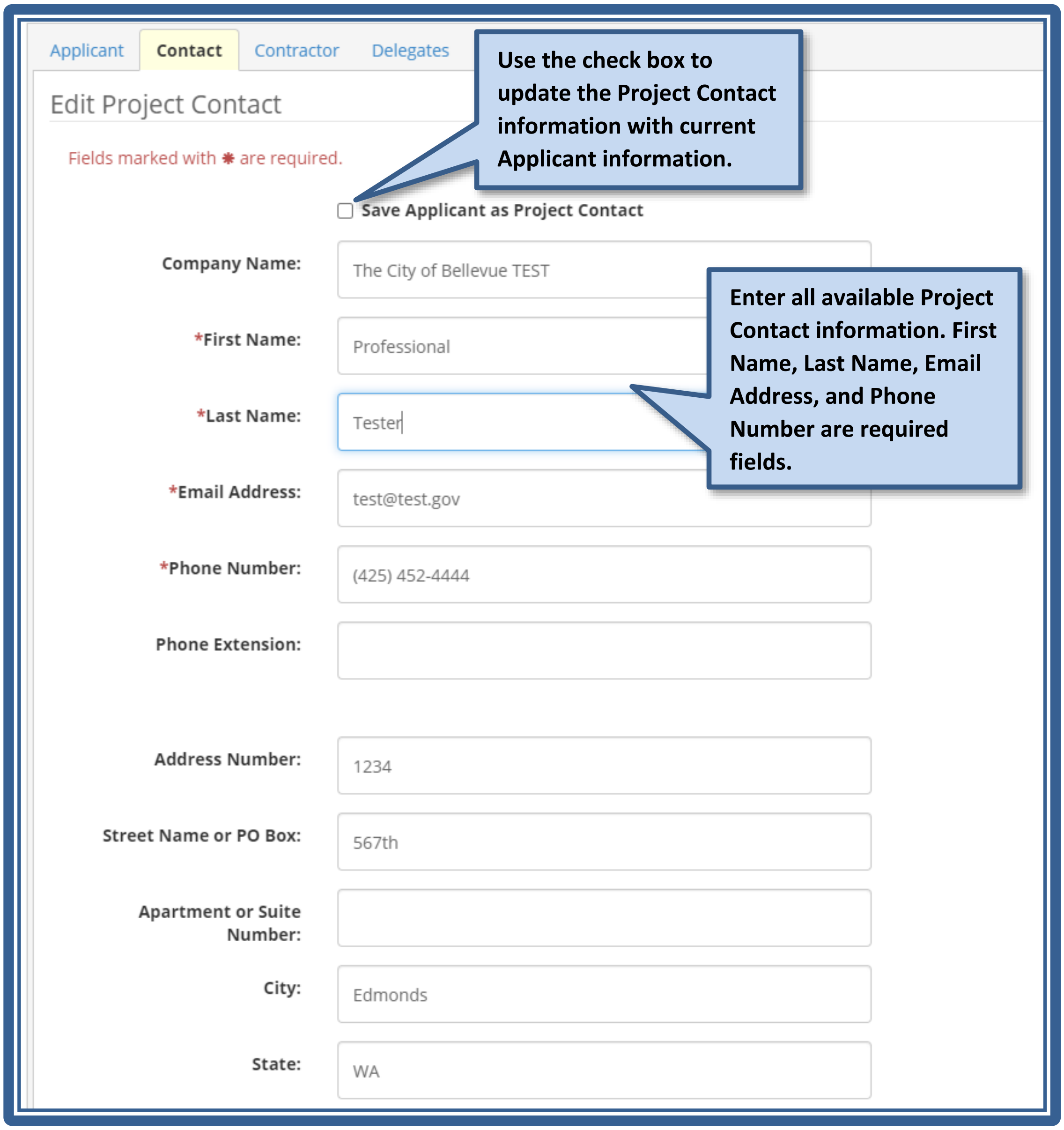
- The applicant must be an MBP user and must provide the MBP username or email address.
- Each application / permit must have an applicant. You can "swap" one applicant for another but cannot save an application / permit without a designated applicant.
- Changes to applicants are recorded on the Activity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



Managing Project Contacts

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

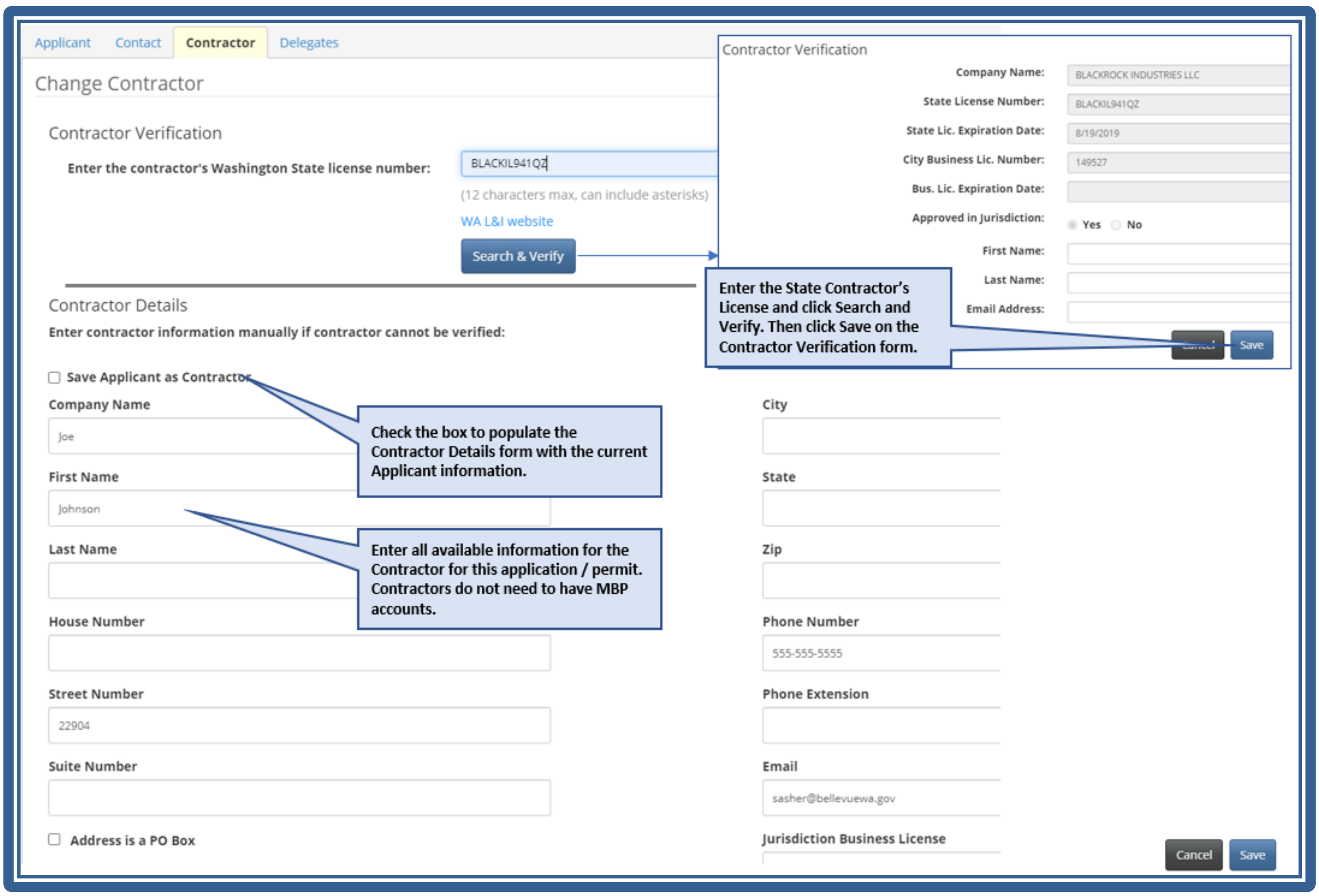
- Project Contacts have no access to the application/permit and cannot manage or pay invoices on the permit.
- Project Contacts do not need to be MBP users.
- If the Project Contact needs access to the application/permit, they must be added as a Delegate (Delegates must be MBP users).
- Changes to Project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



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.

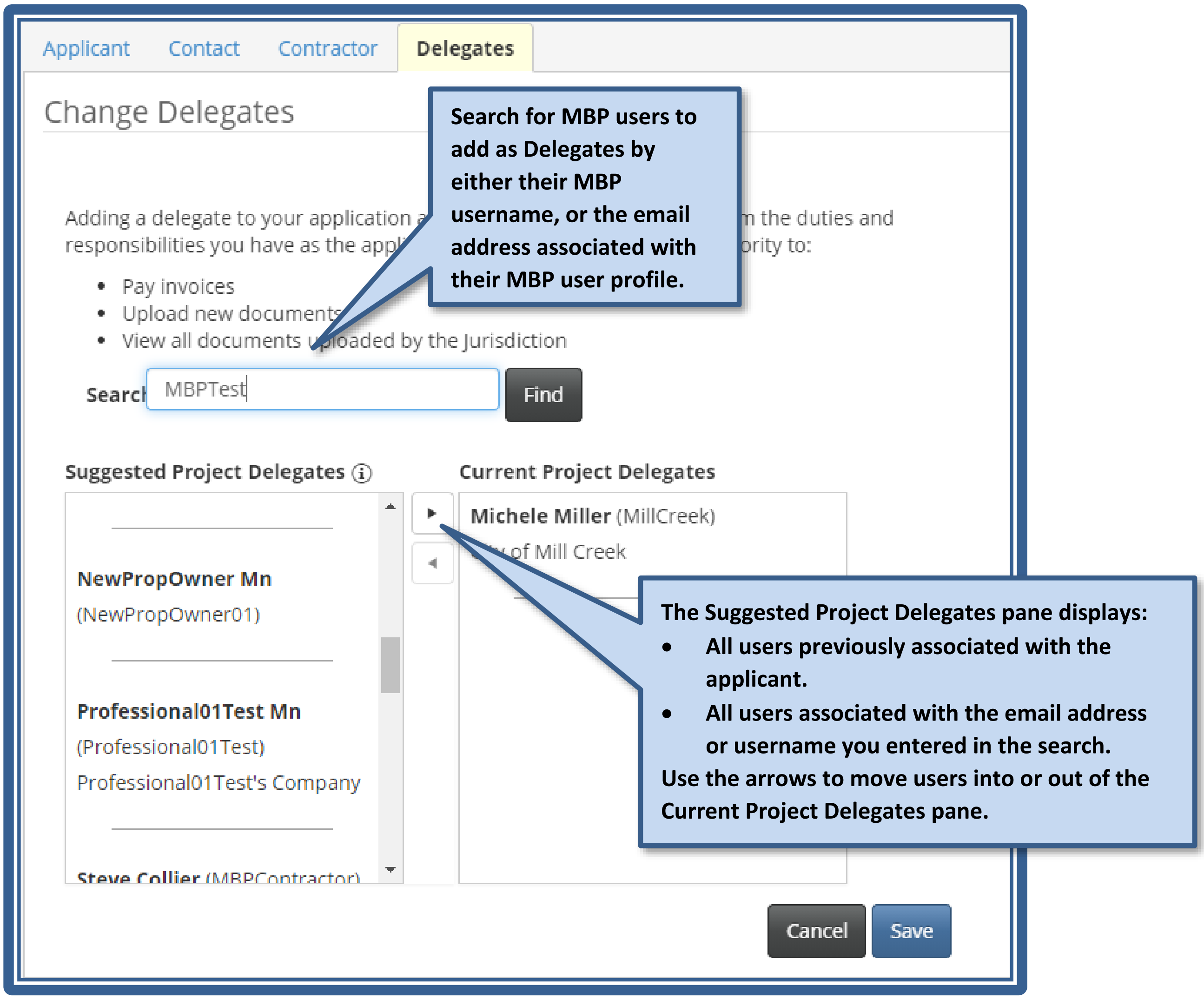
- Contractors have no access to the application/permit and cannot manage or pay invoices on the permit.
- Contractors do not need to be MBP users.
- If the Contractor needs access to the application/permit, they must be MBP users and then be added as a Delegate (Delegates must be MBP users).
- Changes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



Managing Delegates

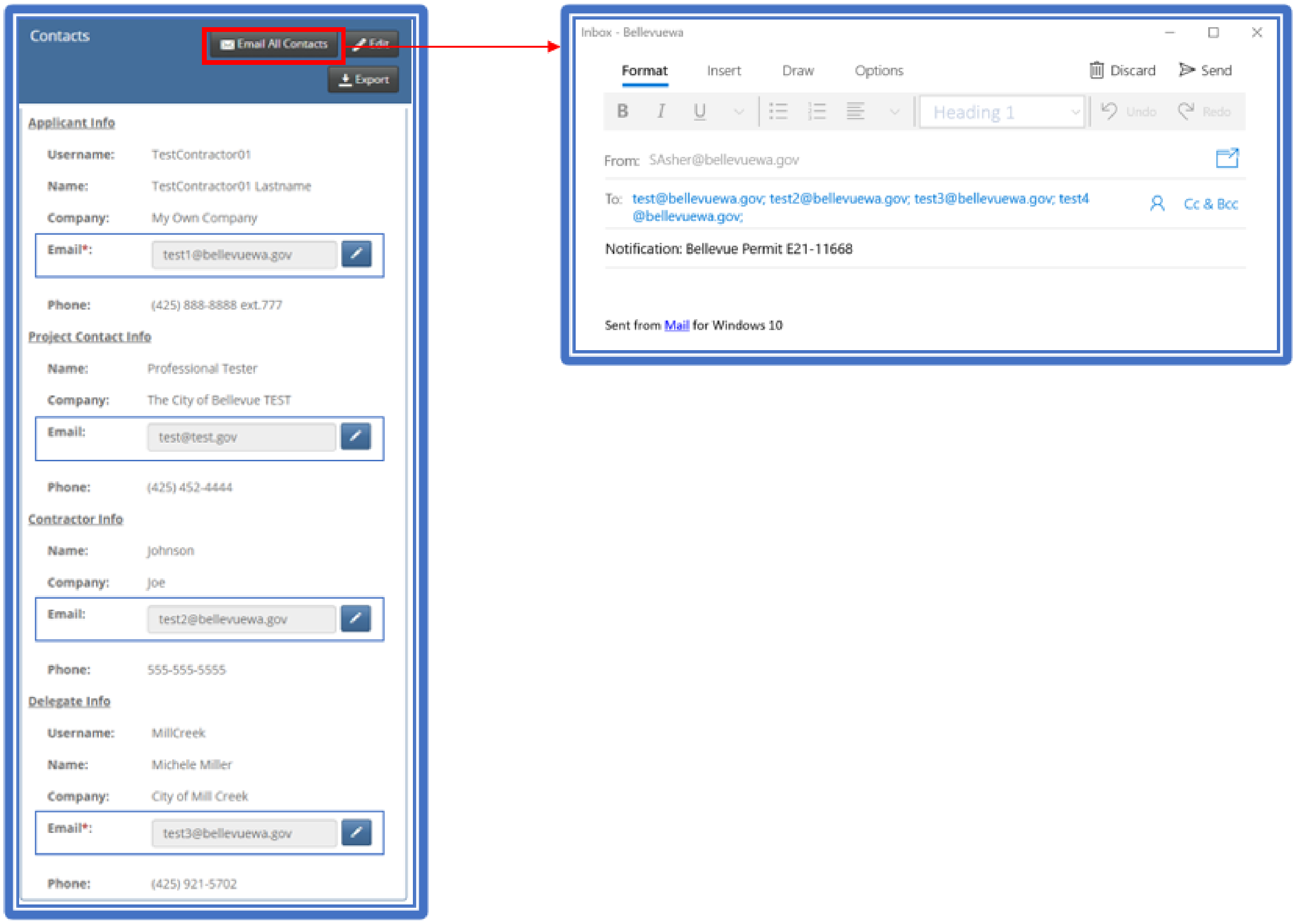
Delegates can be added to applications/permits during the application process and can be added or removed by Jurisdiction Administrators or Staff. Delegates have the same level of access to the permit as the Applicant, and can pay invoices, upload documents, manage Contacts and view all communications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



Sending an Email to All Project Contacts

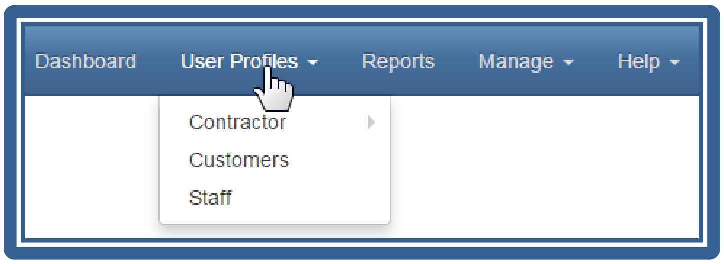
You can generate an email to send to all project contacts. An email is generated that contains pre-populated email addresses for each contact type, a pre-populated subject line, and a blank message body. The email recipients can be modified, if needed, before the message is sent. A record of the email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



User Profiles

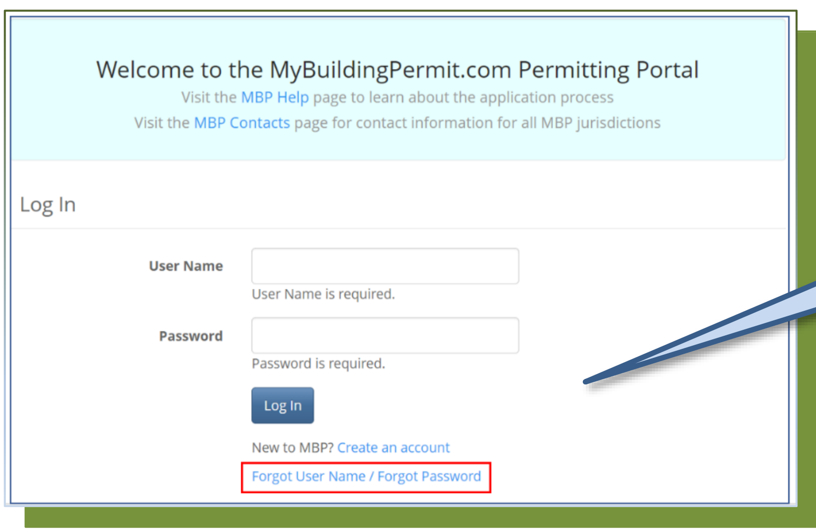
The **User Profiles** menu allows you to search for and manage **Contractor**, **Customer**, and **Staff** accounts.
User Profile Search Tips:

- **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.



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.*

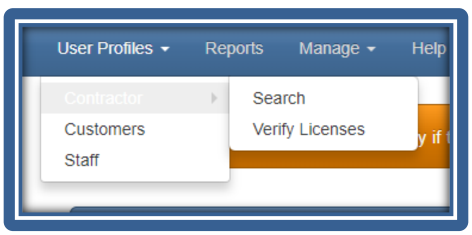
Jurisdictions can perform the following actions to a Contractor Account:

- 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.

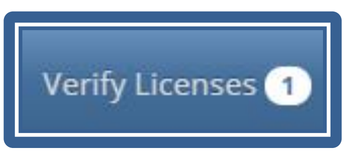
Search

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



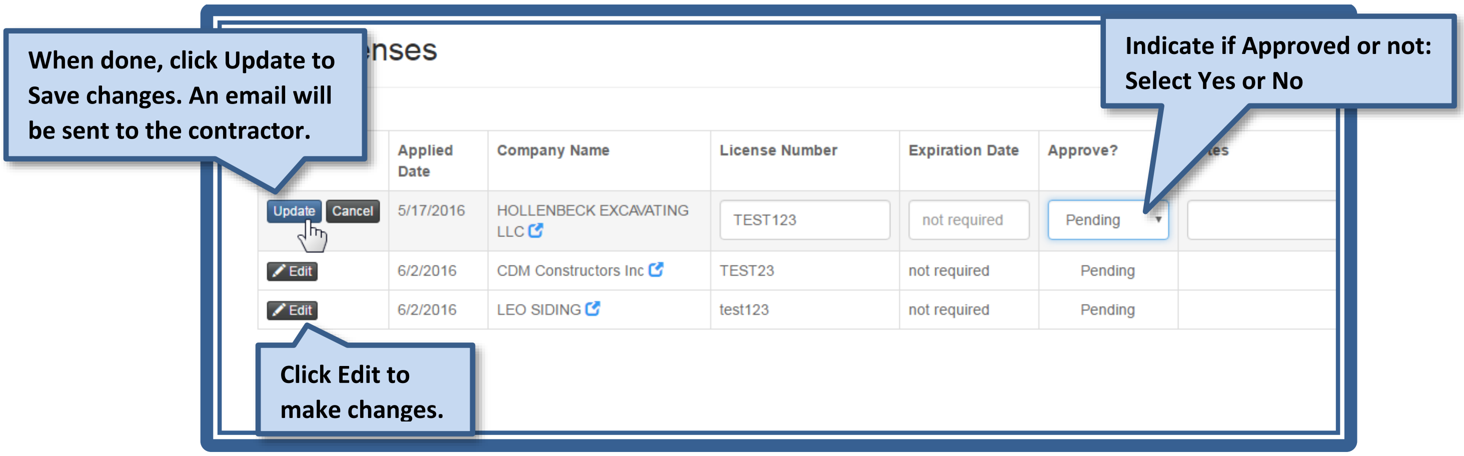
Verify Licenses

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.



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).

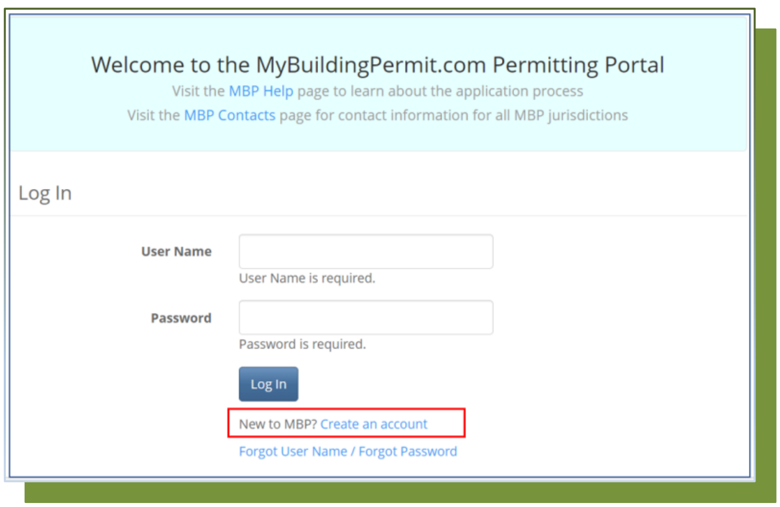
This process is used by licensed contractors to create an account on MyBuildingPermit.com. When registering a new company on MBP, state license validation is required, and some jurisdictions require local business licenses as well before a licensed contractor can submit a permit application.

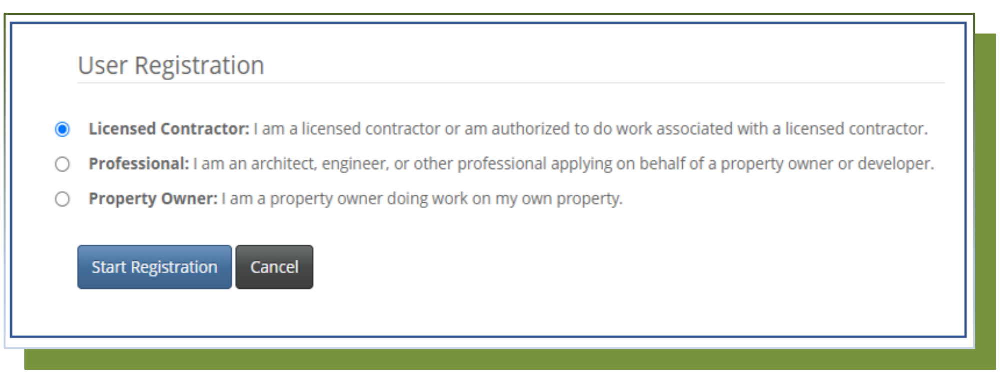
NOTE: A company UBI may only be registered one time with MBP; however, there can be multiple user accounts associated with a single company.

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.

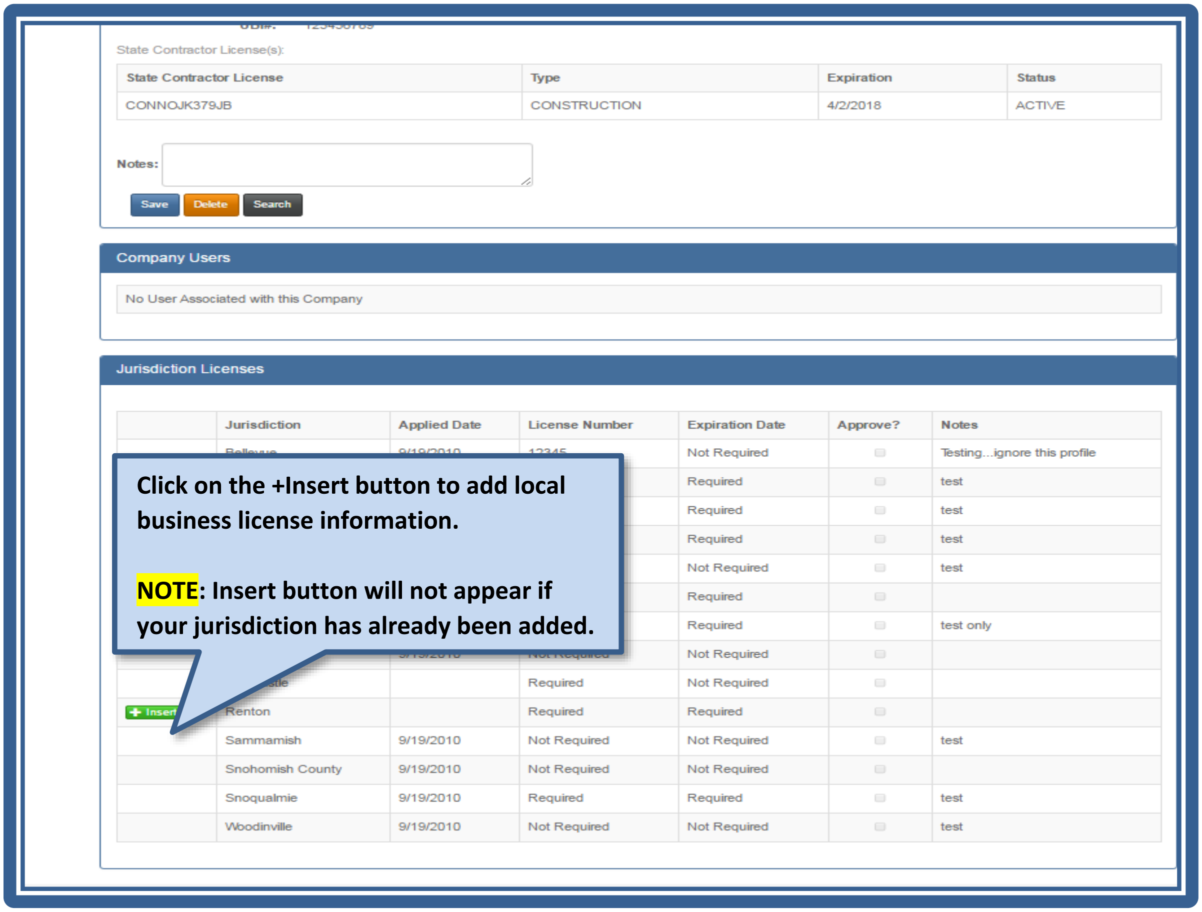
1. Click Create an Account on the MyBuildinPermit.com Login Page.
2. On the User Registration page, select Licensed Contractor.
3. Enter WA State UBI number and click Search.
4. Complete the Contractor Registration.
5. Verify Company Information and enter Phone Number.
6. Enter Jurisdiction License information (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).



Customer Accounts

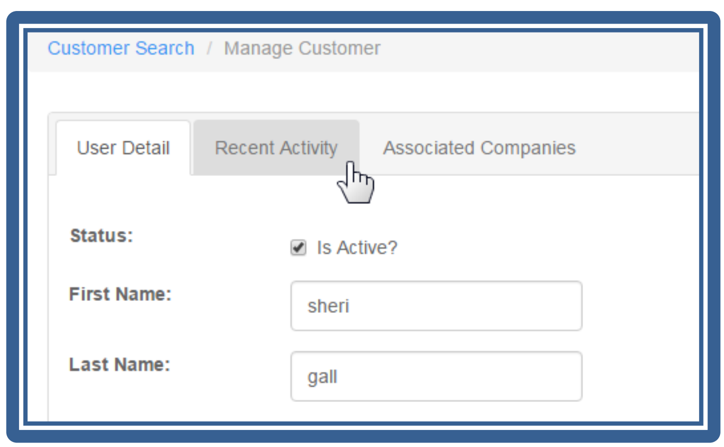
USER PROFILES → Customers allows you to search accounts by either a Username or Email address.

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



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

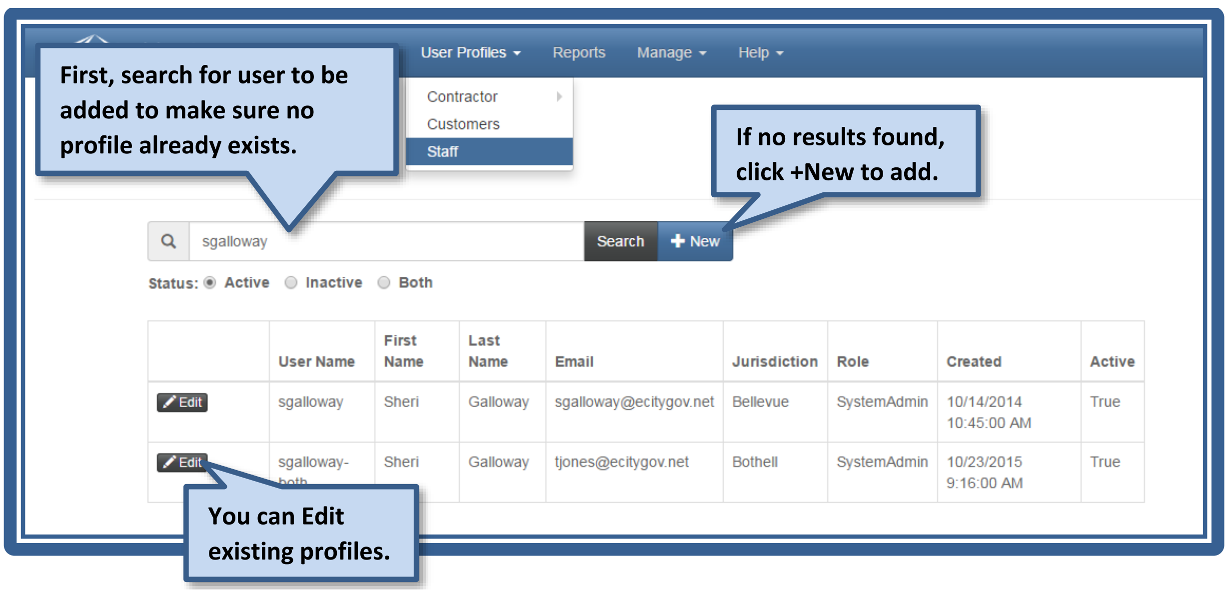
Staff Accounts

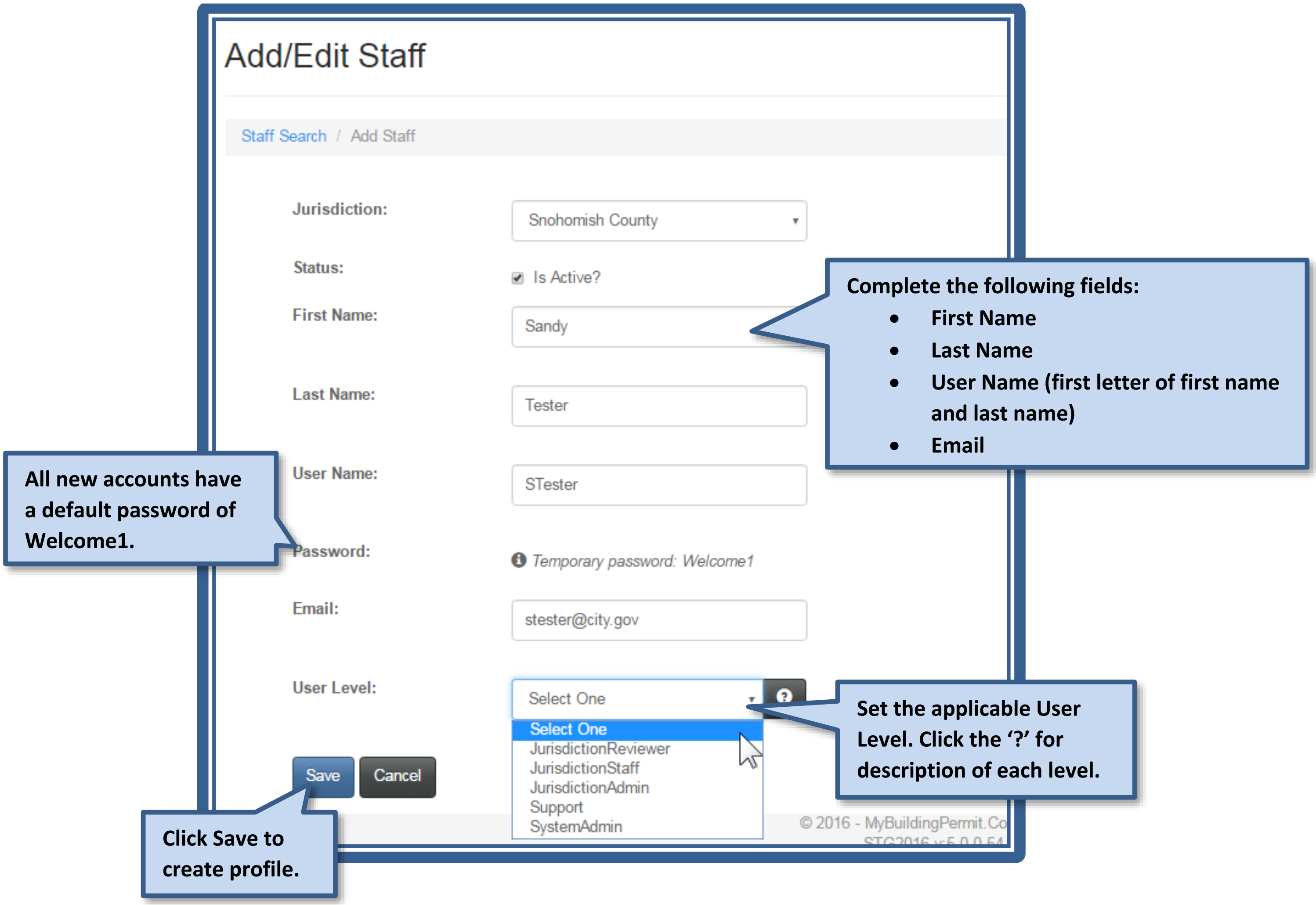
Allows you to search your jurisdiction's users and modify:

- 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.

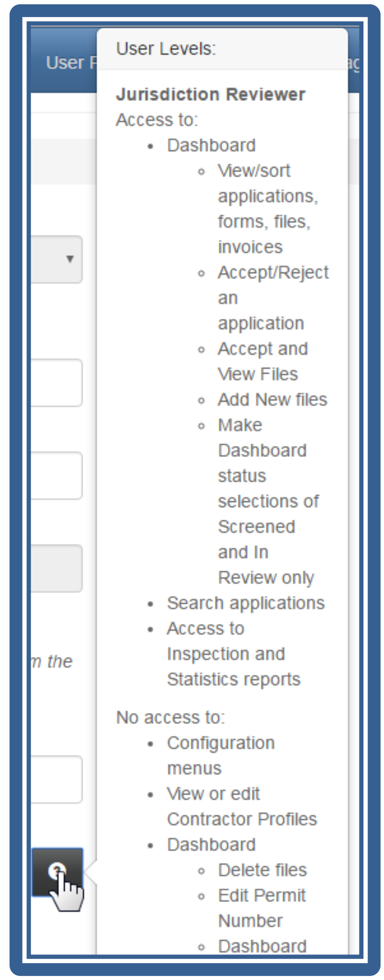




NOTE: It is good practice to inactivate any Staff accounts for people no longer at your jurisdiction. Edit the staff profile and deselect the Active indicator under Status.

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.

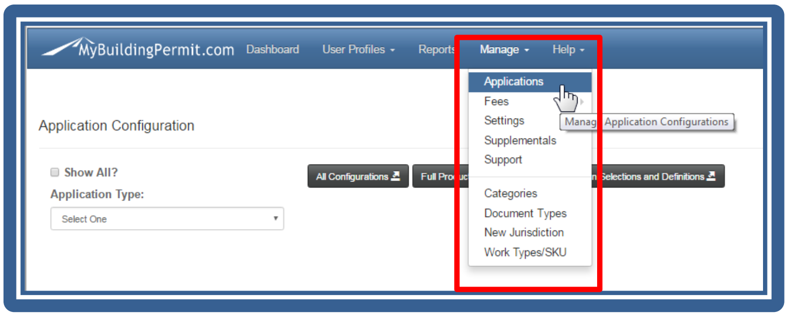
Using the Manage Menu

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

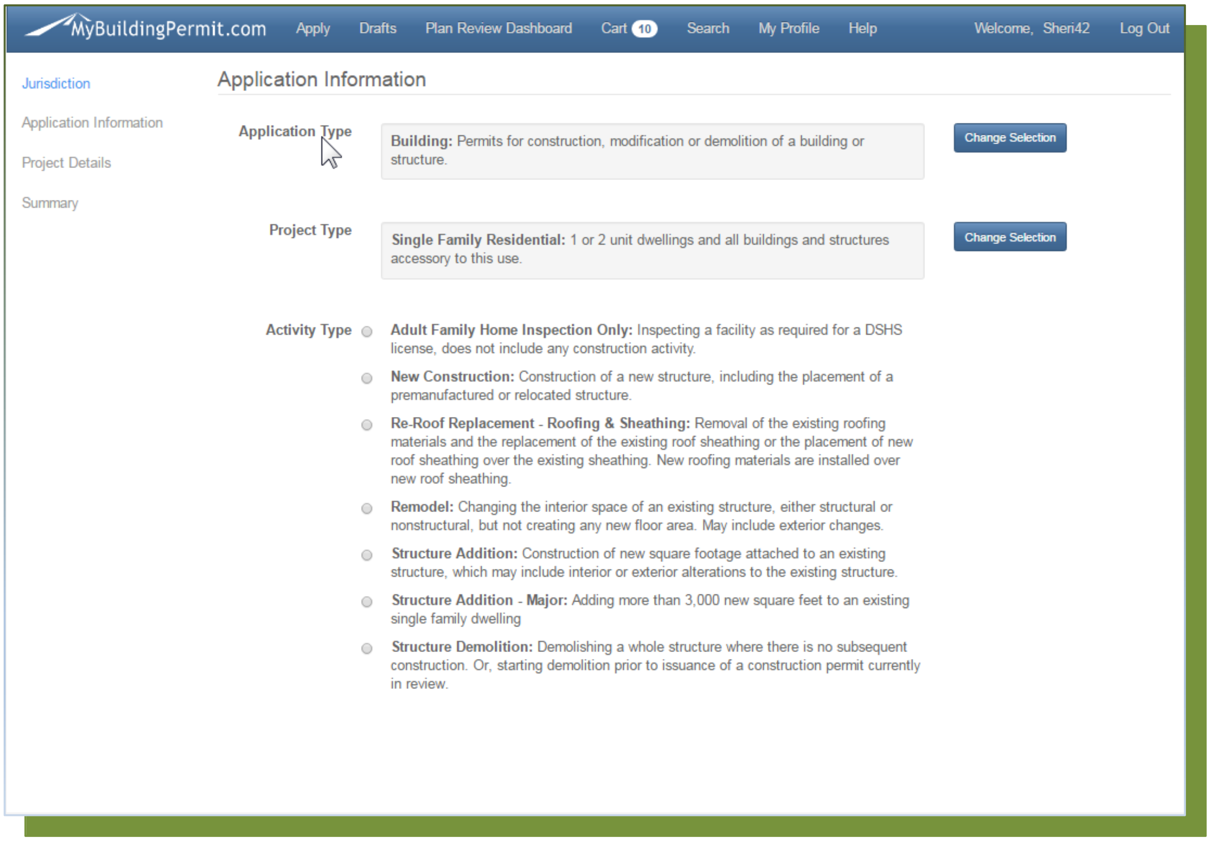
As the customer progresses through the MBP Permit Application Process, each selection and piece of data they enter is determined by the jurisdiction. The jurisdiction "*configures*" their applications offered through MBP on the Jurisdiction Admin site using the **MANAGE → Applications** feature.

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.

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

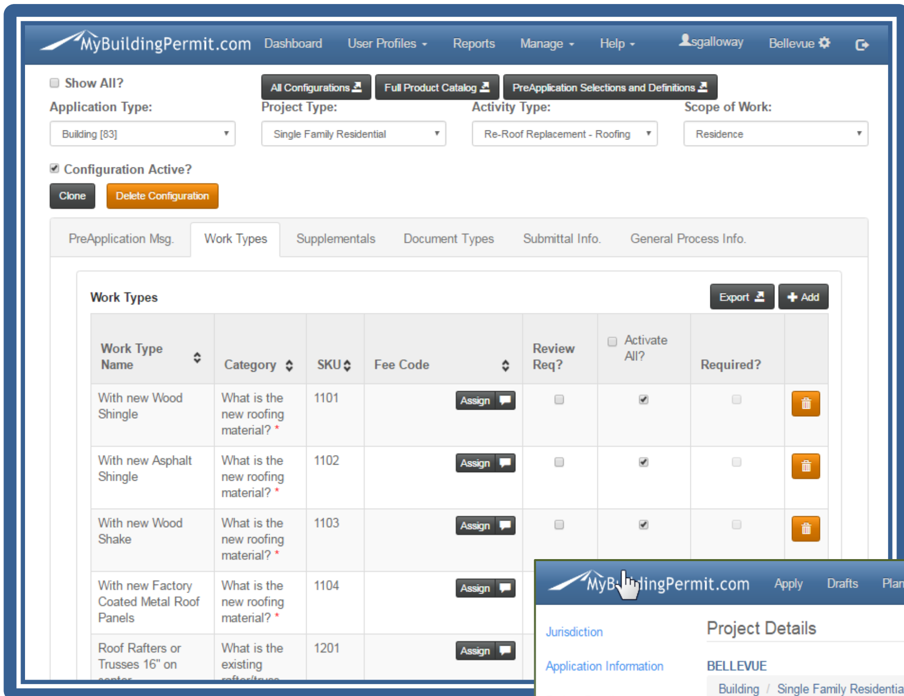


Each of the options available under **Application Type, Project Type, Activity Type, and Scope of Work** were first agreed upon by the MBP committees. A formal request must be submitted to the MBP Project/Program manager to have a new one created.

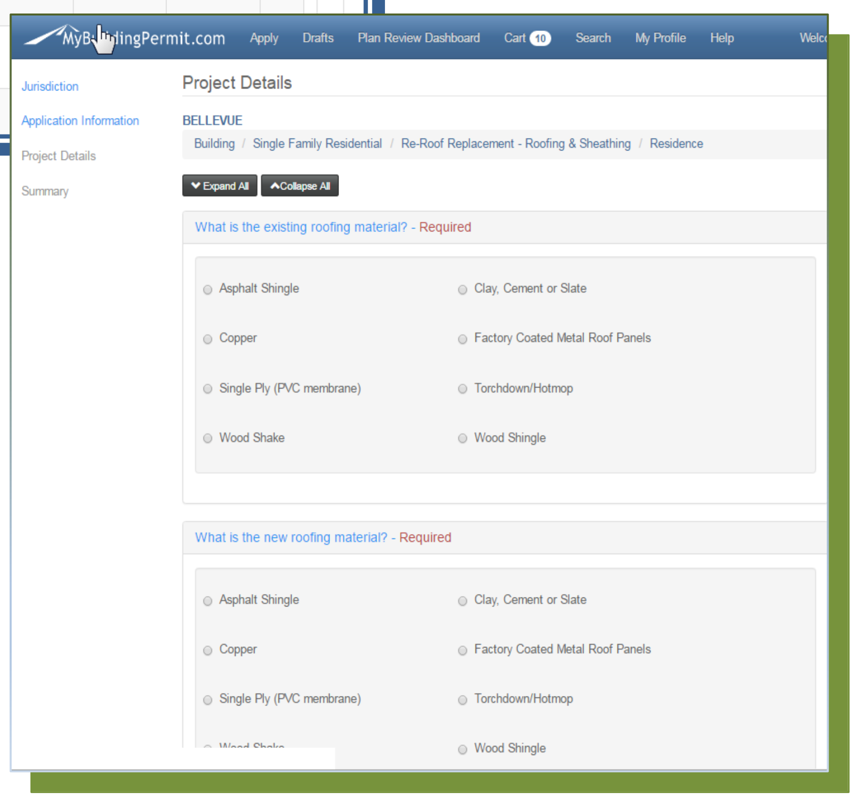
After the first four "buckets" or types are selected by the applicant, the fifth "bucket" is Project Details. Each jurisdiction determines the information needed from the customer for each specific application. The Project Details page contains "*work types*" also referred to as "***SKU***'s". These 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:



And looks like this to the Customer/Applicant:

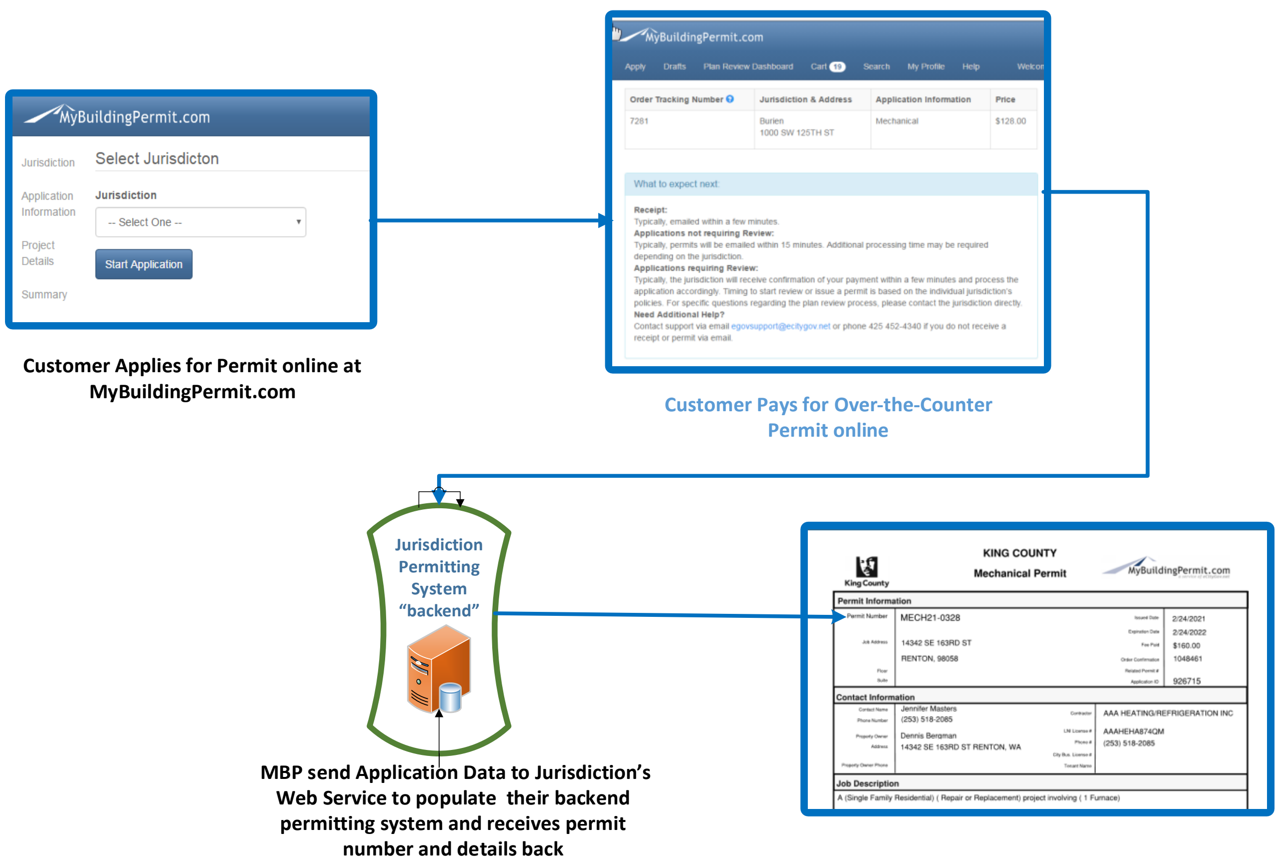


Application Integration

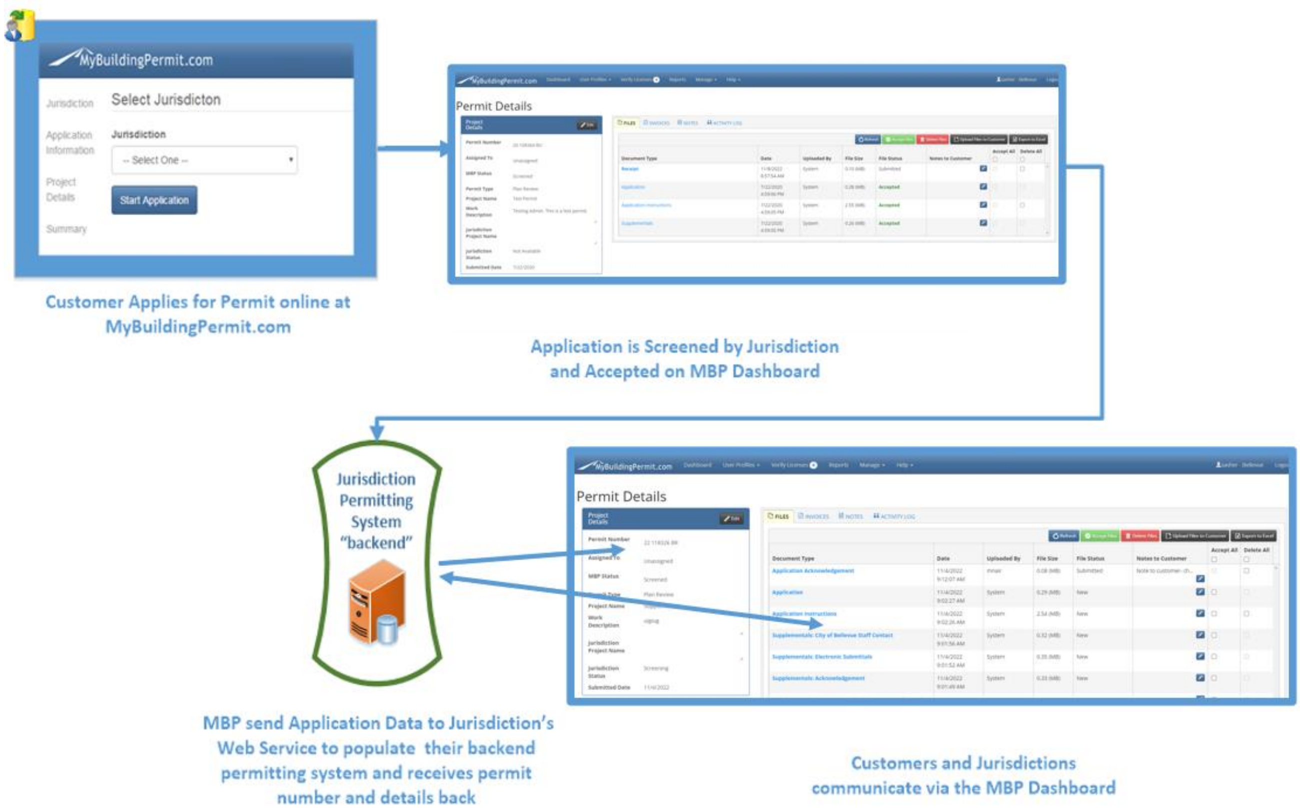
The Application Configuration, including the SKU detail and fees, will be included in the XML output from MBP that is sent to the jurisdiction via Web Services and must be *mapped* by you to your backend permitting systems. For more information on MBP integration process see the MBP Integration Section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



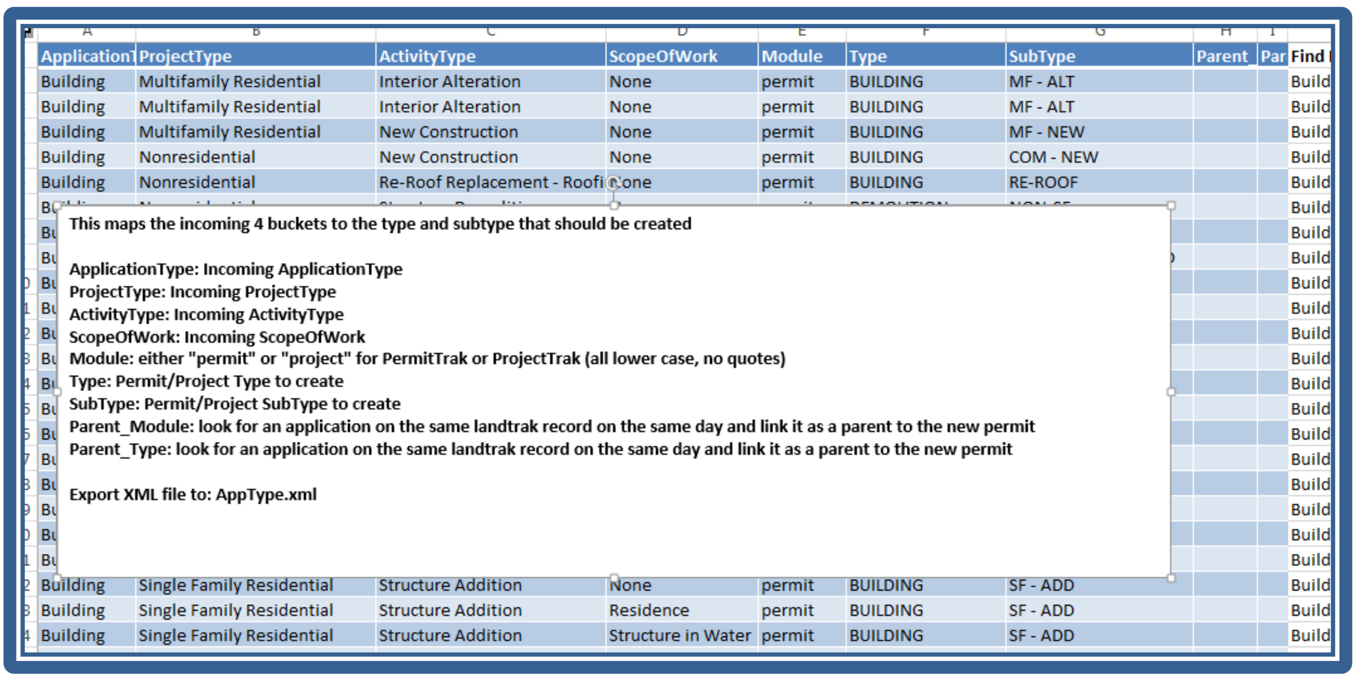
Plan Review Permit



Considerations when Configuring Applications:

- 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.

Here is an example of how a jurisdiction with TRAKiT as their backend permitting system maps the MBP "buckets" to their database.



ApplicationT	ProjectType	ActivityType	ScopeOfWork	Module	Type	SubType	Parent	Par	Find
Building	Multifamily Residential	Interior Alteration	None	permit	BUILDING	MF - ALT			Build
Building	Multifamily Residential	Interior Alteration	None	permit	BUILDING	MF - ALT			Build
Building	Multifamily Residential	New Construction	None	permit	BUILDING	MF - NEW			Build
Building	Nonresidential	New Construction	None	permit	BUILDING	COM - NEW			Build
Building	Nonresidential	Re-Roof Replacement - Roofi	None	permit	BUILDING	RE-ROOF			Build
Building	Single Family Residential	Structure Addition	None	permit	BUILDING	SF - ADD			Build
Building	Single Family Residential	Structure Addition	Residence	permit	BUILDING	SF - ADD			Build
Building	Single Family Residential	Structure Addition	Structure in Water	permit	BUILDING	SF - ADD			Build

This maps the incoming 4 buckets to the type and subtype that should be created

ApplicationType: Incoming ApplicationType
ProjectType: Incoming ProjectType
ActivityType: Incoming ActivityType
ScopeOfWork: Incoming ScopeOfWork
Module: either "permit" or "project" for PermitTrak or ProjectTrak (all lower case, no quotes)
Type: Permit/Project Type to create
SubType: Permit/Project SubType to create
Parent_Module: look for an application on the same landtrak record on the same day and link it as a parent to the new permit
Parent_Type: look for an application on the same landtrak record on the same day and link it as a parent to the new permit

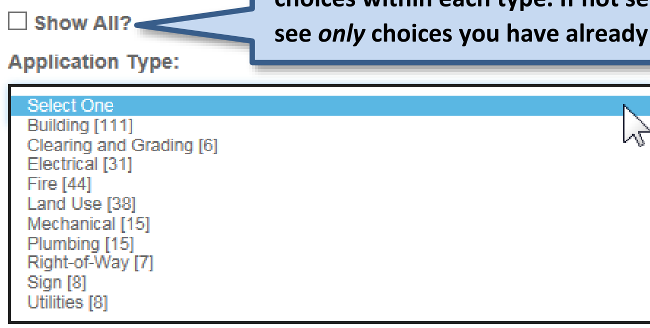
Export XML file to: AppType.xml

Selecting Configuration Types

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

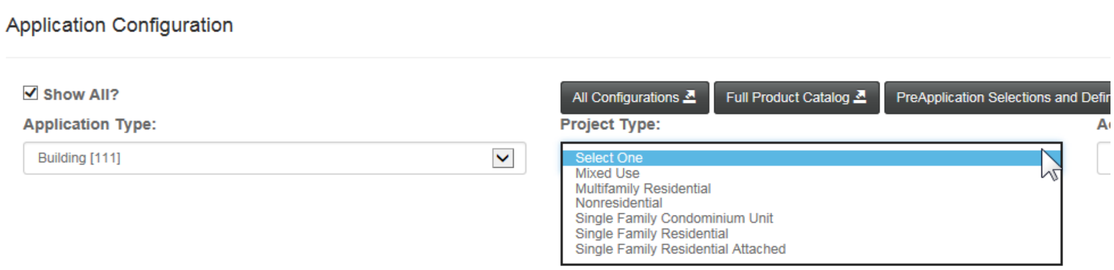
APPLICATION Type

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

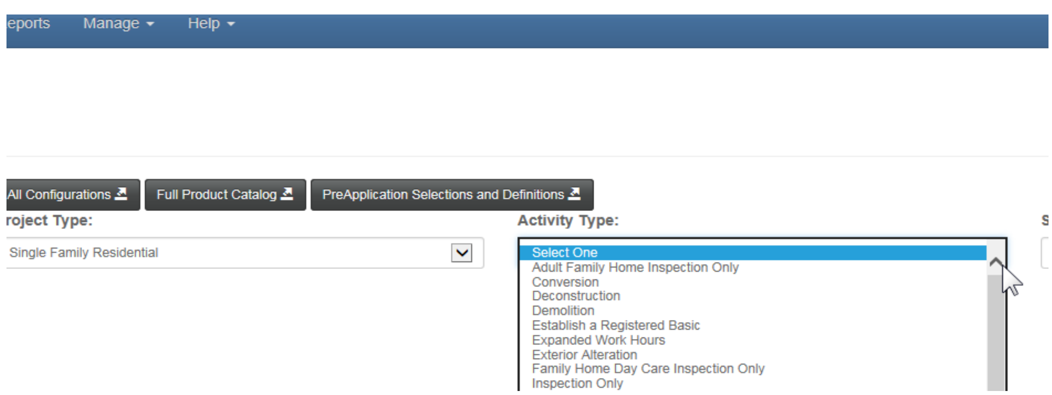


The number in brackets next to the Application Type tells you how many configurations you already have for that type.

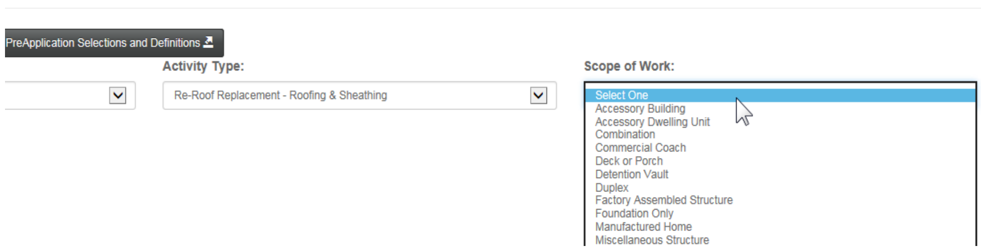
PROJECT Type



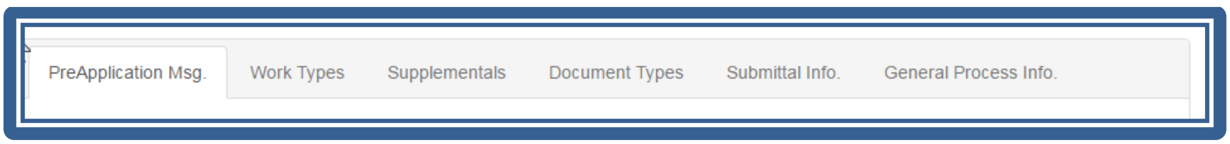
ACTIVITY Type



SCOPE of Work



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).

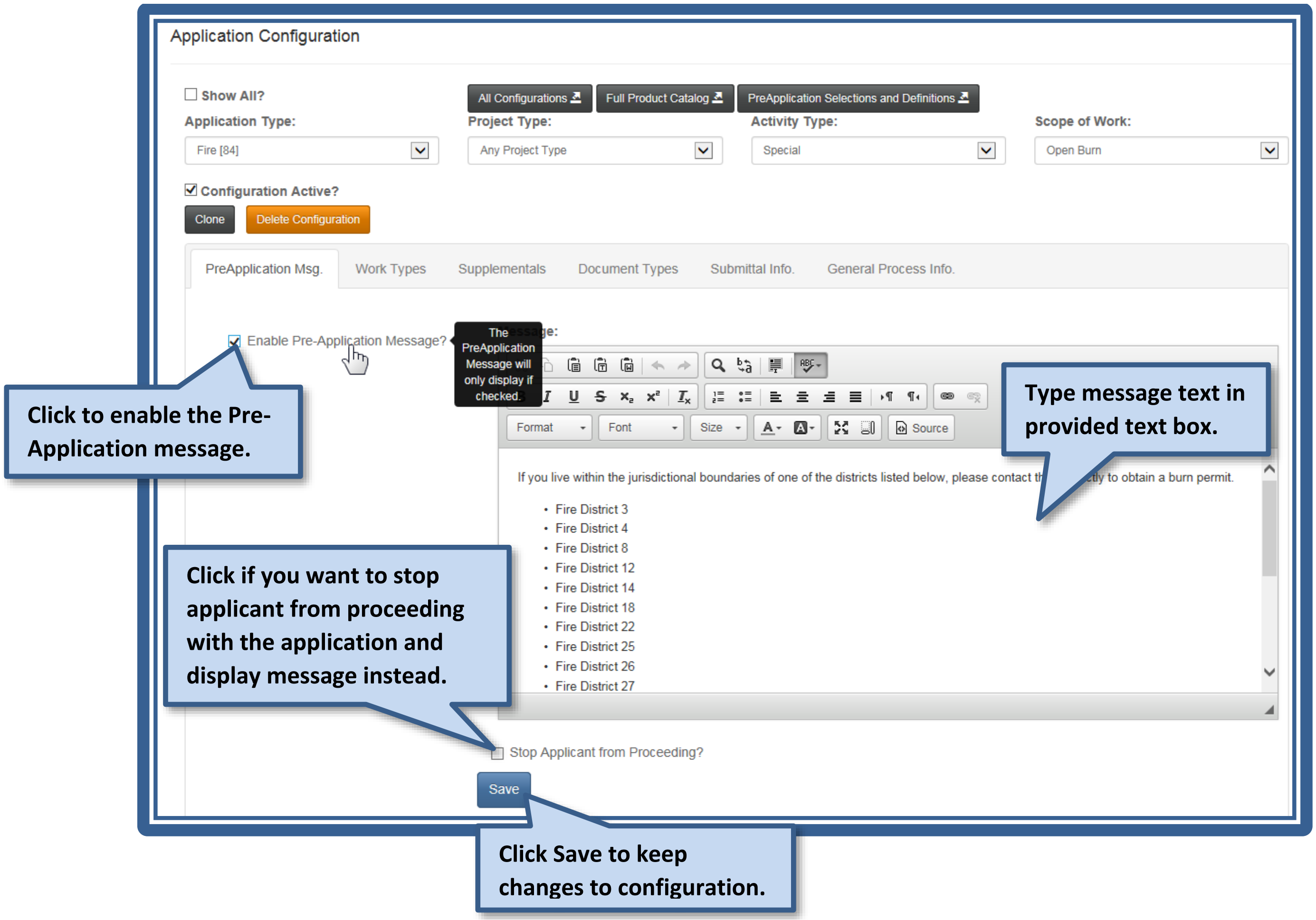


Creating a Pre-Application Message:

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.

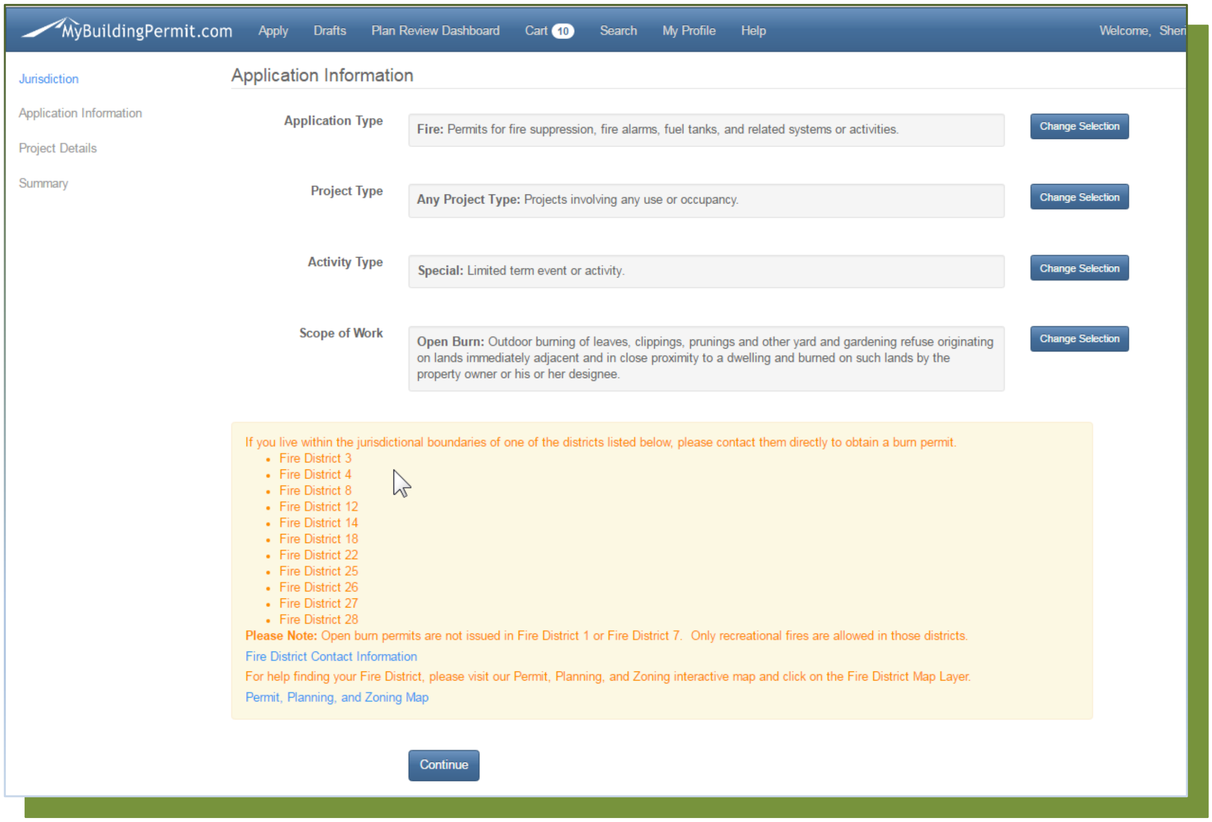
Steps:

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



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



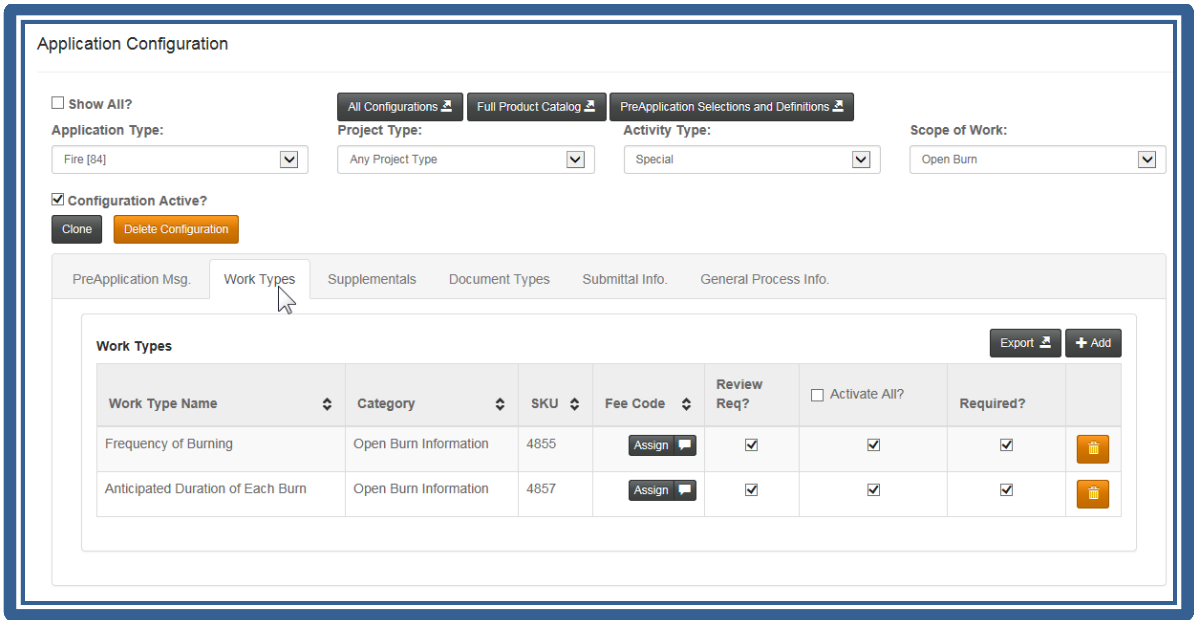
Adding a Work Type/SKU

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.

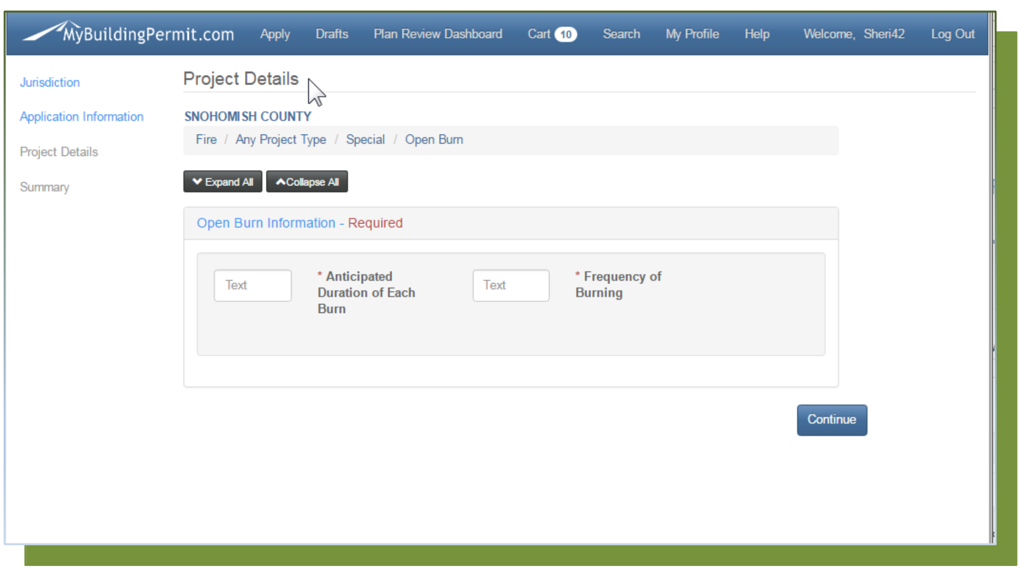
Each Work Type has a unique identifying number known as a **SKU** which will be sent to your backend permitting system via an XML text file with the SKU number, your jurisdiction short name (i.e. KL for Kirkland), and the permit type: KL_MECH_5476. Your Web Service integration will translate this to 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

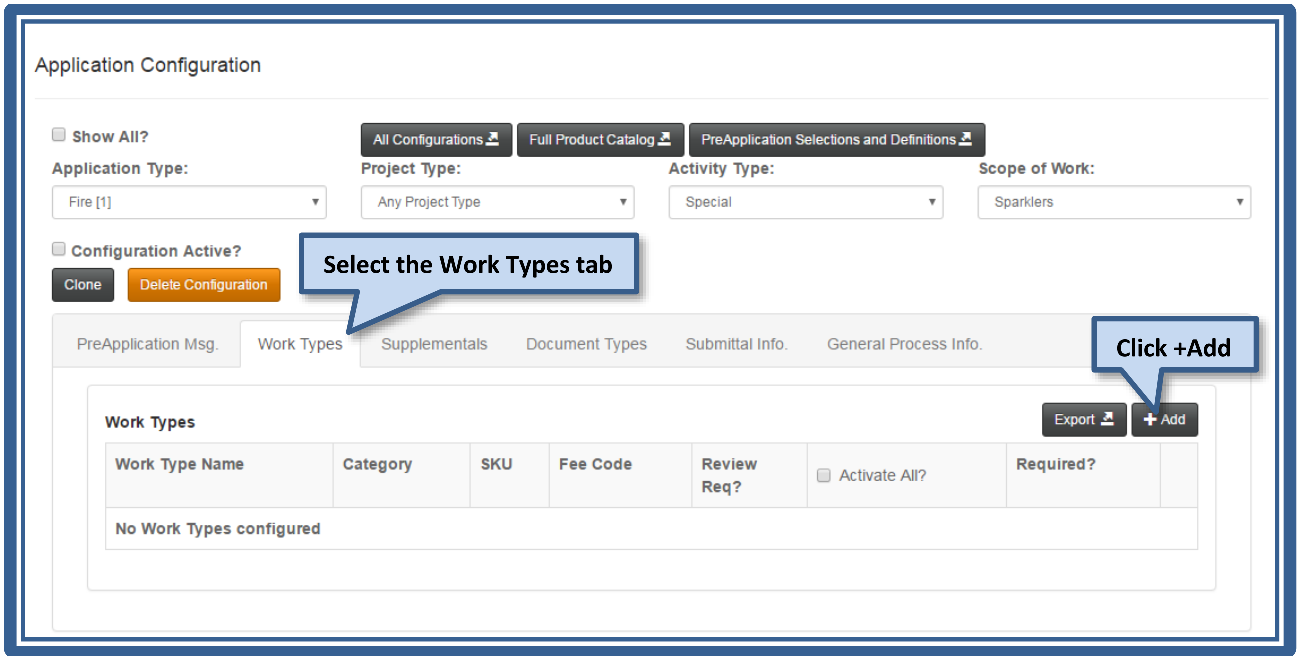


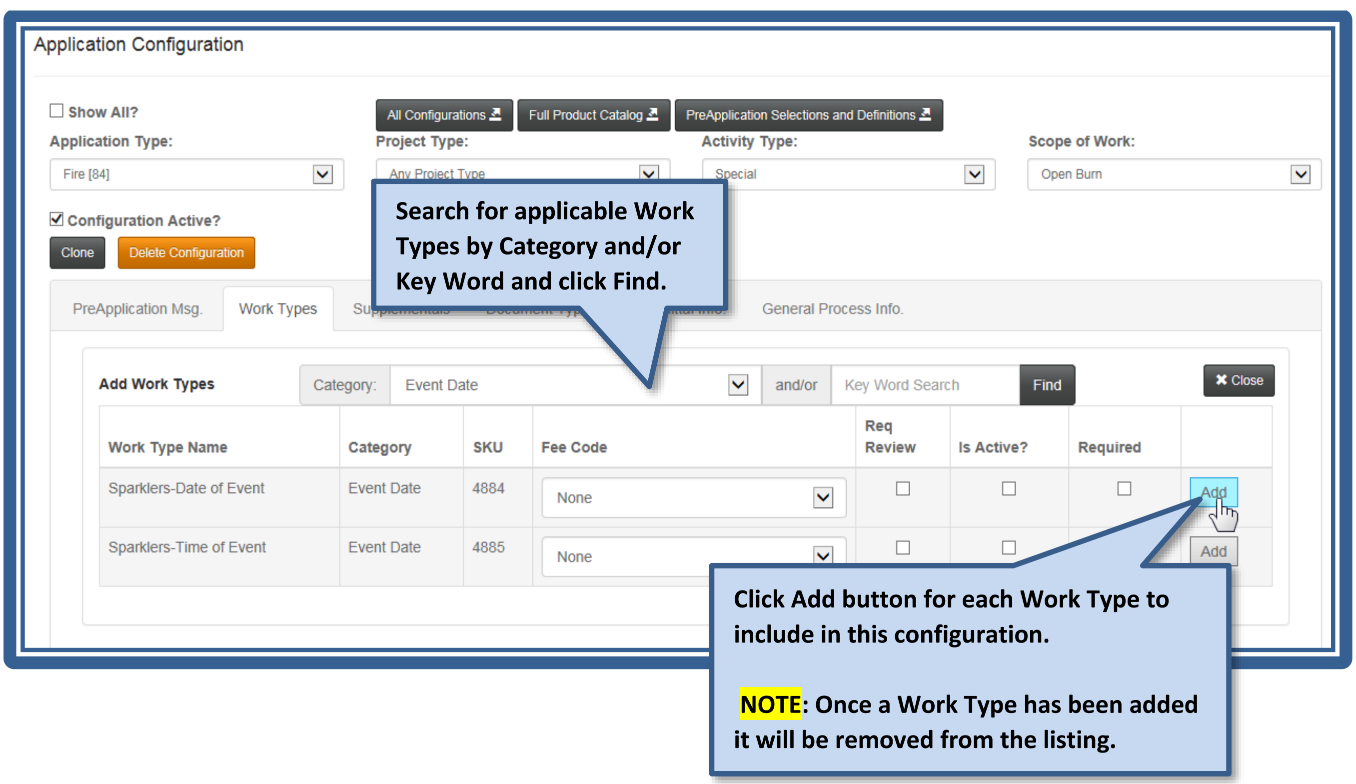
Will show as this on the Customer Application Project Details Screen:

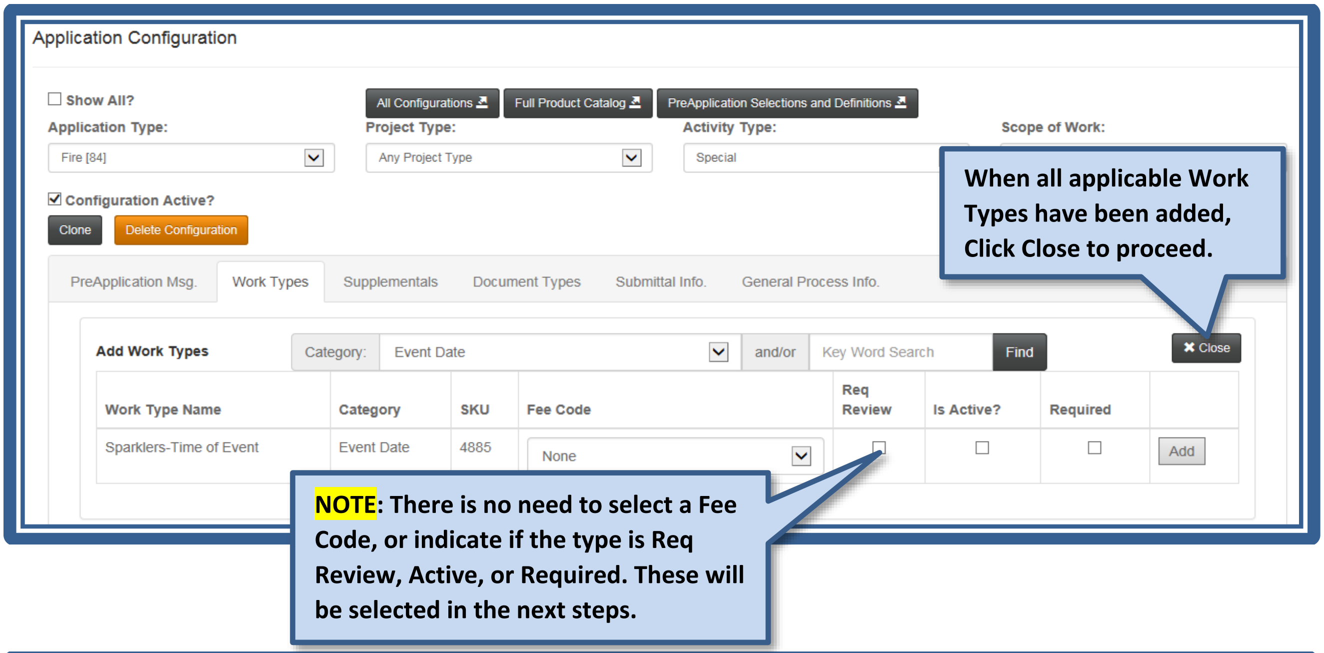


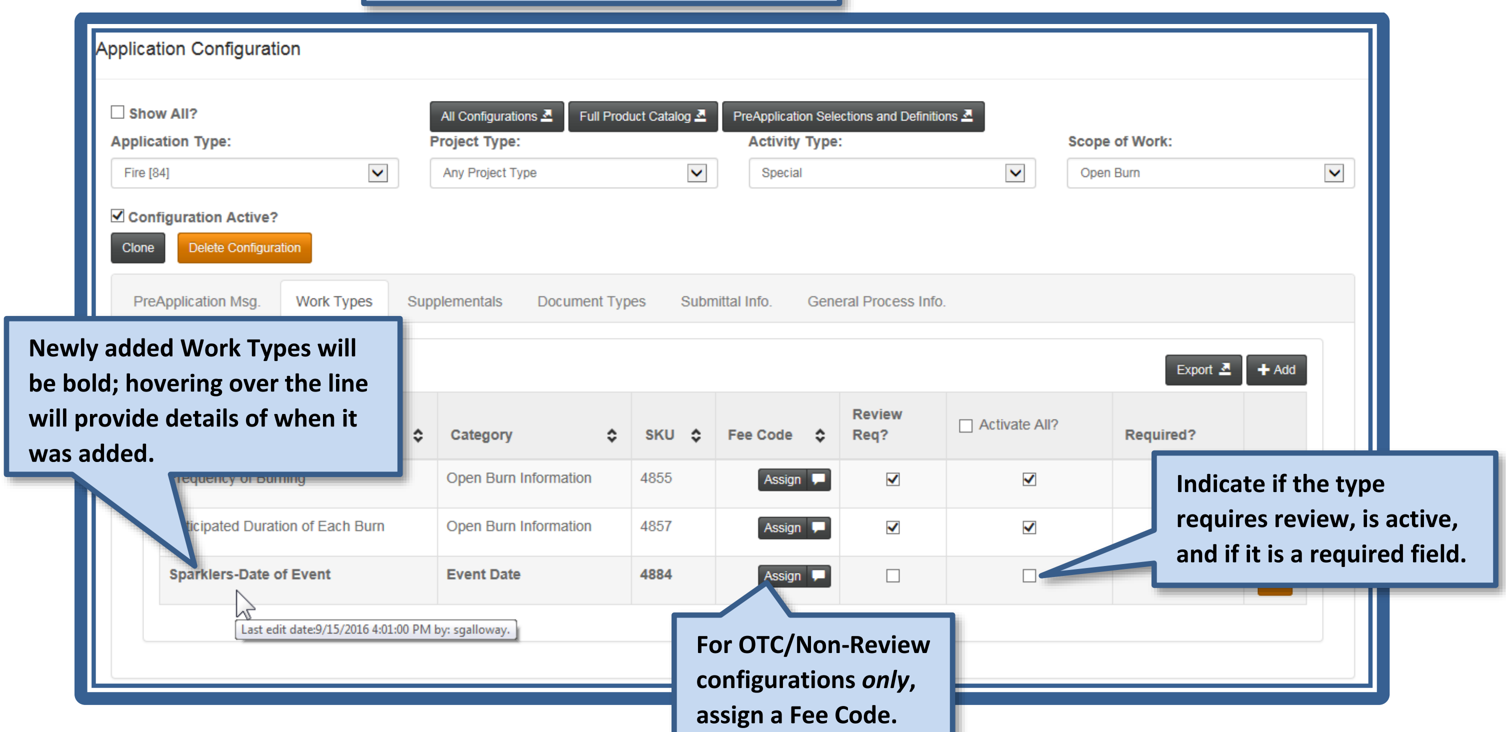
Steps:

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



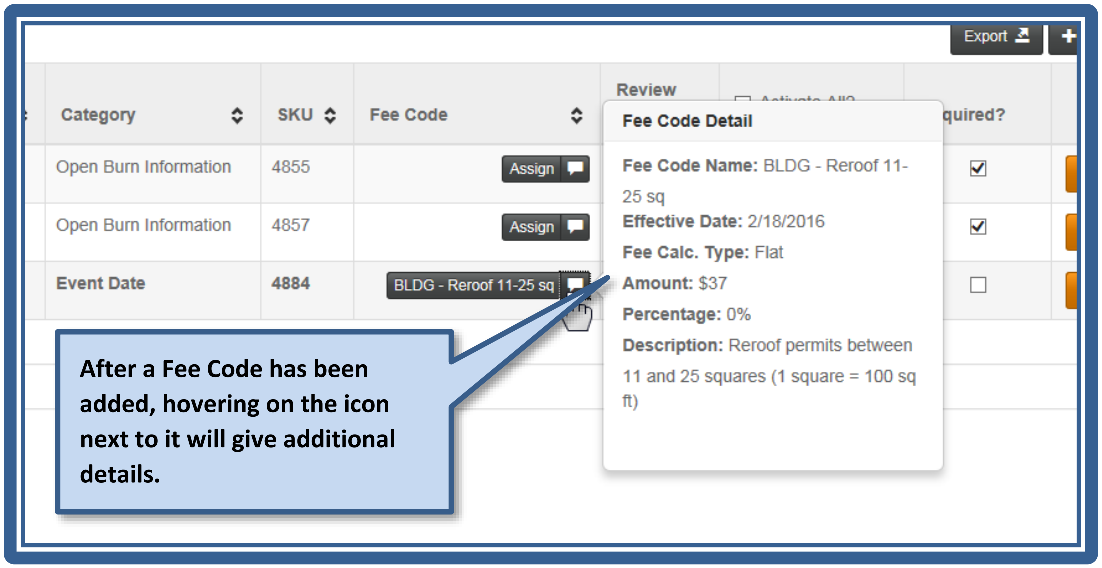






NOTE: Plan Review configurations will not use Fee Codes—jurisdictions will Invoice for any fees due.

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.



NOTE: See FEE CODES Section in this document for detailed instructions on creating Fee Codes.

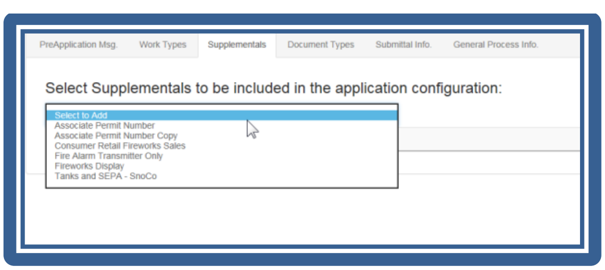
Adding Supplemental Questionnaires

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.

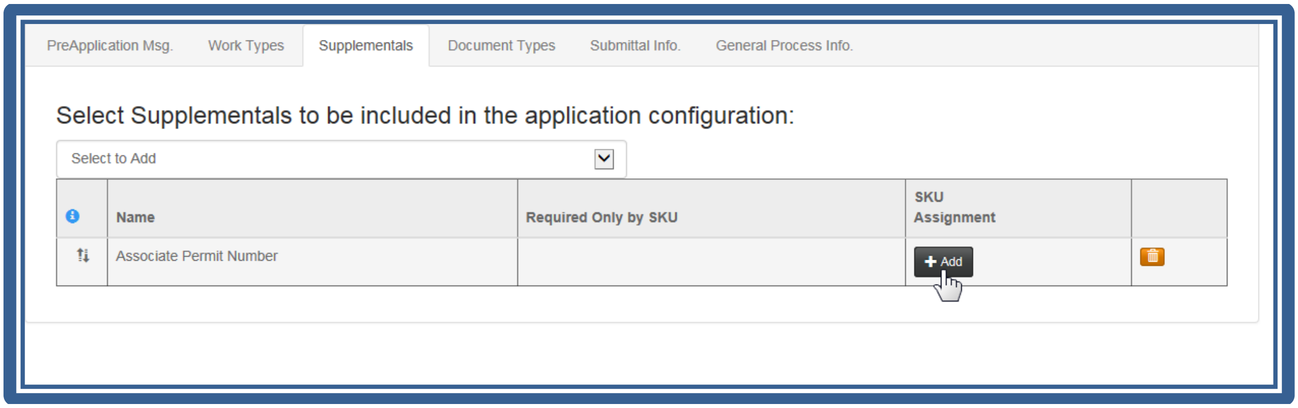
You can provide additional information to the customer or gather supplemental details form the applicant using Supplemental configurations. Supplementals entered to a specific Application Configuration will display for the customer during the application process after they've entered the project details 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:

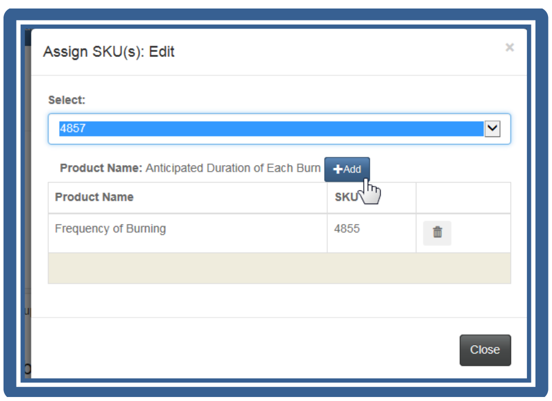
1. Select the applicable four buckets: Application Type, Project Type, Activity Type, Scop of Work.
2. Click on the **Supplementals** tab.
3. Click the **Select to Add** box and select the applicable pre-existing questionnaire you want to add.



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



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

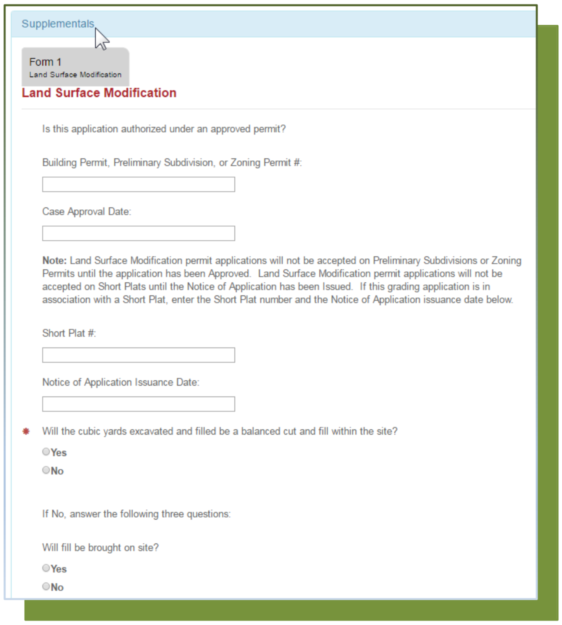


   c. You can add multiple SKUs to a Supplemental however, only the configured SKUs will appear in the drop-down list.
   d. Click **Close**.
   e. Use the **DELETE** Button to remove a SKU assignment.

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.

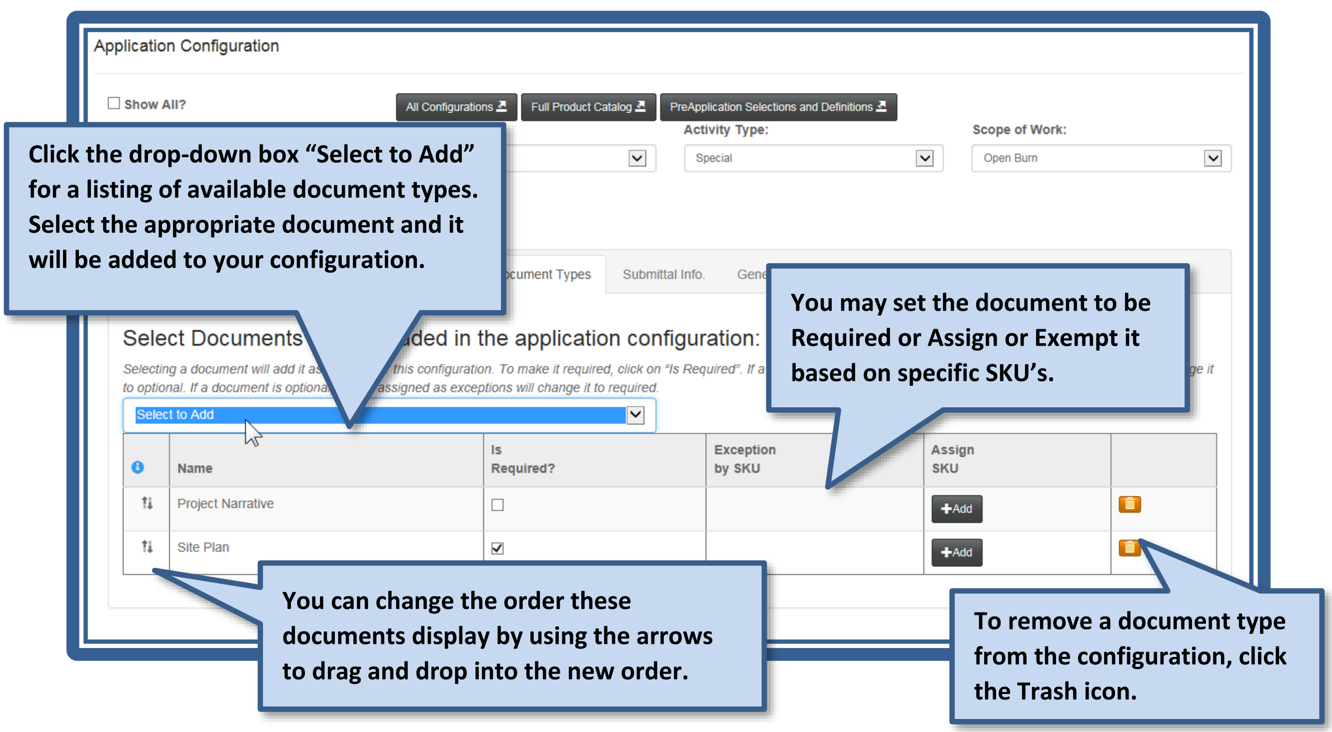
NOTE: To create a new Supplemental questionnaire, use the the **MANAGE** Supplementals menu. See Managing Supplementals – Creating New Questionnaires for more details.

Example of a Customer Supplemental Screen



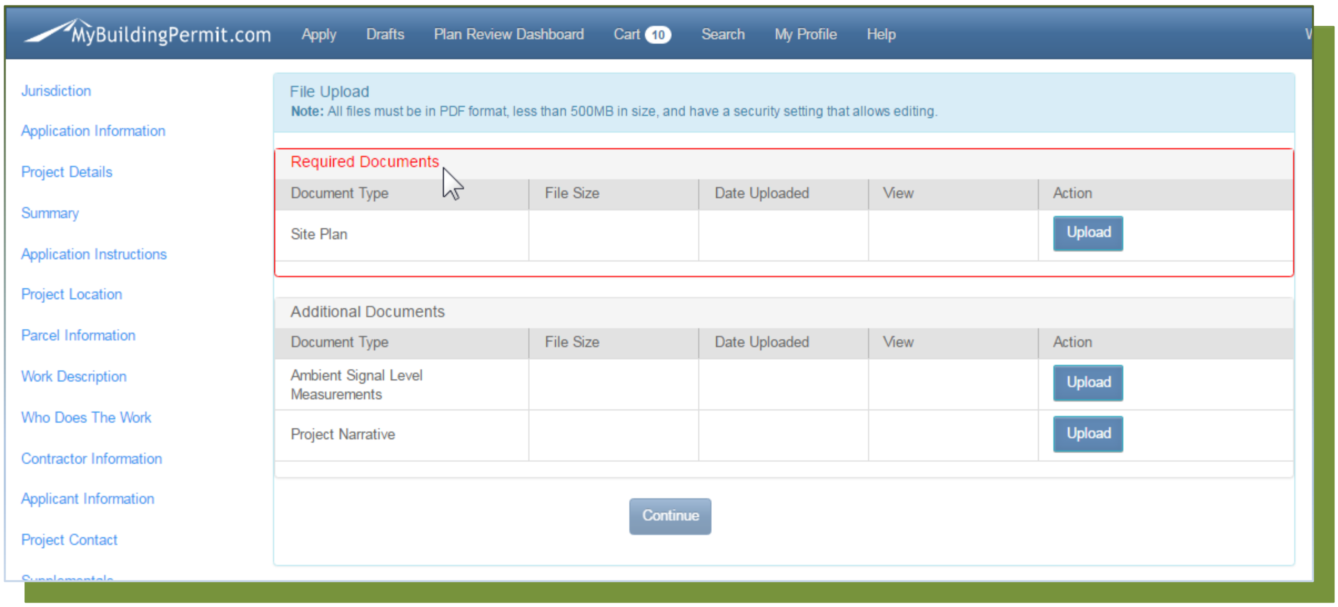
Adding Document Types

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.



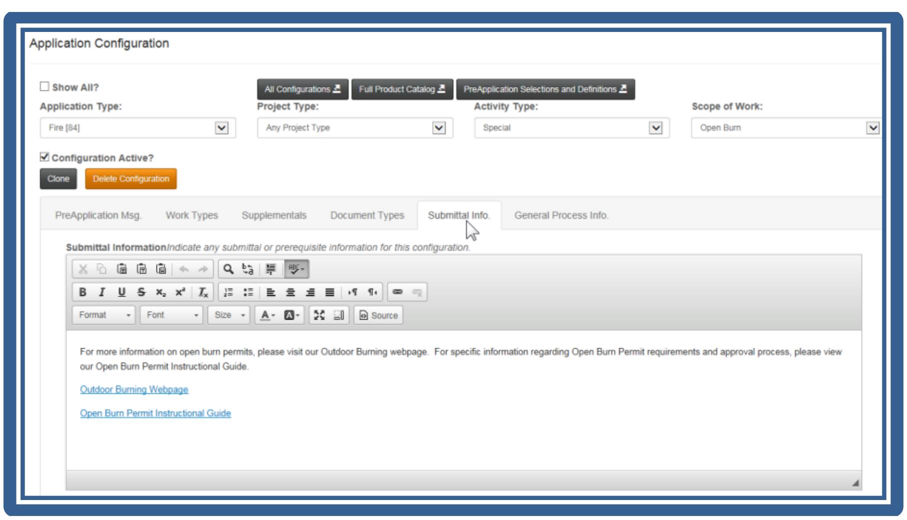
NOTE: If a document is marked as required, SKU's assigned as exceptions will change it to optional. If a document is optional, SKU's assigned as exceptions will change it to required.

Example of a Customer Application File Upload Screen



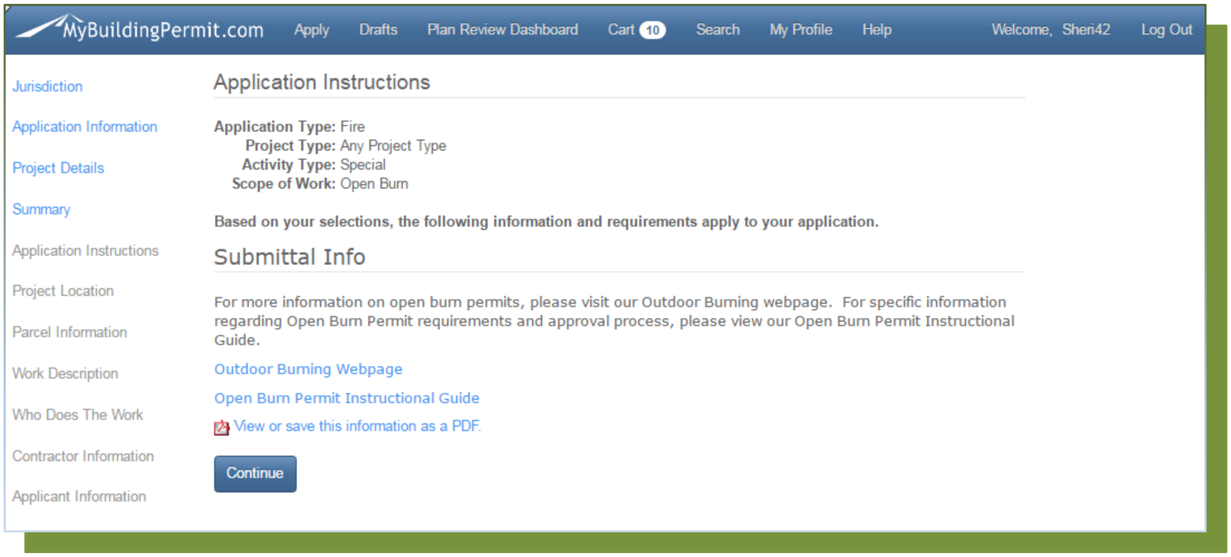
Adding Submittal Information

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.



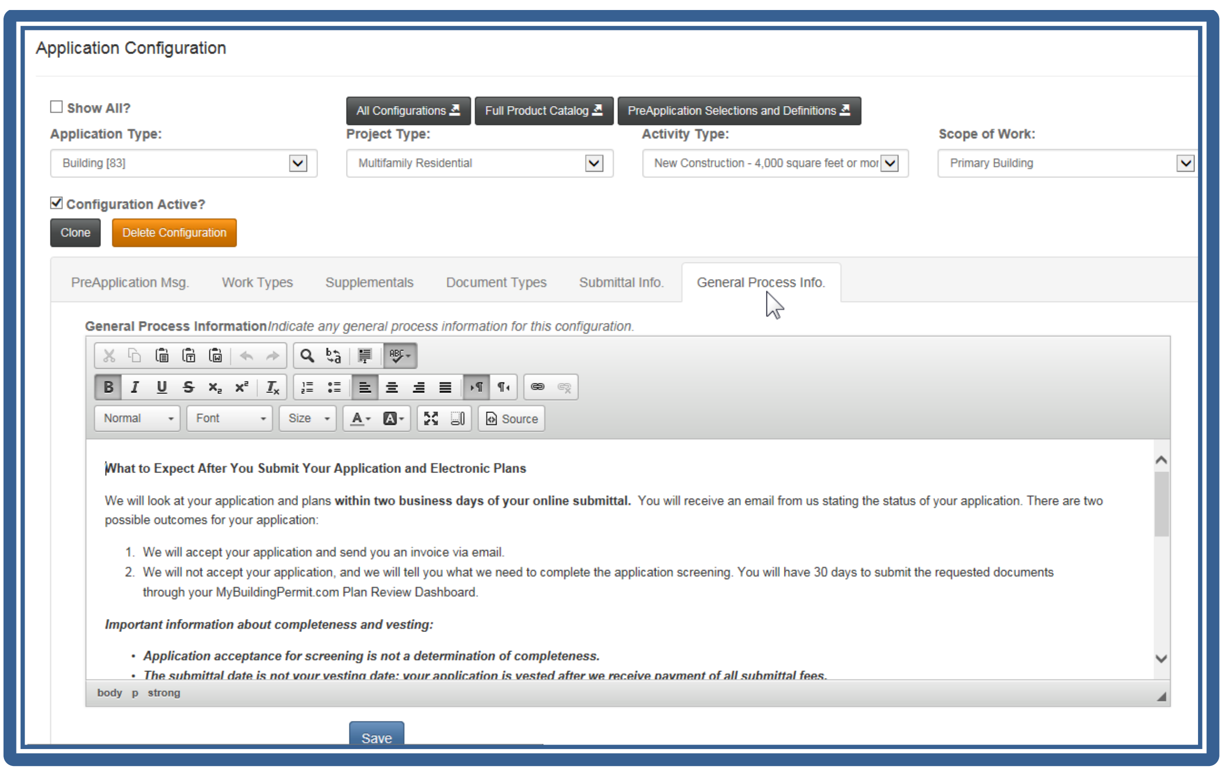
NOTE: The information will appear on this application configuration only – it is **not** globably added to all applications.

Customer Application Instructions Screen – contains the Submittal Info from configuration

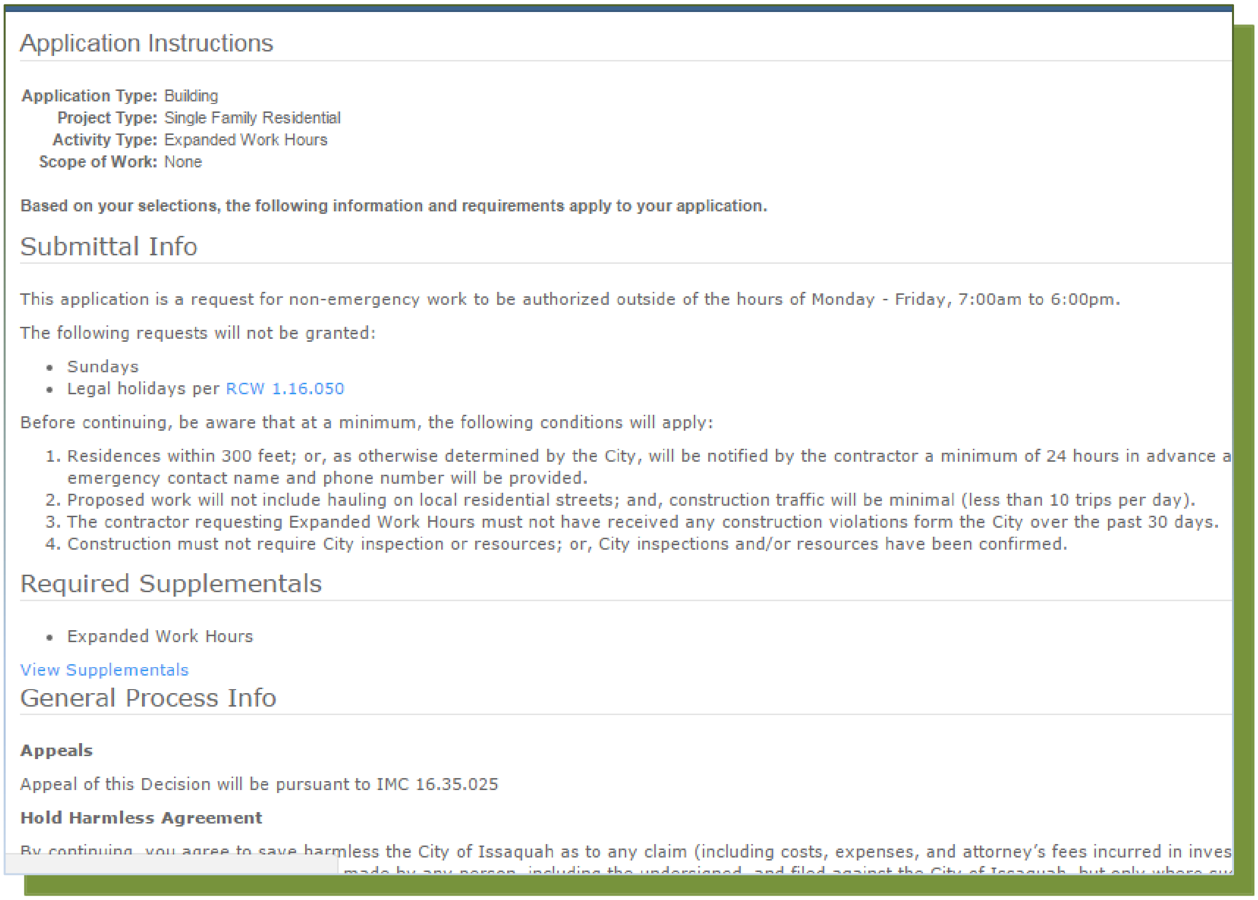


General Process Info Tab

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.

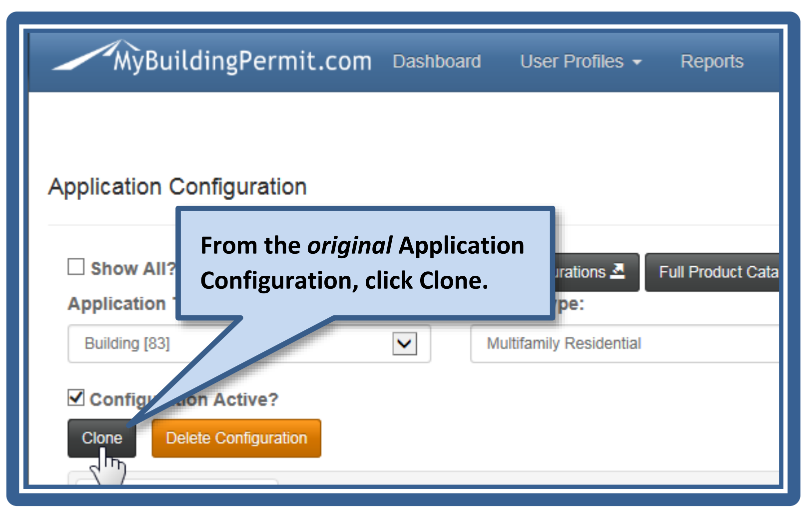


Example of Submittal Info, Required Supplements list and General Process Info on the Customer Application Screen



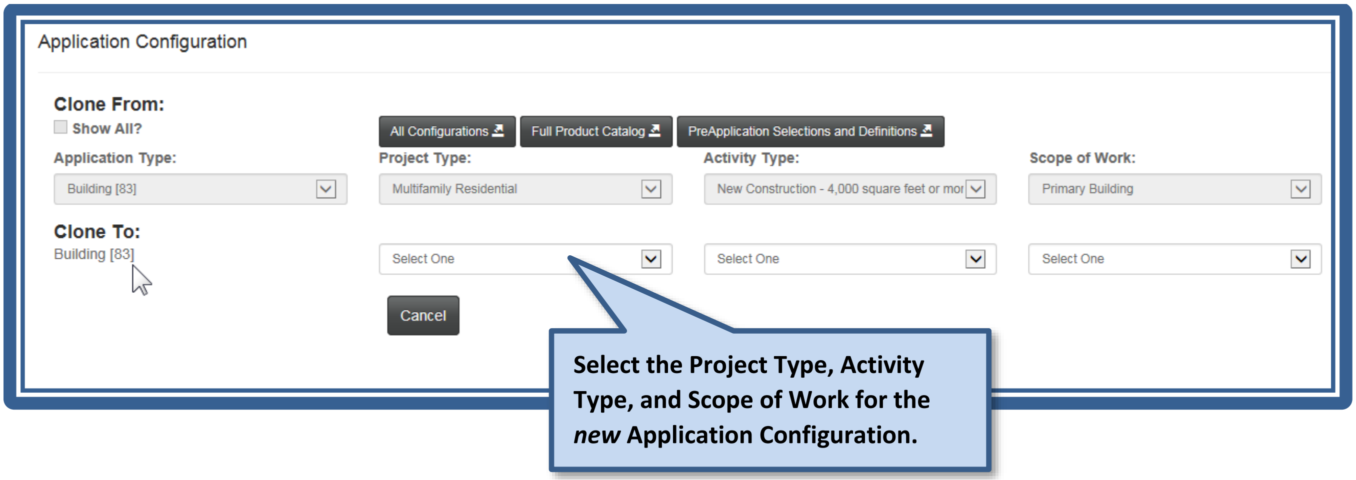
Cloning or Copying an Application Configuration

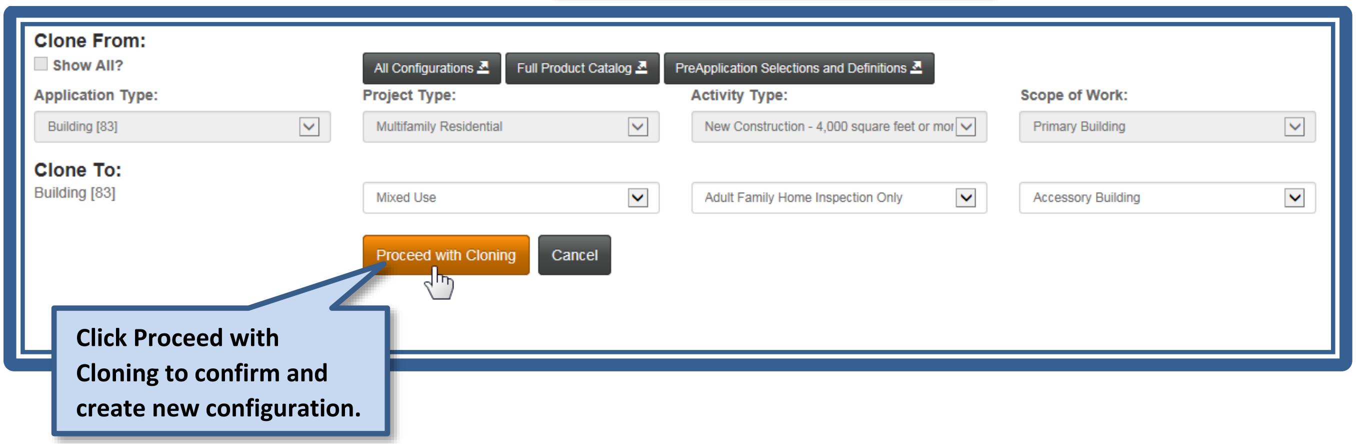
Once you have an Application Configured, you may Clone it to another configuration. The Application Type must be the same (such as Building to Building), but the other 3 "buckets" may be different from the original.

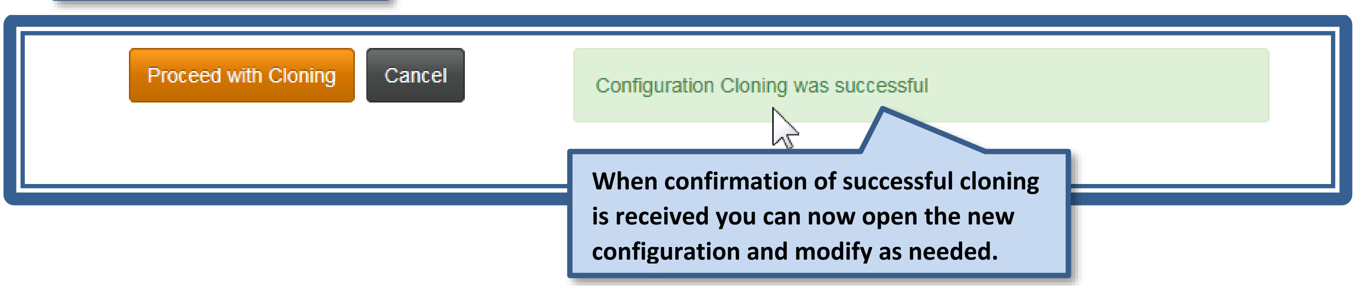


The following components of the configuration will be copied to the new configuration:

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

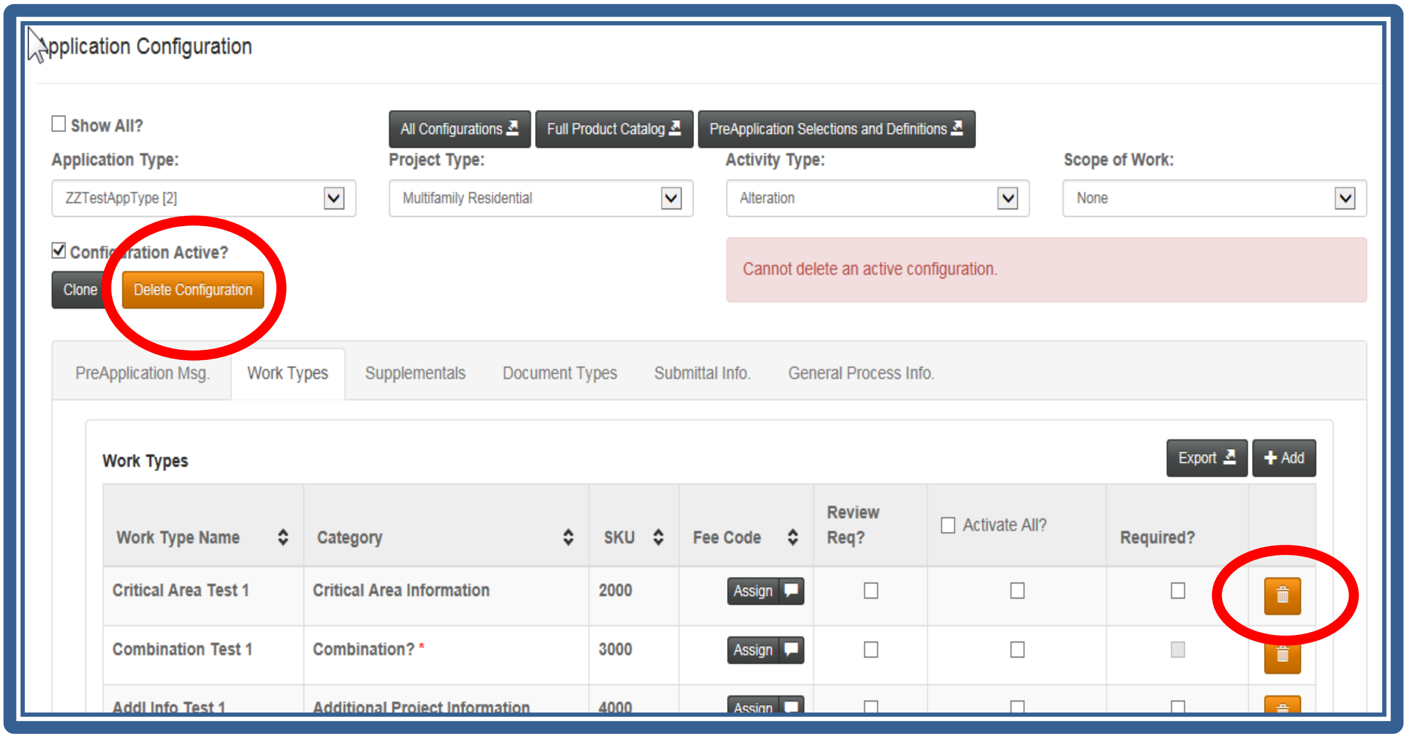

Application Configuration
Clone From:
Show All?
All Configurations
Full Product Catalog
PreApplication Selections and Definitions
Application Type:
Project Type:
Activity Type:
Scope of Work:
Building [83]
Multifamily Residential
New Construction - 4,000 square feet or mor
Primary Building
Clone To:
Building [83]
Select One
Select One
Select One
Cancel
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:
Project Type:
Activity Type:
Scope of Work:
Building [83]
Multifamily Residential
New Construction - 4,000 square feet or mor
Primary Building
Clone To:
Building [83]
Mixed Use
Adult Family Home Inspection Only
Accessory Building
Proceed with Cloning
Cancel
Click Proceed with Cloning to confirm and create new configuration.


Proceed with Cloning
Cancel
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.



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

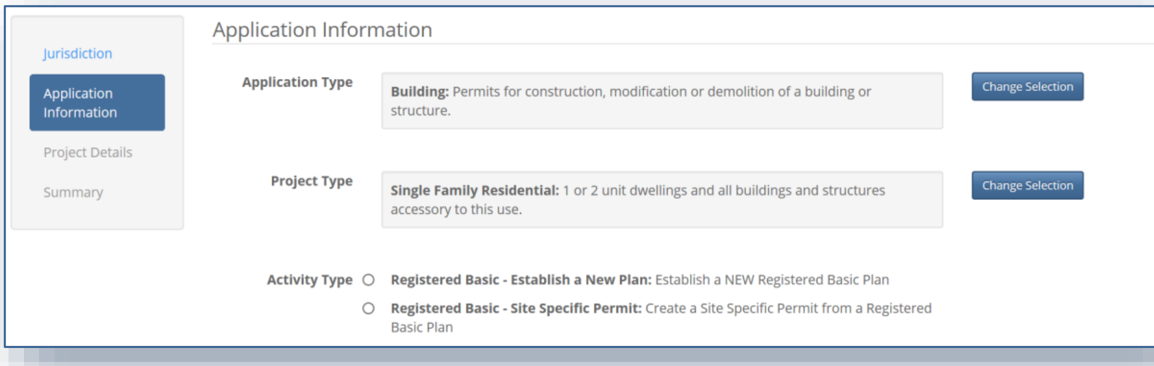
See the "Bucket Type Requests" section of this document for detailed instructions.

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.



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.

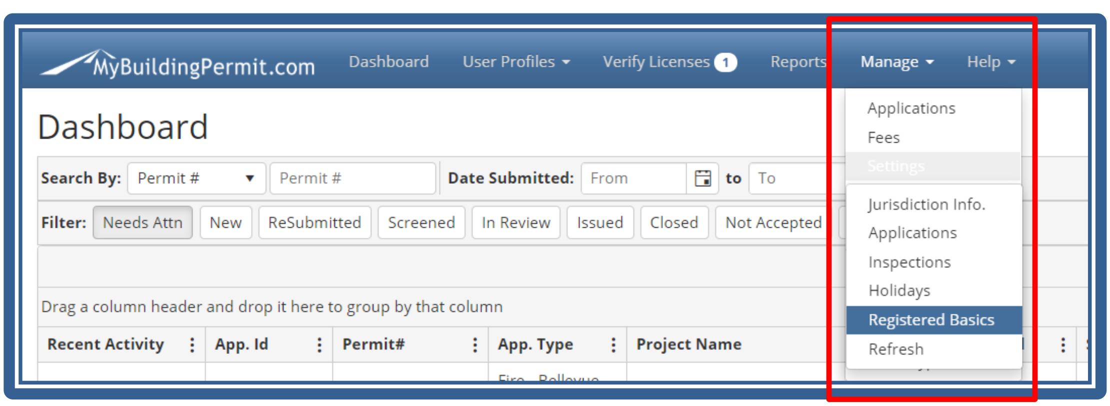
To enable use of Registered Basics in MBP, you must:

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

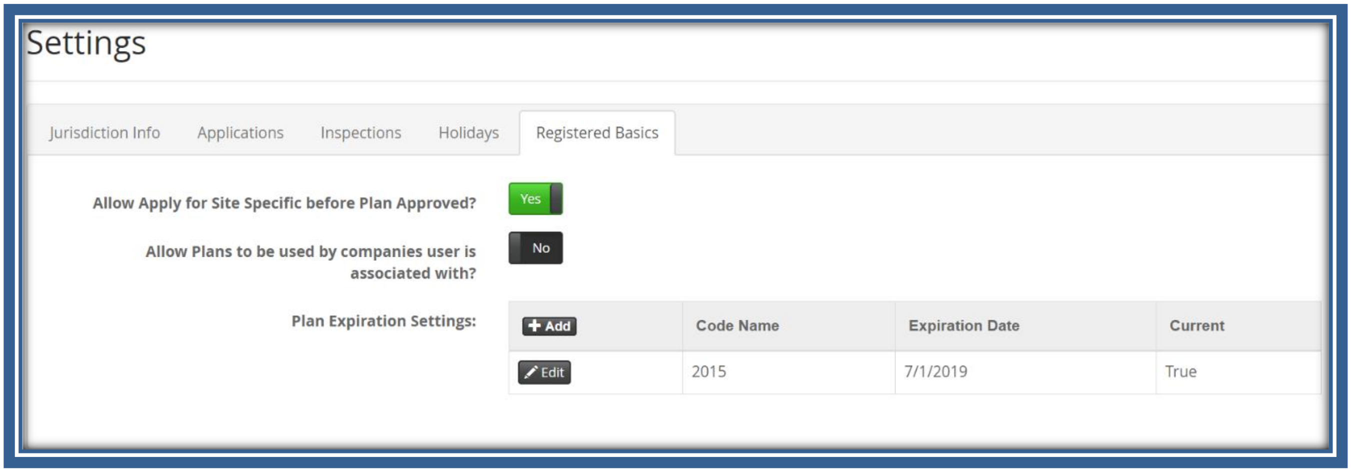
Configuring Registered Basics Settings

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:



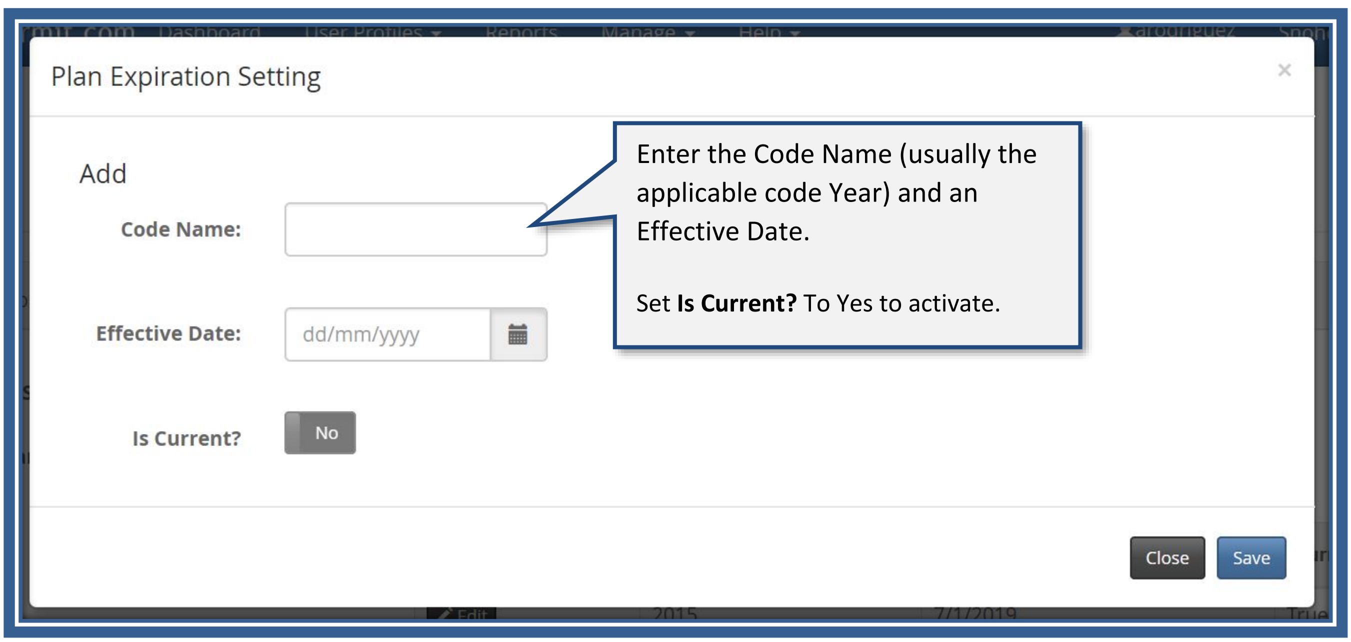
2. Select the applicable settings:



- **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.

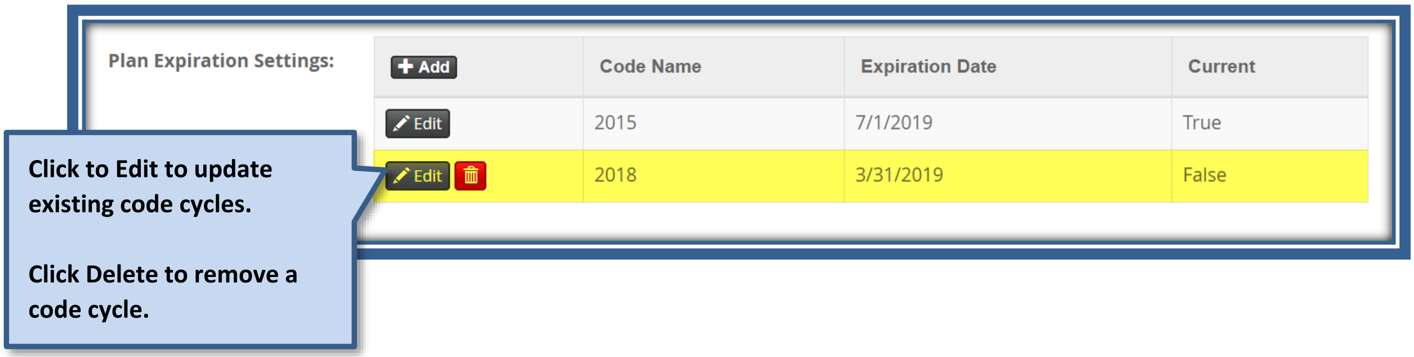
- **Allow Plans to be used by companies' user is associated with?** - This setting allows/disallows the sharing of basics plans across companies.

3. Click **+ Add** under Plan Expiration Settings to add current code cycle to the table:



4. Click Save to proceed.

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



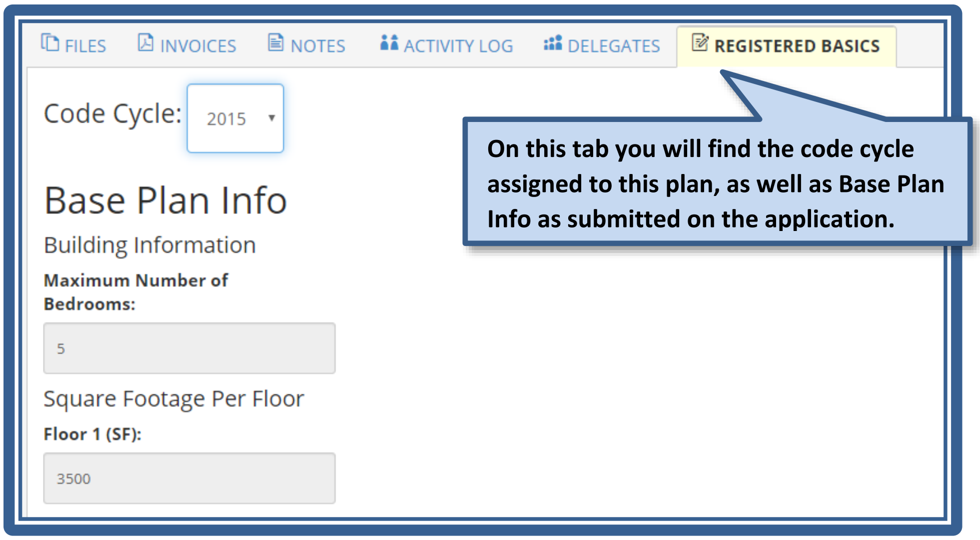
Note: You can only delete a code cycle if it has not been referenced on an open basic plan. The assigned code cycle will be added to all Base plan applications.

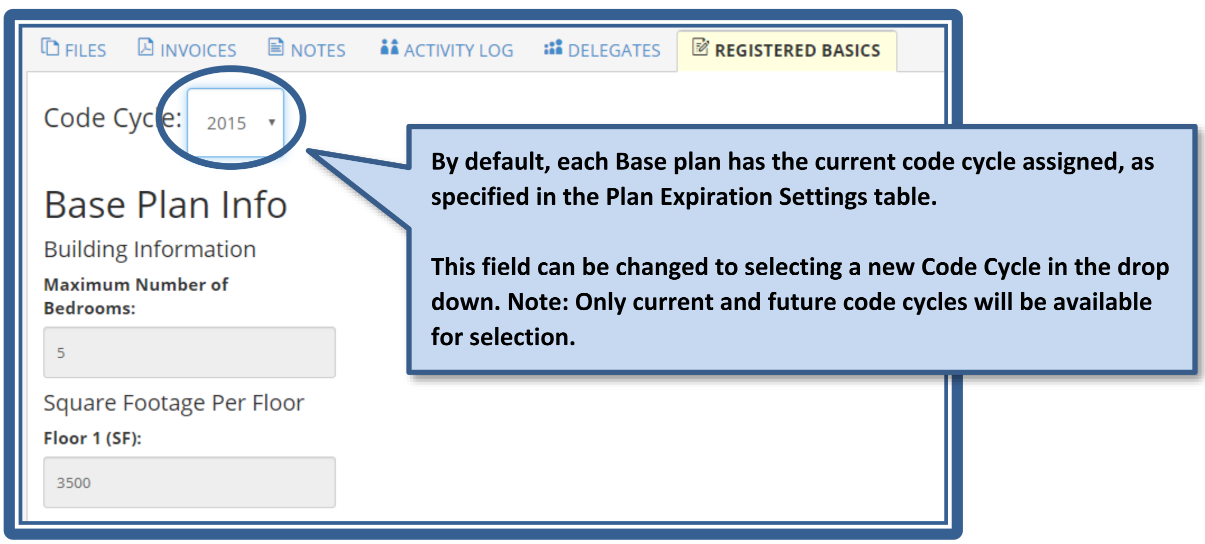
Considerations before Configuring Registered Basics settings:

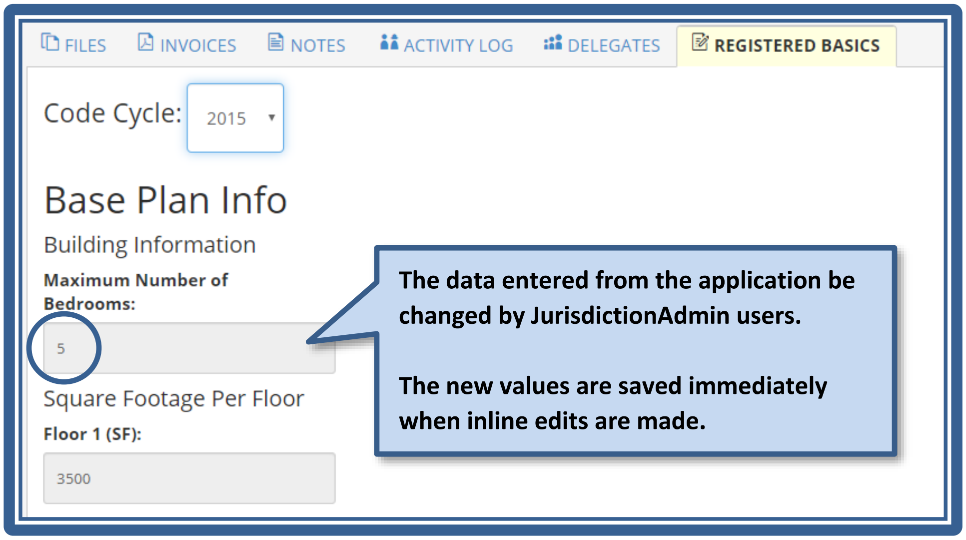
- Know whether your jurisdiction allows applying for site specific applications using plans that are accepted (not approved plans yet).
- Know whether your jurisdiction allows plans sharing among companies where user is associated with all of them.
- Come up with intuitive and easy Code Name. It is good 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:







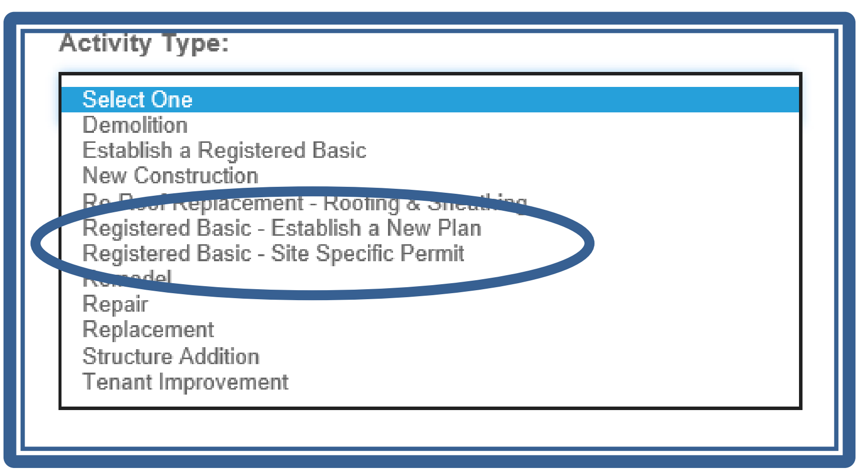
Note: These fields on the Registered Basics tab can only be edited when the application is in the following MBP statuses: ***New/Submitted, Not Accepted, Screened, and In Review***.

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:

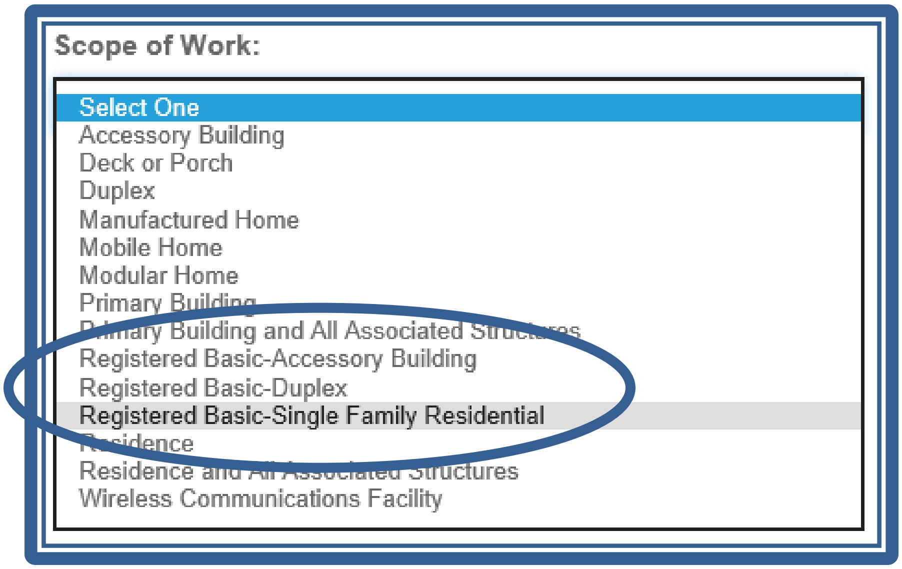
Bucket selection will be:

- 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



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

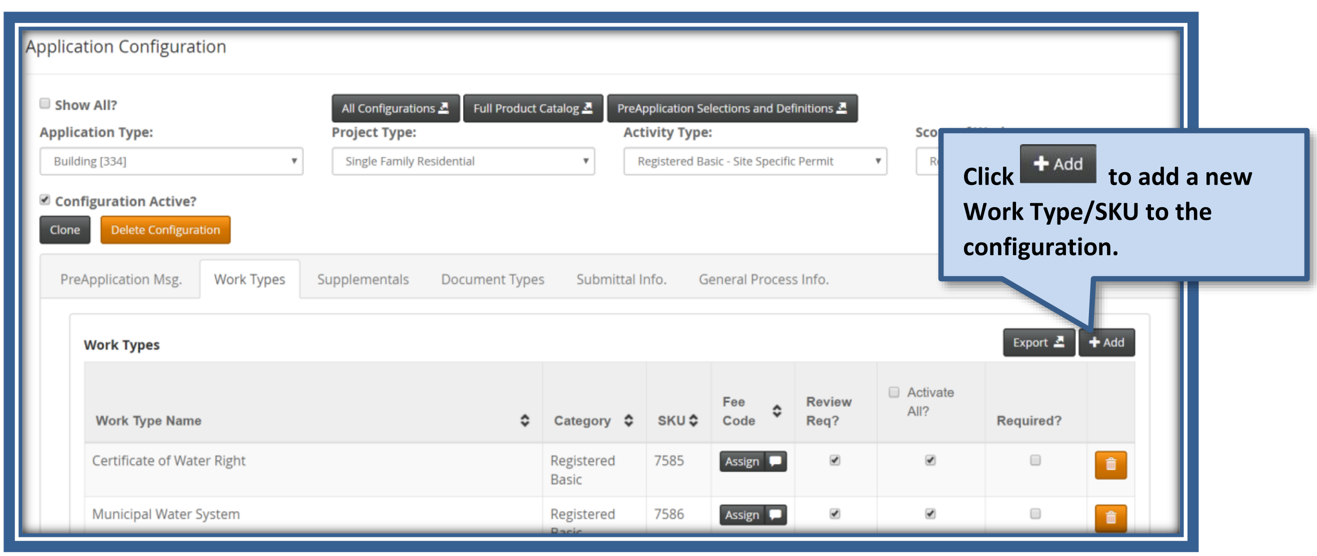
Registered Basic Work Types are created to be used exclusively in Registered Basic permit application configurations. Existing, non-registered basic SKUs cannot be used in these application configurations.

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

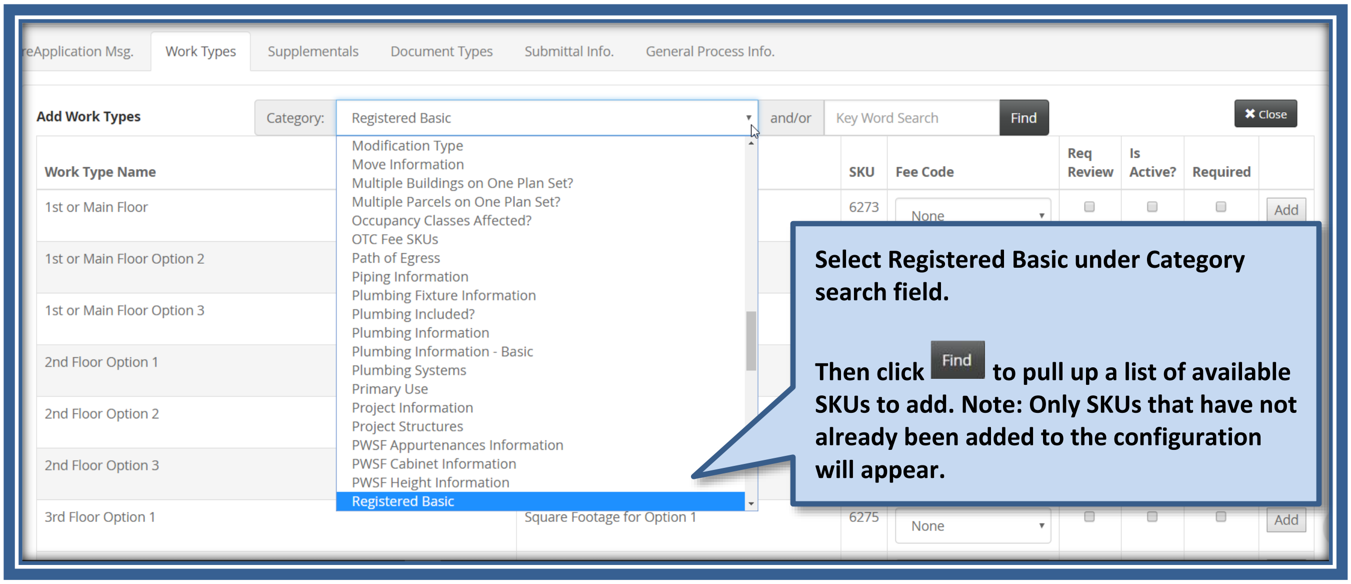
1. Log in to the Admin site as a JurisdictionAdmin user. Click Manage → Applications

- 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:



3. Select Registered Basic under Category:



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:

MBP Fee Code Name	Fee Type	Formula / Percentage	Valuation / Range Table
Gas Piping	Range		Gas Piping
Mechanical Fixture	Calculated	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

Table List
Table Name
Building Fee
Gas Piping

Valuation / Range Tables						
Table Name	Row	Minimum	Maximum	Base Rate	Plus $$	For Every
Building Fee	1	0	500	$26.45	0.00	0
Building Fee	2	501	2,000	$26.45	3.30	100
Building Fee	3	2,001	25,000	$78.85	16.00	1,000
Building Fee	4	25,001	50,000	$444.30	11.60	1,000
Building Fee	5	50,001	100,000	$730.95	7.70	1,000
Building Fee	6	100,001	500,000	$1,127.85	6.60	1,000
Building Fee	7	500,001	1,000,000	$3,672.40	5.50	1,000
Building Fee	8	1,000,001	99,999,999	$6,369.15	4.40	1,000
Gas Piping	1	1	5	$6.00	0.00	0
Gas Piping	2	6	99,999,999	$8.00	2.00	1

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.

MBP SKU	Juris Fee Code

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.

Fee Types
Calculated
Flat
Percentage
Range
Valuation

Don't edit this

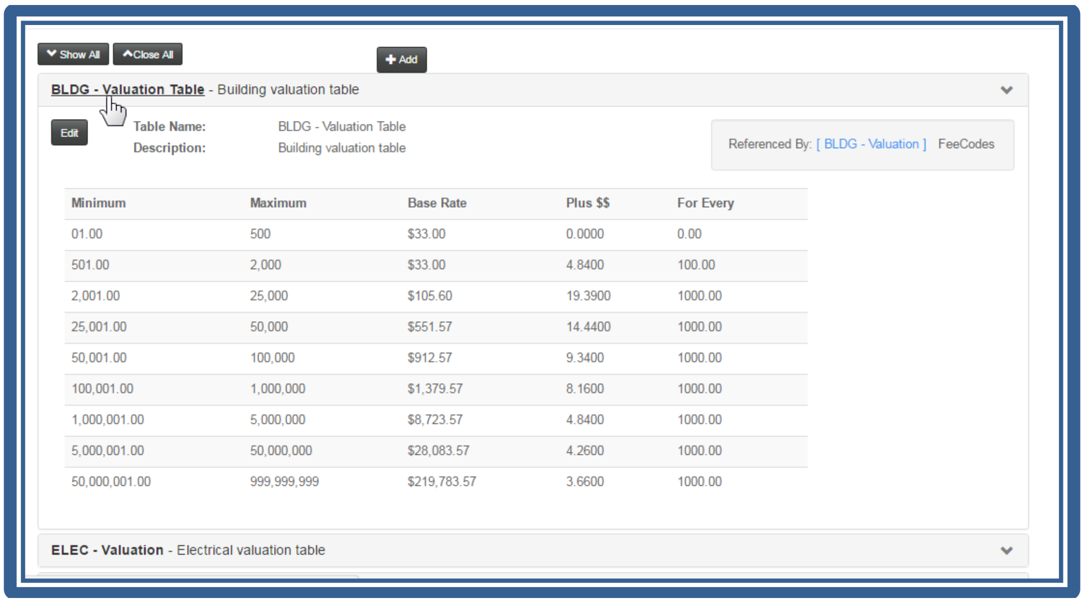
Valuation/Range Tables—Overview

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.

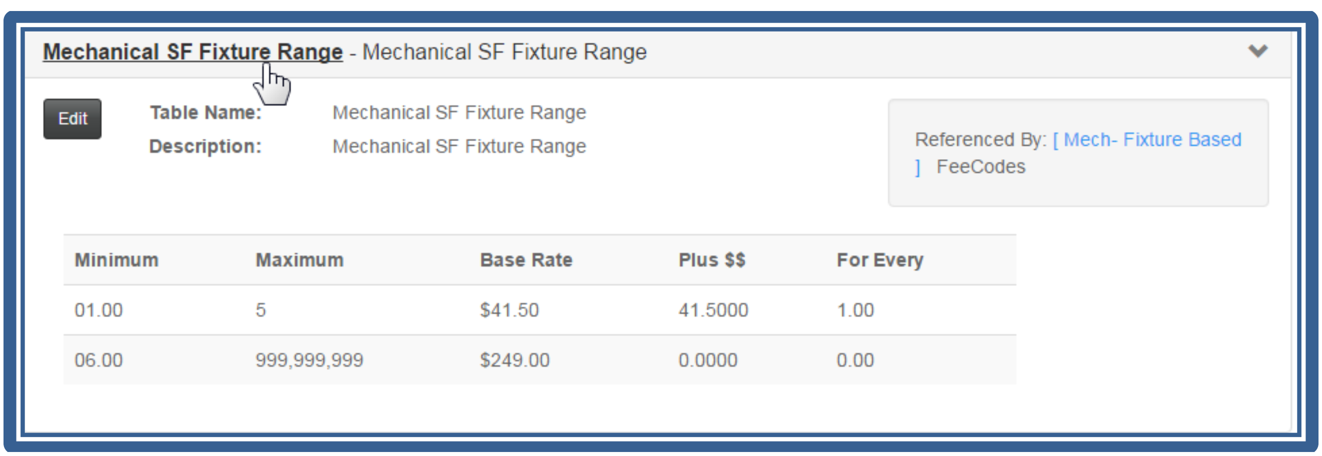
A valuation table or range table needs to be created prior to using it with a Fee Code. The Fee Code must be created before you can assign it to a Work Type in the Application Configuration.

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



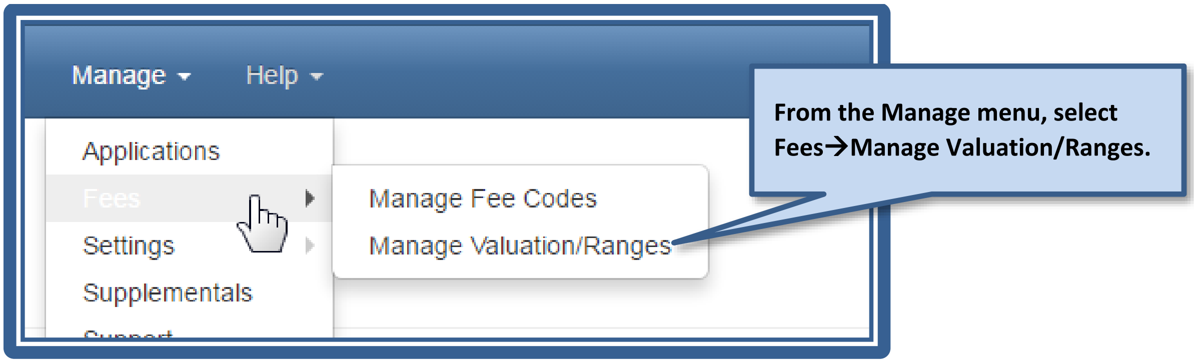
Minimum	Maximum	Base Rate	Plus $$	For Every
01.00	500	$33.00	0.0000	0.00
501.00	2,000	$33.00	4.8400	100.00
2,001.00	25,000	$105.60	19.3900	1000.00
25,001.00	50,000	$551.57	14.4400	1000.00
50,001.00	100,000	$912.57	9.3400	1000.00
100,001.00	1,000,000	$1,379.57	8.1600	1000.00
1,000,001.00	5,000,000	$8,723.57	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

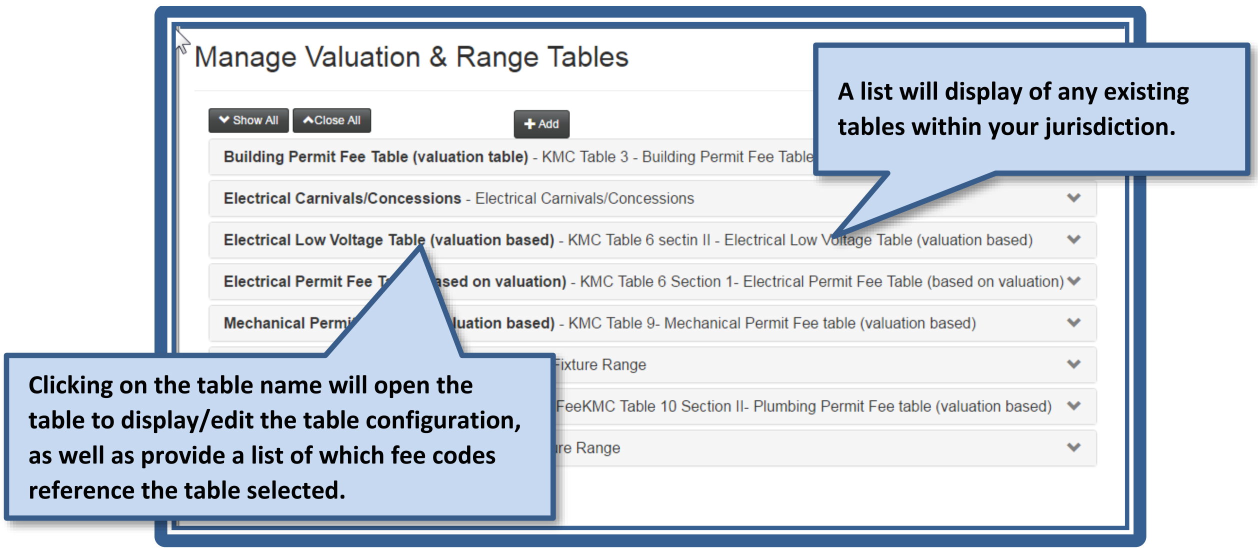
Example of a Range Table (the Minimum and Maximums represent quantity ranges)

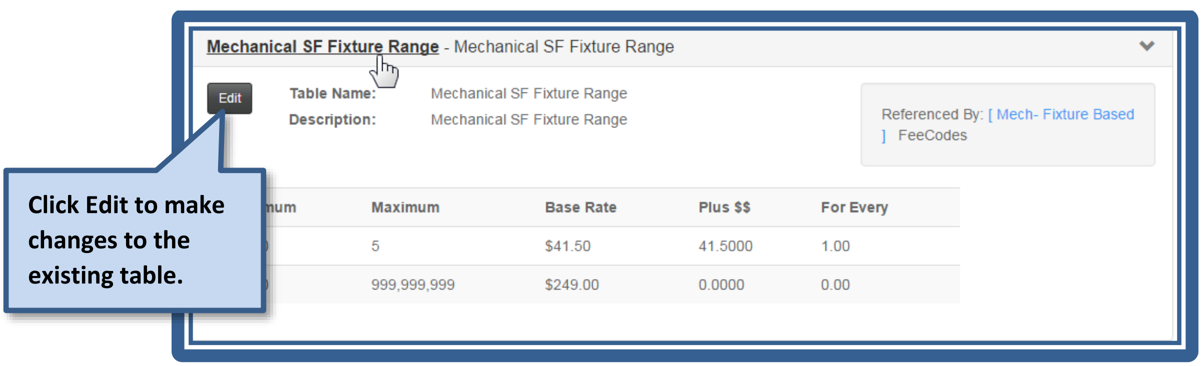


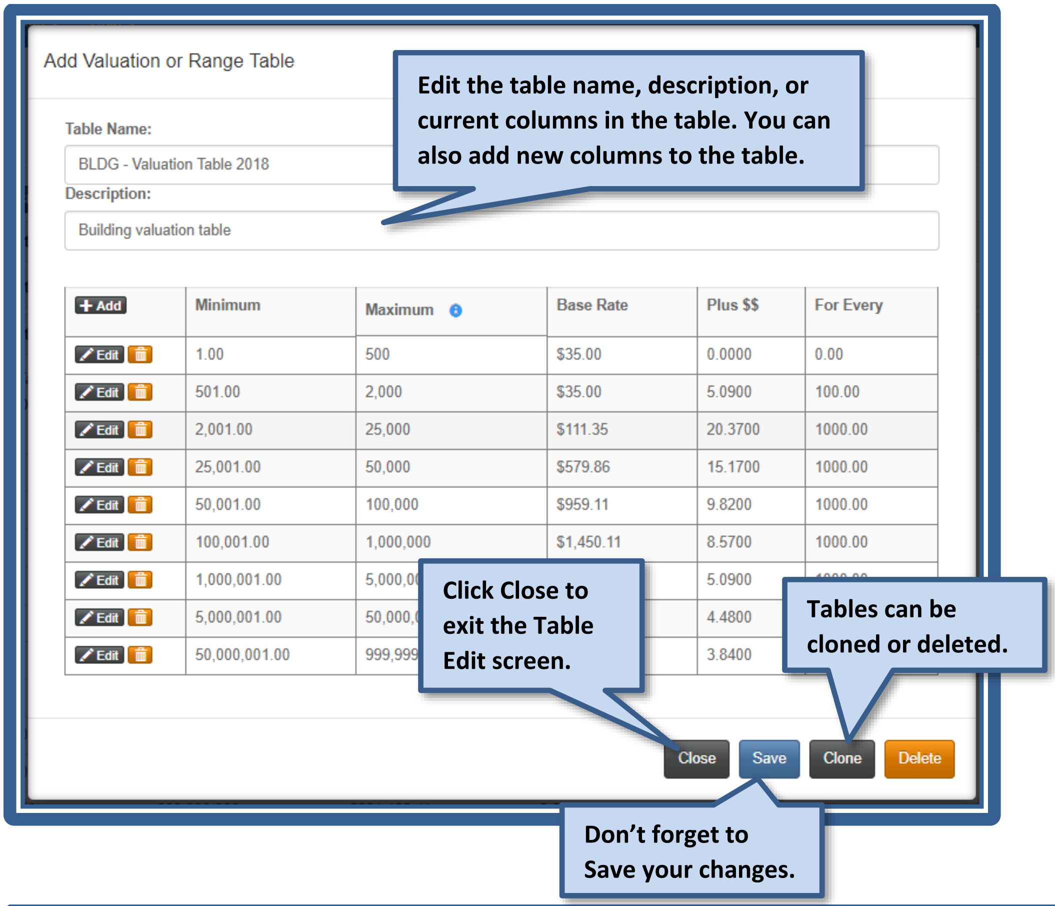
Minimum	Maximum	Base Rate	Plus $$	For Every
01.00	5	$41.50	41.5000	1.00
06.00	999,999,999	$249.00	0.0000	0.00

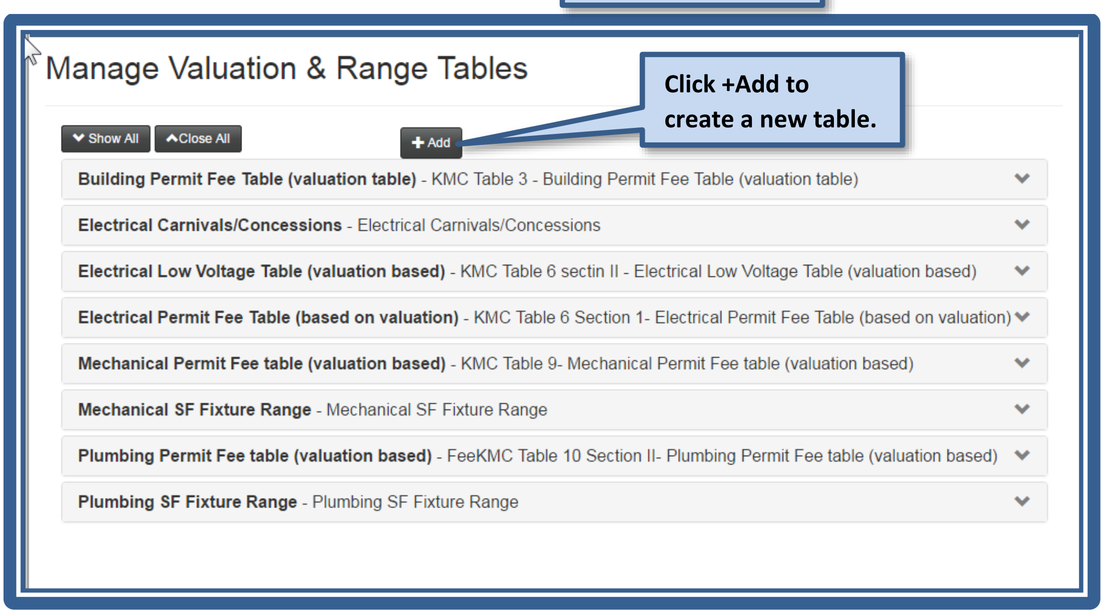
Creating or Editing Valuation or Range Tables

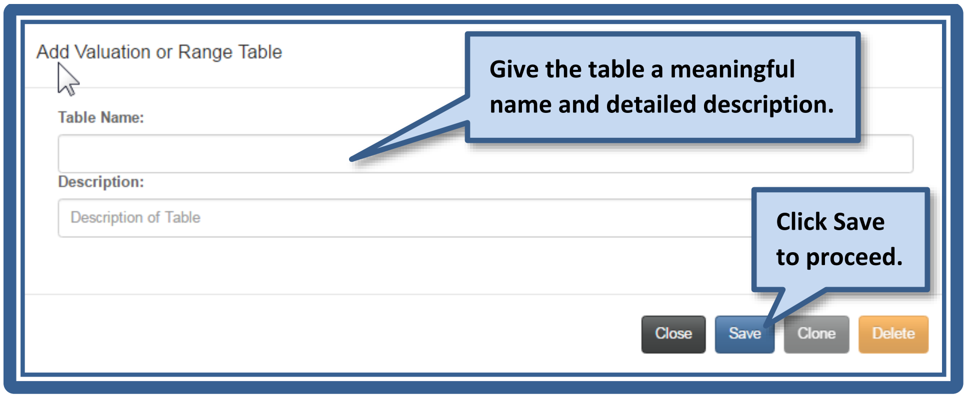


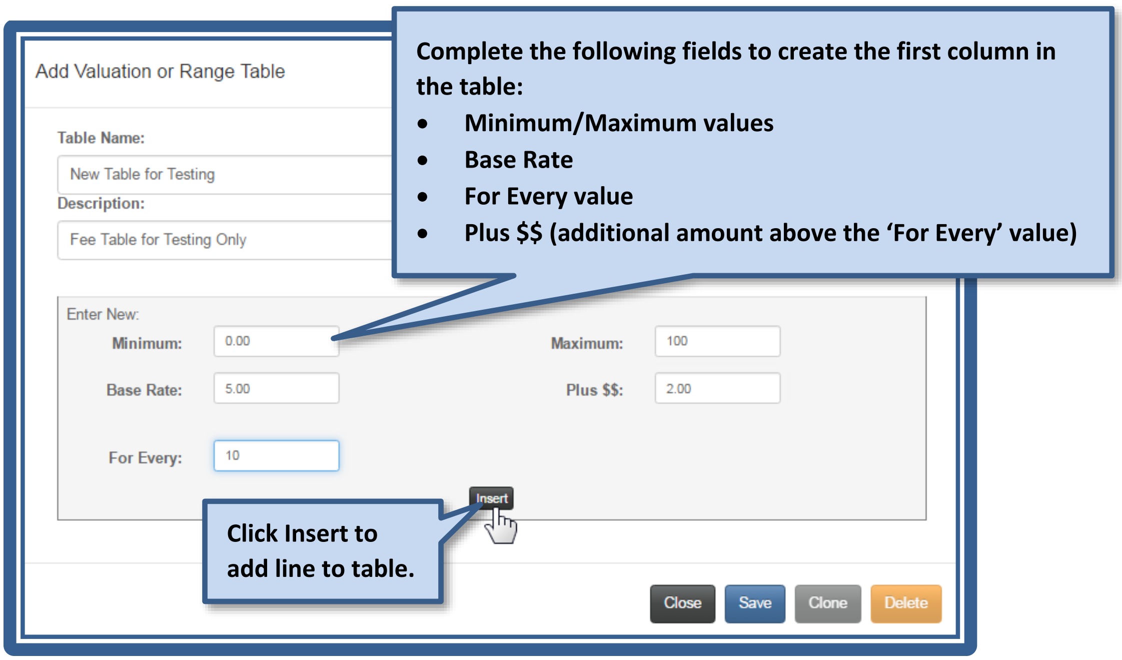


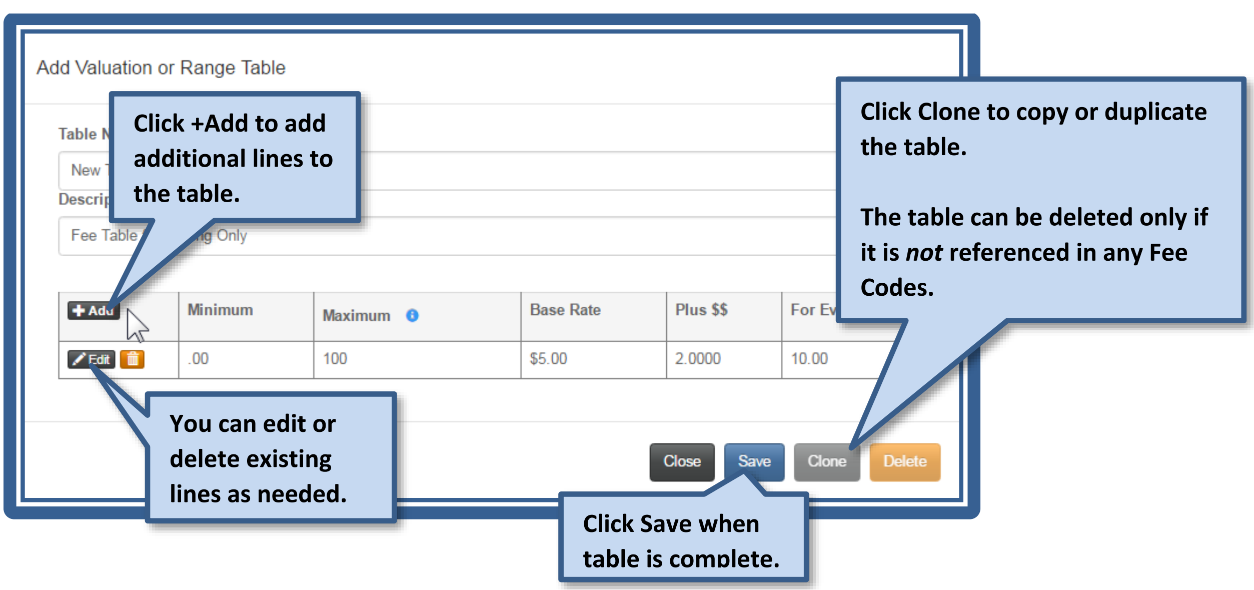


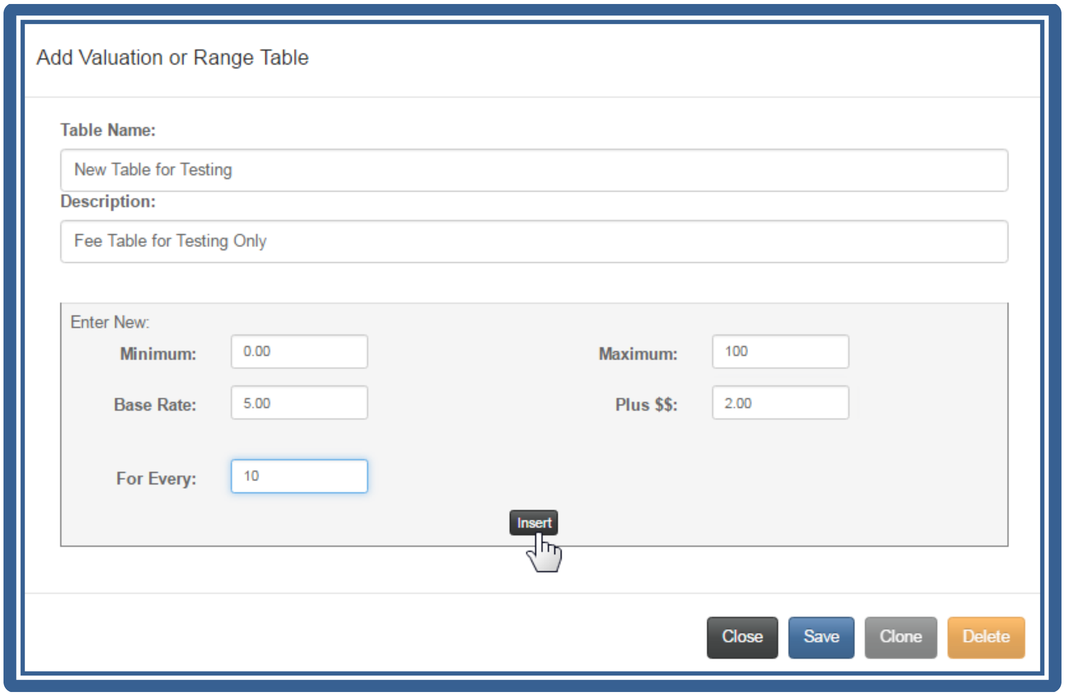

Add Valuation or Range Table
Edit the table name, description, or current columns in the table. You can also add new columns to the table.
Table Name:
BLDG - Valuation Table 2018
Description:
Building valuation table
+ Add | Minimum | Maximum | Base Rate | Plus $$ | For Every
Edit | 1.00 | 500 | $35.00 | 0.0000 | 0.00
Edit | 501.00 | 2,000 | $35.00 | 5.0900 | 100.00
Edit | 2,001.00 | 25,000 | $111.35 | 20.3700 | 1000.00
Edit | 25,001.00 | 50,000 | $579.86 | 15.1700 | 1000.00
Edit | 50,001.00 | 100,000 | $959.11 | 9.8200 | 1000.00
Edit | 100,001.00 | 1,000,000 | $1,450.11 | 8.5700 | 1000.00
Edit | 1,000,001.00 | 5.0900
Edit | 5,000,001.00 | 4.4800
Edit | 50,000,001.00 | 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
Click +Add to create a new table.
Show All
Close All
+ Add
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 sectin 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
Give the table a meaningful name and detailed description.
Table Name:
Description:
Description of Table
Click Save to proceed.
Close
Save
Clone
Delete


Add Valuation or Range Table
Complete the following fields to create the first column in the table:
• Minimum/Maximum values
• Base Rate
• For Every value
• Plus $$ (additional amount above the 'For Every' value)
Table Name:
New Table for Testing
Description:
Fee Table for Testing Only
Enter New:
Minimum:
0.00
Maximum:
100
Base Rate:
5.00
Plus $$:
2.00
For Every:
10
Insert
Click Insert to add line to table.
Close
Save
Clone
Delete

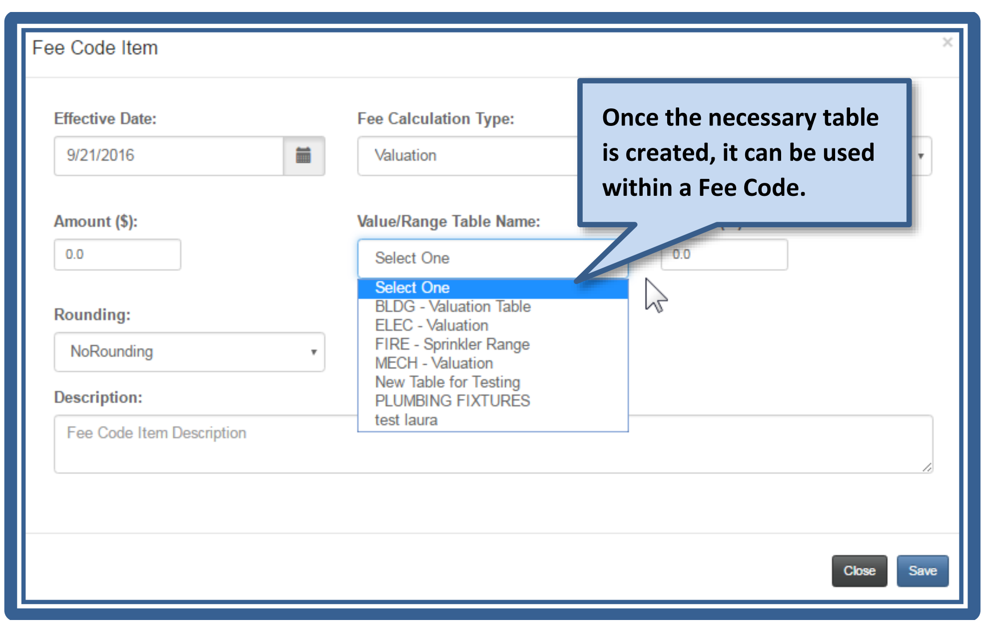

Add Valuation or Range Table
Click +Add to add additional lines to the table.
Click Clone to copy or duplicate the table.
The table can be deleted only if it is *not* referenced in any Fee Codes.
Minimum
Maximum
Base Rate
Plus $$
Edit
.00
100
$5.00
2.0000
10.00
You can edit or delete existing lines as needed.
Close
Save
Clone
Delete
Click Save when table is complete.



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 sets) = $4.

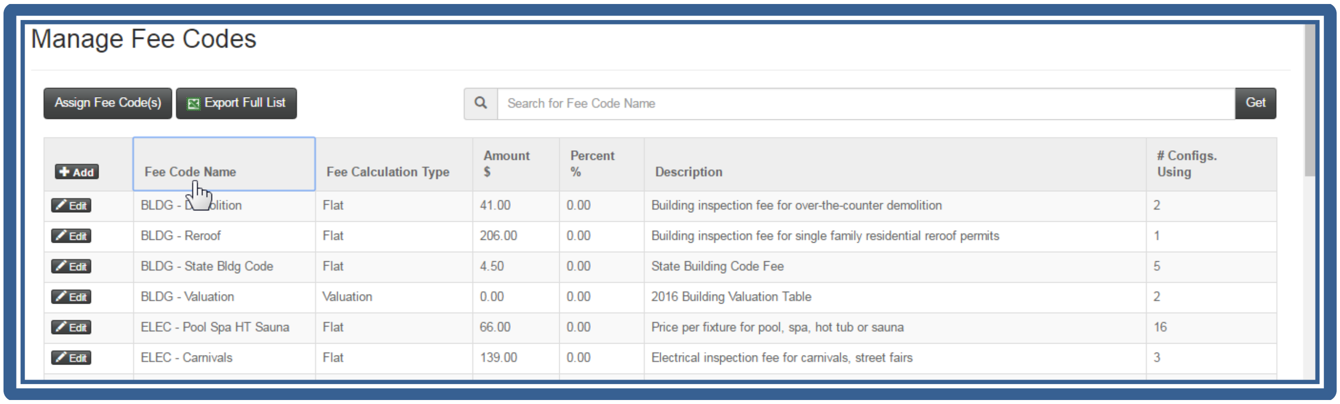
Example of a Fee Code using a Valuation Table



Fee Codes—Overview

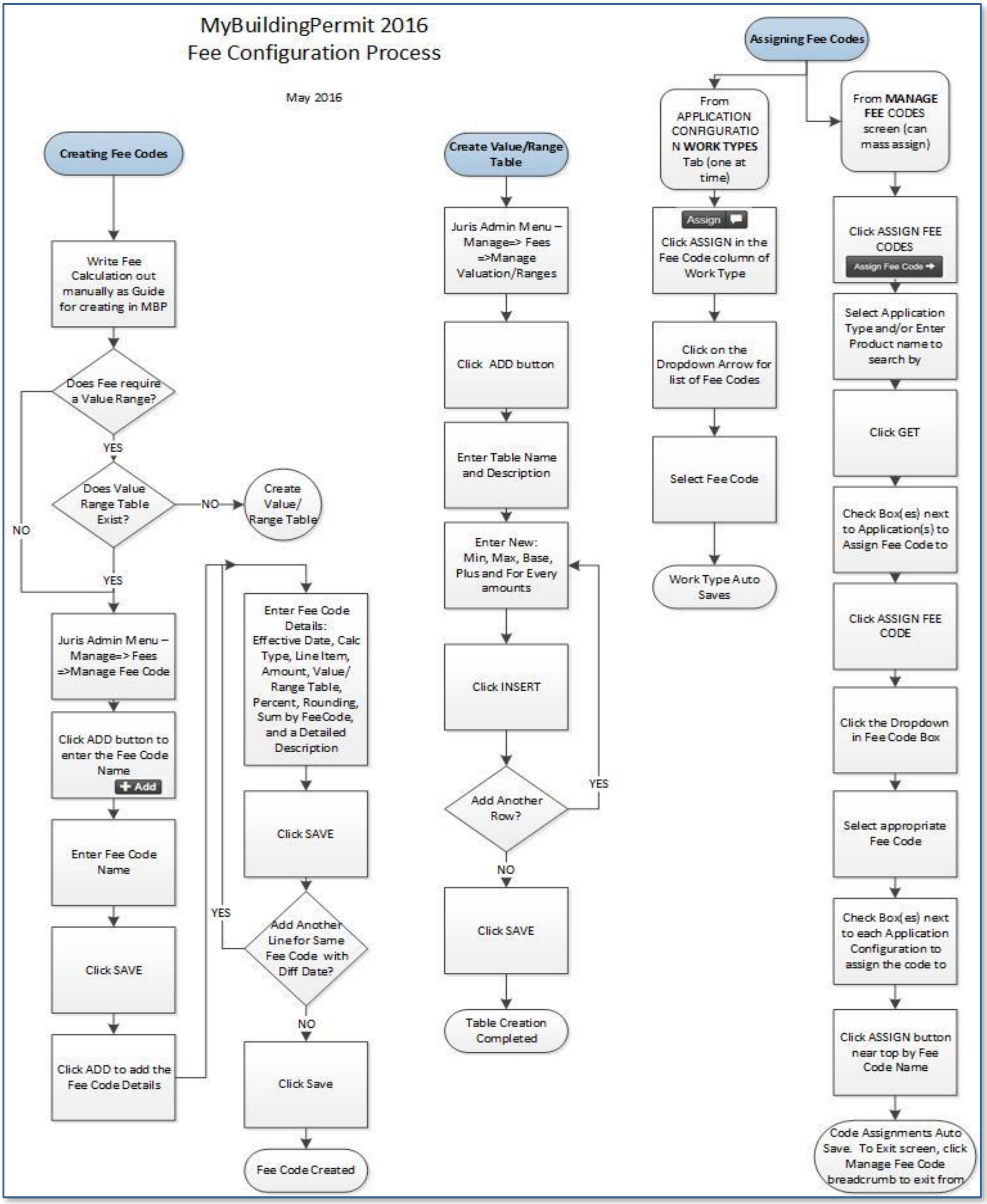
Fees Codes include the following information: Fee Code name, calculation type, dollar amount, valuation and range tables, screen name label in the Cart, rounding options, and a brief description. Fee codes are used instead of hard coded calculations to allow ease of modifications and adjustments when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



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


MyBuildingPermit 2016
Fee Configuration Process
May 2016
Creating Fee Codes
Write Fee Calculation out manually as Guide for creating in MBP
Does Fee require a Value Range?
YES
NO
Does Value Range Table Exist?
NO
Create Value/ Range Table
YES
Juris Admin Menu – Manage=> Fees =>Manage Fee Code
Click ADD button to enter the Fee Code Name
Add
Enter Fee Code Name
Click SAVE
Click ADD to add the Fee Code Details
Enter Fee Code Details: Effective Date, Calc Type, Line Item, Amount, Value/ Range Table, Percent, Rounding, Sum by FeeCode, and a Detailed Description
Click SAVE
Add Another Line for Same Fee Code with Diff Date?
YES
NO
Click Save
Fee Code Created
Create Value/Range Table
Juris Admin Menu – Manage=> Fees =>Manage Valuation/Ranges
Click ADD button
Enter Table Name and Description
Enter New: Min, Max, Base, Plus and For Every amounts
Click INSERT
Add Another Row?
YES
NO
Click SAVE
Table Creation Completed
Assigning Fee Codes
From APPLICATION CONFIGURATION WORK TYPES Tab (one at time)
Assign
Click ASSIGN in the Fee Code column of Work Type
Click on the Dropdown Arrow for list of Fee Codes
Select Fee Code
Work Type Auto Saves
From MANAGE FEE CODES screen (can mass assign)
Click ASSIGN FEE CODES
Assign Fee Code
Select Application Type and/or Enter Product name to search by
Click GET
Check Box(es) next to Application(s) to Assign Fee Code to
Click ASSIGN FEE CODE
Click the Dropdown in Fee Code Box
Select appropriate Fee Code
Check Box(es) next to each Application Configuration to assign the code to
Click ASSIGN button near top by Fee Code Name
Code Assignments Auto Save. To Exit screen, click Manage Fee Code breadcrumb to exit from

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.

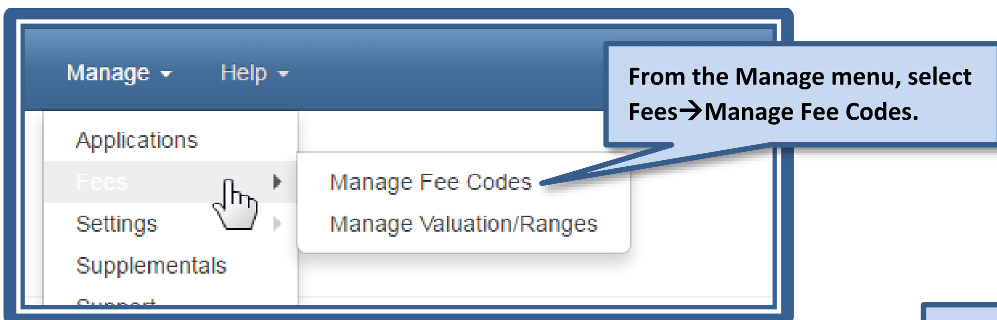
Fee Codes are assigned to Work Types that do ***not*** require Plan Review within an Application Configuration. (see Configuring Applications)

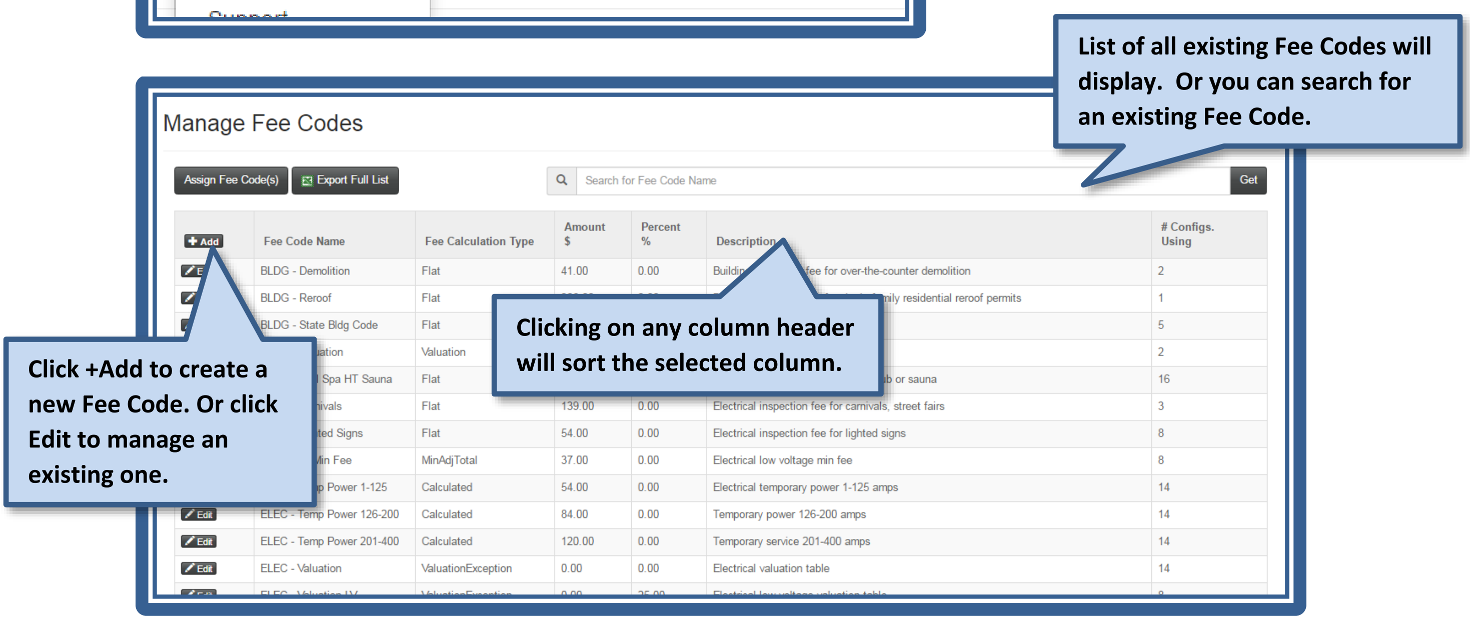
You can assign Fee Codes while configuring your Applications, or from the **MANAGE** Fee Code screens. A single named Fee Code can have multiple calculations, each with a different "Effective Date".

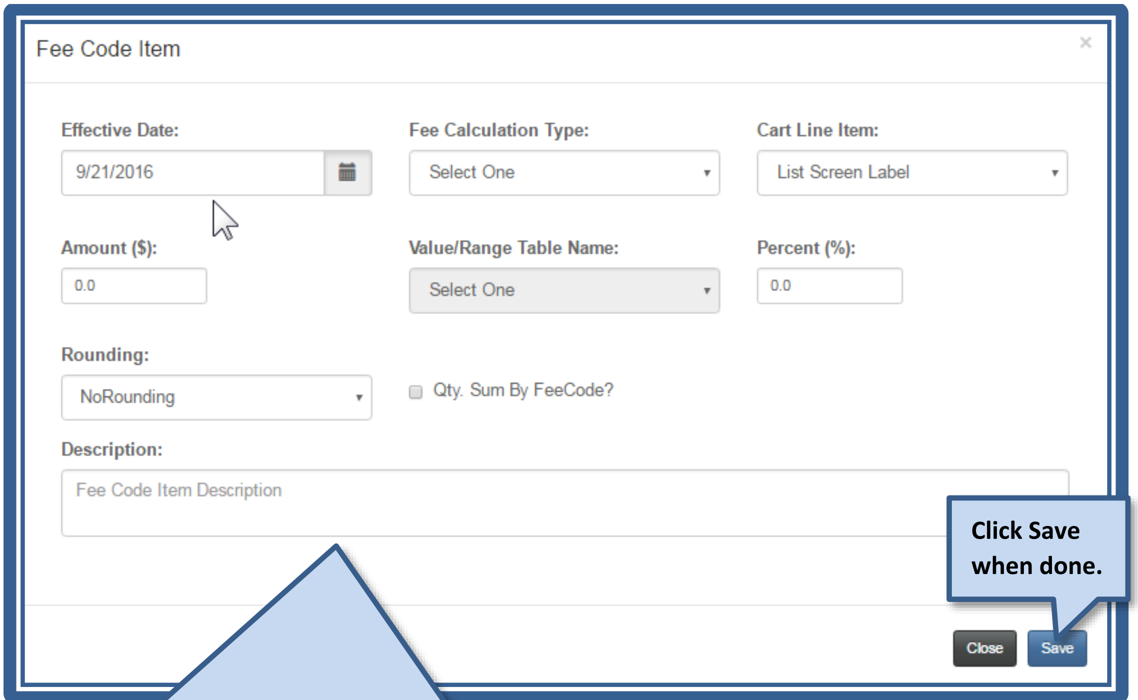
Order for creating Fee related items:

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:







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).

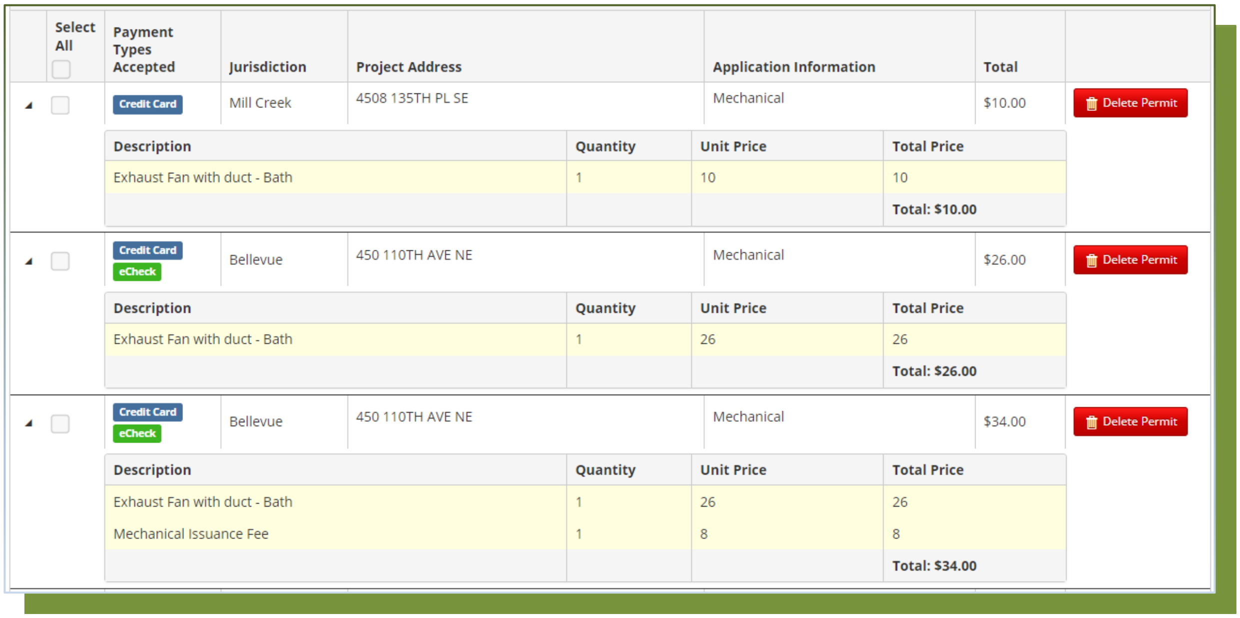
Calculation Type:

- **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.**

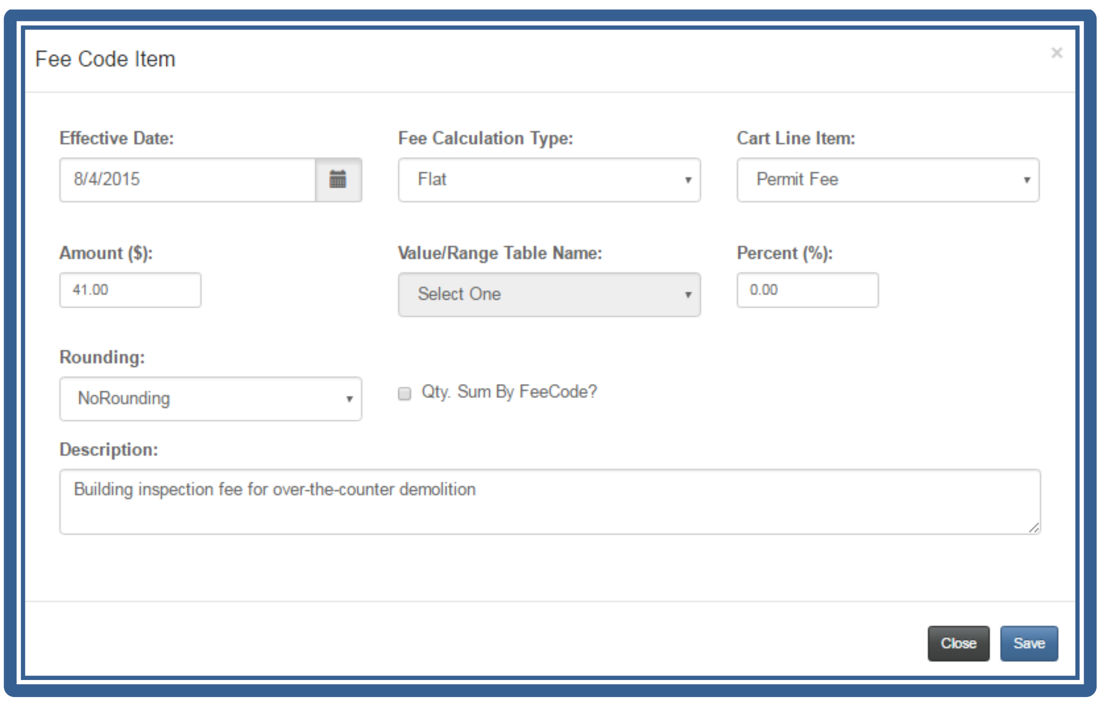
***Other types of calculations such as Minimum and Maximum Adjusted Amounts can be created for your jurisdiction if needed.**

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

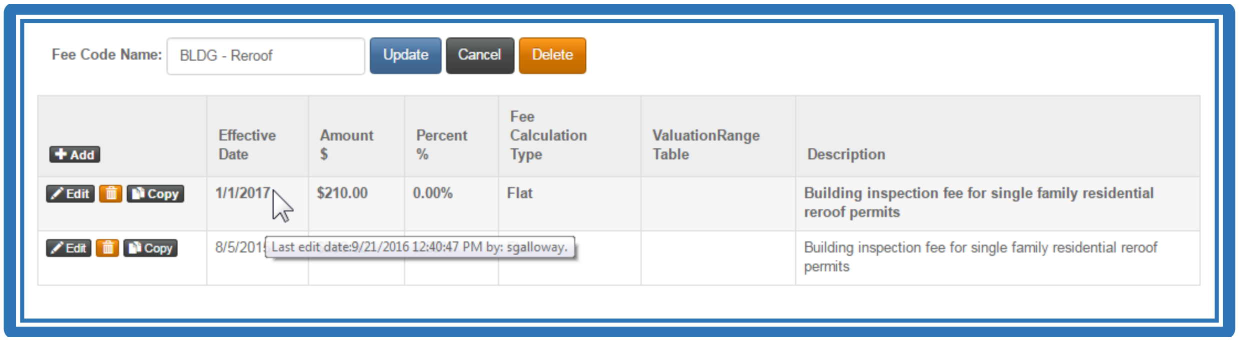


Example of a FLAT Fee calculation – regardless of the quantity the applicant would enter, or the value of the work, any Work Type information entered that has this Fee Code assigned would be charged a flat $41



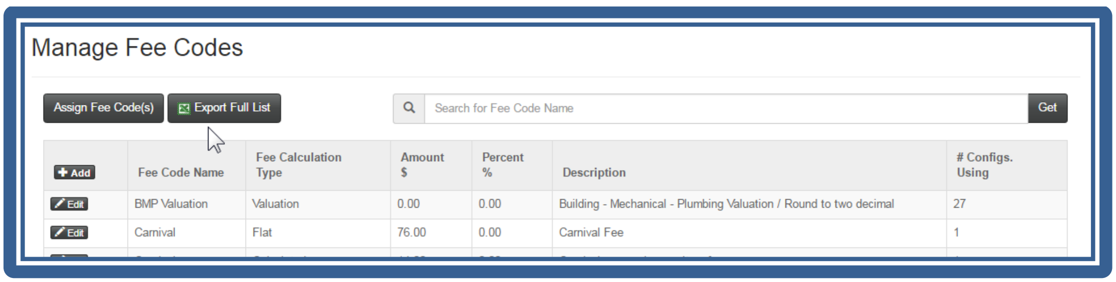
NOTE: Newly updated data will have a darker shading and hovering over that line will display information on who and when it was last edited.

Example of a Fee code with multiple Effective Dates

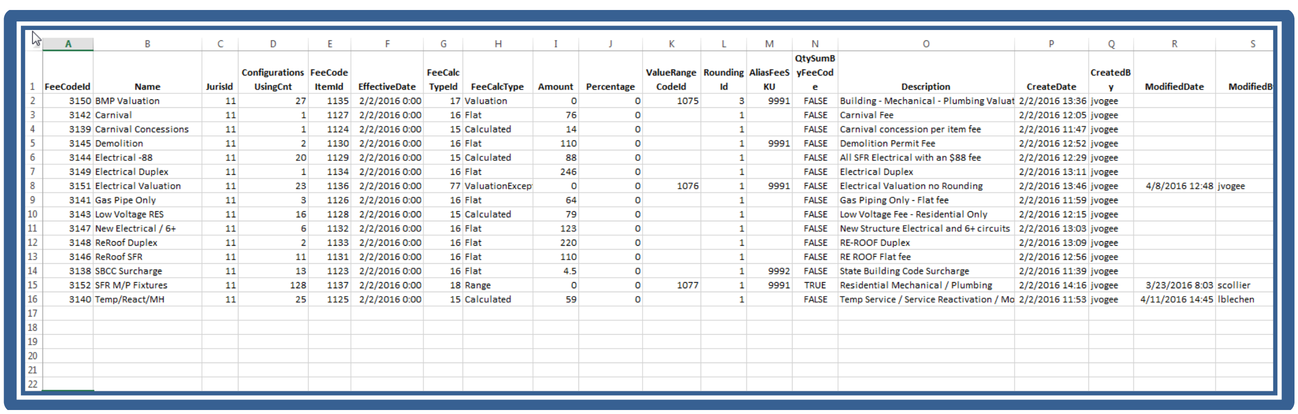


Exporting your Fee Code List

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.



Example of the Fee Code Export

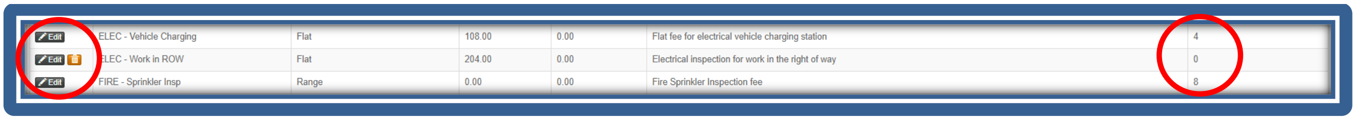


	A	B	C	D	E	F	G	H	I	J
1	FeeCodeId	Name	JurisId	Configurations UsingCnt	FeeCode ItemId	EffectiveDate	FeeCalc TypeId	FeeCalcType	Amount	Percentage
2	3150	BMP Valuation	11	27	1135	2/2/2016 0:00	17	Valuation	0	0
3	3142	Carnival	11	1	1127	2/2/2016 0:00	16	Flat	76	0
4	3139	Carnival Concessions	11	1	1124	2/2/2016 0:00	15	Calculated	14	0
5	3145	Demolition	11	2	1130	2/2/2016 0:00	16	Flat	110	0
6	3144	Electrical -88	11	20	1129	2/2/2016 0:00	15	Calculated	88	0
7	3149	Electrical Duplex	11	1	1134	2/2/2016 0:00	16	Flat	246	0
8	3151	Electrical Valuation	11	23	1136	2/2/2016 0:00	77	ValuationExcep	0	0
9	3141	Gas Pipe Only	11	3	1126	2/2/2016 0:00	16	Flat	64	0
10	3143	Low Voltage RES	11	16	1128	2/2/2016 0:00	15	Calculated	79	0
11	3147	New Electrical / 6+	11	6	1132	2/2/2016 0:00	16	Flat	123	0
12	3148	ReRoof Duplex	11	2	1133	2/2/2016 0:00	16	Flat	220	0
13	3146	ReRoof SFR	11	11	1131	2/2/2016 0:00	16	Flat	110	0
14	3138	SBCC Surcharge	11	13	1123	2/2/2016 0:00	16	Flat	4.5	0
15	3152	SFR M/P Fixtures	11	128	1137	2/2/2016 0:00	18	Range	0	0
16	3140	Temp/React/MH	11	25	1125	2/2/2016 0:00	15	Calculated	59	0
17										
18										
19										
20										
21										
22										

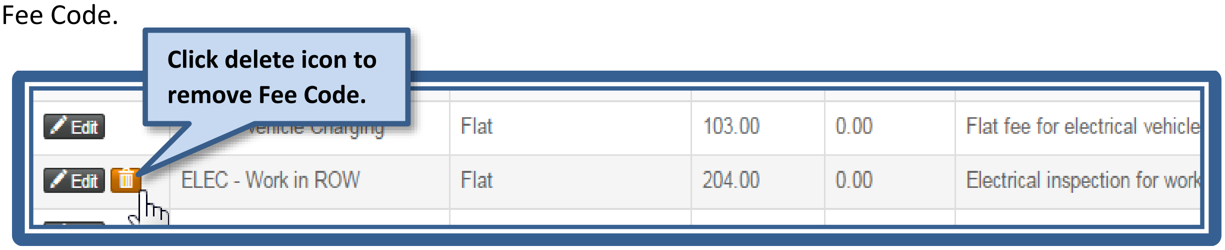
	K	L	M	N	O	P	Q	R	S
1	ValueRange CodeId	Rounding Id	AliasFeeS KU	QtySumB yFeeCod e	Description	CreateDate	CreatedB y	ModifiedDate	ModifiedB
2	1075	3	9991	FALSE	Building - Mechanical - Plumbing Valuat	2/2/2016 13:36	jvogee		
3		1		FALSE	Carnival Fee	2/2/2016 12:05	jvogee		
4		1		FALSE	Carnival concession per item fee	2/2/2016 11:47	jvogee		
5		1	9991	FALSE	Demolition Permit Fee	2/2/2016 12:52	jvogee		
6		1		FALSE	All SFR Electrical with an $88 fee	2/2/2016 12:29	jvogee		
7		1		FALSE	Electrical Duplex	2/2/2016 13:11	jvogee		
8	1076	1	9991	FALSE	Electrical Valuation no Rounding	2/2/2016 13:46	jvogee	4/8/2016 12:48	jvogee
9		1		FALSE	Gas Piping Only - Flat fee	2/2/2016 11:59	jvogee		
10		1		FALSE	Low Voltage Fee - Residential Only	2/2/2016 12:15	jvogee		
11		1		FALSE	New Structure Electrical and 6+ circuits	2/2/2016 13:03	jvogee		
12		1		FALSE	RE-ROOF Duplex	2/2/2016 13:09	jvogee		
13		1		FALSE	RE ROOF Flat fee	2/2/2016 12:56	jvogee		
14		1	9992	FALSE	State Building Code Surcharge	2/2/2016 11:39	jvogee		
15	1077	1	9991	TRUE	Residential Mechanical / Plumbing	2/2/2016 14:16	jvogee	3/23/2016 8:03	scollier
16		1		FALSE	Temp Service / Service Reactivation / Mo	2/2/2016 11:53	jvogee	4/11/2016 14:45	lblechen
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.



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

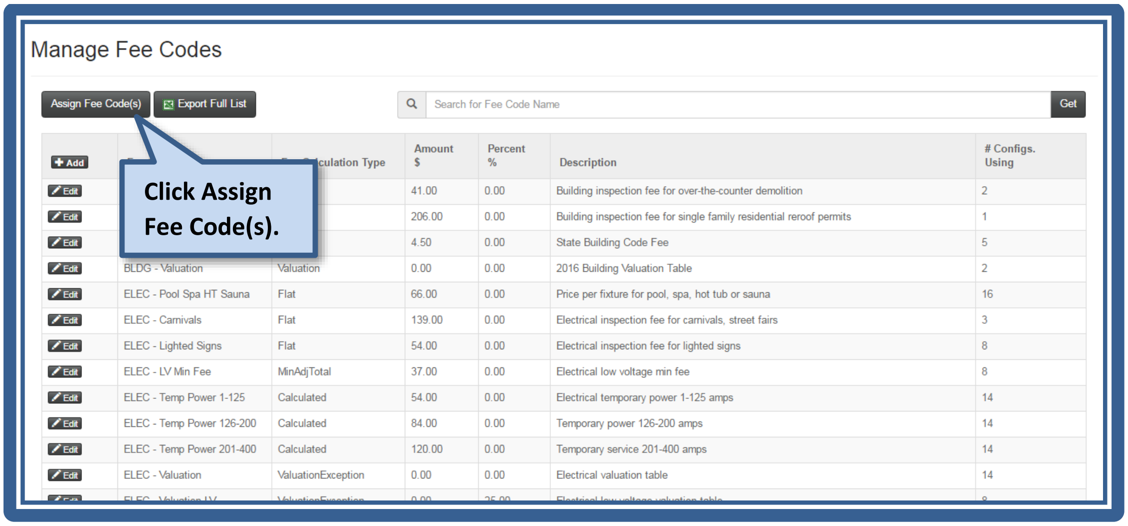
There are two ways to get into the ASSIGN FEE CODE functionality:

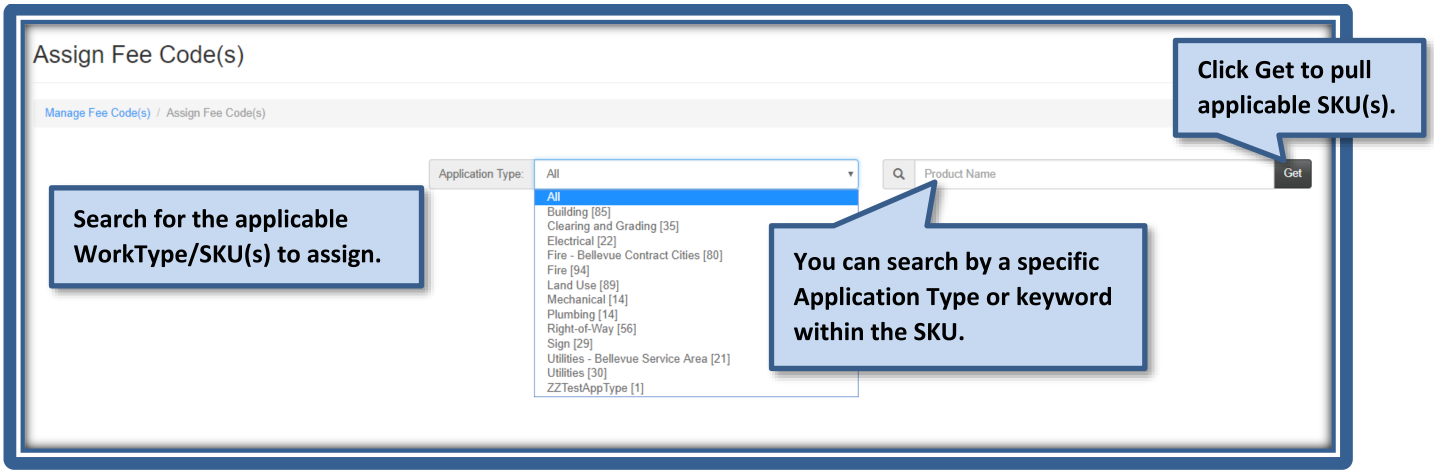
1. **MANAGE**=> Fees=>Manage Fee Codes then click the **ASSIGN FEE CODES** button.

Or

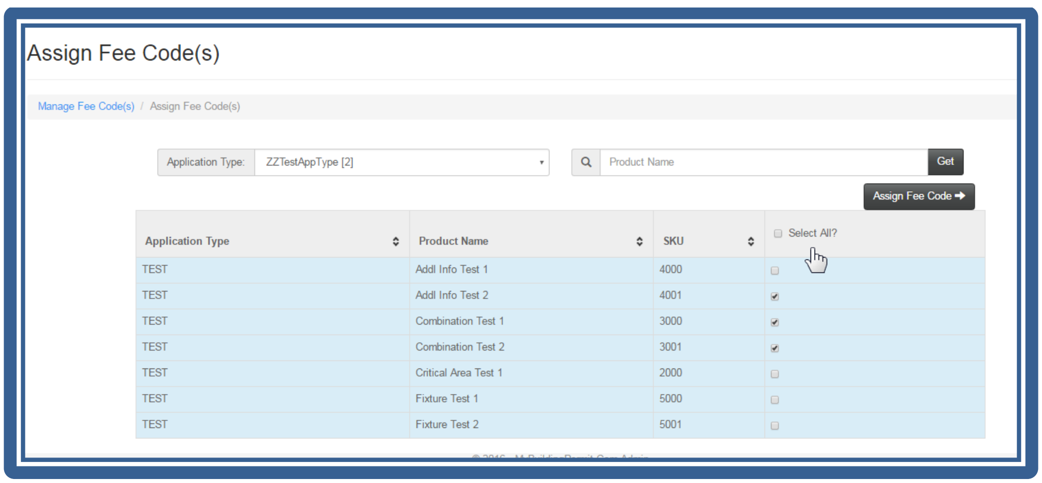
2. When Configuring the Application, Work Types Tab, use the **ASSIGN** button in the Fee Code column.

Option #1:
From the MANAGE→Fees→Manage Fee Codes

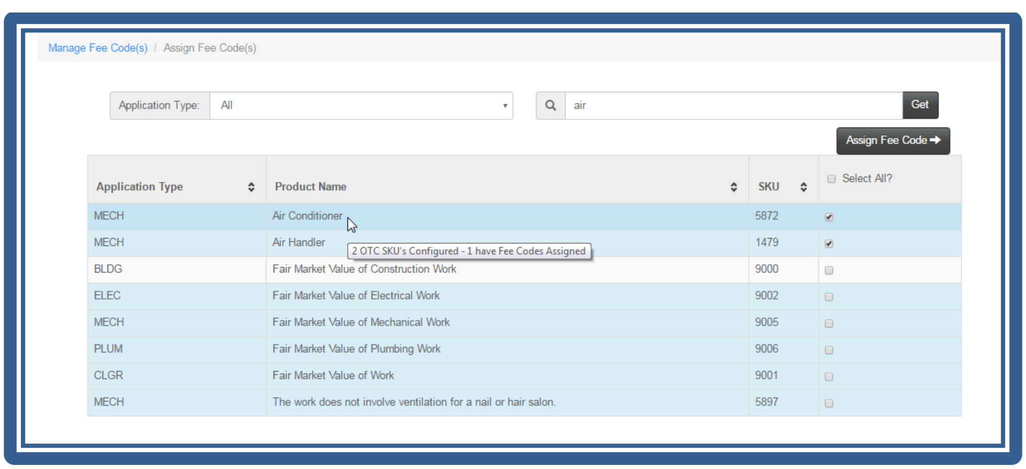


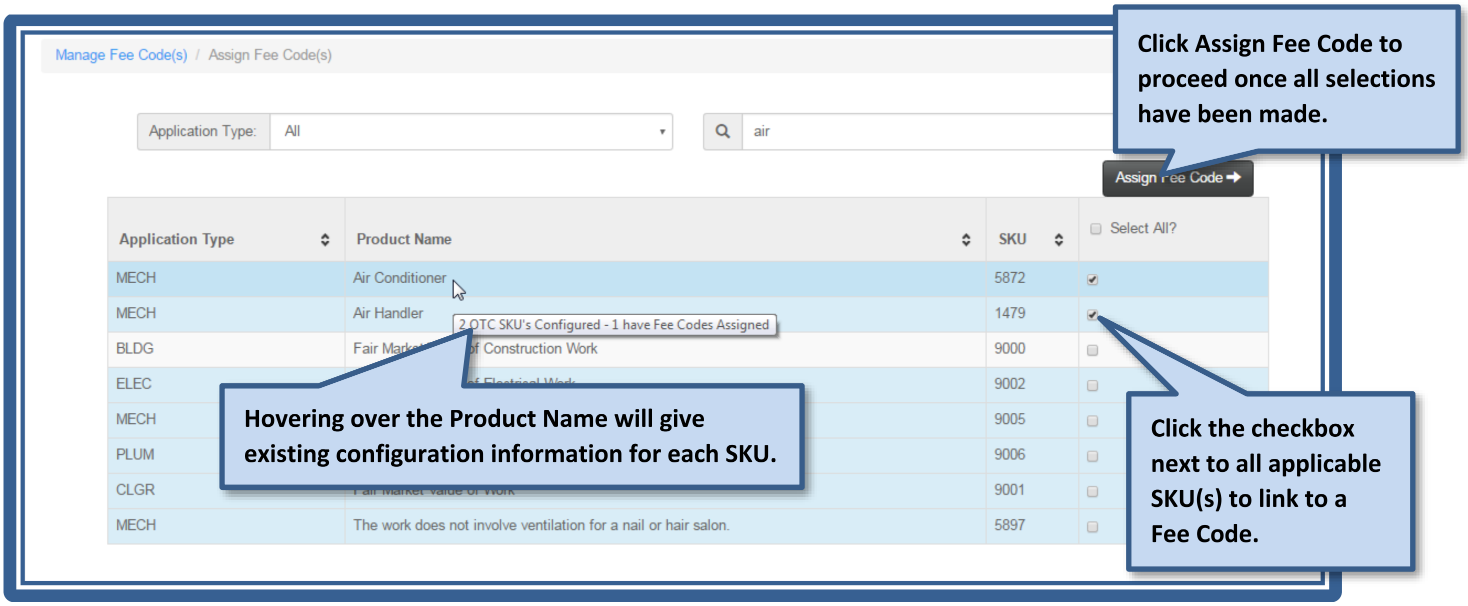


Example of a completed search by Application Type:

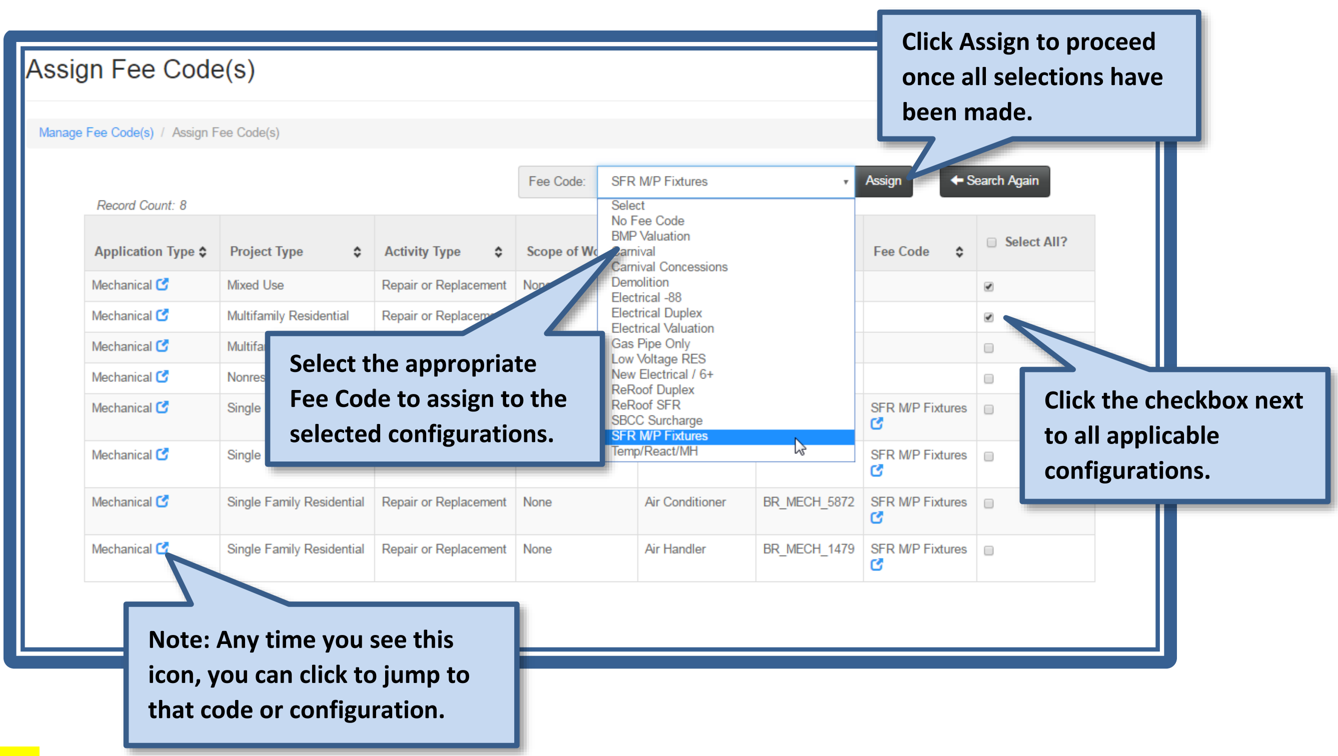


Example of a completed search by a Keyword



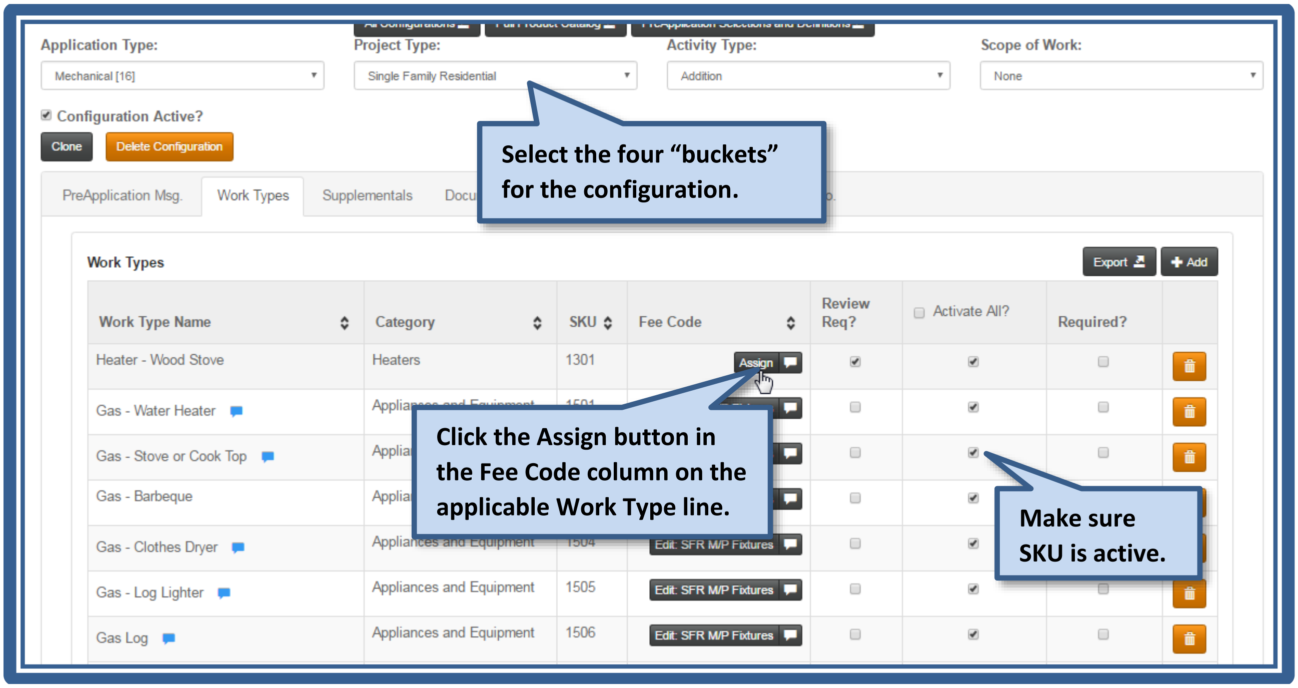


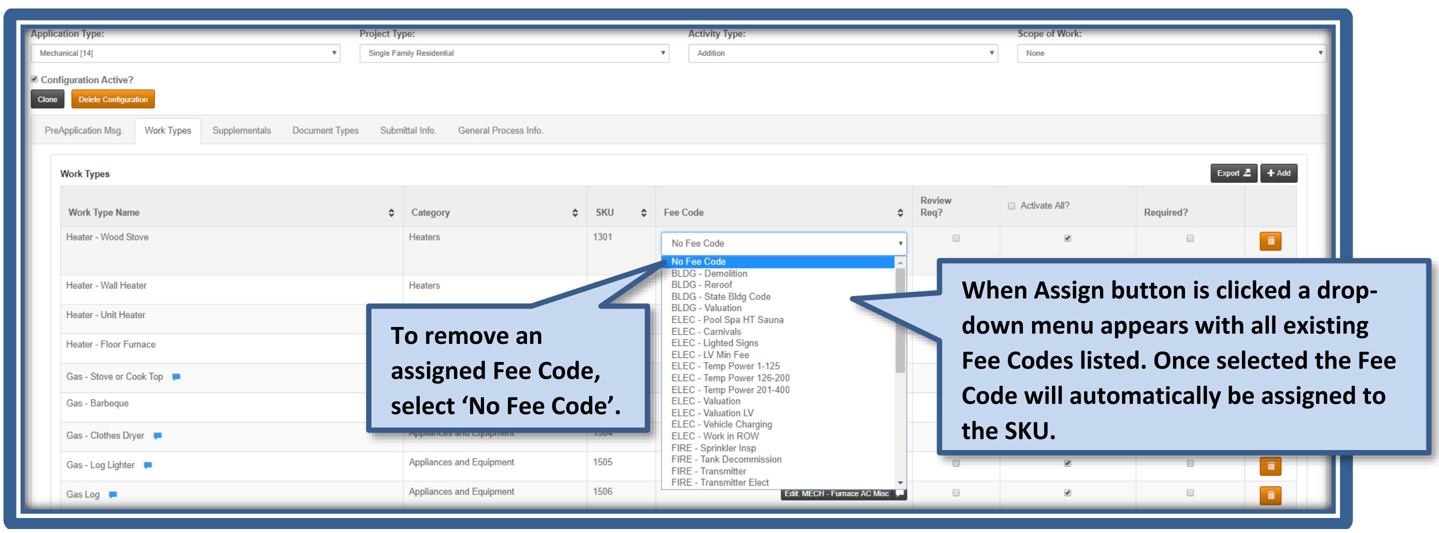
After clicking the Assign Fee Code button, a listing of all configurations containing those previously selected SKU(s) will appear:



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





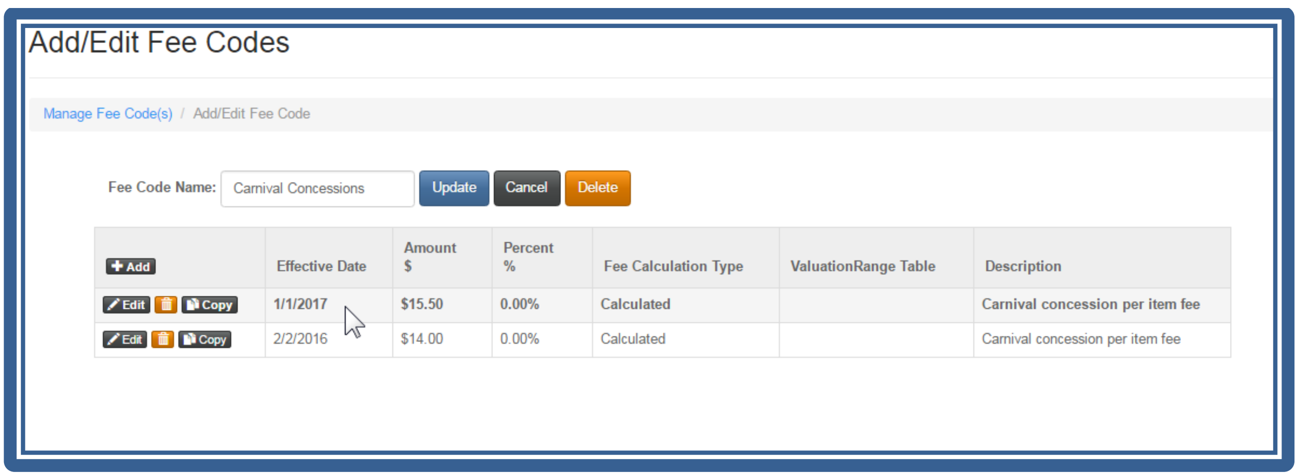
REMINDER: Only **Over-the-Counter** permits need Fee Codes assigned – Plan Review fees will come from your backend permitting system when you invoice.

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: Carnival Concessions   Update   Cancel   Delete

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

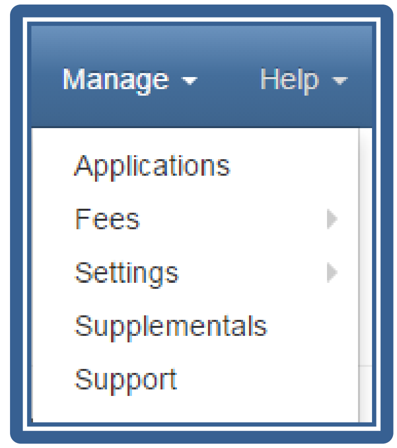
NOTE: If you've created a new Valuation/Range Table that will be used with your new Fee Code, be sure to change the Table Name in the Fee Code setup as well.

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.

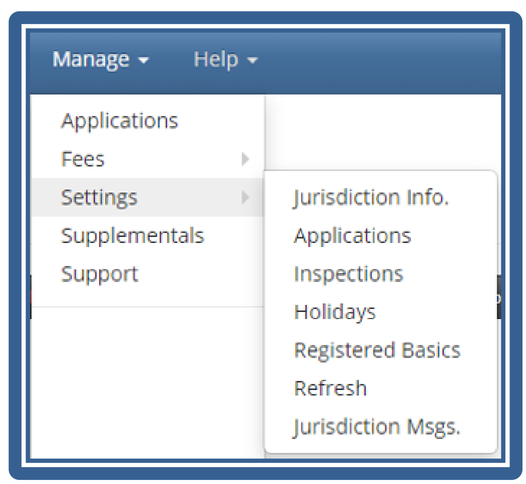
Settings – Jurisdiction Information, Application Types you will accept on MBP, Inspection Information and Holidays (only if this information isn't available from your backend permitting system).

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 form 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.

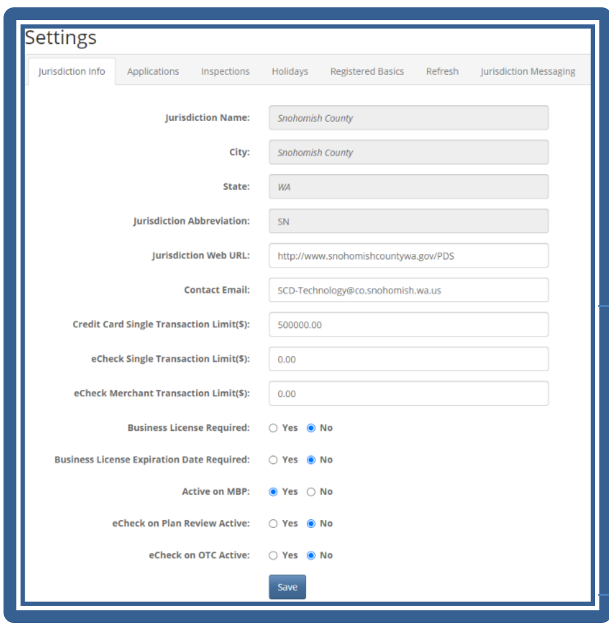
Registered Basics – If your jurisdiction accepts registered basic plans, this is where you set specific criteria for the plans.

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:

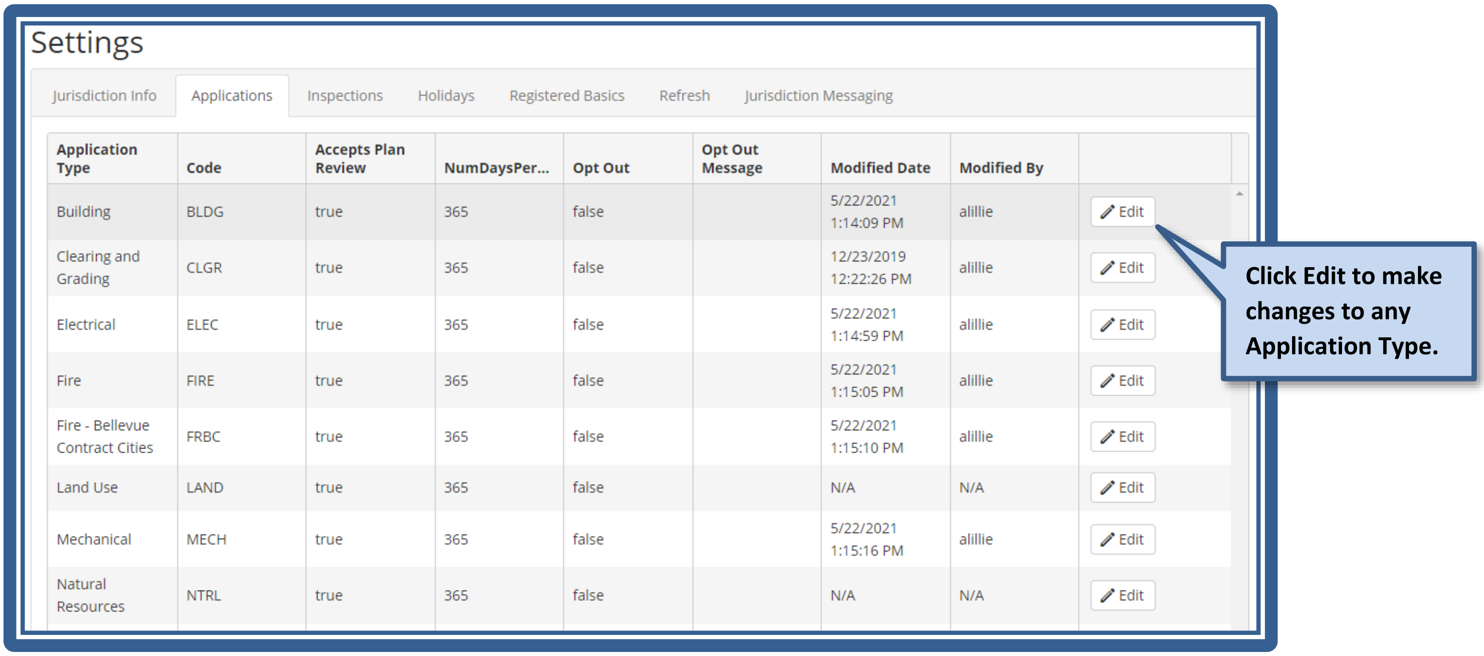


These are the only fields that can be modified: Jurisdiction URL; Contact Email; Transaction Limit.

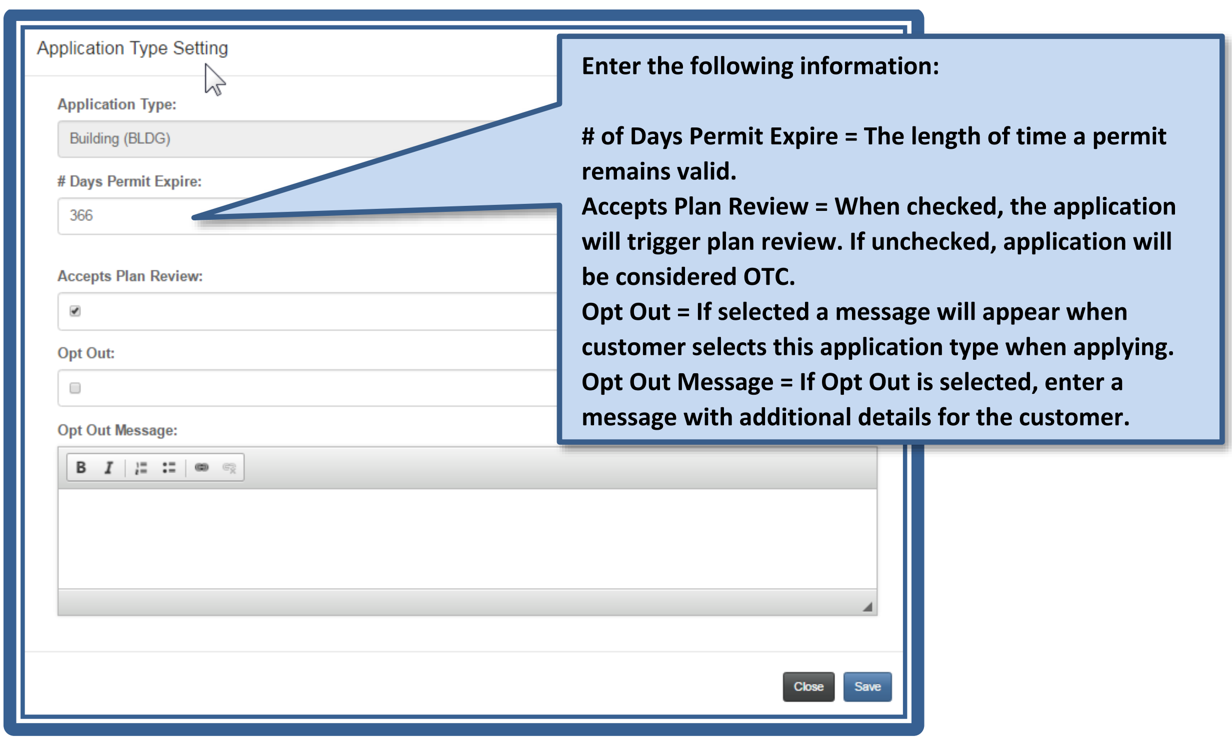
You can also set business license requirements and if your jurisdiction is active on MBP.

Applications

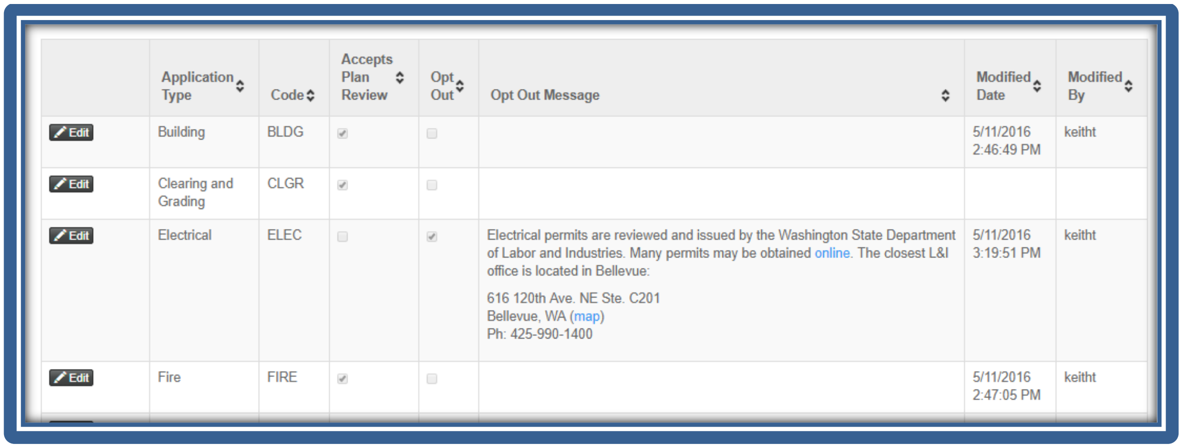
List of Application Types currently offered at your jurisdiction. Determines if application requires plan review or not.



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

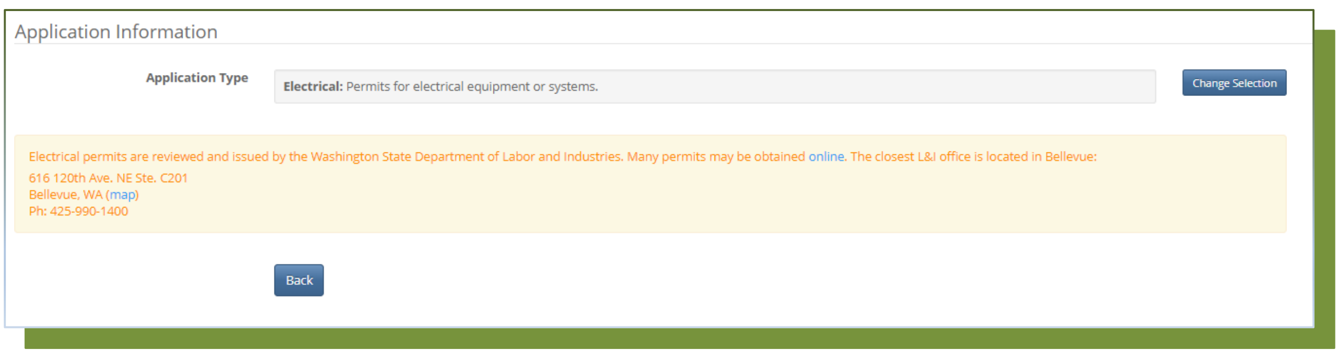


Example of an Opt Out message in Jurisdiction Settings:

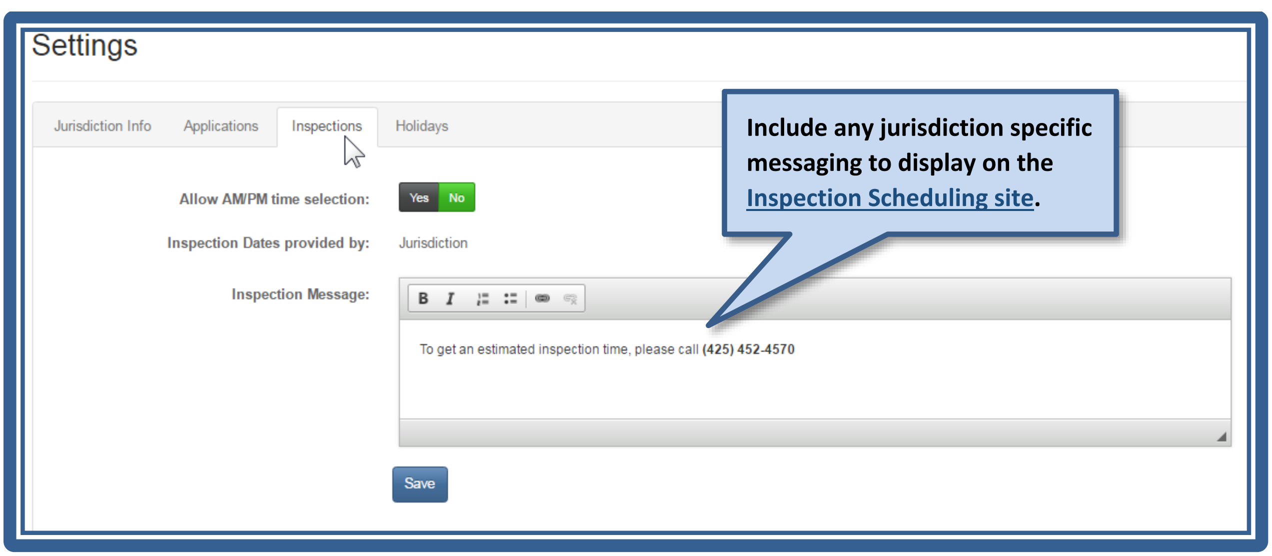


	Application Type	Code	Accepts Plan Review	Opt Out	Opt Out Message	Modified Date	Modified By
Edit	Building	BLDG	☑	☐		5/11/2016 2:46:49 PM	keitht
Edit	Clearing and Grading	CLGR	☑	☐			
Edit	Electrical	ELEC	☐	☑	Electrical permits are reviewed and issued by the Washington State Department of Labor and Industries. 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	5/11/2016 3:19:51 PM	keitht
Edit	Fire	FIRE	☑	☐		5/11/2016 2:47:05 PM	keitht

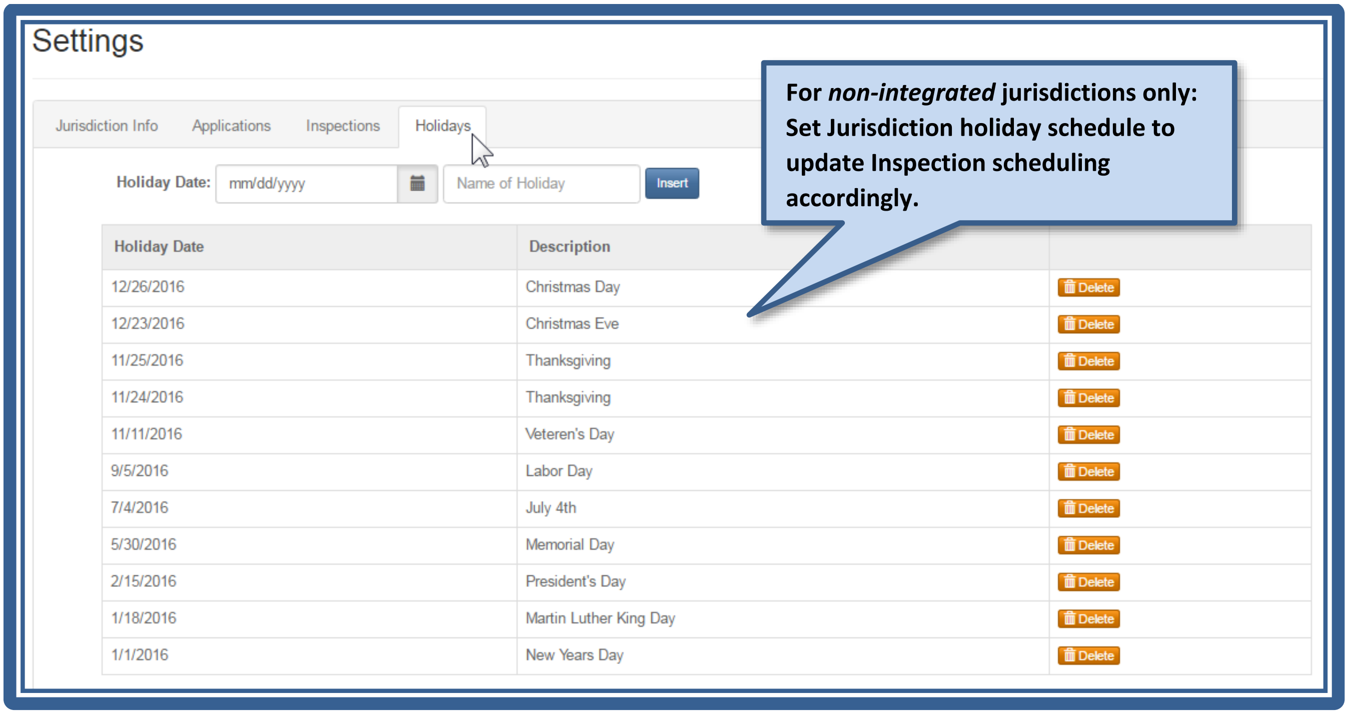
Example of an Opt Out message as displayed to customer:



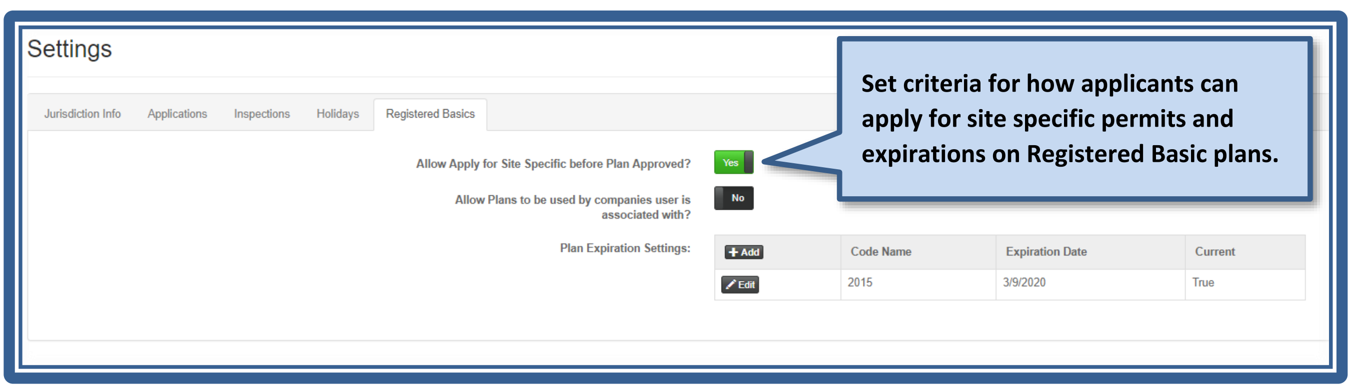
Inspections—Messaging



Holidays—Non-integrated Jurisdictions Only

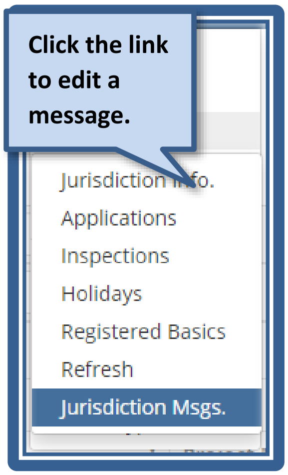


Registered Basics



Jurisdiction Messages

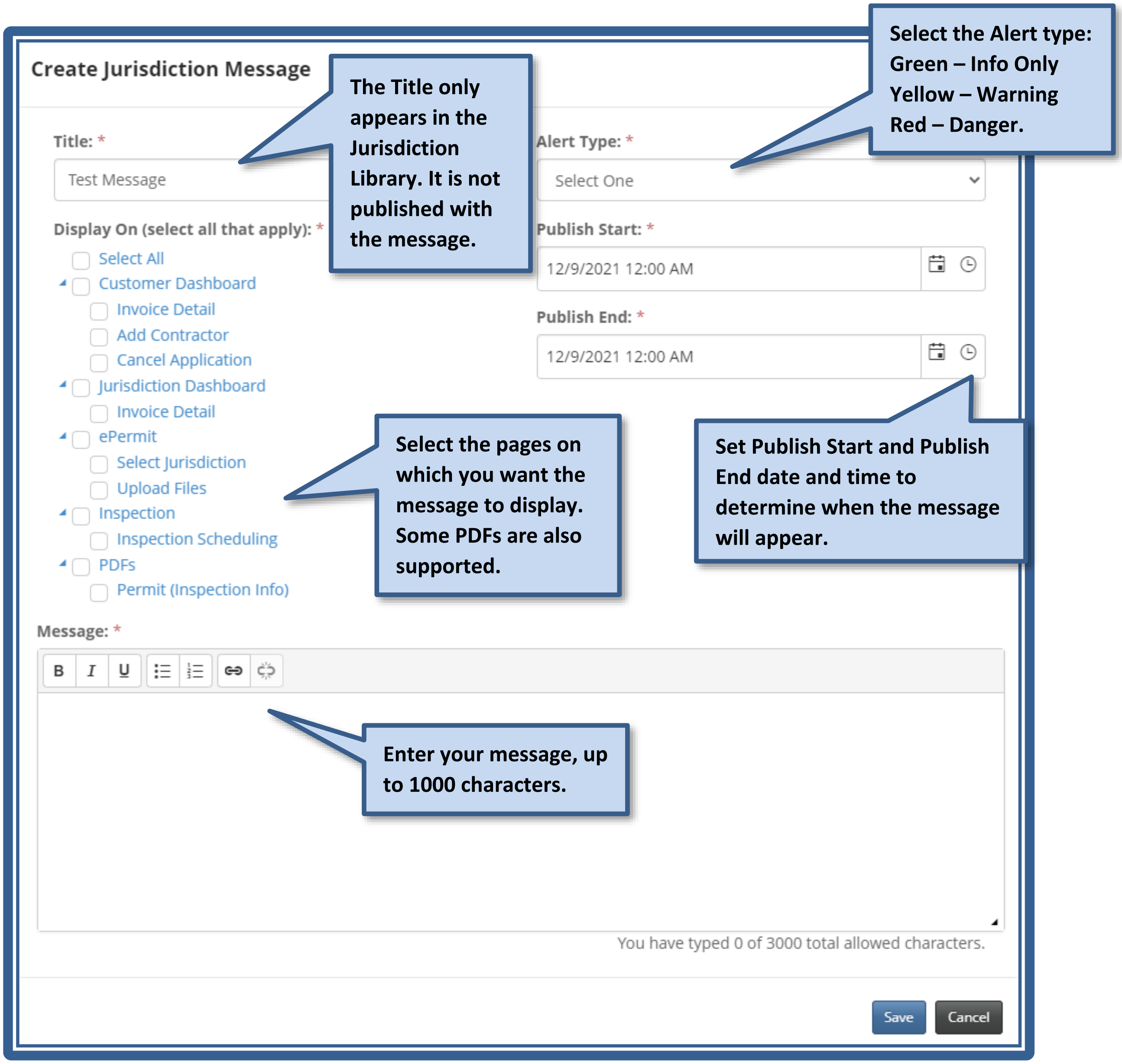
You can add messaging to several pages in MBP via the Jurisdiction Msgs. Sub-menu under Settings.

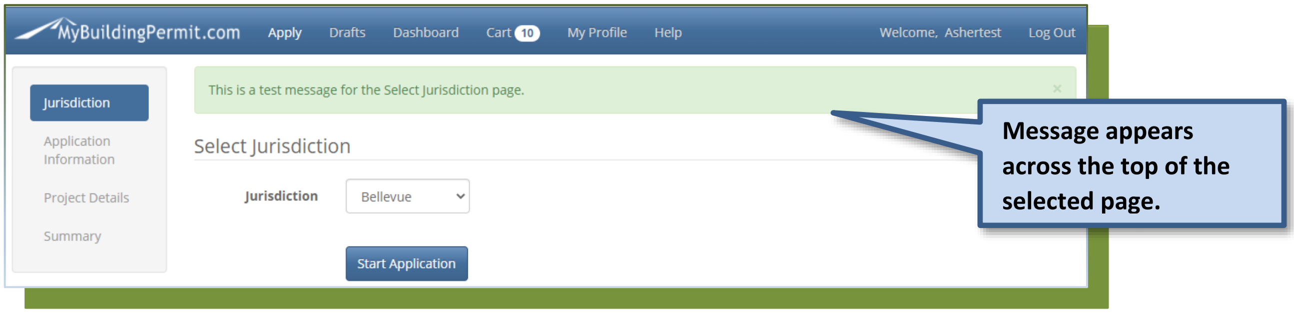


You can create new messages or edit existing ones and specify the pages and timing for the messages to display.

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.





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

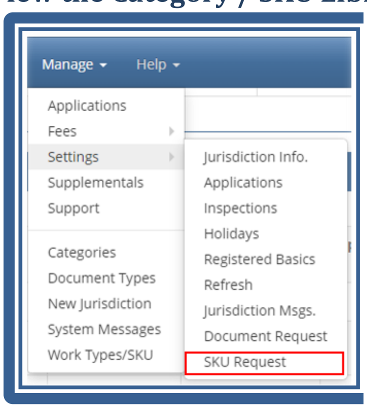
SKU (WorkType) and Category Requests can be made via MBP Admin under **Manage > Settings > SKU Request**. When the request is submitted, an email is generated and routed to MBP Support. Once received, the eGov Service Delivery Team team will review and implement the request in Staging. After the requestor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

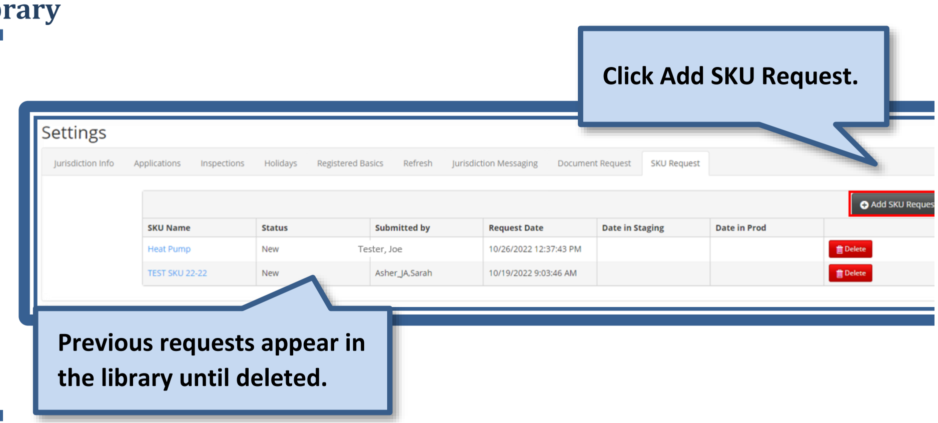
Prepare the SKU or Category Request

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

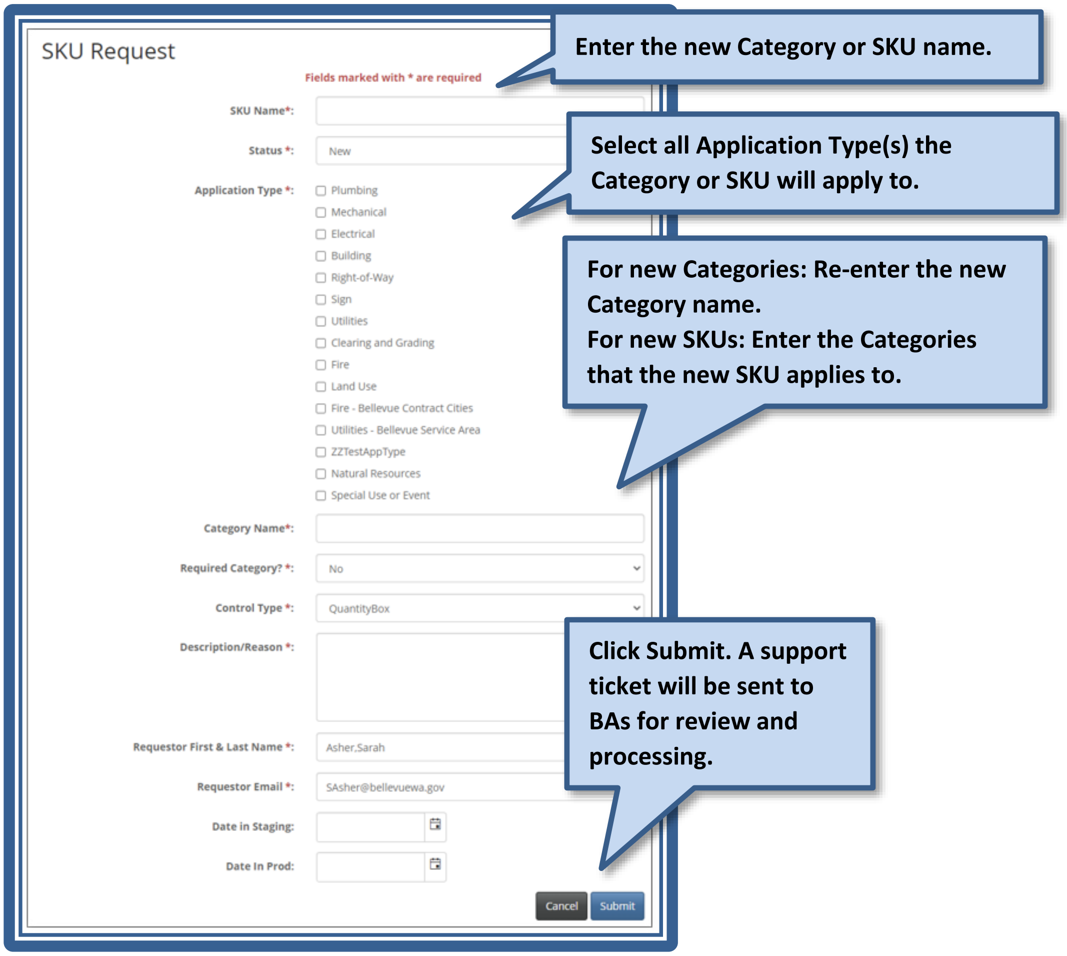
Request Type	Approval Required by…	Request Submitted via…	Information needed
SKU Request	**eGov Service Delivery Team**	SKU Request form (Admin > Manage > Applications > Settings > SKU Request form) A support ticket and email are auto generated.	See information requested in form. At a minimum we need the following: • Application Type(s) • SKU Name • Control Type • Category that SKU applies to
Category Request	**eGov Service Delivery Team**	SKU request form, or submit via support ticket: (egovsupport@ecitygov.net)	See information requested in form. At a minimum we need the following: • Application Type(s) • Category Name

View the Category / SKU Library





Complete The SKU Request Form



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.

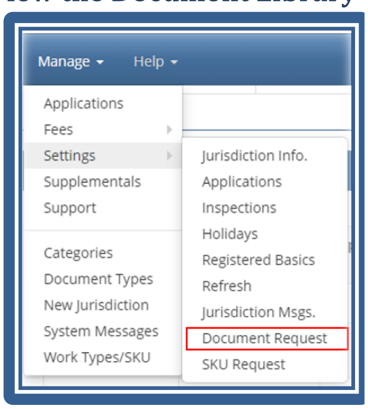
NOTE: To reduce potential duplicate Document and Work Types, we search current inventory lists of documents and SKUs to identify a similar, already existing match. In these instances, we will contact the original requestor to verify if we can use the existing type or if a new one is still needed.

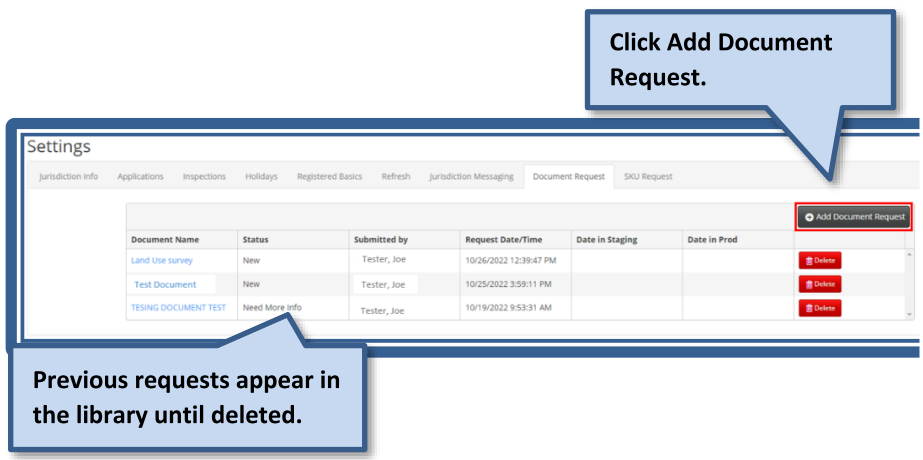
Prepare the Document Request

Gather the following information before submitting a Document Request.

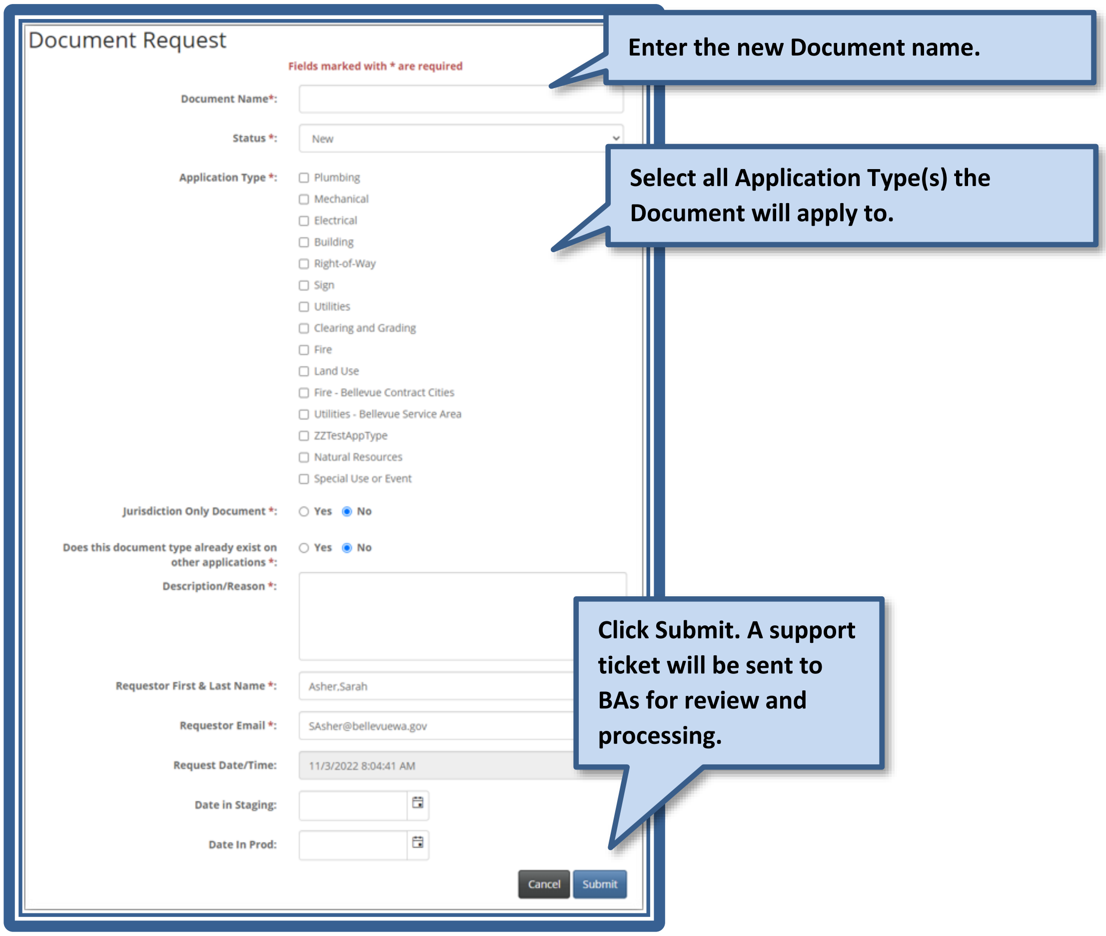
Request Type	Approval Required by…	Request Submitted via…	Information needed
Document Request	**eGov Service Delivery Team**	Document Request form (Admin > Manage > Applications > Settings > Document Request form) A support ticket and email are auto generated.	See information requested in form. At a minimum, we need the following: • Application Type(s) • Document Name

View the Document Library





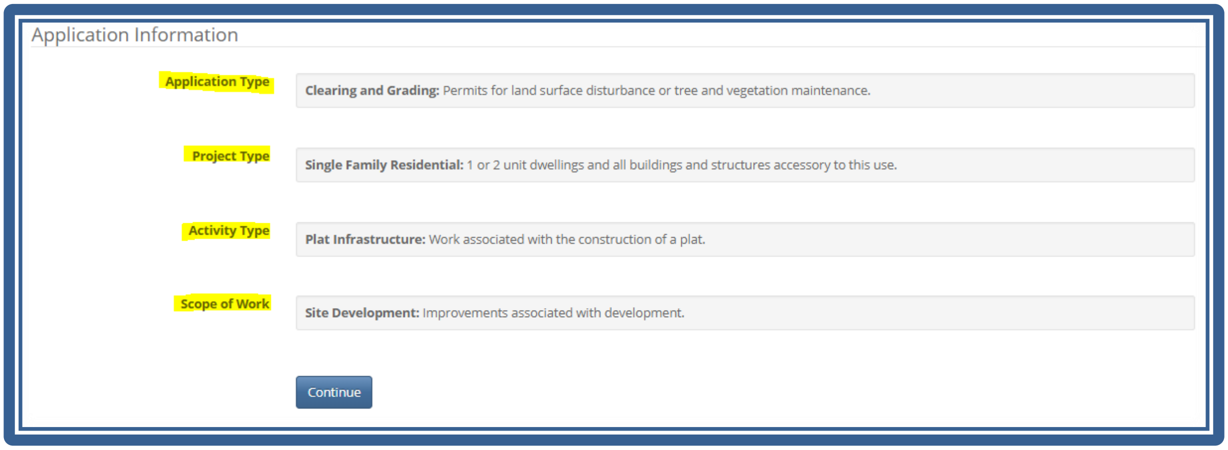
Complete The Document Request Form



"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":



- Bucket #1: **Application Type**
- Bucket #2: **Project Type**

We do not add/edit these buckets without Program Committee discussion.

- Bucket #3: **Activity Type**
- Bucket #4: **Scope of Work**

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 (1st Bucket)	**Program Committee**	Support Ticket (egovsupport@ecitygov.net)	Requires the following information: • Application Type • Application Type Description (these appear to the Applicant)
Project Type (2nd Bucket)	**Program Committee**	Support Ticket (egovsupport@ecitygov.net)	Requires the following information: • Application Type • Project Type Name • Project Type Description (these appear to the Applicant)
Activity Type Request (3rd Bucket)	**eGov Service Delivery Team**	Support ticket (egovsupport@ecitygov.net)	Requires the following information: • Application Type • Activity Type name • Activity Type description

Scope of Work Requests (4th Bucket)	**eGov Service Delivery Team**	Support ticket (egovsupport@ecitygov.net)	Requires the following information: • Application Type • Scope of Work name • Scope of Work description

Managing Supplementals

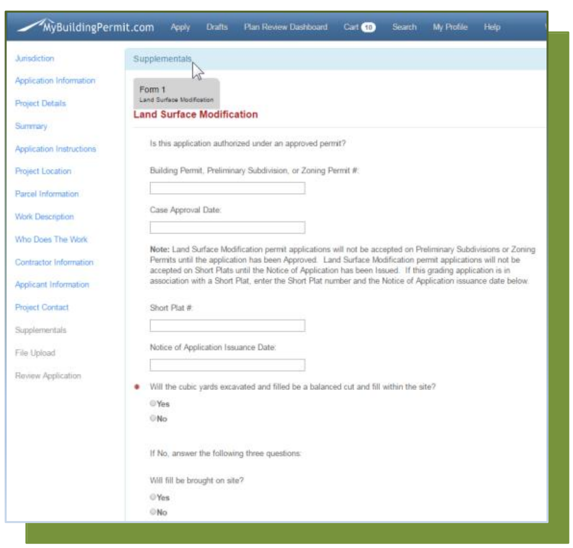
Before you can add Supplementals to your configurations, you must create them in the system. Once they're saved, you can add them during the configuration process. See Adding Supplemental Questionnaires for detailed instructions on adding Supplementals to a configuration.

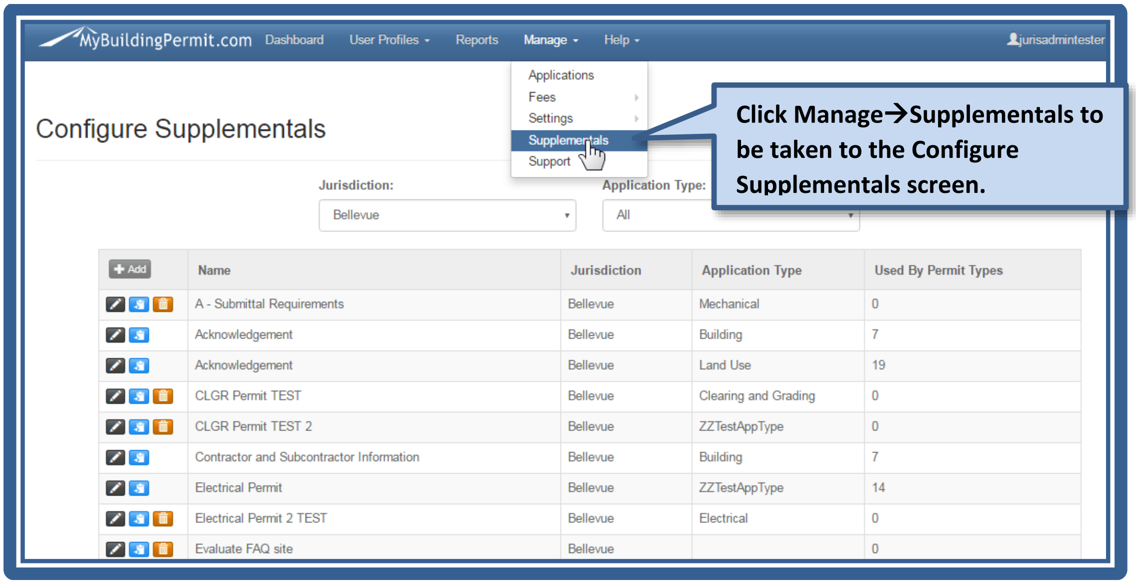
Creating New Questionnaires

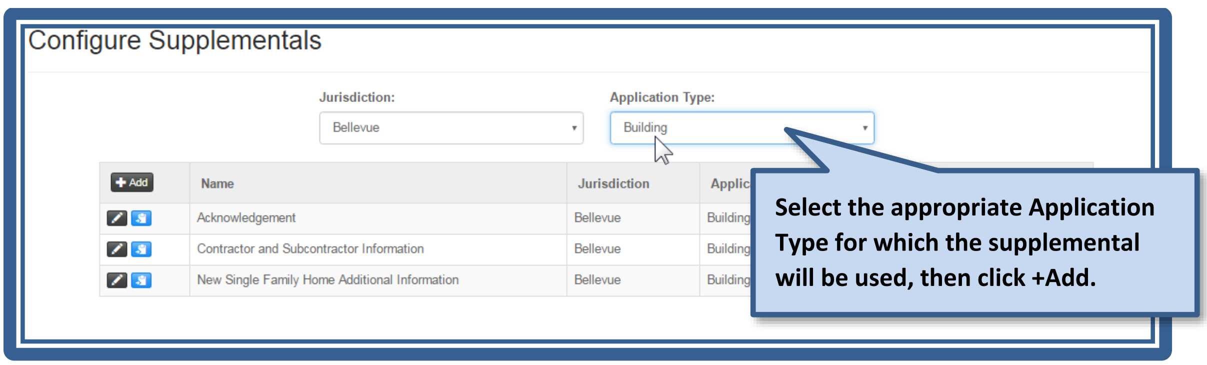
Supplementals are a way a jurisdiction can request additional information or provide more detail to an applicant on Plan Review applications. Supplementals must be created first in the Jurisdiction Admin **MANAGE**→Supplementals menu, then assigned to an Application Configuration.

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.

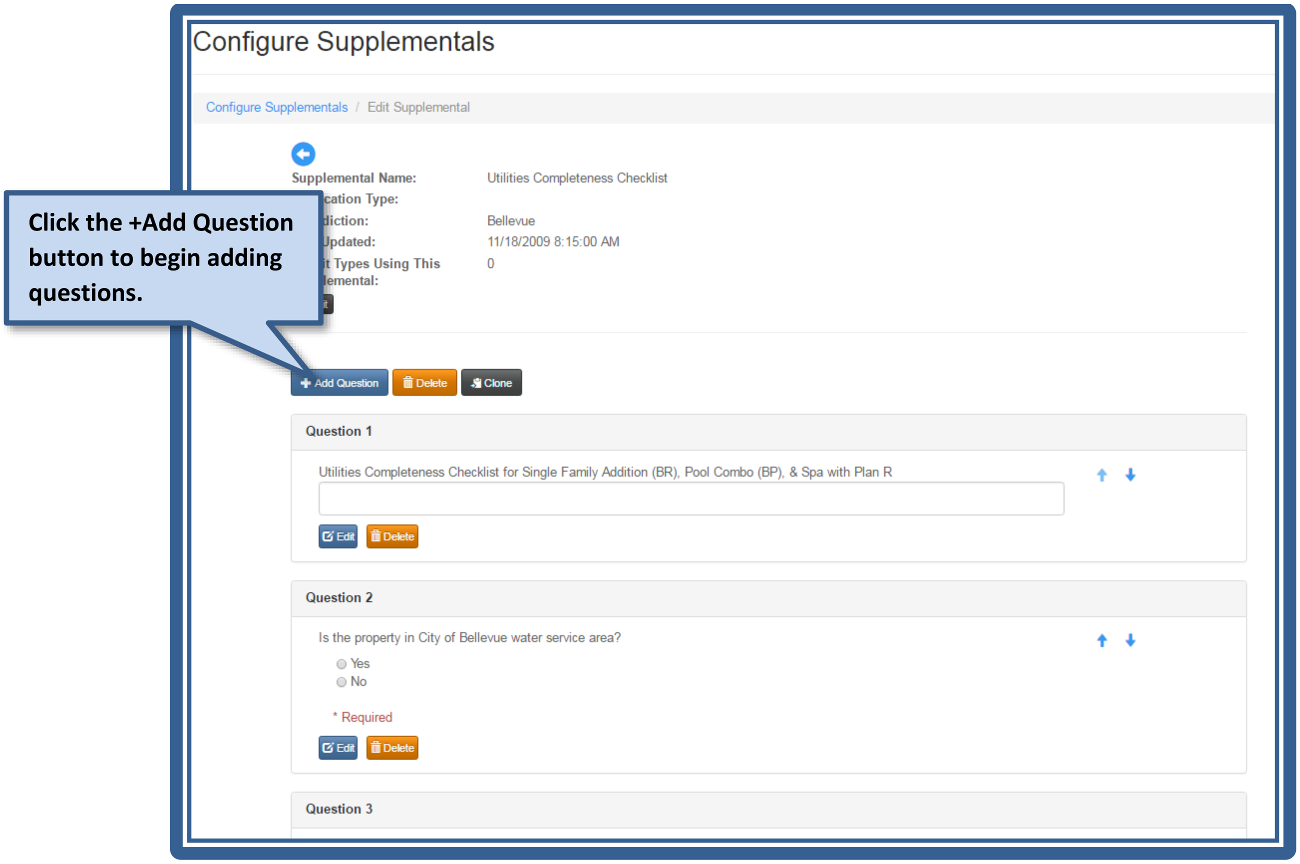
Example of a Customer Application Supplemental view

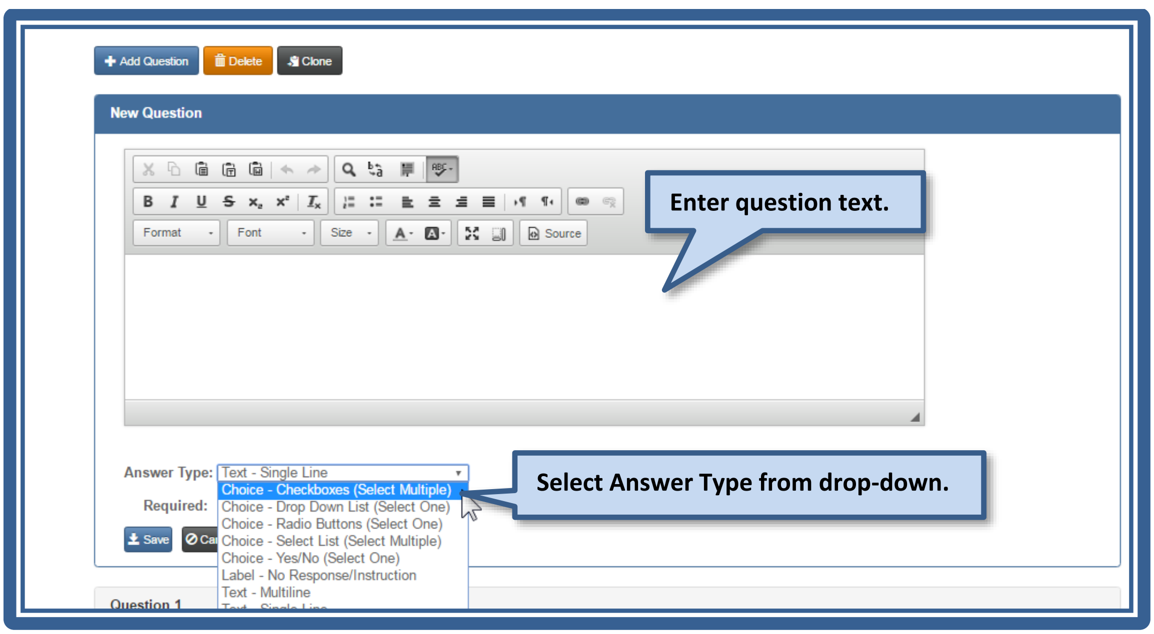


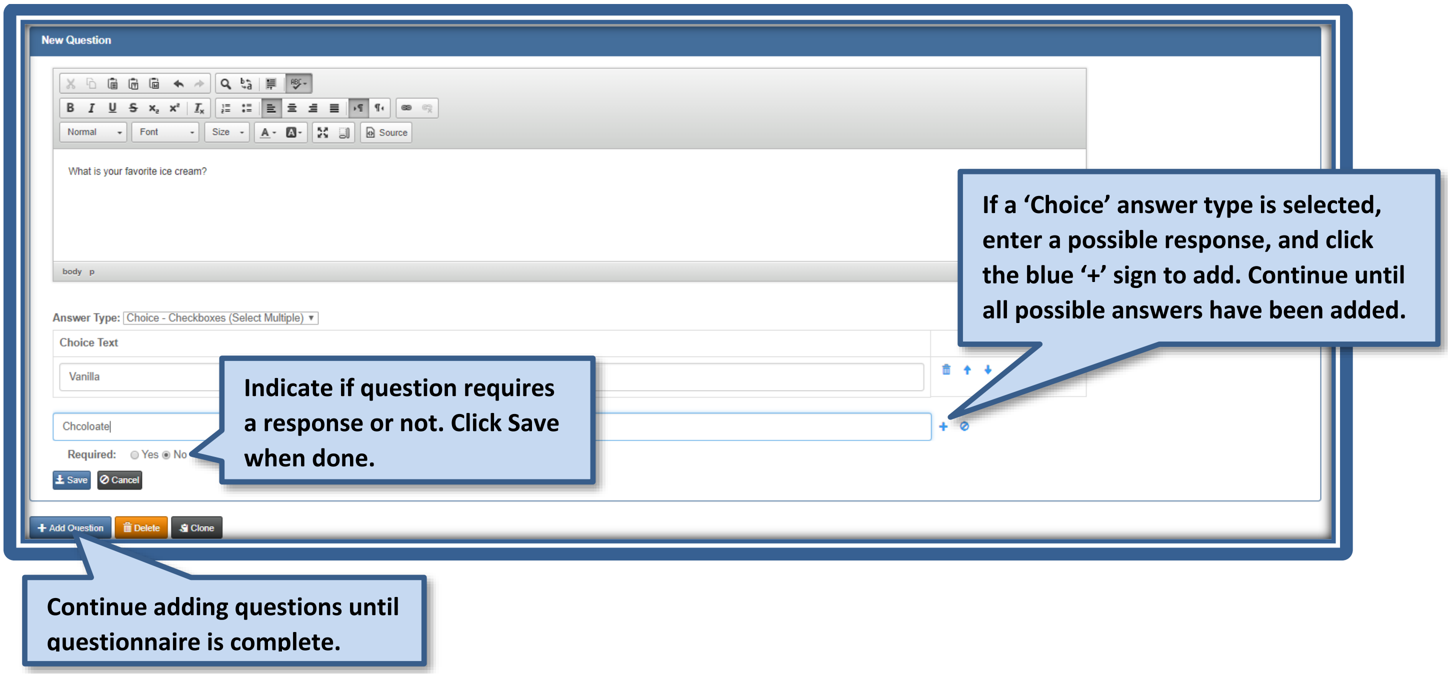

Click Manage→Supplementals to be taken to the Configure Supplementals screen.
Configure Supplementals


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

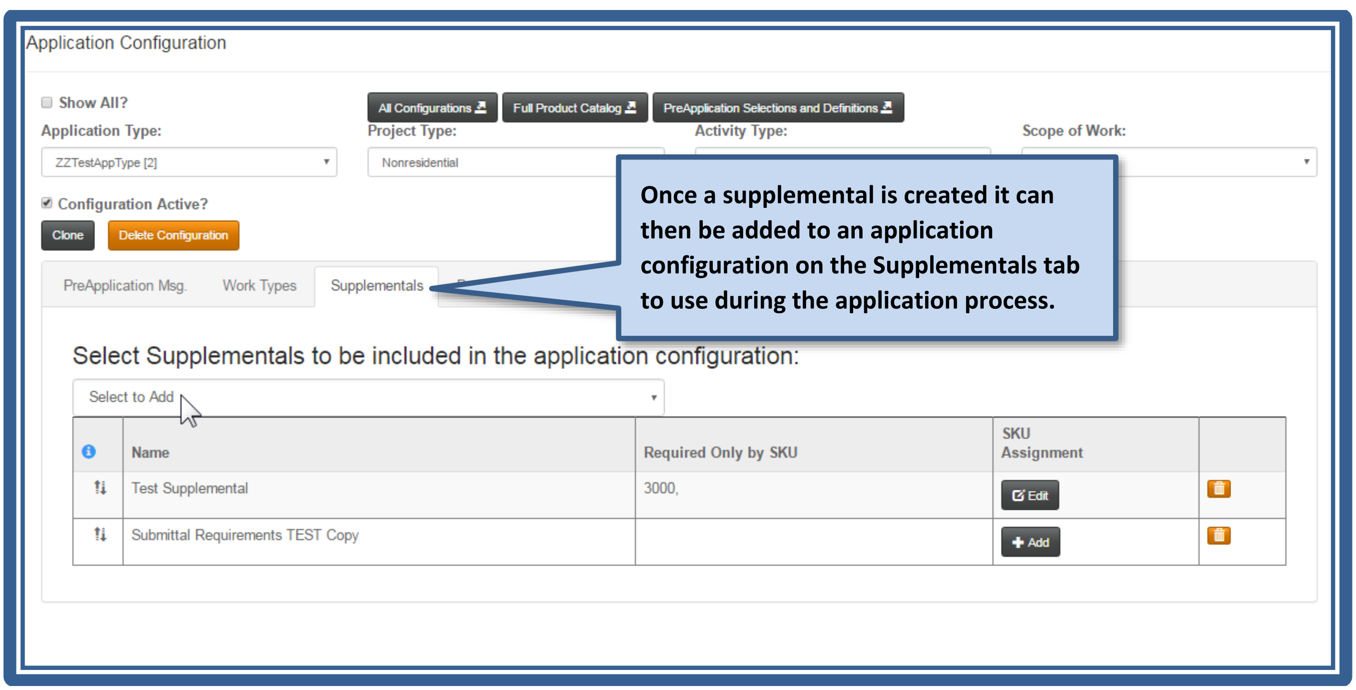

Complete the Supplemental Name field and click Save.
Configure Supplementals


Configure Supplementals
Configure Supplementals / Edit Supplemental
Supplemental Name:
Utilities Completeness Checklist
Bellevue
11/18/2009 8:15:00 AM
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
Format
Font
Size
Source
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
Required:
Save
Select Answer Type from drop-down.
Question 1



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.

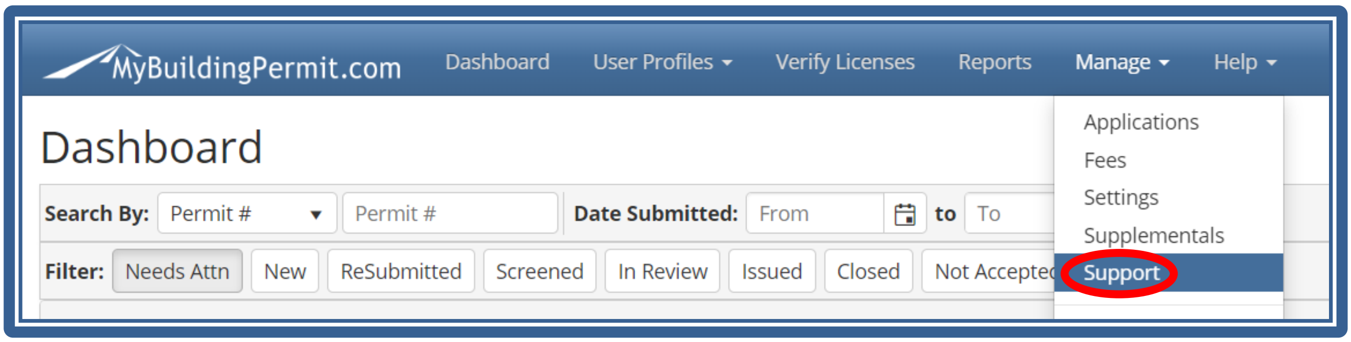


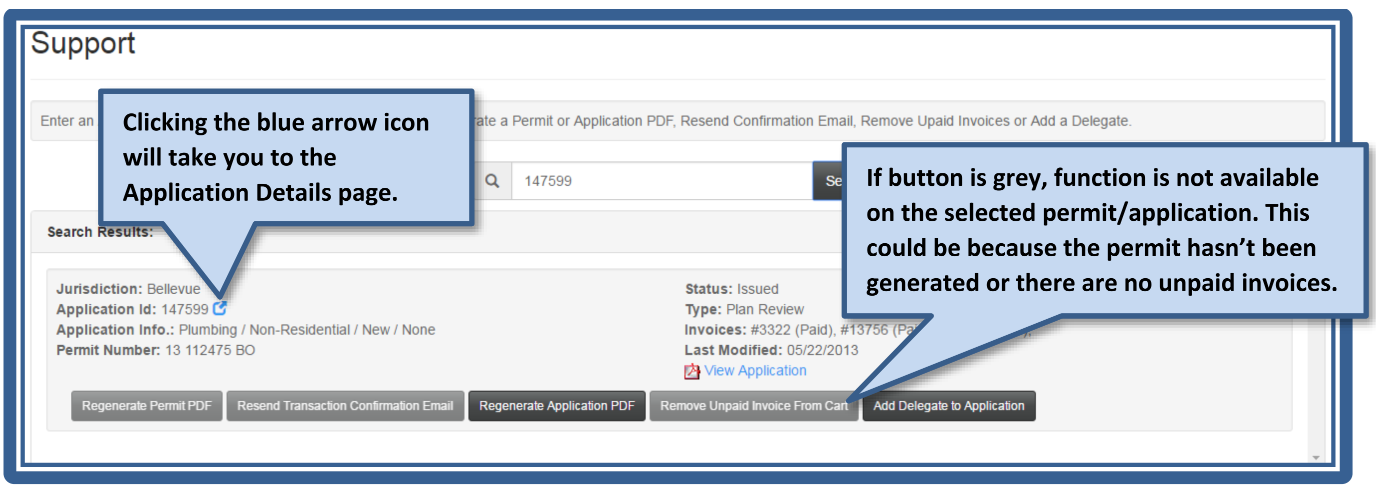
Support Menu

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.

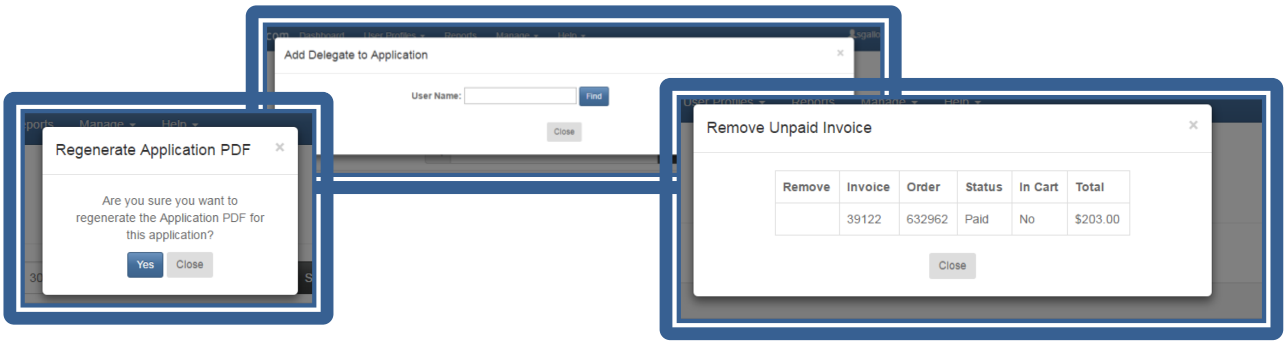
To access the Support page, navigate to **MANAGE**→Support:





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:

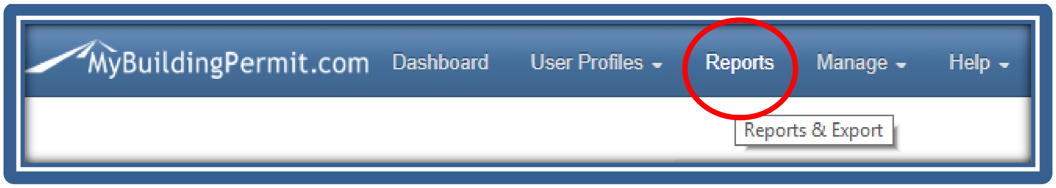
Action	Email Text
New Documents Uploaded	One or more documents have been uploaded to this application. To clear the recent activity status on the application and remove the application from the **Needs Attention** tab on the Jurisdiction Dashboard, accept or delete the document(s).
Invoice added to a 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 https://epermit.mybuildingpermit.com/Login, go to the **Jurisdiction Dashboard**, enter the Permit # in the **Quick Search Field**, then click on the **Invoice** 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 https://epermit.mybuildingpermit.com/Login, 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 https://epermit.mybuildingpermit.com/Login, 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 https://epermit.mybuildingpermit.com/Login 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 https://epermit.mybuildingpermit.com/Login 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 egovsupport@ecitygov.net.
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 **Jurisdiction Dashboard** and enter the Application ID in the **Quick Search field**. 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 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



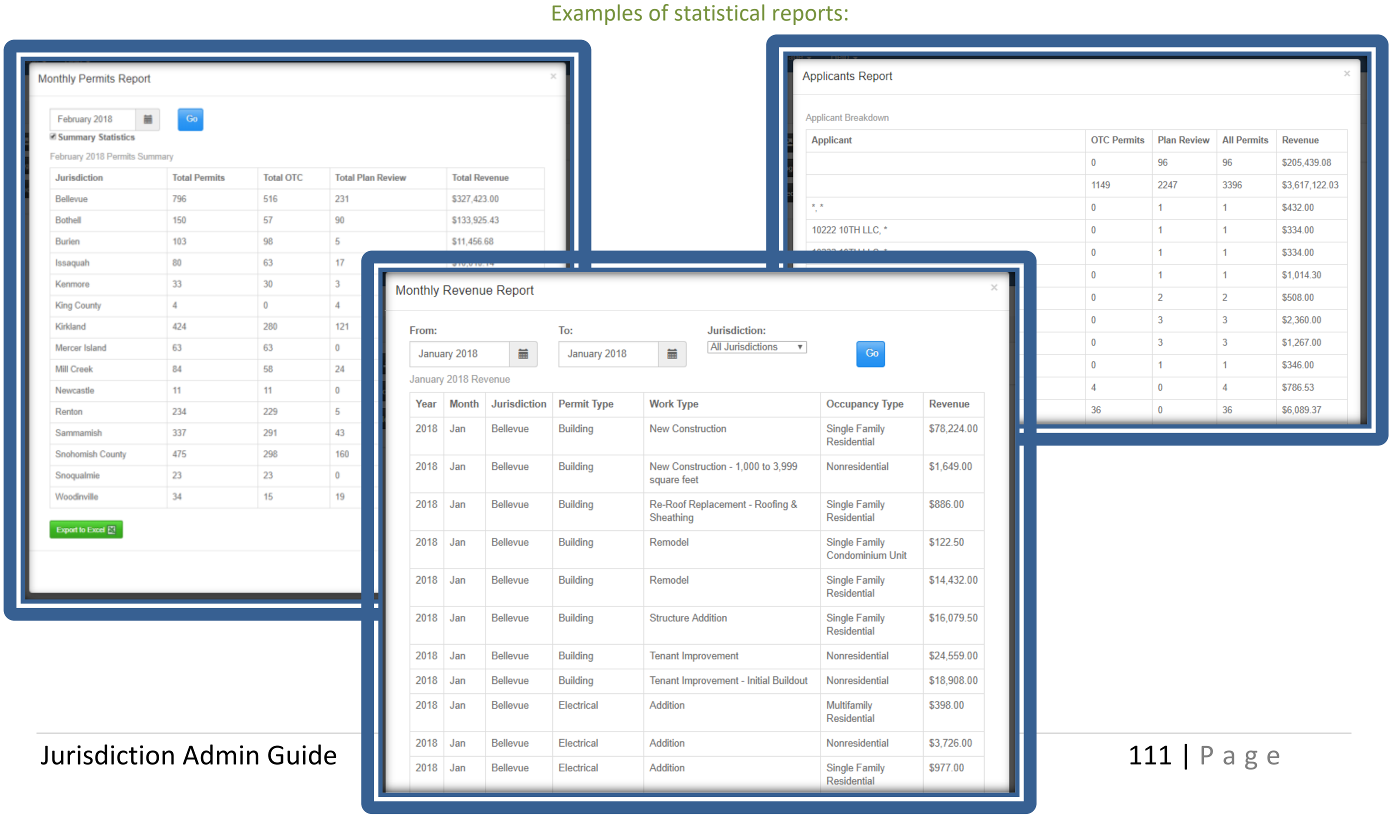
MyBuildingPermit Metrics

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:



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”:

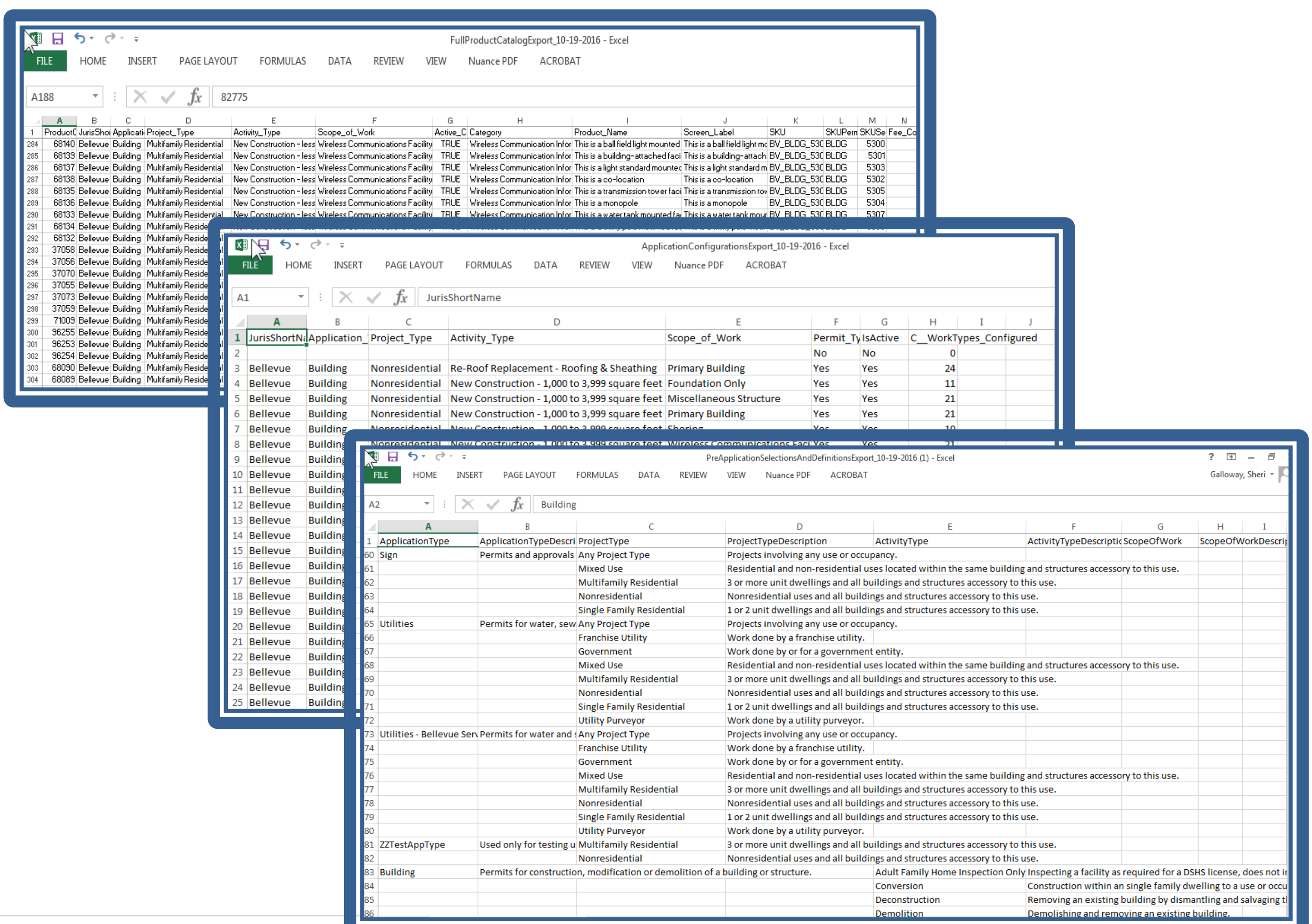
- **All Configurations** = Provides a jurisdiction specific list of all existing application configurations and indicates if the application is active and if it requires plan review. Also provides the total number of WorkType/SKUs associated with each configuration.

- **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:



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	InspectionSummaryReport_20161019.pdf
10/19/2016	InspectionDetailReport_20161019.pdf
10/18/2016	InspectionSummaryReport_20161018.pdf
10/18/2016	InspectionDetailReport_20161018.pdf
10/17/2016	InspectionSummaryReport_20161017.pdf
10/17/2016	InspectionDetailReport_20161017.pdf
10/14/2016	InspectionSummaryReport_20161014.pdf
10/14/2016	InspectionDetailReport_20161014.pdf
10/13/2016	InspectionSummaryReport_20161013.pdf

- **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.

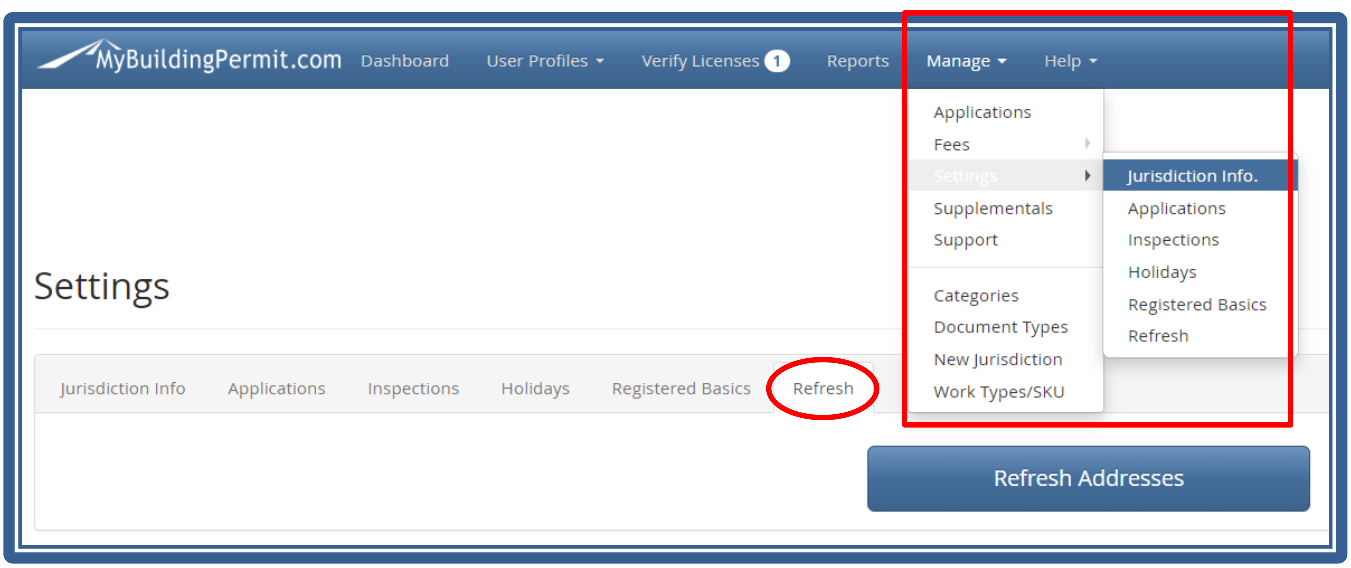
Managing Addresses

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

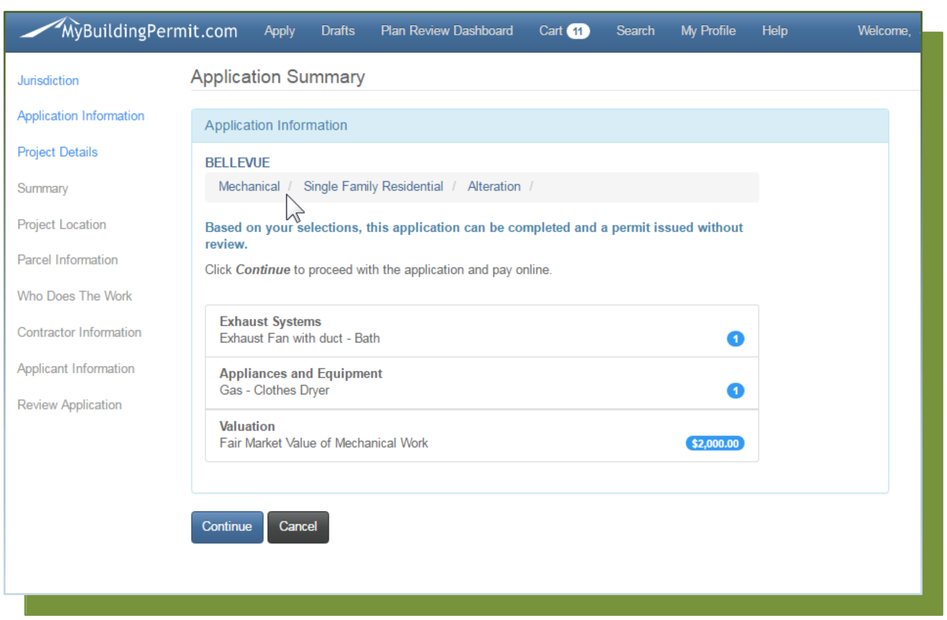
MyBuildingPermit.com sends permit application data to the member jurisdictions' permitting system (referred to as "backend permitting system") and then displays information from the backend such as status, activity, invoice data, etc.

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.

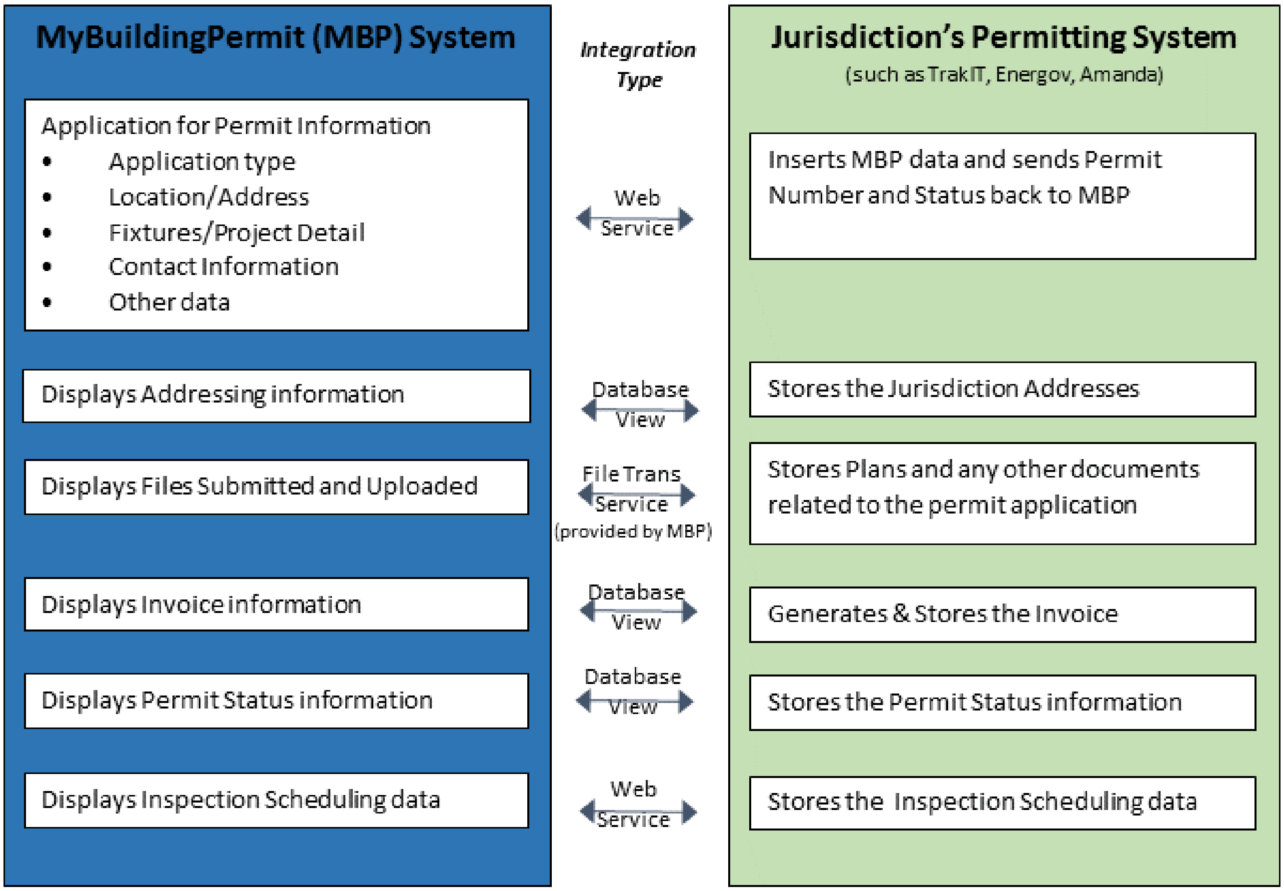
Each jurisdiction's backend permitting system is the official 'system of record' and stores all application and permit data. This information is not stored in MBP, as it only connects to your backend to display the data.

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



How Data Transfers and Displays



Integration Points

Component	Method	Notes
Permit Creation	Web Service	Web Service *created by Jurisdiction* to consume the XML output from MBP
Inspection Scheduling	Web Service	Web Service *created by Jurisdiction* to consume the XML output from MBP
File Transfer	Web Service	Web Service is *provided by MBP* – 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)

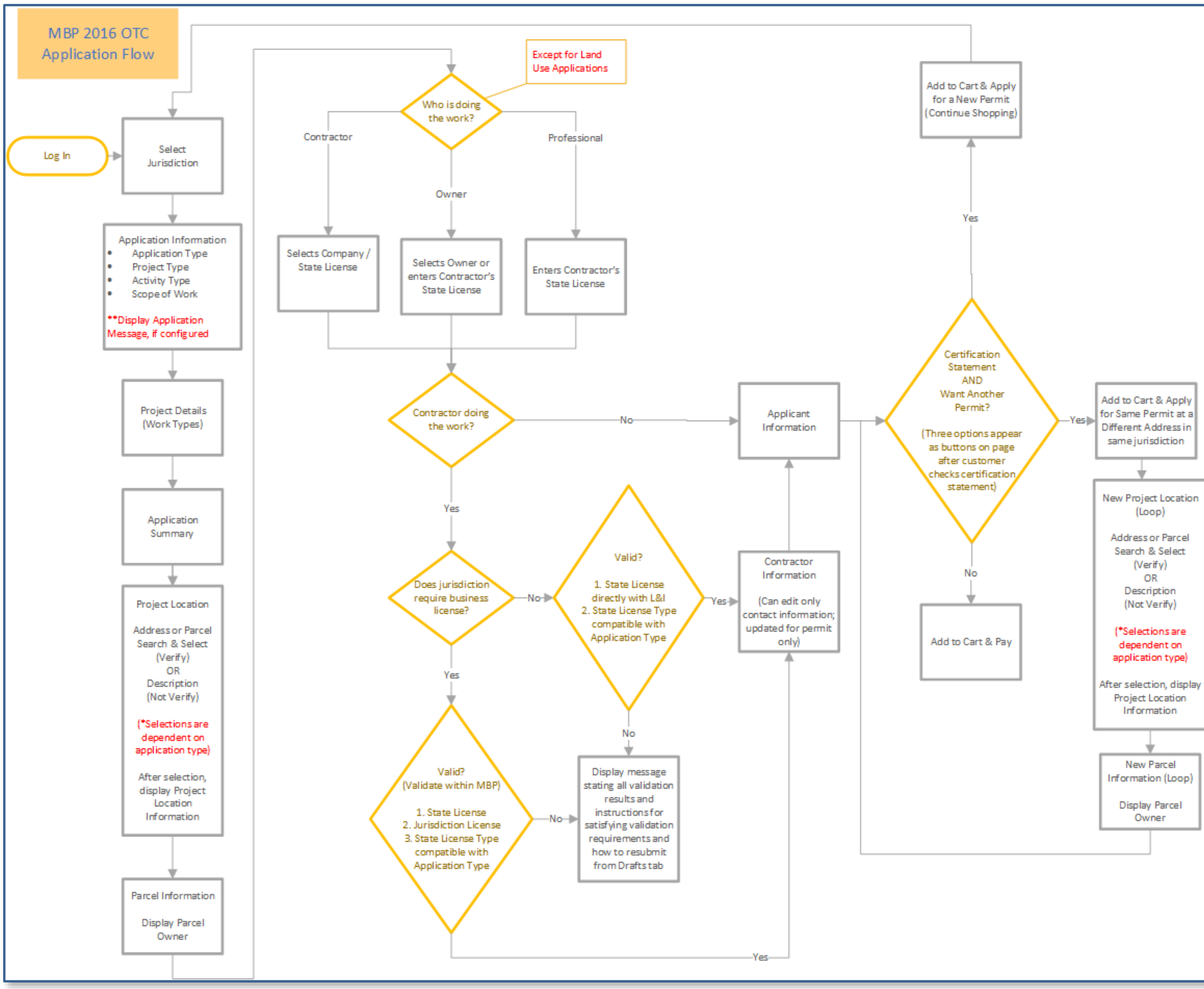
Database View – a ***subset of read-only table data*** in your backend database

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.

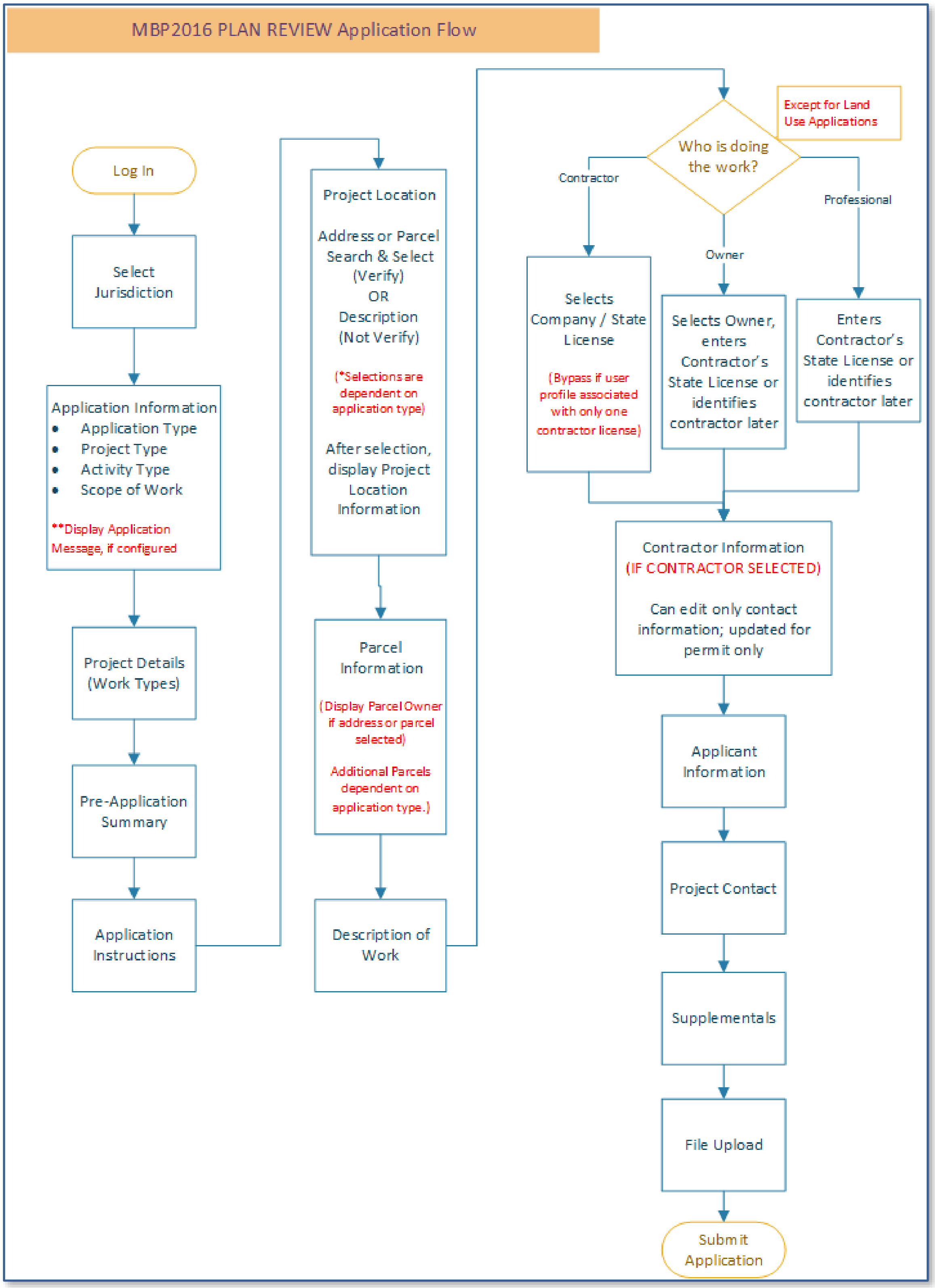
XML – the standardized ***format of the data*** that is sent from MBP to the backend permitting system via a Web Service

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
Phone: 425-452-4340

Help Documents for customers are available on MyBuildingPermit.com Help page.

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.

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 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 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 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 for assistance. He will have to run the query manually and then all future search queries should run with no issues.

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

A. Email 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 Finaled 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.

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:

a. PayPal only accepts two white spaces in the Name field on the card.
b. 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:

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

