One-Stop Arlington Customer Advisory Working Group

Meeting Summary
September 25, 2018

WG member attendees: Jeff Adler, David Guillaudeu, Kenneth Hewitt, Kelley Rawson, Matthew Roberts, Karen White, Christopher Young
County staff attendees: Sadé Bowers, Allison Cook, Hakim Mourad, Lavar Youmans

Comments/Questions from members are summarized below:

What worked well and what could be improved from the ePlan launch?

- The launch went as well as expected. The first few submissions were easy. As more customers began to use the new system problems were encountered. A couple of months after ePlan was launched customers began to have issues with getting support. In addition, as customers started the revisions process some additional issues appeared in the system.
- The process was easy to go from paper submissions to ePlan. The process was straightforward and Comfortable for the customer.
- In Arlington county ePlan is much easier than other jurisdictions.
- Issue encountered: during submission, plans would not be accepted because of AutoCAD view windows or Adobe PDF security settings
- Communication requires improvement. The designated 3x3 open box for approval stamps was not communicated to customers once this change went into effect. Customers had their plans rejected. No formal communication about this requirement was made to customers.
- Customers would like to have more knowledge and information about tips regarding the application such as help links, example of the appropriate naming conventions, etc.
- The County should clearly identify who the customer needs to call when they need technical support. Currently customers must call main permitting office number then get routed to technical support. Customers would like to call technical support directly.
- Having the option to obtain fee amount due ahead of time would be very convenient for customers. Since large sums of money require a check, lead processing time would be helpful.

What worked well and what could be improved from the online payment launch?

- The process was straight forward. Not any different than other online purchase platforms. Very simple testing process.
- Customer appreciate that the email link sends them directly to the payment portal.
- Customers like having the option for e-check, because credit cards have purchase limits.
- In the portal, customers would like to see the remaining balance for a permit.
- Active revisions fees don't show up in the portal. Customers must go through the inspections site, and customers can only see the balance there for ISD. Zoning and DES don't post their fee.
- The online payment portal doesn't break down the balance for customers. It would be helpful if this was shown so it could be allocated to different areas and coded to the right account for their business. Currently the breakdown is only shown on the receipt after payment. In some cases, customers call and ask for the breakdown or to be emailed a screen shot.

What resources do you use for ePlan questions or help? What do you wish was available?

- Customers will either email or call Ade for technical support. In other cases, they sometimes email staff directly. Customers will search the website on occasion before making a phone call.
- A feature that customers wish was available in ePlan would be the option to request to be added to the project. Currently, applicants can add people to a project, but there is no way for others to request to be added so they have to wait for the applicant to take action.

- On the website, customers would like to be able to sign up to be added to an email distribution list to be notified about what changes have been made to the process or system. A communication similar to the letter to industry used by Fairfax County. It will be helpful to be aware of changes a head of time like updates for permit fee increases or code changes.
- Customers would like to have an online forum for the permitting system. A place where they leave comments and questions. The forum would be very similar to other online technical discussion groups. This would also benefit the County to see how frequently certain questions are being asked and the County can track views of the forum.
- Open houses are a good idea, but they are not frequent enough. It was also said that based on their work load, they do not have time for dedicated training onsite at the County office.
- Customers expressed interest in short videos and achieving any webinars or other online training.
- Webinars are a good idea, but the webinars need to be specific topics – such as how to apply for a new residential house or a Right of Way permit.
- For technical troubleshooting customers are open to the idea of Skype and GoToMeeting or other such tools to be used to assist in resolving their issue.

What would improve the consistency and clarity of help and support?
- Workflow map that shows customers an all-encompassing process of steps for permits. Including the appropriate staff members at each stage of the process. The map should offer help each step of the way. The map could have a collapsible list of steps. If possible, customers would also like the option to right click on the map and see additional information in pop-ups such as the code, requirements etc.
- ADA compliance for the website and system.
- A chart that outlines the overview of the permitting process in the County for new customers.
- Customers would like to have more information published on the website for them to view. This information needs to be consistent and accountable across all agencies.
- Customers suggest County staff undergo training to make sure consistent information is provided to customers.
- Customers would like to have a permitting subject matter expert. This person should be able to answer all permitting process questions within reason. An example given was the "planner of the day" that Fairfax County has.

What are the most effective styles of training we can offer?
- Some customers feel that if the system is intuitive enough then training may not be needed.
- Training that is deemed "just in time training". Training in sections of the system where there could be help links to videos that shows you that section of the application process only.
- Customers stated they are not going to sit down for 30 minutes or more of training. Based on their work load they do not have time for dedicated training onsite at the County office.
- It is very unlikely that customers are going to come to an onsite workshop/class. They are more likely to go into the system and just try it. Customers will seek help along the way when needed.
- A library of YouTube how to videos is what they would want most in regards to learning how to use the system. Videos should be short and focus on one area. Customers are not interested in comprehensive videos
- Customers training preference is for e-learning and videos
- Customers suggest that trainings be geared specifically towards certain types of projects. This method would be very helpful for them.
- If the County decides to host webinars customers want to make sure the County archives the sessions and post them to be viewed later.
- Customers offered to help the County develop tips and tricks documentation for customers.

How can we make the testing process an effective use of your time?
- Allowing customers to use previously submitted projects would be very helpful for testing. It would be very beneficial to see how the new system operates since customers will already know the comments,

revisions required, etc. The County would assign a specific reviewer to look for the test submission from the customer and this will allow interactive testing in real time using old projects.

- Another option would be to allow customers to submit a real project concurrently in the new systems and in ePlan to see how the new system behaves in comparison with the existing system. The scenario will also offer the opportunity to train internal staff as well.
- Some customers prefer testing on their own time using their computer. They do not want to be scheduled for a session.