

 **Accela** **DigEplan**  
Integrated electronic plan review

# Case study Oklahoma City

## **Oklahoma City processes up to 17,000 permits per year and was looking to create efficiency by moving to a digital submittal and review format.**

**As the COVID-19 pandemic hit, the city had to revise their electronic plan review timeline to fast track their implementation.**

With a population in excess of 650,000, Oklahoma City has expanded due to an economic boom in recent years. As stated by Scott Wise, Chief Plans Examiner at Oklahoma City: "We are listed as the fourth largest city in land mass in the contiguous USA, at around 621 square miles. This is a compilation of everything from agricultural farmland, suburban neighbourhoods, shopping malls, inner-city sports, businesses and entertainment."

Scott continued, "Our staff of 19, supported by 45 inspectors, service permits that range from skyscrapers to agricultural barns." Oklahoma City was keen to improve permitting processes and transition away from reviewing blueprints, which required applicants to submit three sets of hard copy plans.

"These were physically moved from one department to another for review, most of which was done in a linear fashion with one approval waiting on the next. We even had staff whose job was to sort, stamp and process permits before they could even begin.

**"Having worked with Accela since 2007, we wanted to implement an electronic submittal and plan review system that would work with our existing processes. We had set initial benchmarks; and for product testing and comparison DigEplan excelled."**

"We had a timeline in place for implementation... and then COVID-19 hit. This meant that we needed a new approach, virtually overnight," explained Scott. "We had no good way to service our normal number of 35,000 walk-in citizens. A few hard copies of plans were taken at the door, but it was getting to be absurd."

### **Managing plan review in a pandemic**

"Our IT staff rushed into action, creating electronic email drop boxes for new permits, which was temporary at best and very limited in use and size. And then the situation became more complex.

"The city started to feel the negative effects of COVID-19. City budget was slashed, with our department alone losing 25% of review staff. All the while the low federal interest rates and tax cuts lead to in upwards of 40% increase in residential permitting and 23% in commercial permits, compared to the same period last year," said Scott.

Managing concern for staff welfare, alongside the increased workload was a top priority for Oklahoma City. "Almost half of our staff members began working from home for the first time during the shutdown yet were still required to come in once a week to take home plans to review. All staff had been working at capacity, but it became clear that extensive changes had to be made," stated Scott.

### Implementing digital plan review

Having made the decision to speed up the timeline to introduce DigEplan for plan review integrated to the Accela system, Oklahoma City worked to implement the technology with TruePoint Solutions as the Accela and DigEplan implementation partner.

"TruePoint Solutions was there to guide us throughout the whole process and their experience working with other municipalities played a key role. They were familiar in problems and setbacks, and well-rehearsed in both DigEplan and Accela.

"We only lost one week in transition time due to the pandemic and even conducted socially distanced onsite training," added Scott.

The city overcame a number of operational challenges in their move to electronic plan review. "Coordination of staff during a pandemic was difficult and other departments had only recently started using Accela, so the learning curve for them was much greater," explained Scott.

Another area of focus was the applicant experience. "We had to consider how a customer would upload plans for submittal, which required changes to our online site; creating user profile accounts, registration, payment processes, and how to use Citizen Access to create the permit record.



"After the review, how would a customer receive questions and comments, then how could they upload these revisions to Accela? Would staff receive automatic notifications when revisions were uploaded? All these processes needed to be addressed," explained Scott.

One of the biggest concerns for the city was guiding citizens through the process. "We initially wanted to create a public outreach campaign, which sought to work together with the local home builder associations to inform the public of the change. The COVID-19 shutdown limited our ability to proceed with this initiative and forced us to introduce electronic plan review much quicker."

Scott went on to explain that: "customers weren't used to being turned away at our door and many didn't have computers at home or the experience to use them. Some applicants didn't read or speak English as a first language, and others didn't understand the industry terms. Our telephone hotline was overwhelmed; we weren't expecting to answer so many calls from citizens trying to do simple things like submitting online.

"The larger contractors loved the experience; saving time, removing the need to travel and costs from creating duplicate prints. But homeowners and families who just wanted to build a shed were sometimes quite confused by the process," said Scott.



## Efficiency and flexibility

To ensure the adoption of the new processes were as smooth as possible, the city tried to think like their customers. "We had friends and family, who were not used to industry terms and processes, work through the plan submittal. This enabled us to create tutorials and support where our citizens needed it most. Even staff that were reluctant to change soon found DigEplan to be intuitive and easy-to-use.

"If your staff has used desktop PDF mark-up tools, they will know how to use the same basic functions. Our staff learned very quickly, which enabled us to swiftly provide the plan review service to citizens without losing much time," stated Scott.

**"DigEplan improves efficiency. It has reduced our document routing time between departments, removing the need to carry large burdensome sets of physical copies of the plans back and forth from office to office. Now all reviews can be done simultaneously, with all plans kept in one centralized location – attached in Accela to the permit."**

Savings are also realized by not requiring paper, for both the city and its customers. "The storerooms to house thousands of plans and documents are no longer necessary and customers appreciate the cost savings in not having to print out three sets of plans. They can now simply upload the document and print off one set to keep on the job site once stamped as approved.

By using technology, the city is saving time and providing customers with real time feedback so they can start their projects quicker. "The stamping function saves us from physically stamping hundreds of pages; we can now do it with a simple click of the mouse. And revisions are made in real time, being sent back and forth to the customer swiftly.

"DigEplan has provided a lot of flexibility to support working remotely, not only during COVID-19 but in the future," said Scott. "We could stagger office working hours, where in the past this wouldn't have been possible. During the pandemic without DigEplan, staff would have been sitting at home with nothing to do."



"DigEplan by itself is easy and intuitive software that can help a department recognize immediate increased efficiencies in its plan review processes. It should be noted, DigEplan focuses primarily on the actual act of plan review and the associated communication with the customer. The rest of the existing process needs to be reviewed and may need changes to make the best use of the system with DigEplan," added Scott.

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### About Accela

Accela provides market-leading solutions that empower state and local governments to build thriving communities, grow businesses and protect citizens. Powered by Microsoft Azure, Accela's open and flexible technology helps agencies address specific needs today, while ensuring they are prepared for any emerging or complex challenges in the future. Accela is headquartered in San Ramon, California, with additional offices around the world.

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