2025

JURISDICTION ADMINISTRATOR USER'S GUIDE

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

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Contents

MBP Resources and Links

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**

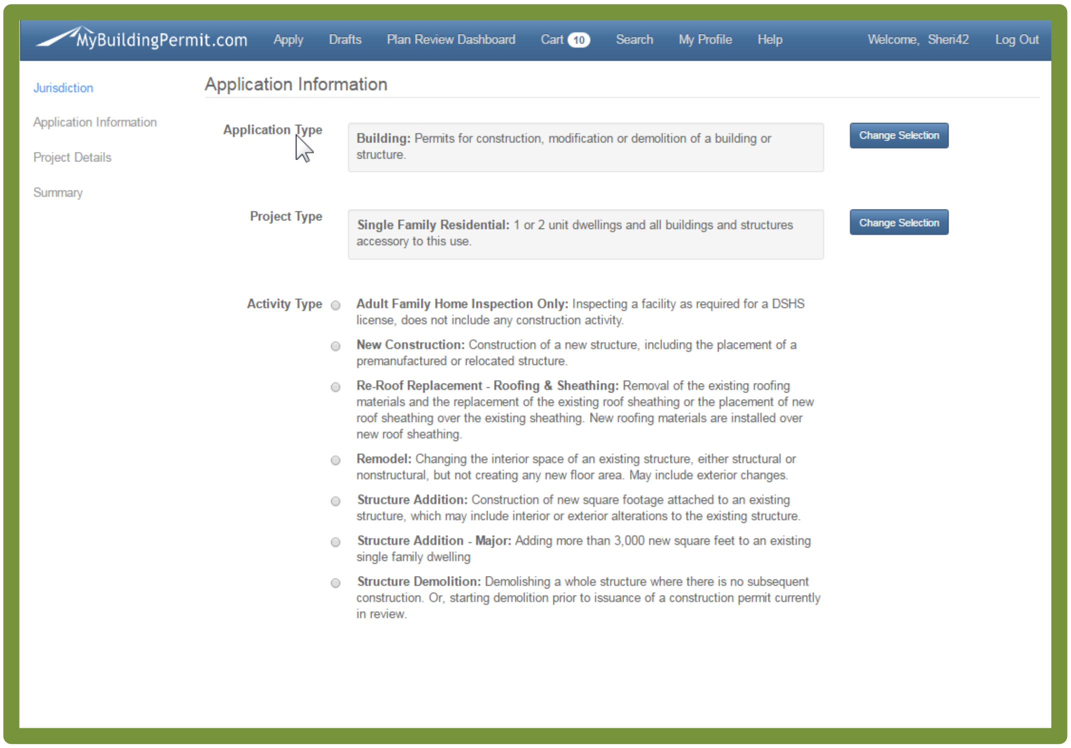
MBP Service Delivery Team

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:

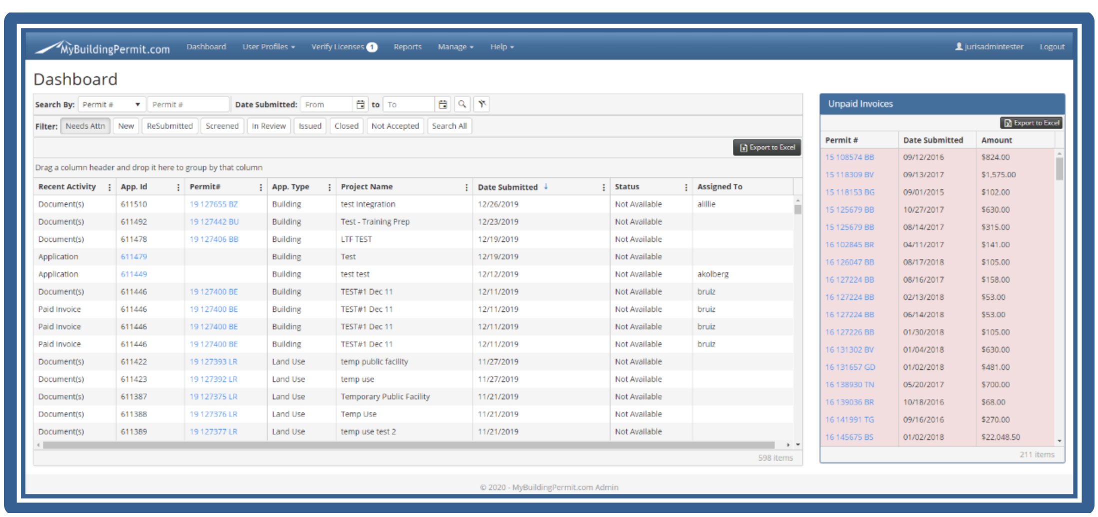
Role	Name	Email
Product Manager	Don Khuong	dkhuong@bellevuewa.gov
Senior Business Analyst; Subject Matter Expert	Michele Miller	mrmiller@bellevuewa.gov
Business Analyst	Sarah Asher	sasher@bellevuewa.gov
MBP Lead Developer	Roopa Lokanath	rlokanath@bellevuewa.gov
Developer	John Conrow	jconrow@bellevuewa.gov
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.

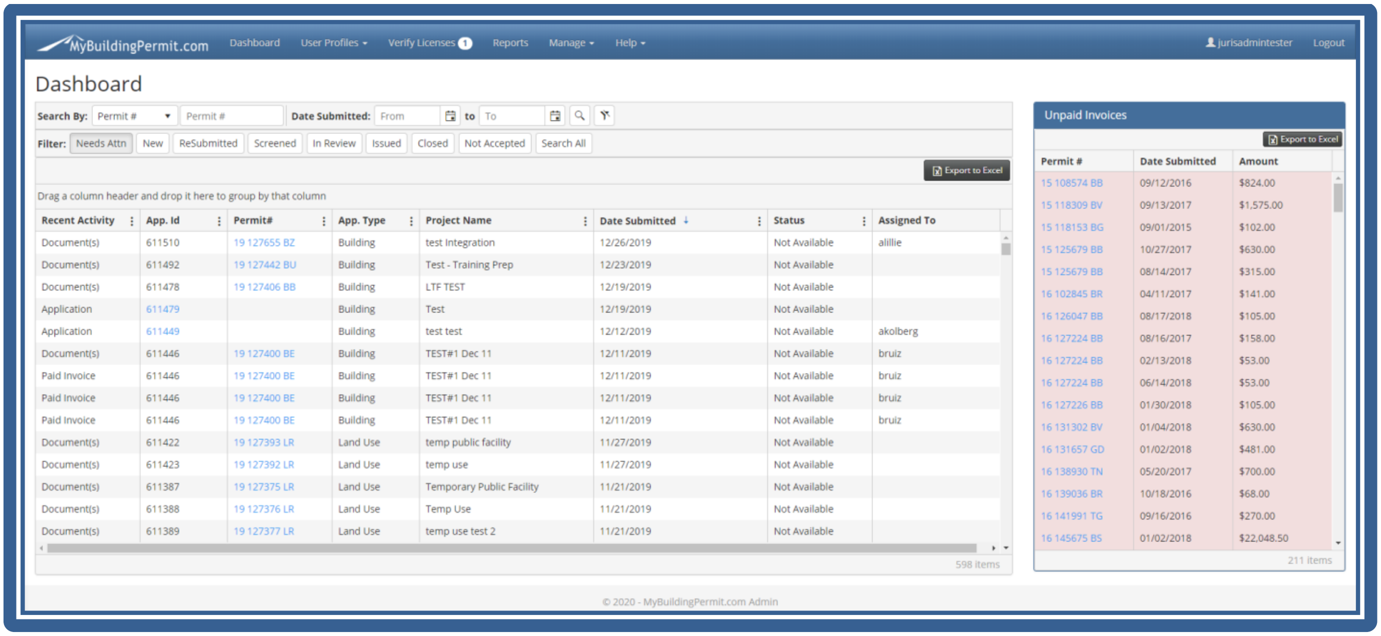


Pictures with a **blue border** are ***jurisdiction administrative*** screenshots.



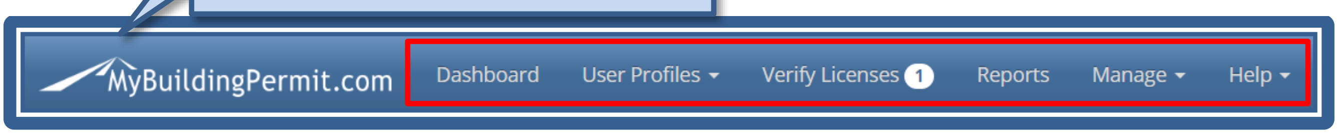
Jurisdiction Administration Home Page

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.



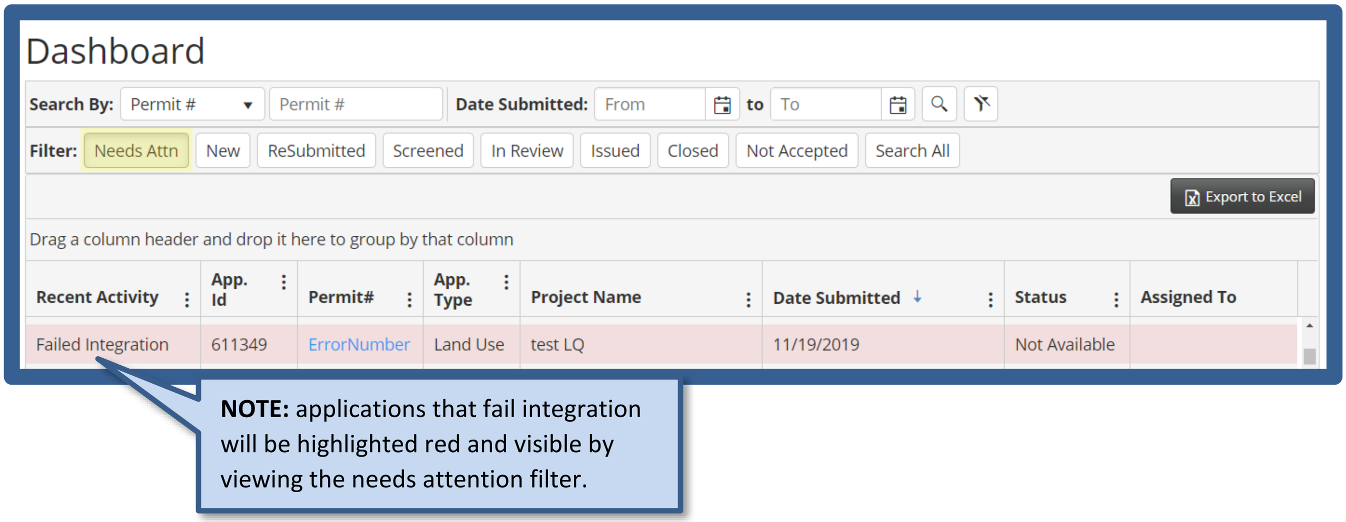
The **Menu bar** gives jurisdictions the ability to administer MBP through several functions:

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



Administrative Functions

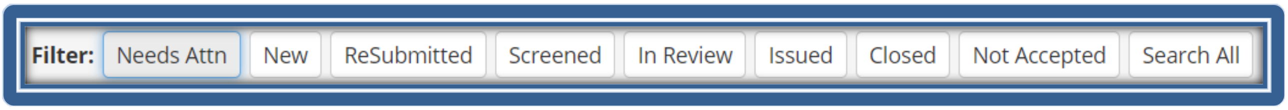
Jurisdiction Dashboard – The enhanced Search and Dashboard filters allow jurisdictions to review and manage plan review applications in the following application statuses: Needs Attention, New, ReSubmitted, Screened, In Review, Issued, Closed, and Not Accepted. “Failed” is no longer a status. Jurisdictions 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 accepts or rejects 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
The 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 the 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.

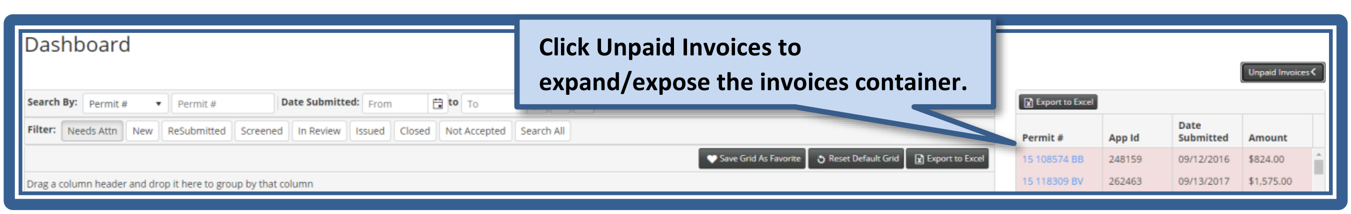
Closed
The project has been completed in accordance with the approved plans and/or associated condition, the applicant cancelled the project, or the project was not resubmitted after being rejected. Revisions cannot be submitted. The jurisdiction manually assigns this status on the Jurisdiction Dashboard.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

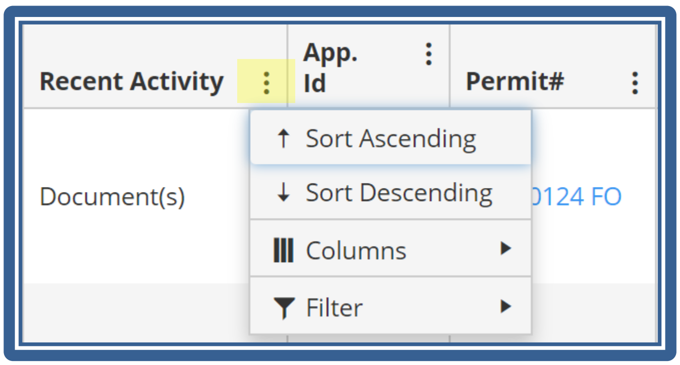
You can choose to view or hide Unpaid Invoices in a separate pane by clicking Unpaid Invoices on the Jurisdiction Dashboard. This allows you to choose the display of your Jurisdiction Dashboard to suit your workflow.

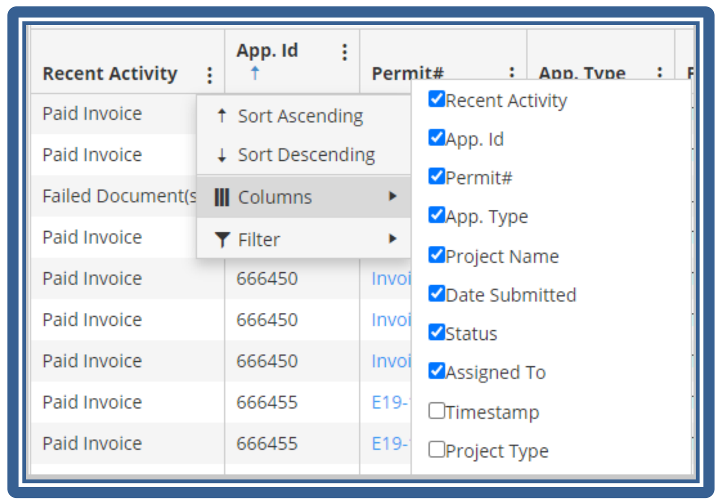


Jurisdiction Dashboard Columns

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) has 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 #and 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.

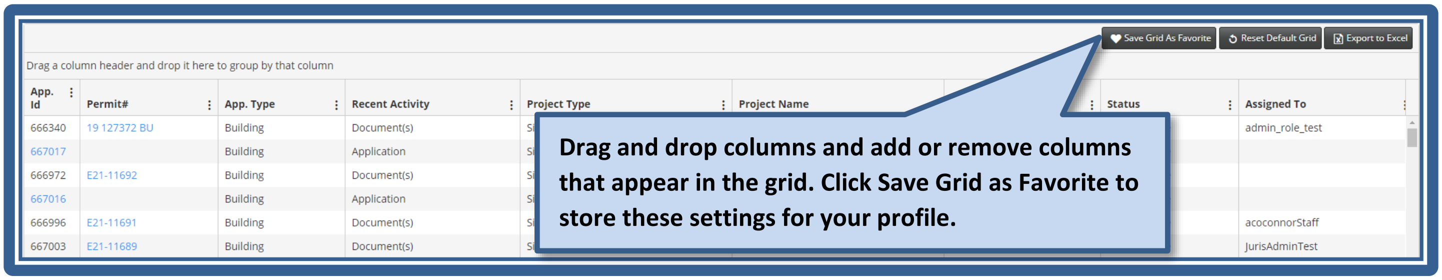
Jurisdiction Status

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.

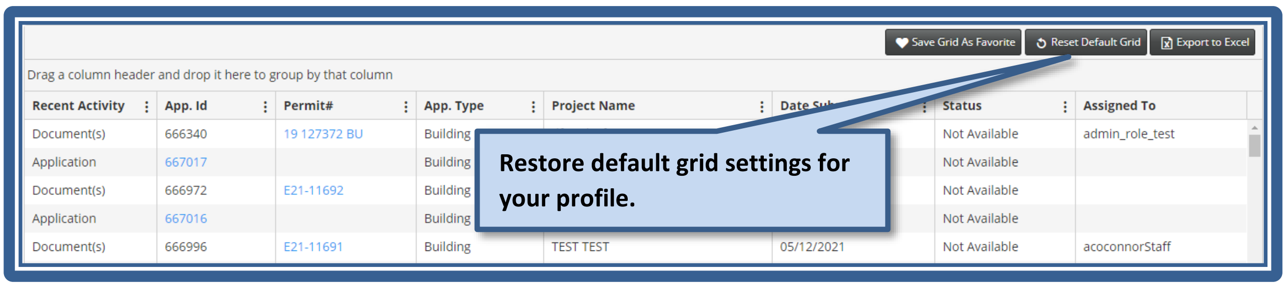
Personalizing Jurisdiction Dashboard Grid Settings

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

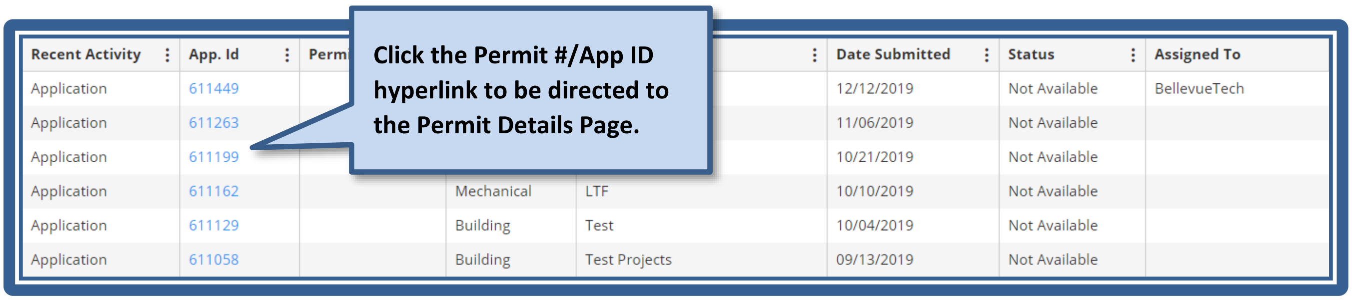


Note: Once saved, your saved Jurisdiction Dashboard Grid settings will be preserved for your profile and are specific to the browser. If you work with more than one browser (for example, both Edge and Chrome), you must set your preferred grid layout for each browser.

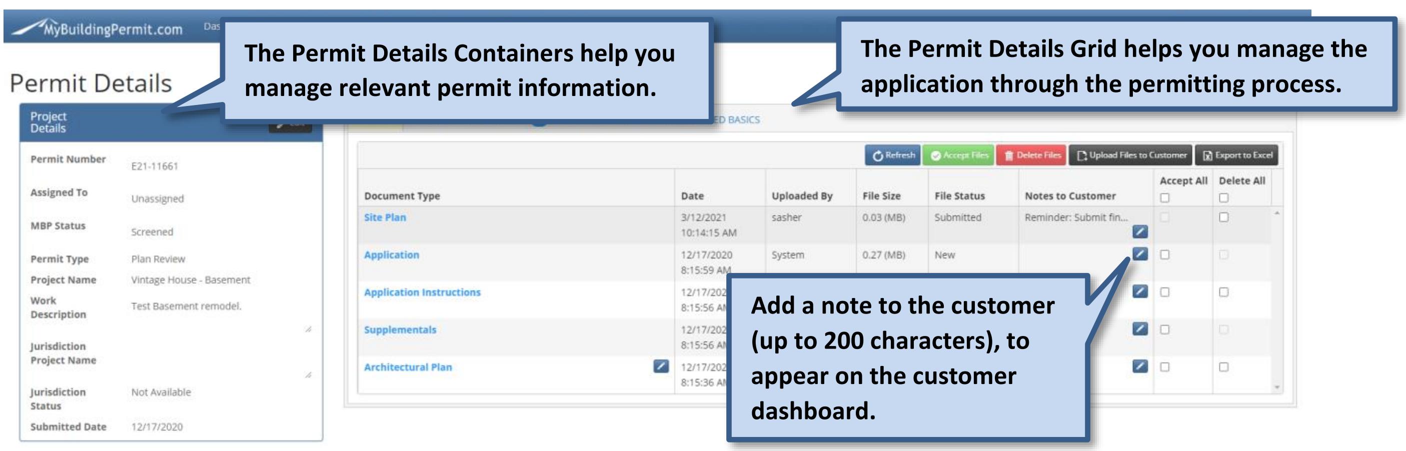
Clearing your browser's cookies will remove your saved grid and restore the default grid view. Update your browser settings to clear cookies less frequently if this is an issue on the MBP Admin Dashboard page. Otherwise, you'll configure your grid columns and resave this arrangement as a favorite after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

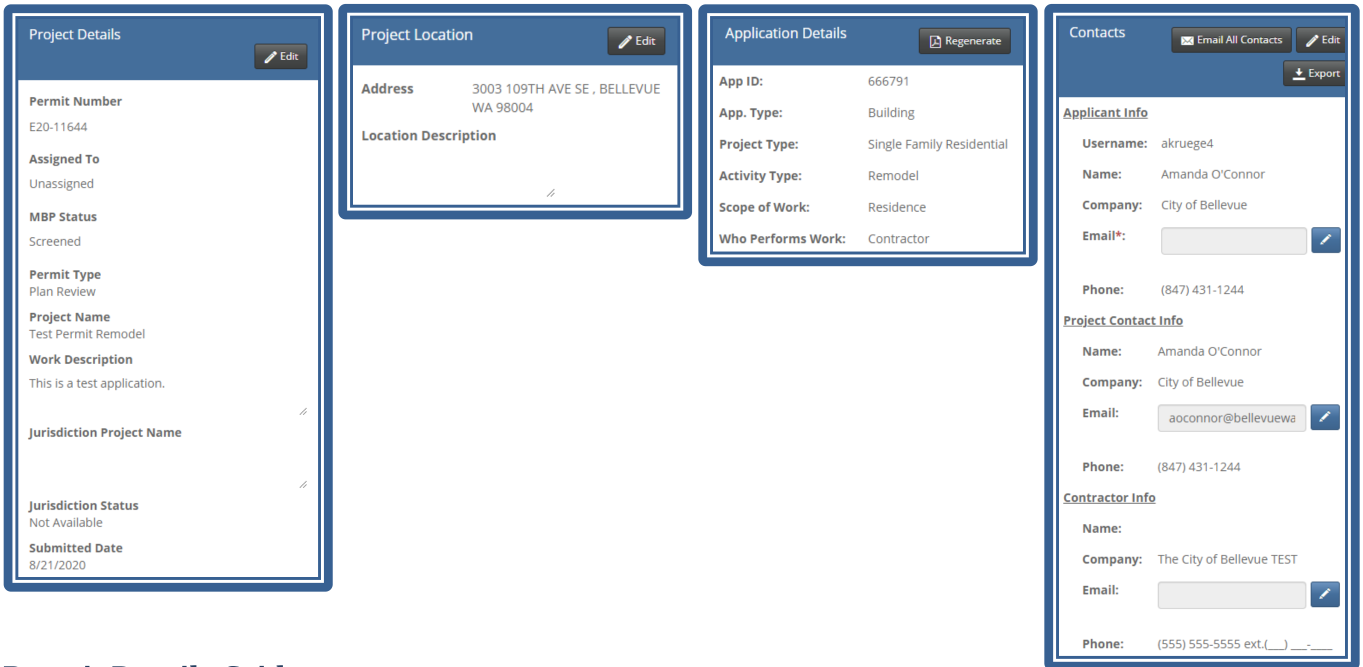


The Permit Details page contains detailed information for this permit:



Permit Details Containers

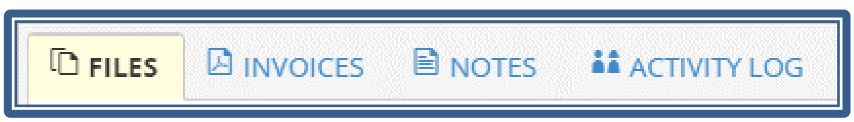
Admin, Staff, and Reviewers can view and manage **Project Details**, **Project Location**, **Application Details**, and Project **Contacts** information in the Permit Details Containers.



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**.



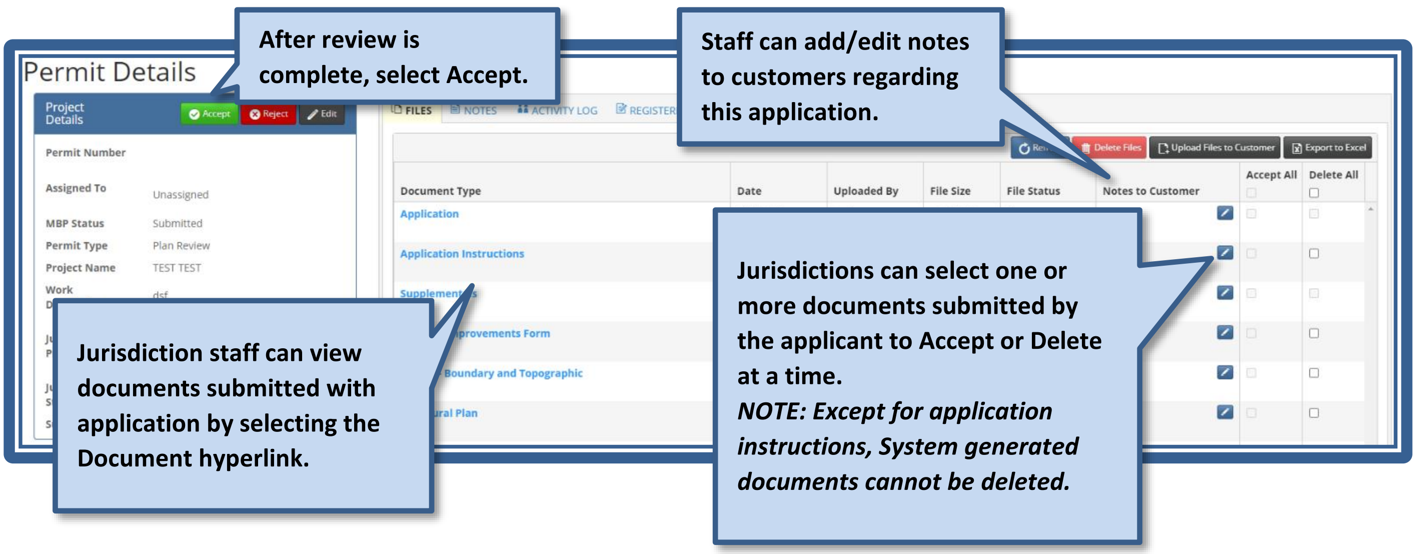
- The FILES tab (Screened, In Review, Issued, or Closed status only), contains a PDF of the application, application instructions, uploaded files, and buttons to view, accept, or delete files (system generated files cannot be deleted, there is no delete button for these files).
- The INVOICES tab (Screened,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

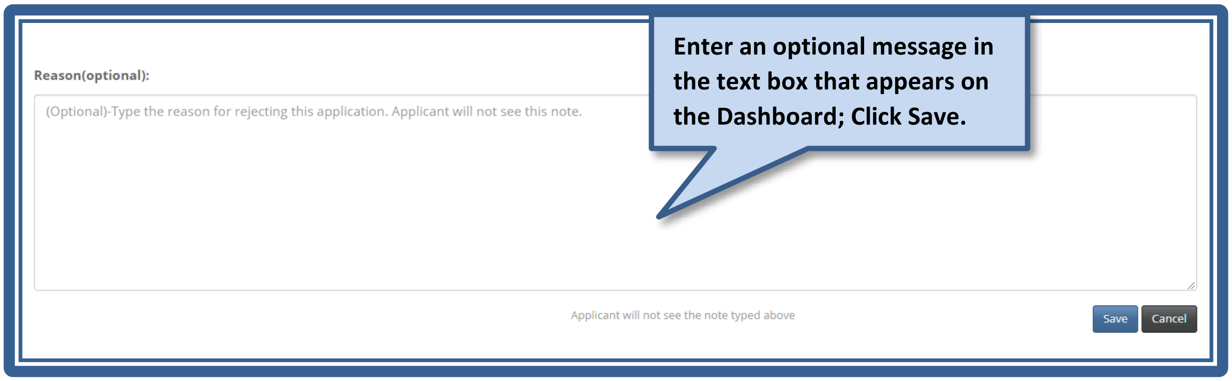


4. The status of the application changes to ***In Process***. The system will process the application and assign a permit number.
5. When the processing is complete, the status of the application is changed to ***Screened*** and the permit can be viewed in the ***Screened*** filter results. **NOTE:**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

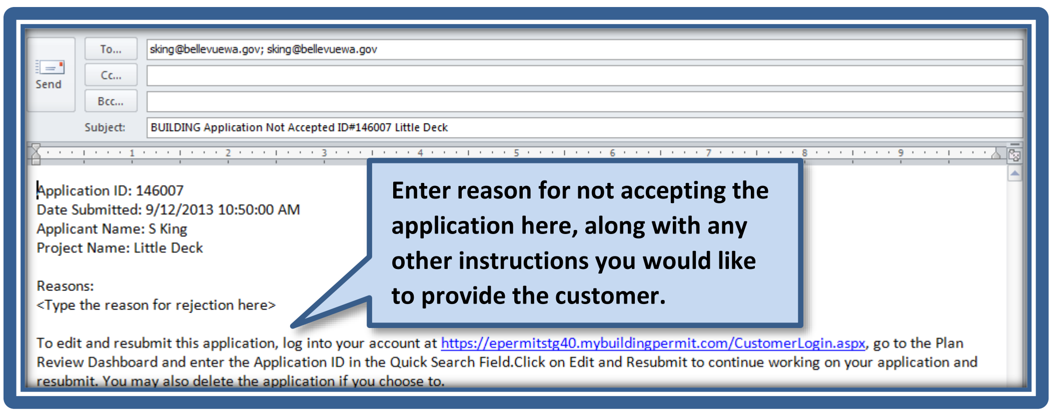
Rejecting an Application

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

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.

Resending Transaction Details (for OTC Initial Payments only)

For OTC permits only, you can regenerate the original Verisign email that was sent when payment was completed for the initial OTC transaction. **NOTE:** you cannot regenerate/resend transaction details for any other permit type. **NOTE*: You*** cannot resend transaction details for PR permits or for invoices added to OTC permits.

Accepting Documents

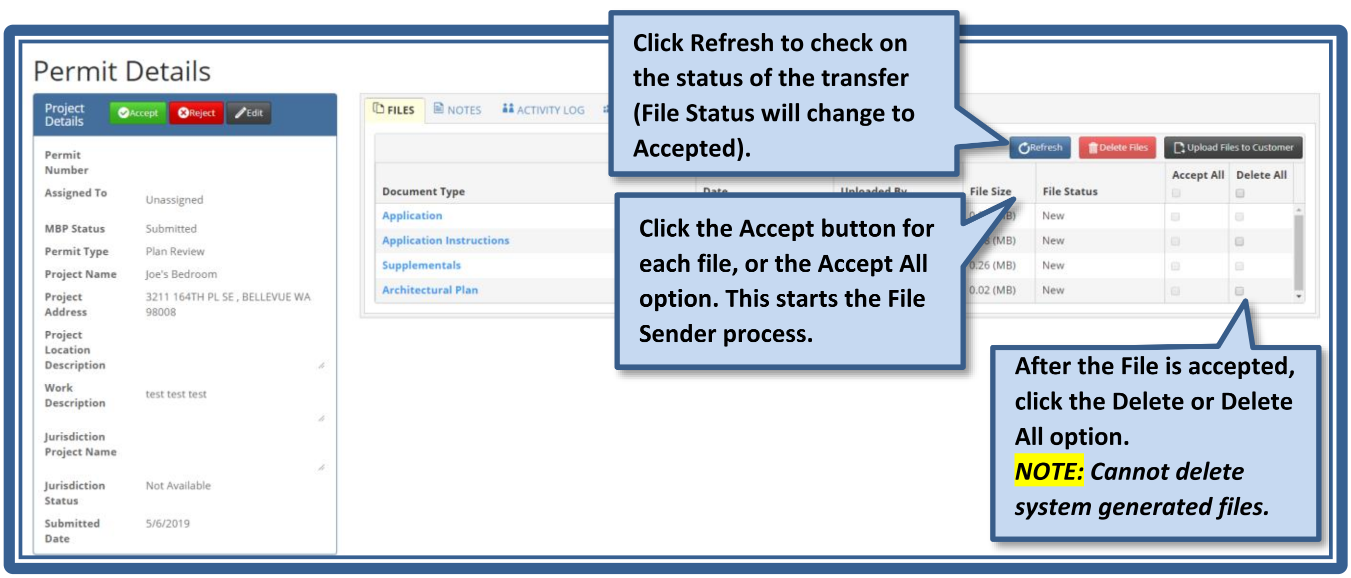
Once the application is accepted and a permit number is assigned, documents can be accepted. The permit displays in the ***Needs Attention*** filter results with a Recent Activity of *Document(s)* until the documents are accepted by the jurisdiction.

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.

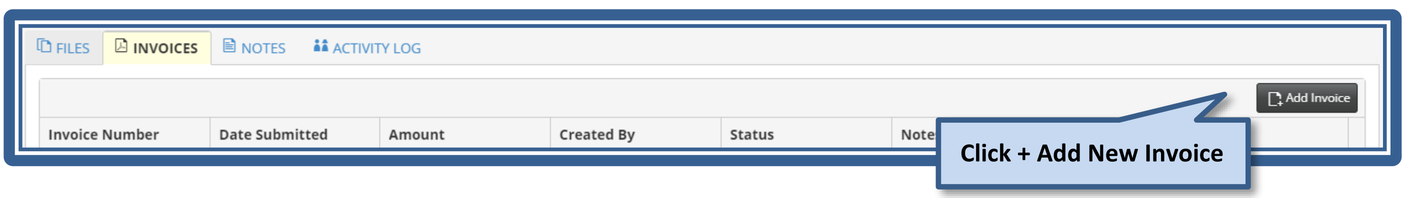
The process for creating invoices will vary slightly depending on the jurisdiction's integration status:

- **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.

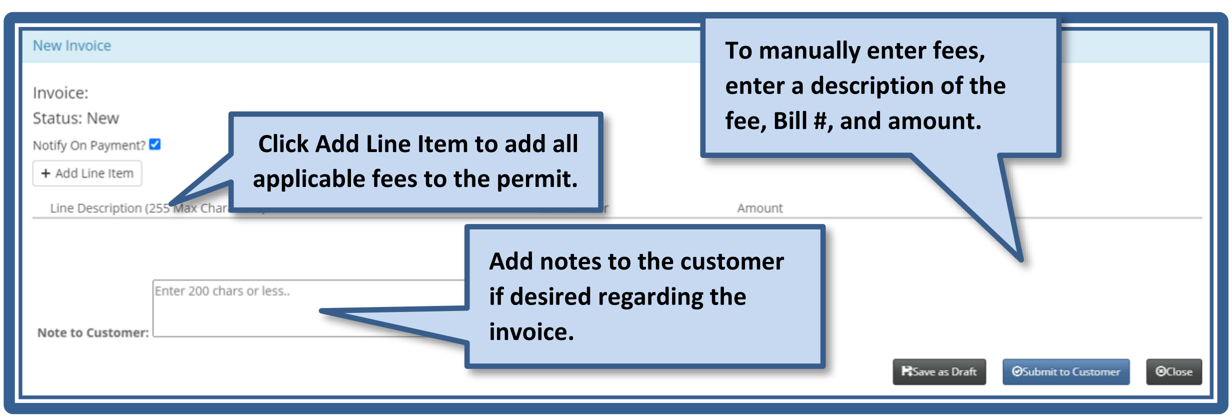
NOTE: You can add an invoice to an issued Over the Counter (OTC) permit if you need to charge additional fees after issuance. You must have the Application ID or Permit number and search for it in the Dashboard to access the Permit Details page. OTC permits do not save to the Jurisdiction Dashboard.

Creating an invoice:

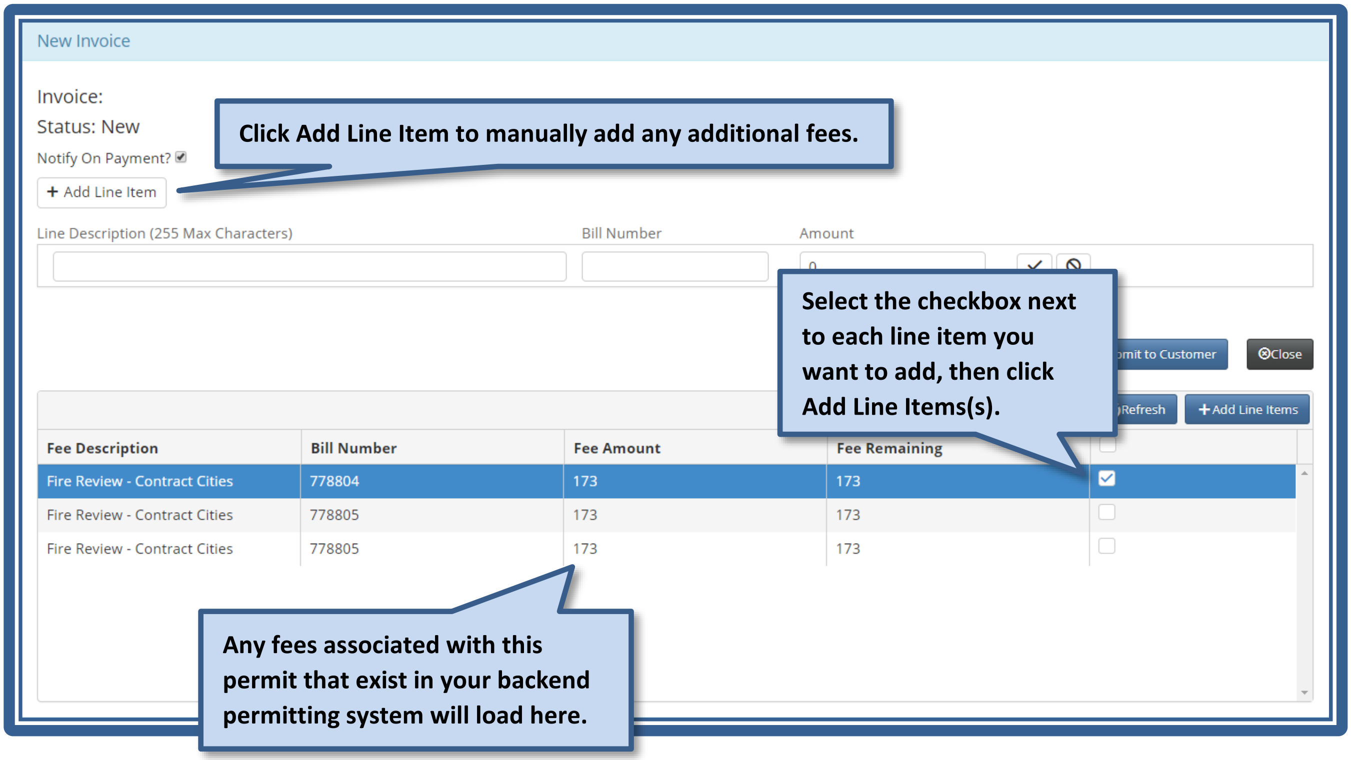
1. Open the Application Detail page from the ***Screened*** tab by clicking on the hyperlinked Permit number.
2. Navigate to the **Invoices** tab (available for Screened, In Review, Issued, and Closed statuses only):



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

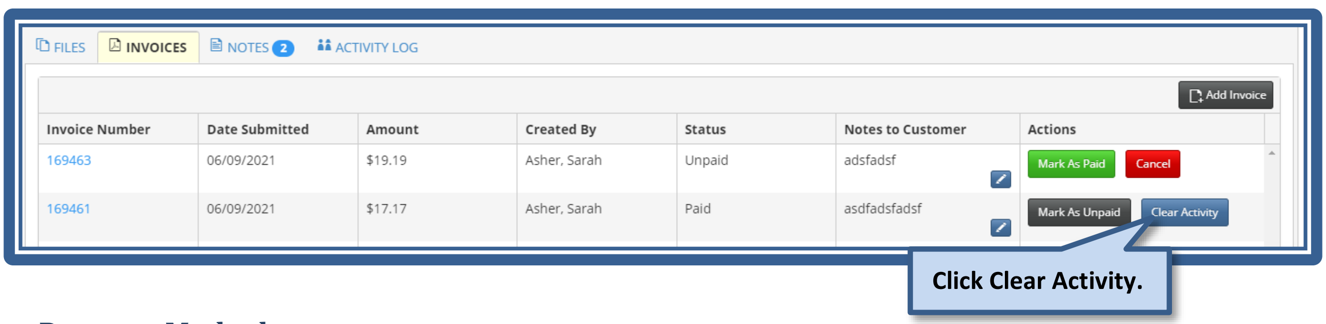
When an invoice is paid, either online through ePermit (the application site) or at the jurisdiction counter, the invoice needs to be marked as paid in the permit tracking system and updated on the Dashboard.

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.

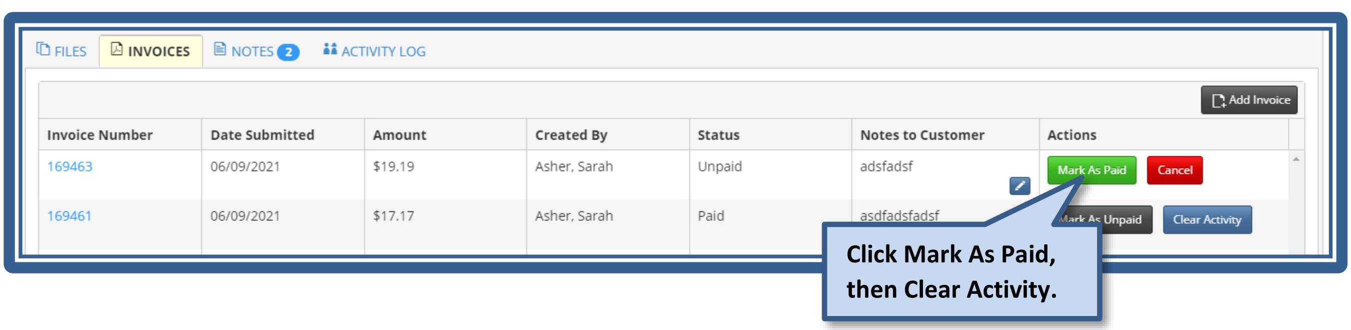
To clear this activity, follow these steps:

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**

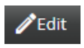
NOTE: You can choose to change the permit status to Issued when you upload a document type of Issued Permit. See next section for details.

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

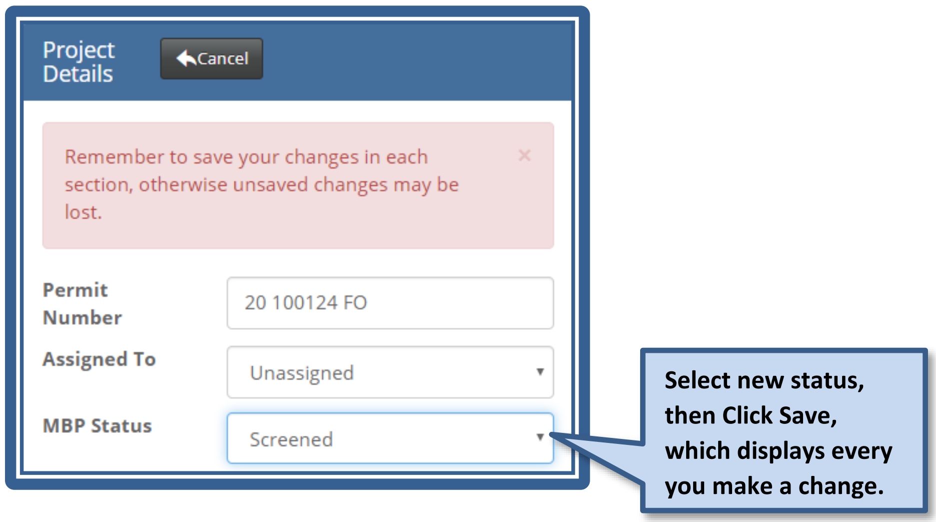
NOTE: You can choose to have permits automatically moved from Issued to Closed. Contact the Service Delivery Team to enable this process.

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

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

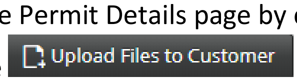
1. Click the 

icon next to the Dashboard Status.

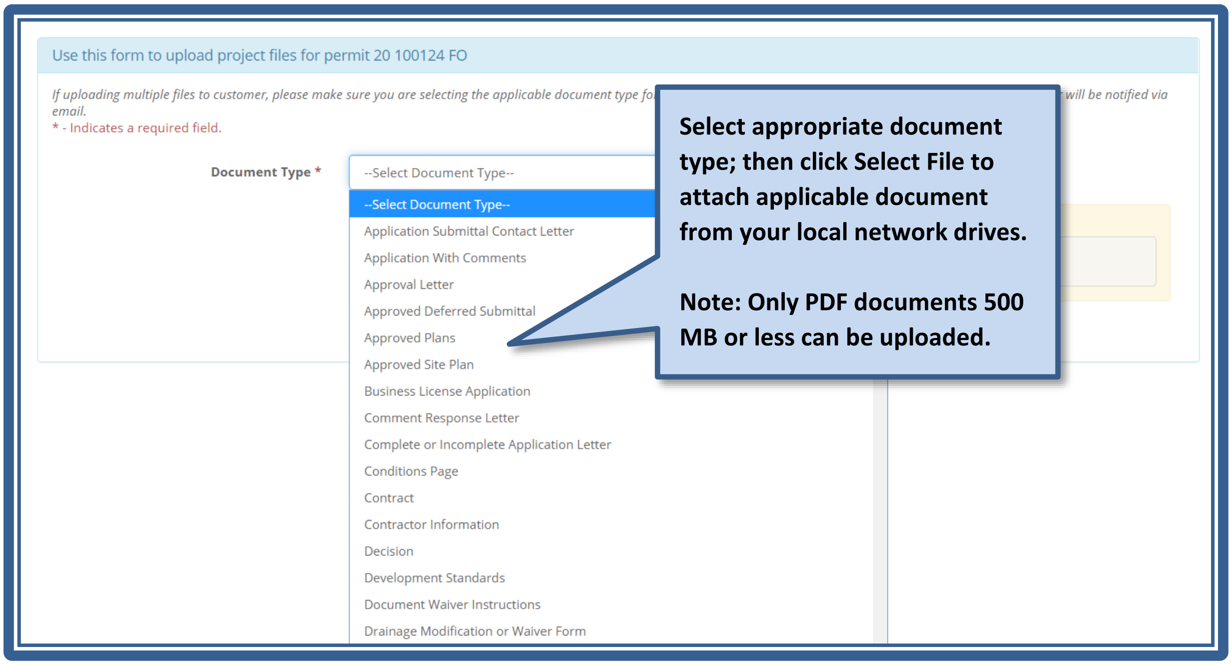


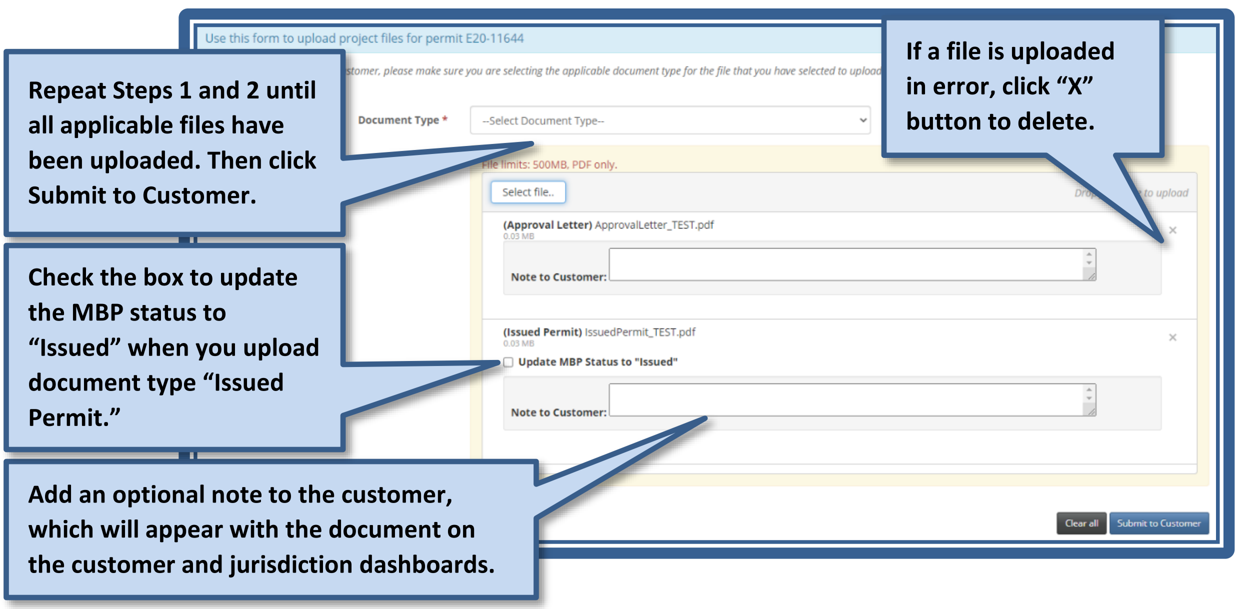
Uploading Files

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

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

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

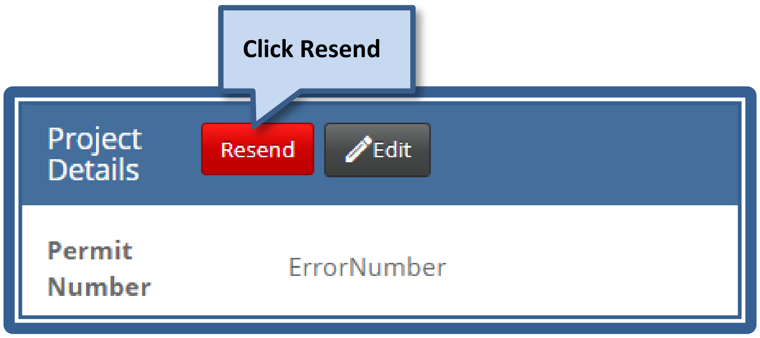

Use this form to upload project files for permit 20 100124 FO
If uploading multiple files to customer, please make sure you are selecting the applicable document type fo
email.
* - Indicates a required field.
Document Type *
--Select Document Type--
--Select Document Type--
Application Submittal Contact 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
Document Type *
--Select Document Type--
File limits: 500MB. PDF only.
Select file..
(Approval Letter) ApprovalLetter_TEST.pdf
Note to Customer:
(Issued Permit) IssuedPermit_TEST.pdf
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**.

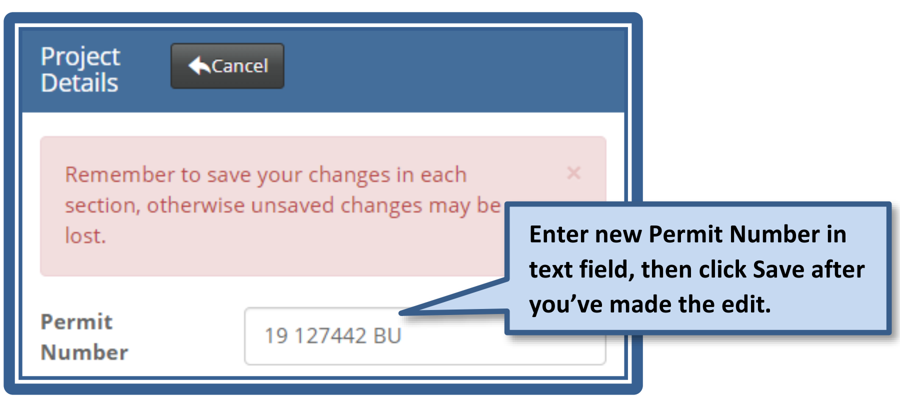
1. Open the Failed application Permit Details page from the ***Needs Attn*** filter by clicking on the hyperlinked word ErrorNumber (displays in the Permit #/App. ID field); select **Resend**:



Changing Permit Numbers

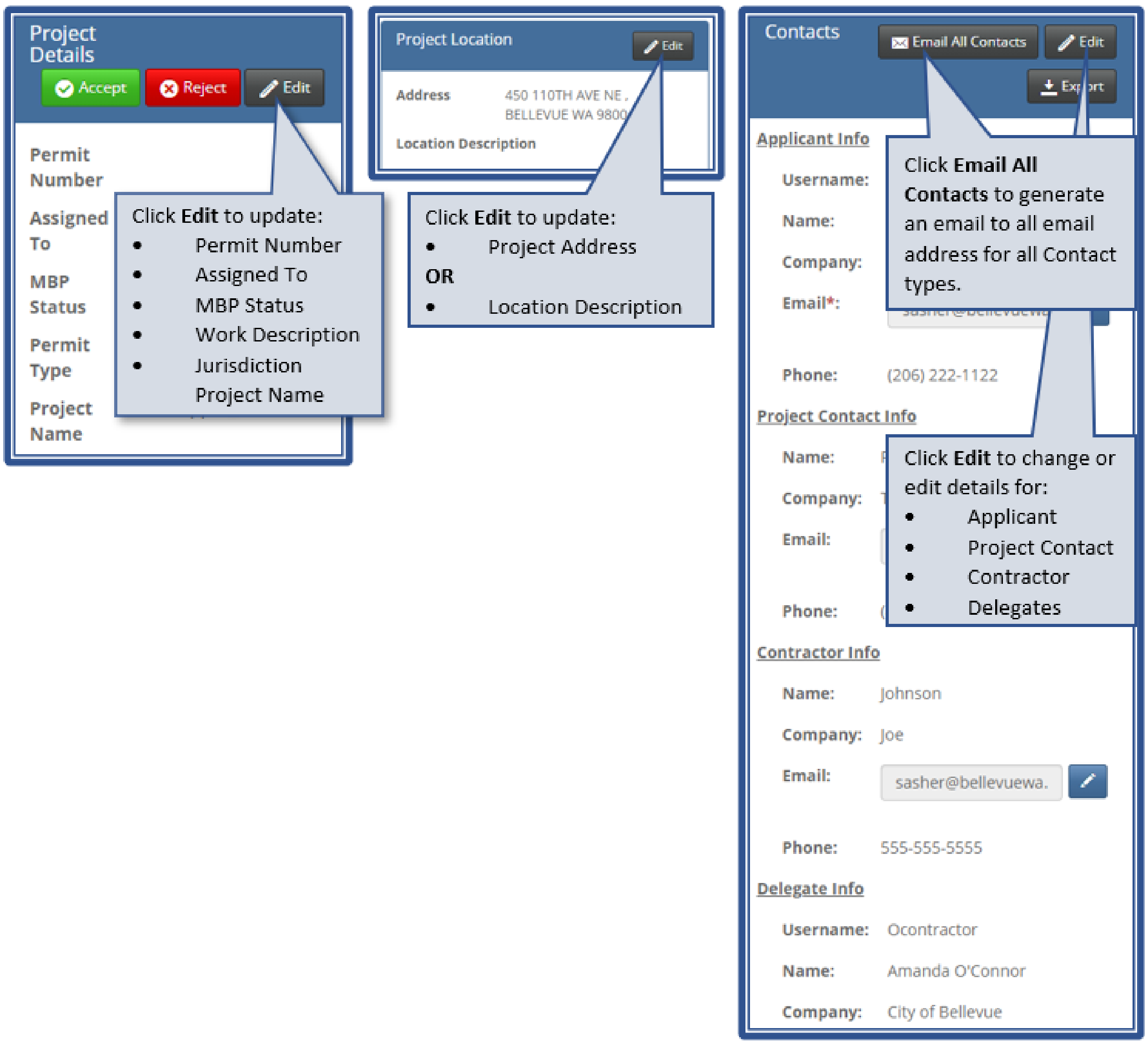
The permit number on the Jurisdiction Dashboard can be edited if necessary. Generally, this is done at the request of the jurisdiction, to match the permit number in the jurisdiction permit tracking system.

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

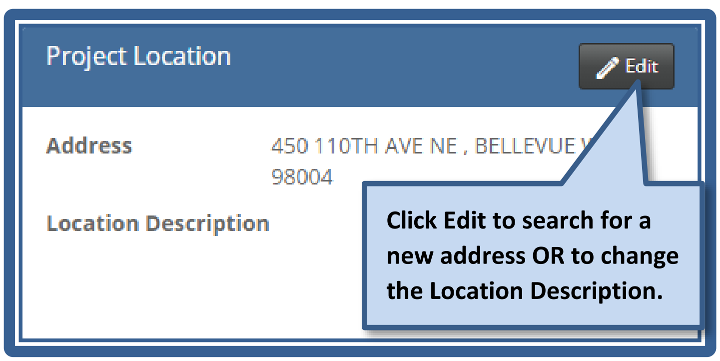
You can update the following Project Details. The fields marked with an asterisk can be modified in the Project Details container:

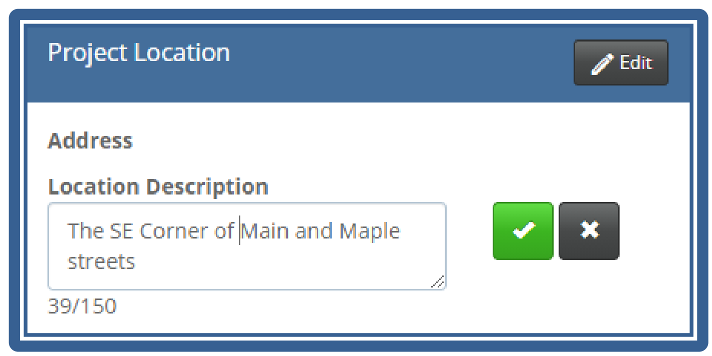
- **Regenerate PDF** – Regenerate the Permit PDF for OTC permits
- ***Permit Number** – update the permit number, if necessary to reconcile with backend permitting system
- ***Assigned To** – assign the permit or application to a staff member to manage

- ***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

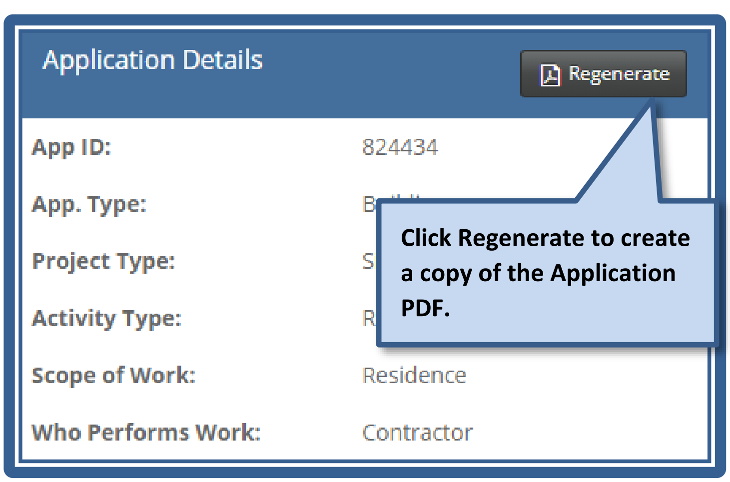
You can manage either the Address or the Project Location, depending on which type of location information is saved with the application. Project Location is only used when a physical address is not available (for example, some Right-of-Way or Special Events applications).





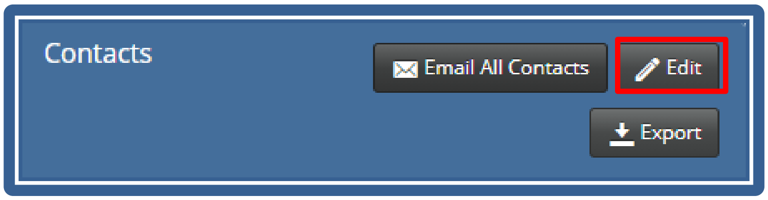
Managing Application Details

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

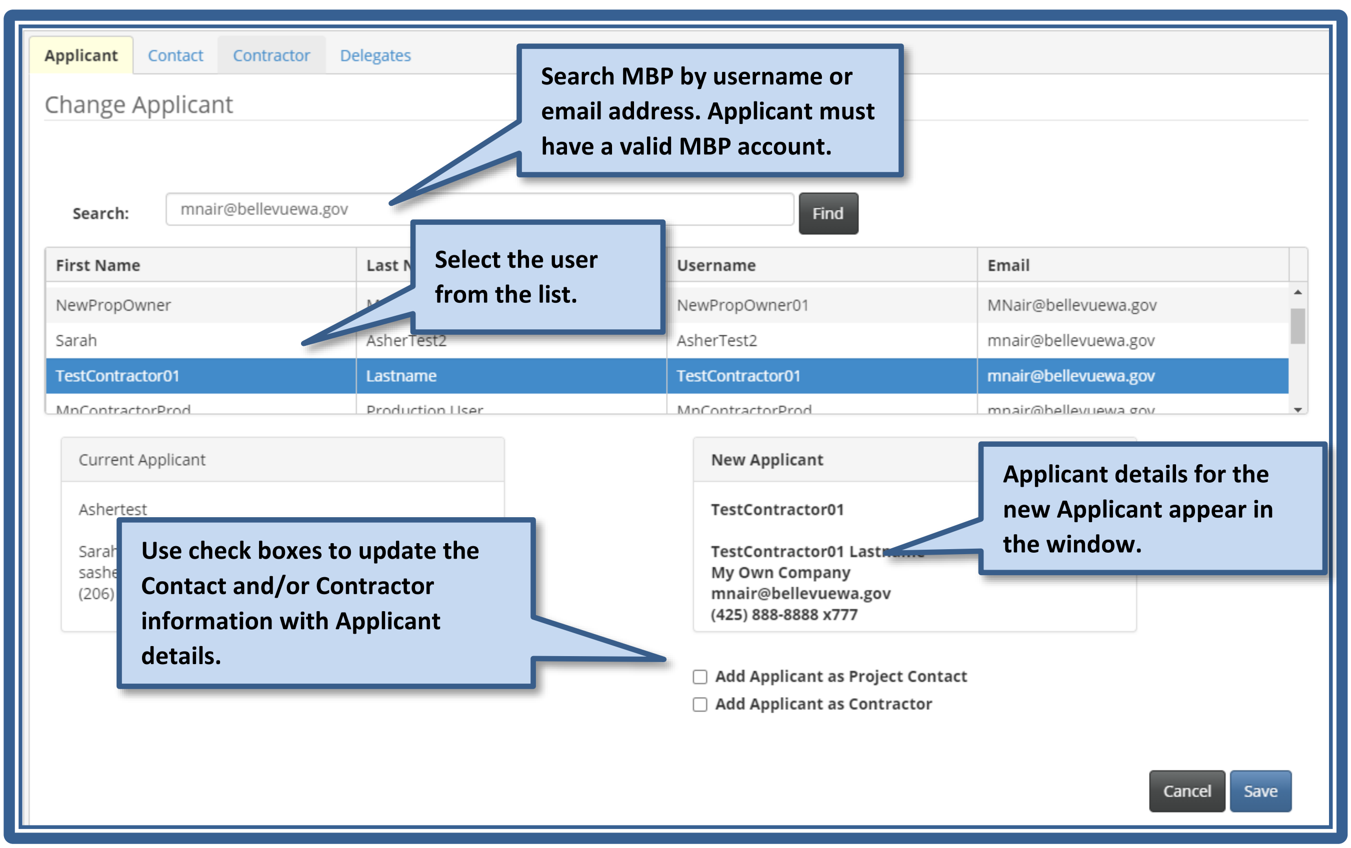
You can manage the details of all Contact types via the Contacts container on the Permit Details page. You can access Contact Management by clicking Edit on the Contacts container.



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:

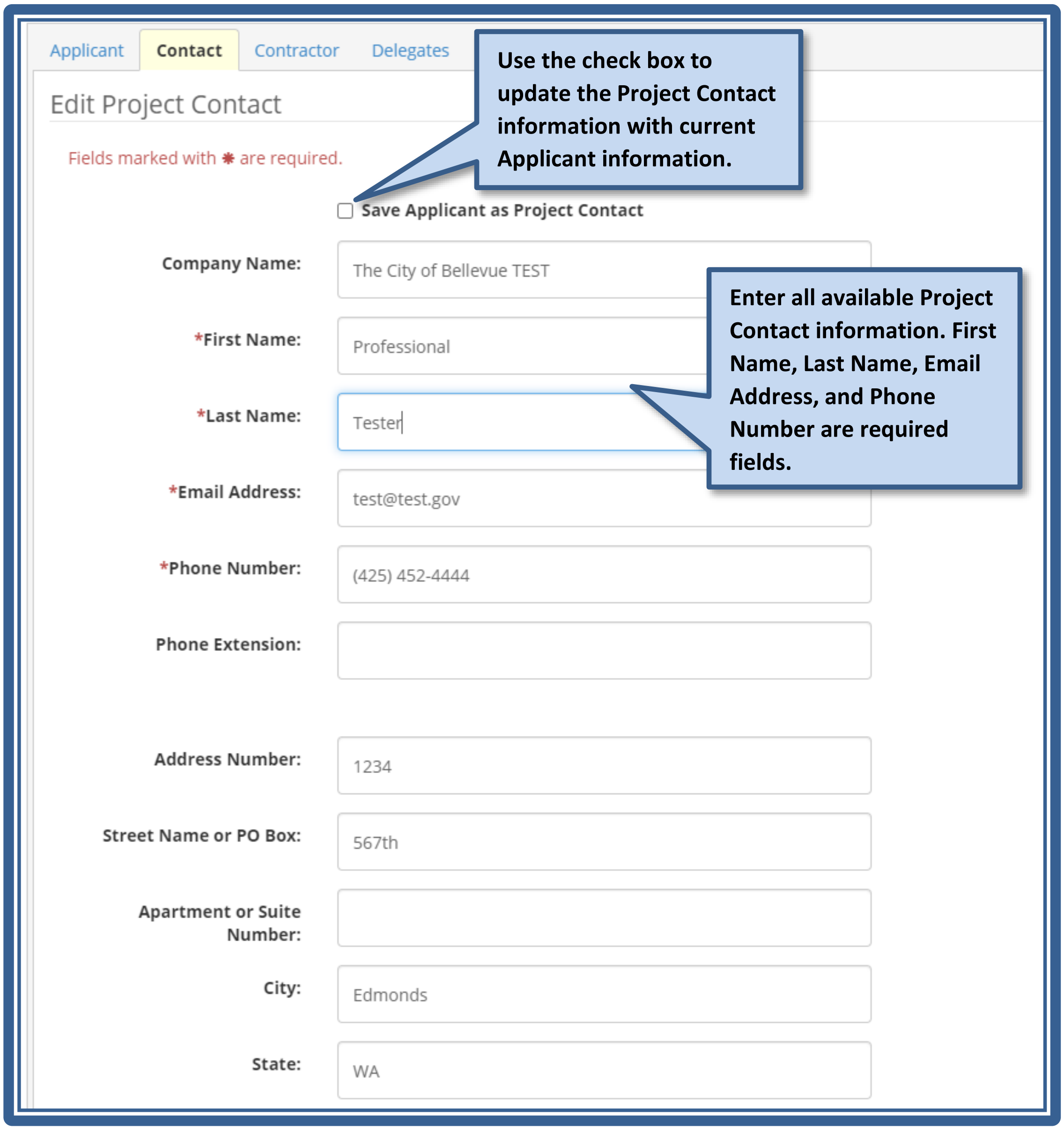
- The applicant must be an MBP user and must provide the MBP username or email address.
- Each application / permit must have an applicant. You can "swap" one applicant for another but cannot save an application / permit without a designated applicant.
- Changes to applicants are recorded on the Activity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



Managing Project Contacts

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

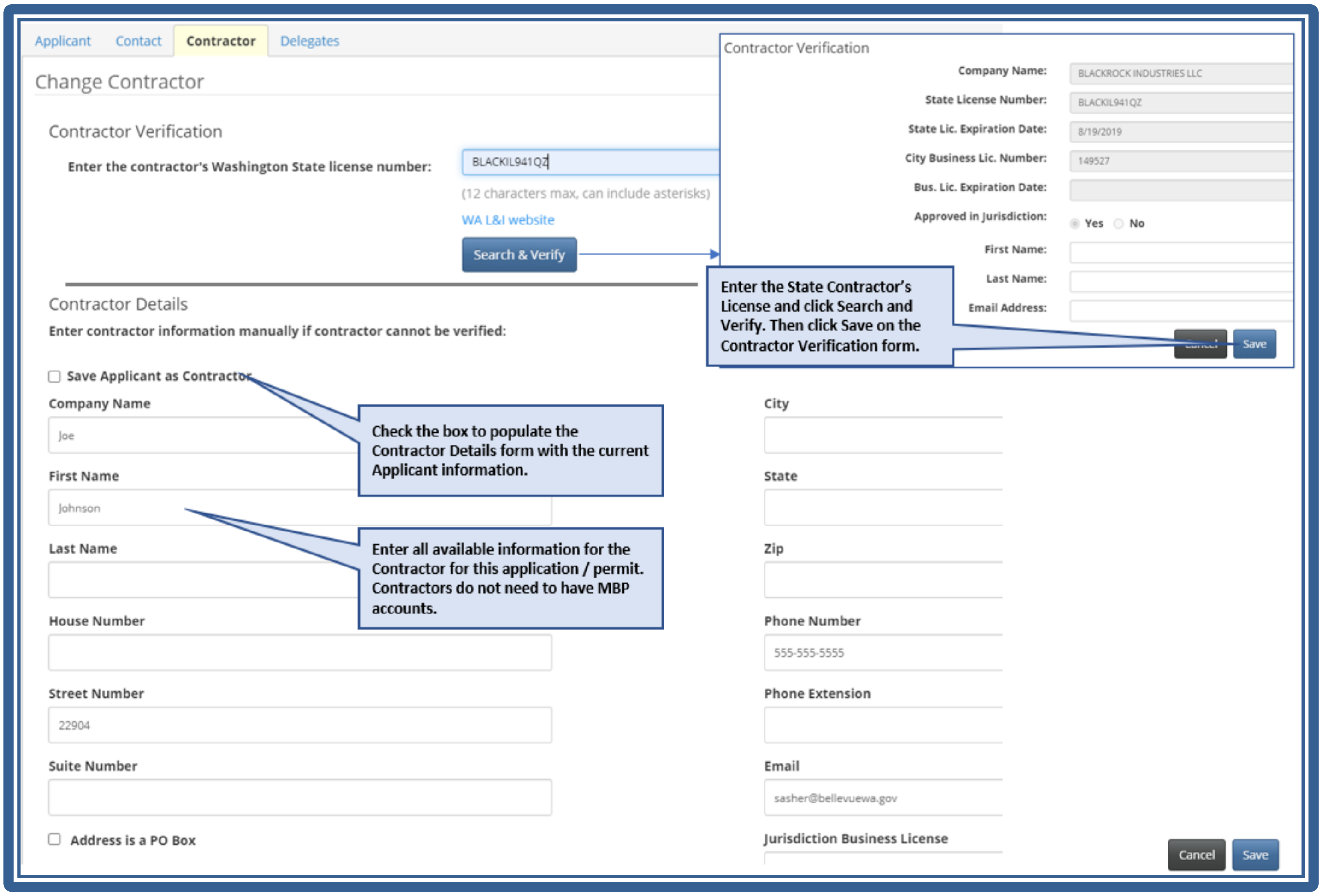
- Project Contacts have no access to the application/permit and cannot manage or pay invoices on the permit.
- Project Contacts do not need to be MBP users.
- If the Project Contact needs access to the application/permit, they must be added as a Delegate (Delegates must be MBP users).
- Changes to Project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

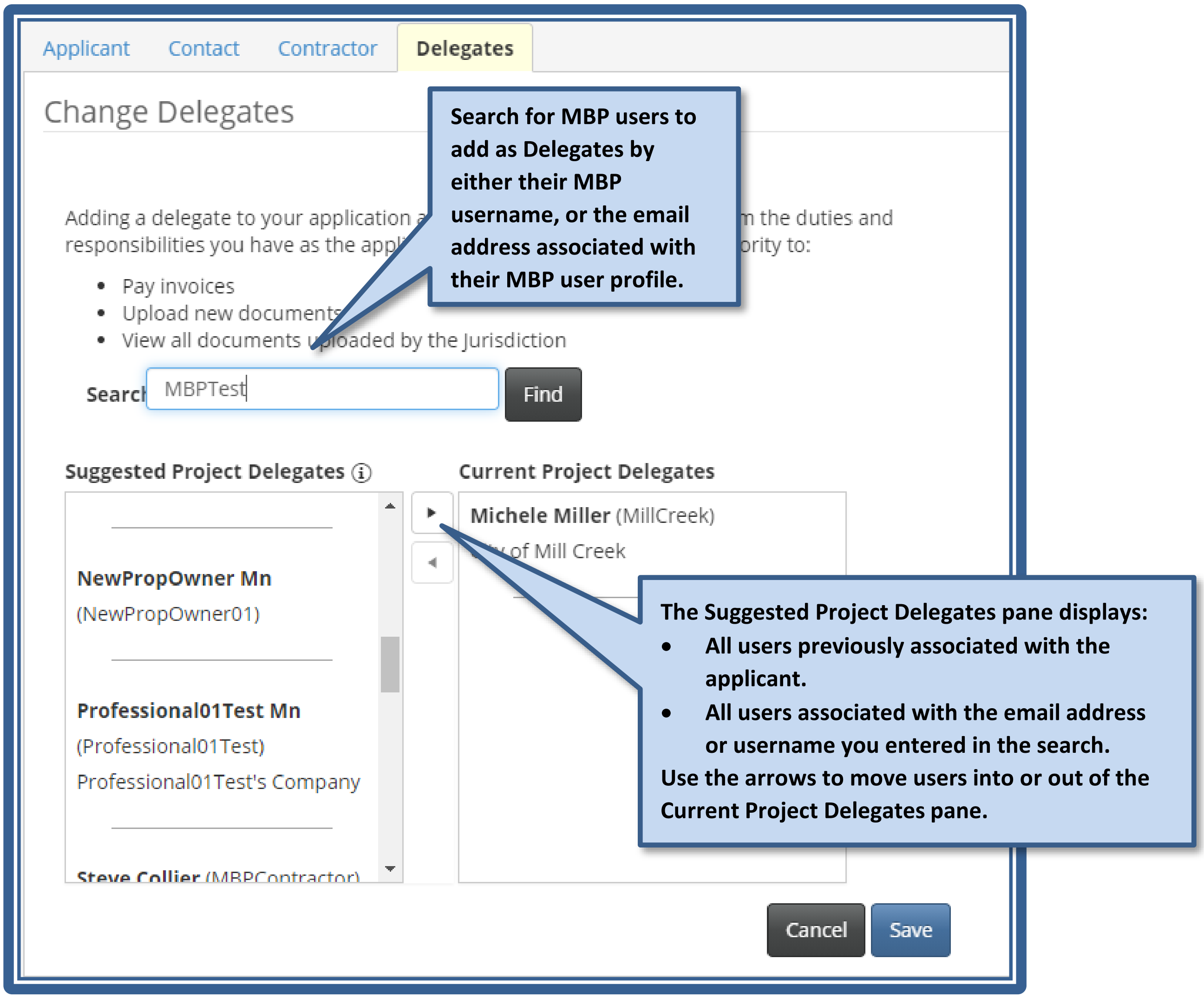
- Contractors have no access to the application/permit and cannot manage or pay invoices on the permit.
- Contractors do not need to be MBP users.
- If the Contractor needs access to the application/permit, they must be MBP users and then be added as a Delegate (Delegates must be MBP users).
- Changes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



Managing Delegates

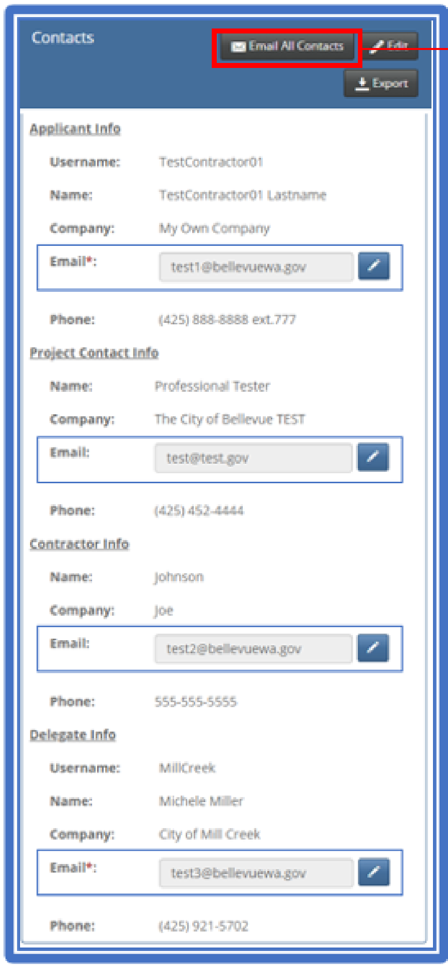
Delegates can be added to applications/permits during the application process and can be added or removed by Jurisdiction Administrators or Staff. Delegates have the same level of access to the permit as the Applicant, and can pay invoices, upload documents, manage Contacts and view all communications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

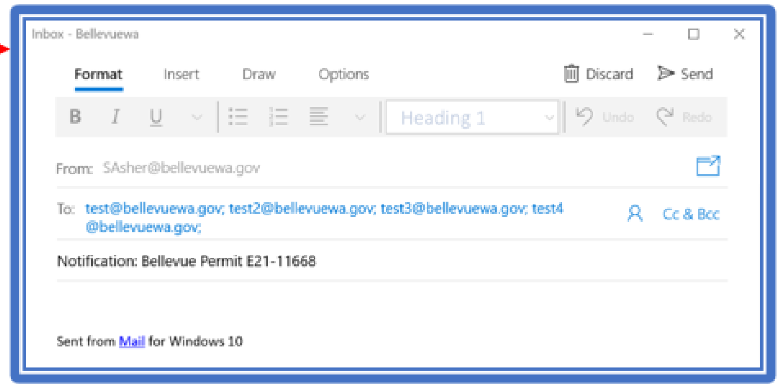
- Delegates must have valid MBP accounts.
- Delegate username or email are required to add them to the application/permit.
- There is no limit on the number of Delegates on an application/permit.
- Changes to Delegates are recorded on the Activity Log on the Jurisdiction Dashboard.



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.

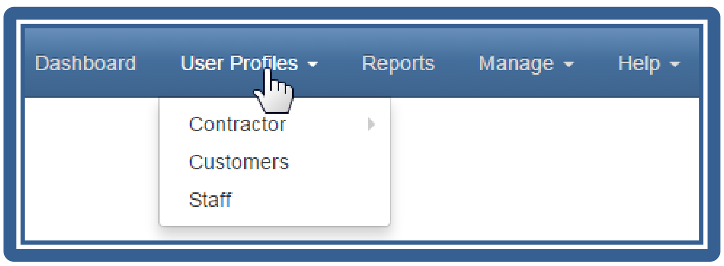




User Profiles

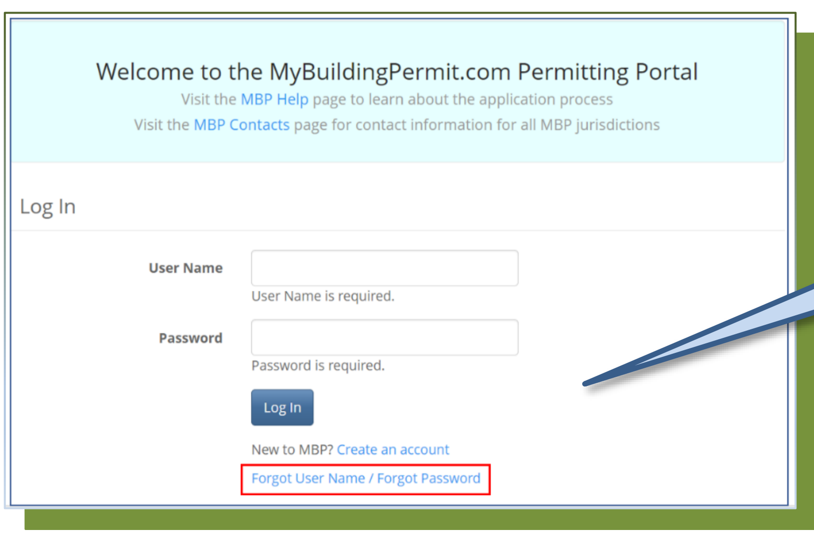
The **User Profiles** menu allows you to search for and manage **Contractor**, **Customer**, and **Staff** accounts.
User Profile Search Tips:

- **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 Account Credentials

User passwords for ePermit cannot be reset through the Admin site. Only the MBP user can reset their password. When the MBP user clicks Forgot Username / Forgot Password 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 ePermit Log In page: 'Forgot User Name / Forgot Password'

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, Electrical, or Plumbing 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 prior to permit issuance.*

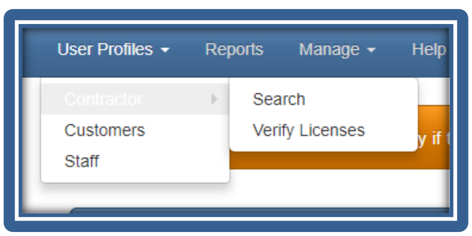
Jurisdictions can perform the following actions to a Contractor Account:

- 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 come 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.

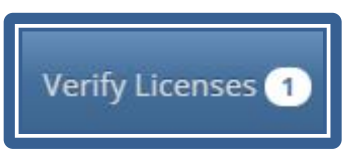
Search

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



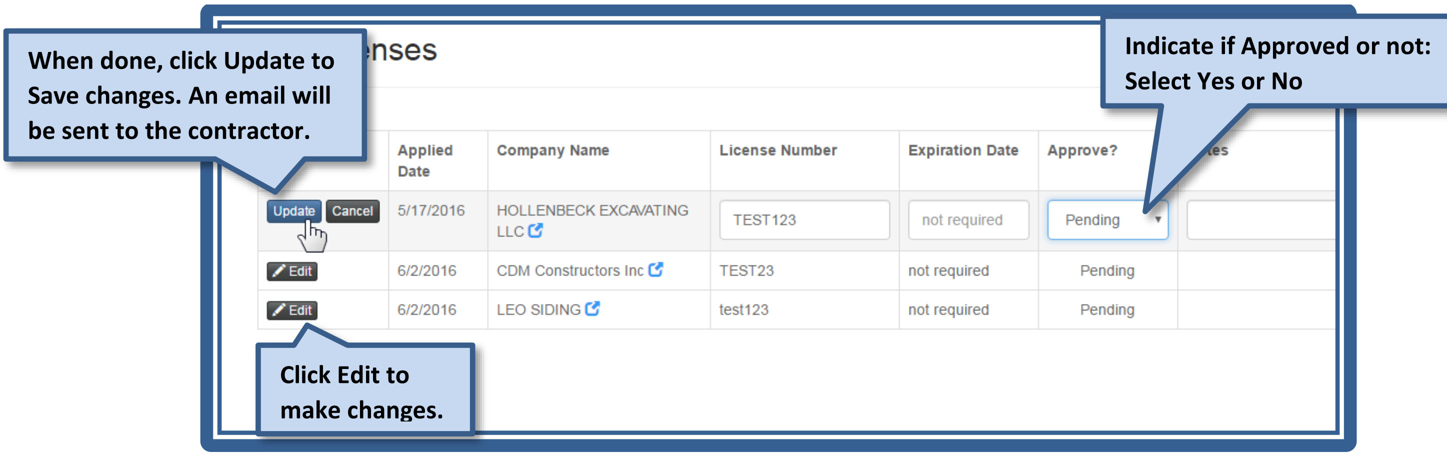
Verify Licenses

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).

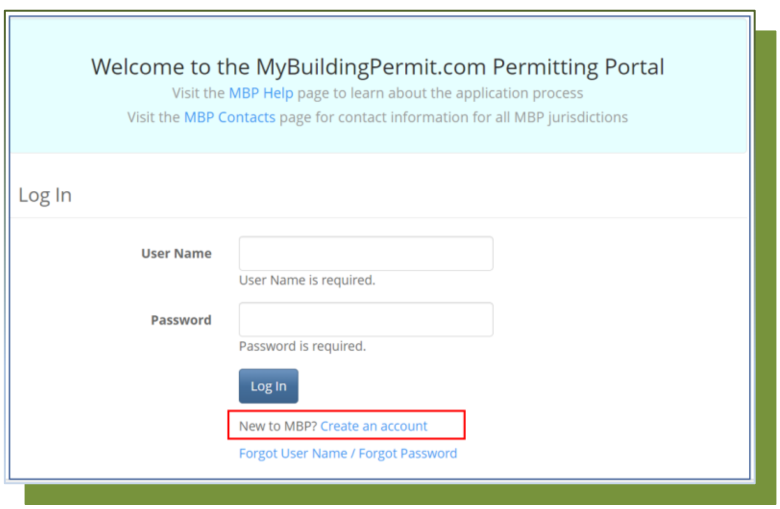
This process is used by licensed contractors to create an account on MyBuildingPermit.com. When registering a new company on MBP, state license validation is required, and some jurisdictions require local business licenses as well before a licensed contractor can submit a permit application.

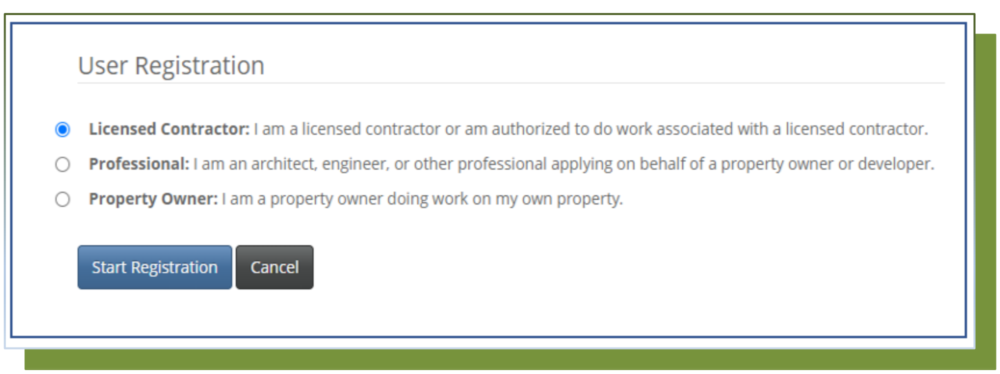
NOTE: A company UBI may only be registered one time with MBP; however, there can be multiple user accounts associated with a single company.

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.

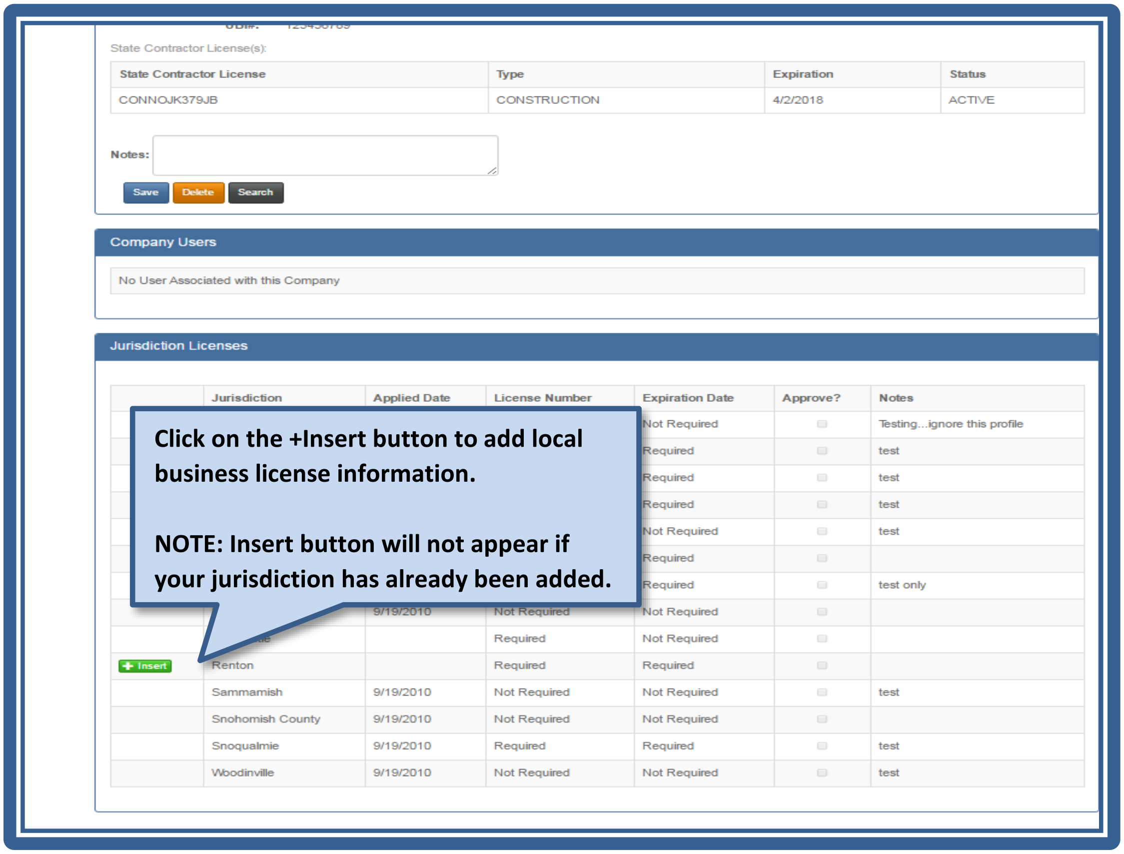
1. Click **Create an Account** on the MyBuildinPermit.com Login Page.
2. On the User Registration page, select **Licensed Contractor**.
3. Enter WA State UBI number and click **Search**.
4. Complete the Contractor Registration.
5. Verify **Company Information** and enter the Phone Number.
6. Enter **Jurisdiction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

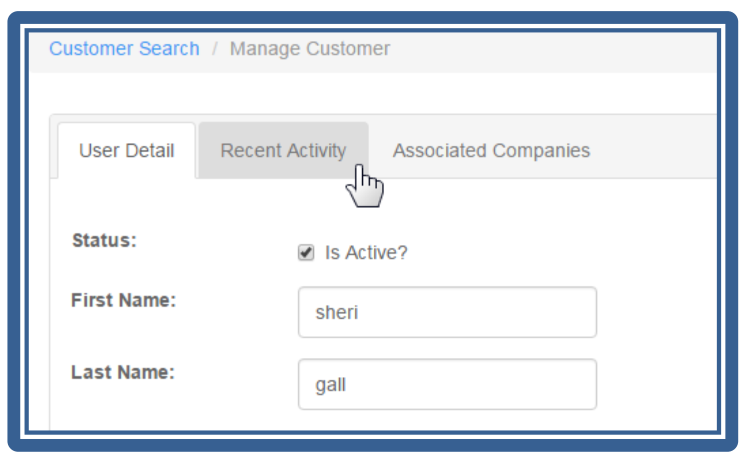
USER PROFILES → Customers allows you to search accounts by either a Username or Email address.

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" links on the Log In screen.

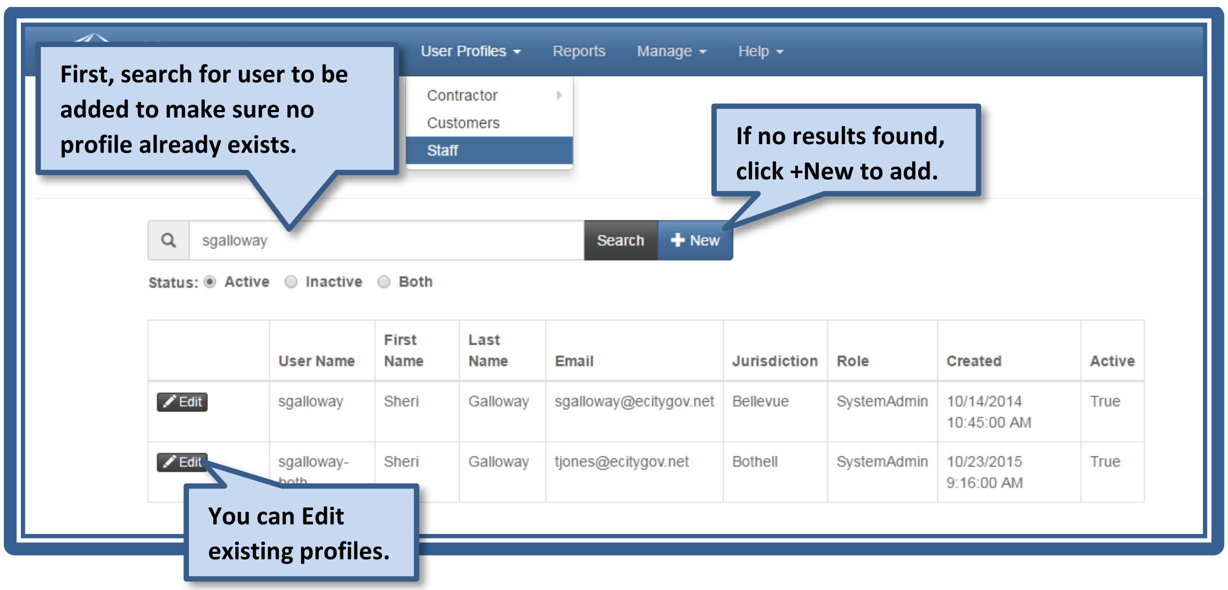
Staff Accounts

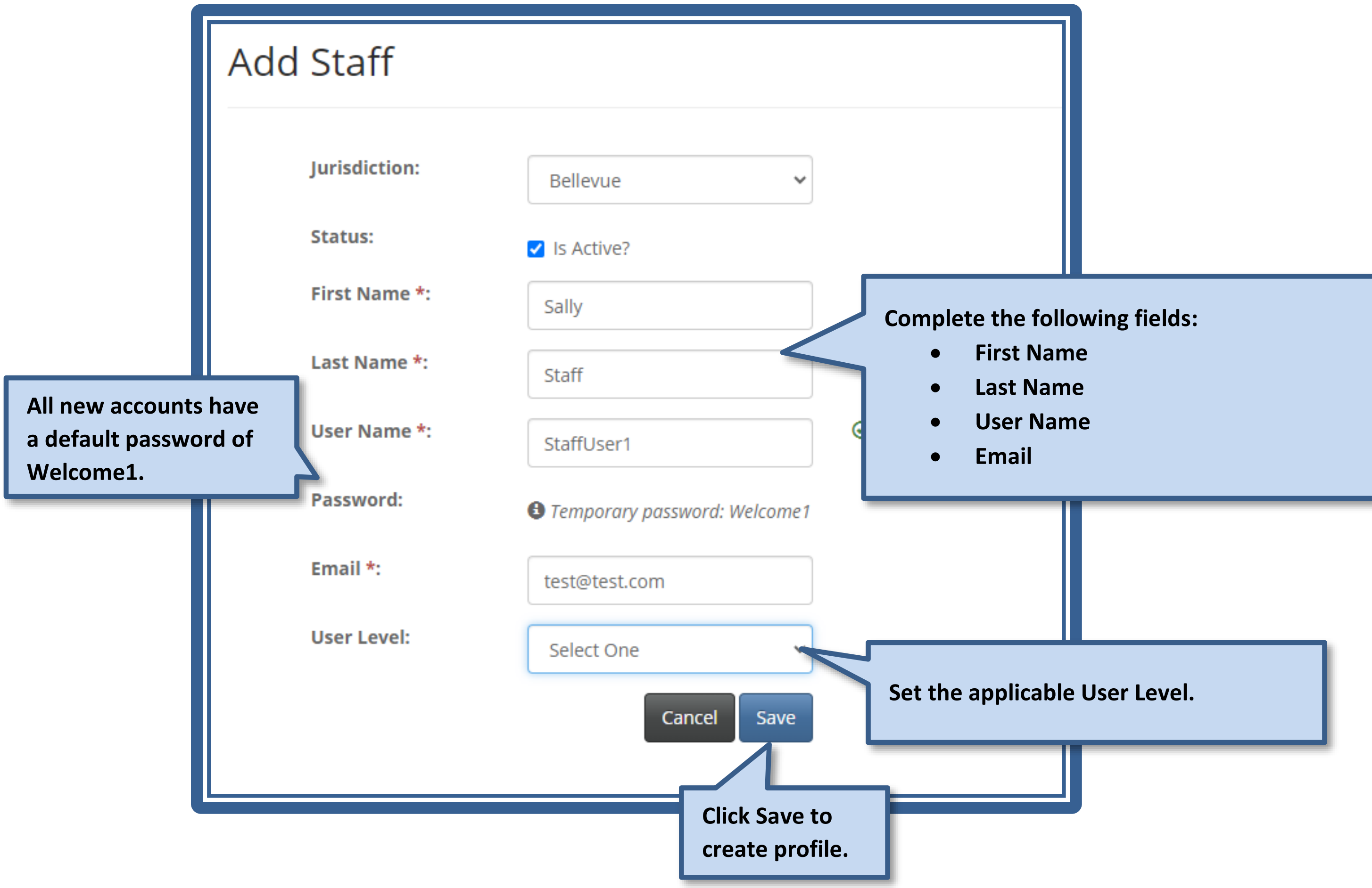
Allows you to search your jurisdiction's users and modify:

- 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. This section describes the access available to each level 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

eGov 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. Only System Admins can grant System Admin user levels.

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 for the jurisdiction and are engaged in creating and editing application configurations. Jurisdiction Admins have read/write access to all editable fields within the MBP Jurisdiction Admin site:

Jurisdiction Admins has access to:

- Read/write all editable fields within the MBP Jurisdiction Admin site
- Create, edit configurations
- Edit Contractor Profiles and Verification
- Create and edit Staff user accounts
- Full Dashboard management and application processing
- Reports
- Manage addresses

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.

Jurisdiction Staff users have access to:

- Accept/Reject an application
- Accept, View, and Delete files
- Create and delete invoices
- Upload documents to customers

- Edit permit number
- Make all dashboard status selections
- Edit Contractor profiles and contractor verification
- Reports

Jurisdiction staff have 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.

Jurisdiction Reviewers have access to:

- View applications, files, invoices
- Upload documents to customers
- Make Dashboard status selections of Screened and In Review only
- Edit permit number

Jurisdiction Reviewers have no access to:

- Configuration menus
- Edit Contractor Profiles
- Delete documents
- Accept/Reject applications
- Create 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.

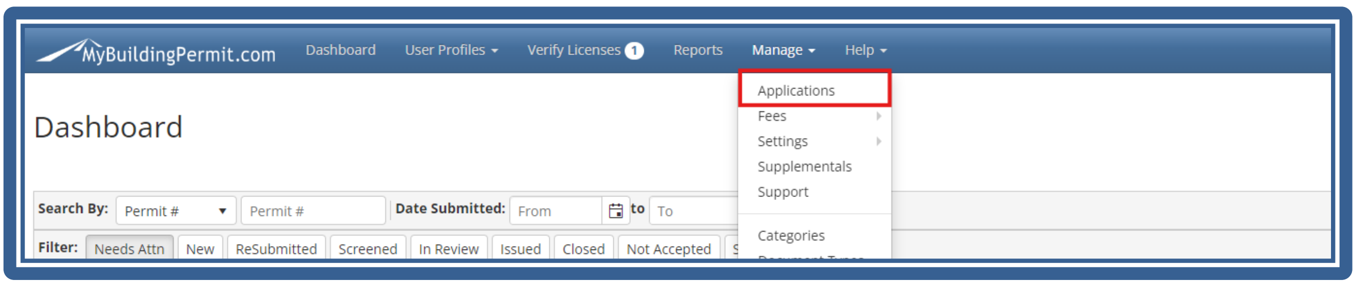
Using the Manage Menu

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 – Search for an invoice, application, or permit.

Configuring Applications

Before users can apply for permits, jurisdiction Administrators must build and activate application configurations. Each jurisdiction follows the configuration workflow to set up their configurations. To begin, go to the **Manage > Applications** menu and make selections for the "four buckets" that comprise a permit in MBP: **Application Type, Project Type, Activity Type, and Scope of Work.** The buckets guide applicants during the application process. Each bucket type includes a brief description/definition to assist the applicant when making their selections.



Each Application Configuration can have the following steps in the workflow:

- Application Configuration Landing Page: All four buckets and at least 1 required Work Type are required for each Application Configuration.
- Pre-Application Message: Displays immediately after the four buckets are selected by the applicant.
- 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.).
- Category Ordering: Arrange the category display order on the Project Details page.
- Conditional Display: Creates a relationship between customer responses to SKUs and categories that display based on those responses.
- Supplementals: Additional questions or information needed from the applicant (NOTE: Responses to Supplementals do not integrate into backend permitting system).
- 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.
- Settings and Options: Set a configuration to Active or Inactive to control its availability in ePermit; Clone or Delete an application.

Customer Application Process and Selections

As applicants progress through the MBP Permit application process, their selections and data entries are determined by the jurisdiction during the configuration process.

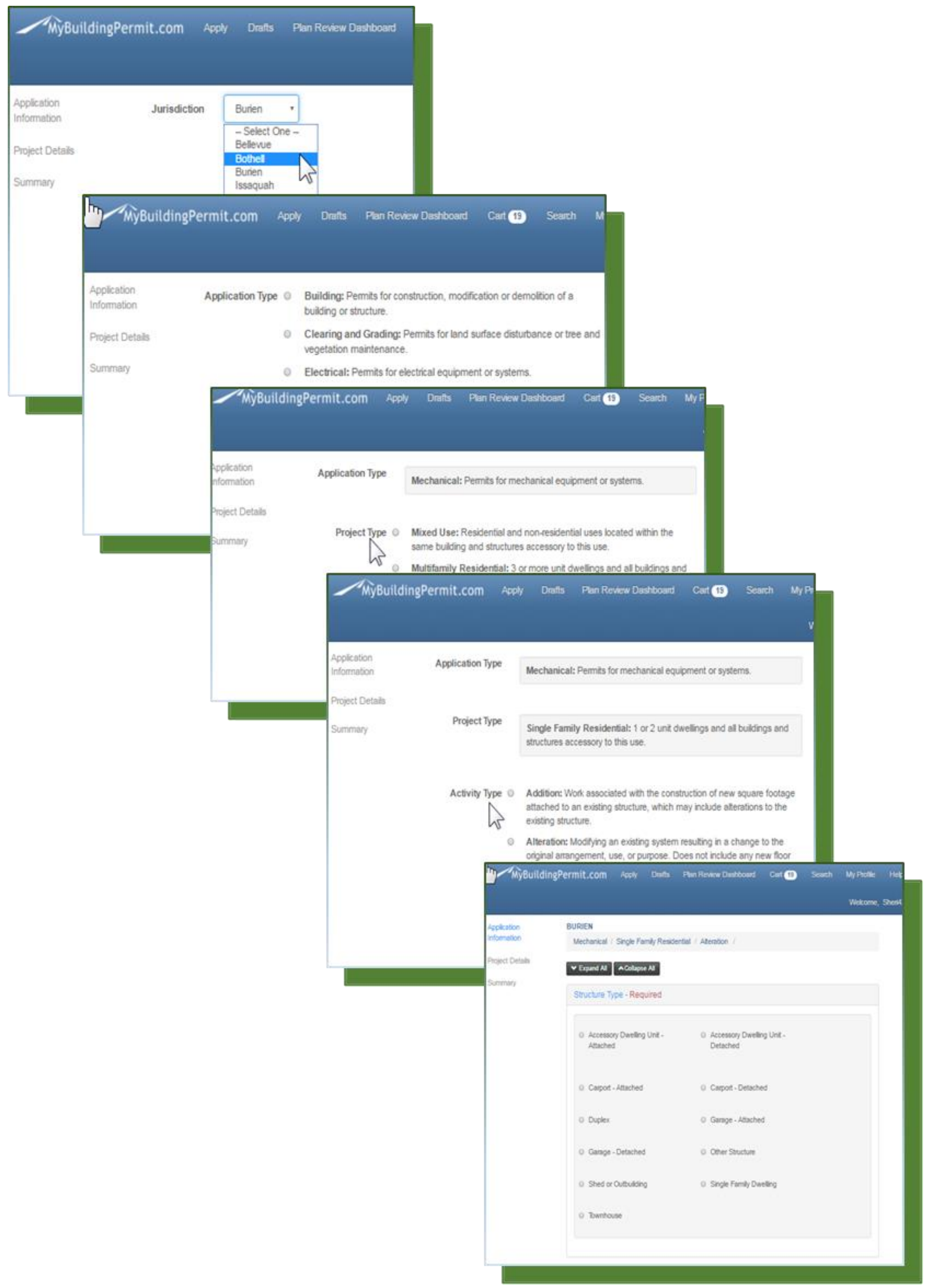
Each jurisdiction configures the applications available through MBP on the Jurisdiction Admin menu under **Manage** > **Applications**.

The bucket options available under **Application Type, Project Type, Activity Type, and Scope of Work** are configured by each jurisdiction. These choices align with their backend permitting system configurations.

MBP sends permit data to the jurisdiction's backend permitting system and receives information back.

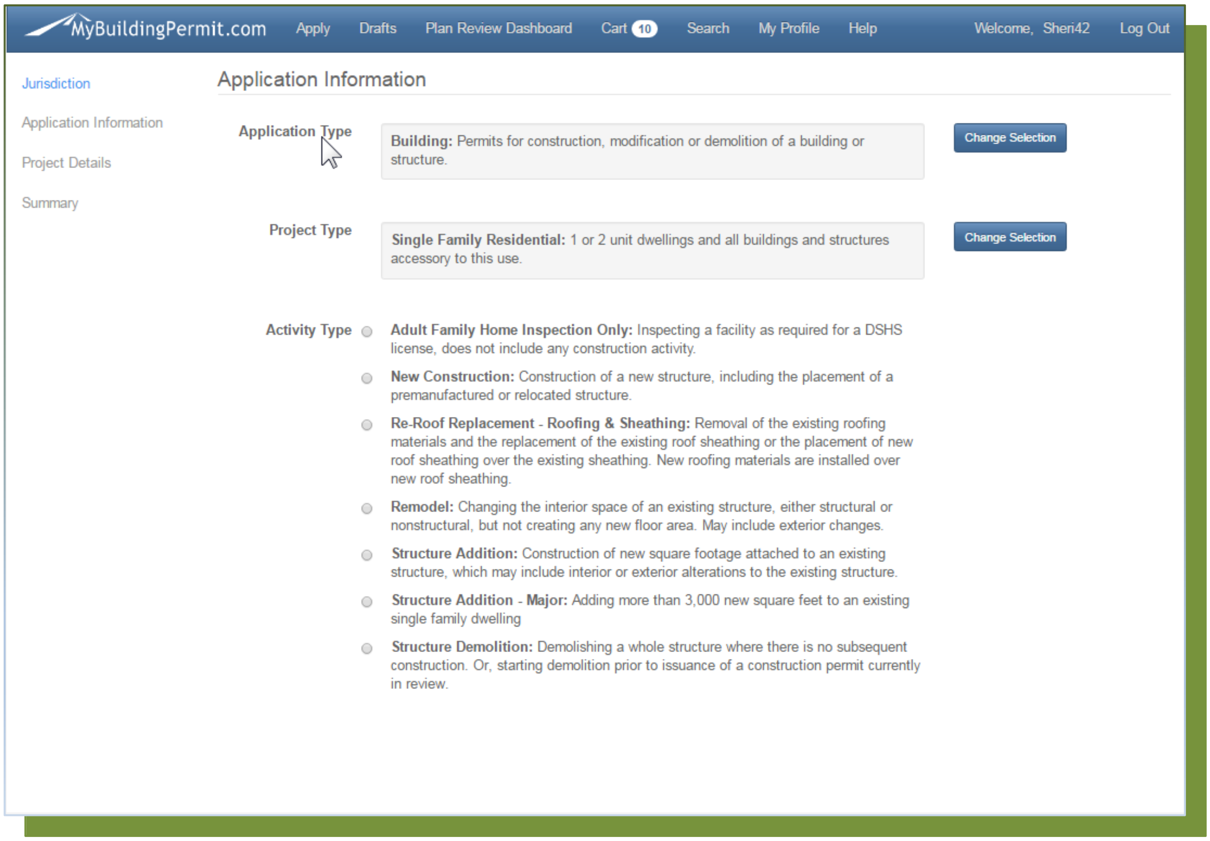
The jurisdiction's Web Service takes the mapped permit data and inserts it into the backend permitting system's database.

The bucket options display in ePermit with brief descriptions to help applicants make accurate selections.



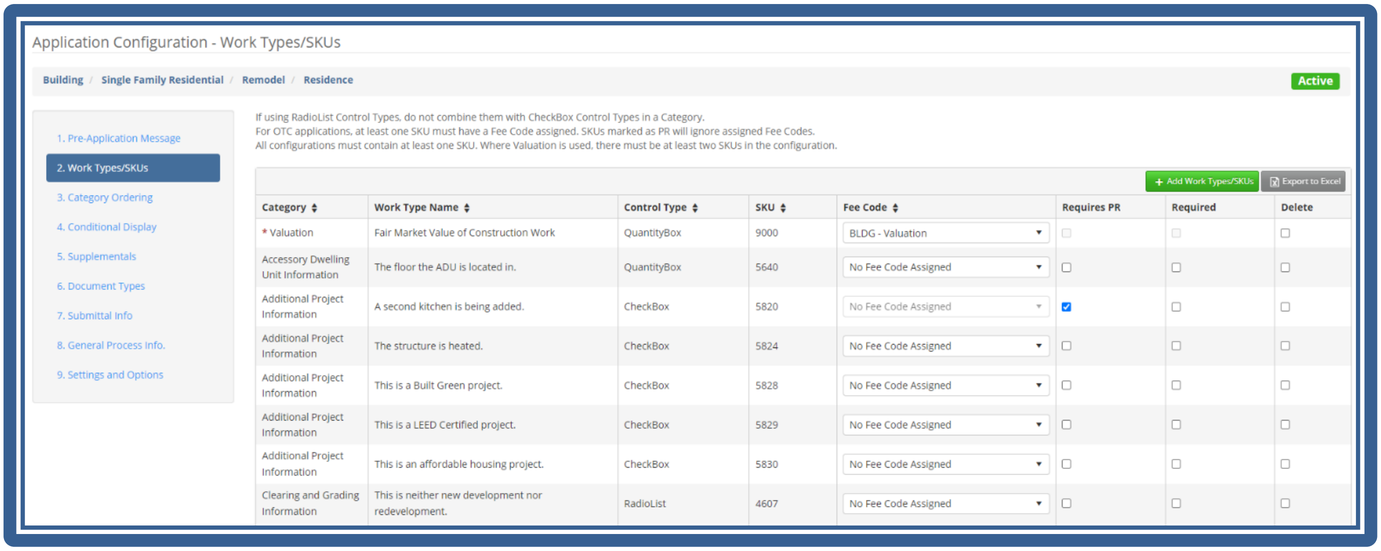
Below is an example of the Activity Type options available to Bellevue applicants after they've selected an Application Type of Building, and Project Type of Single Family Residential:

Customer/Applicant Apply Screen

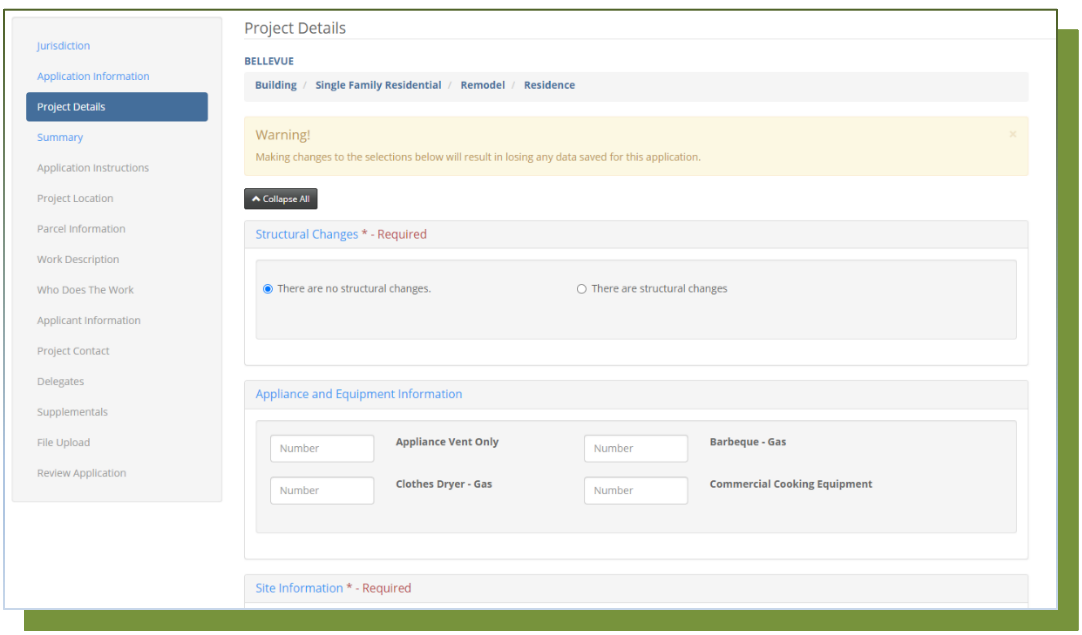


After the first four bucket options are selected by the applicant, the fifth "bucket" is Project Details. The jurisdiction specifies the information required from the customer for each application by adding Work Types/SKUs to the configuration. Work Types/SKUs are grouped assigned to Categories to keep them organized in logical groups. Work Types/SKUs display to applicants on the Project Details page, which applicants must complete as part of the application process.

For the Bellevue Building / Single Family Residential / Remodel / Residence application configuration, the Work Types/SKUs appear as follows:



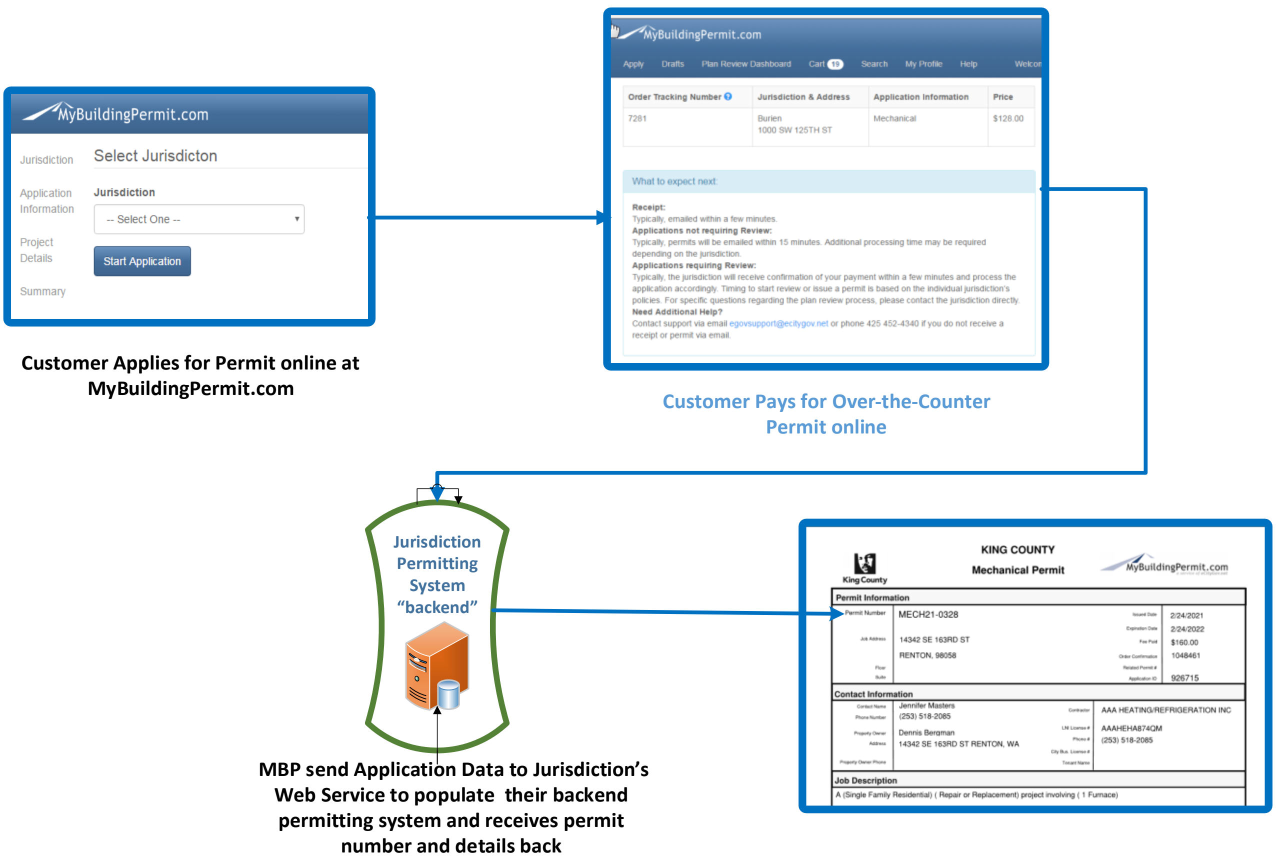
And looks like this to the Customer/Applicant:



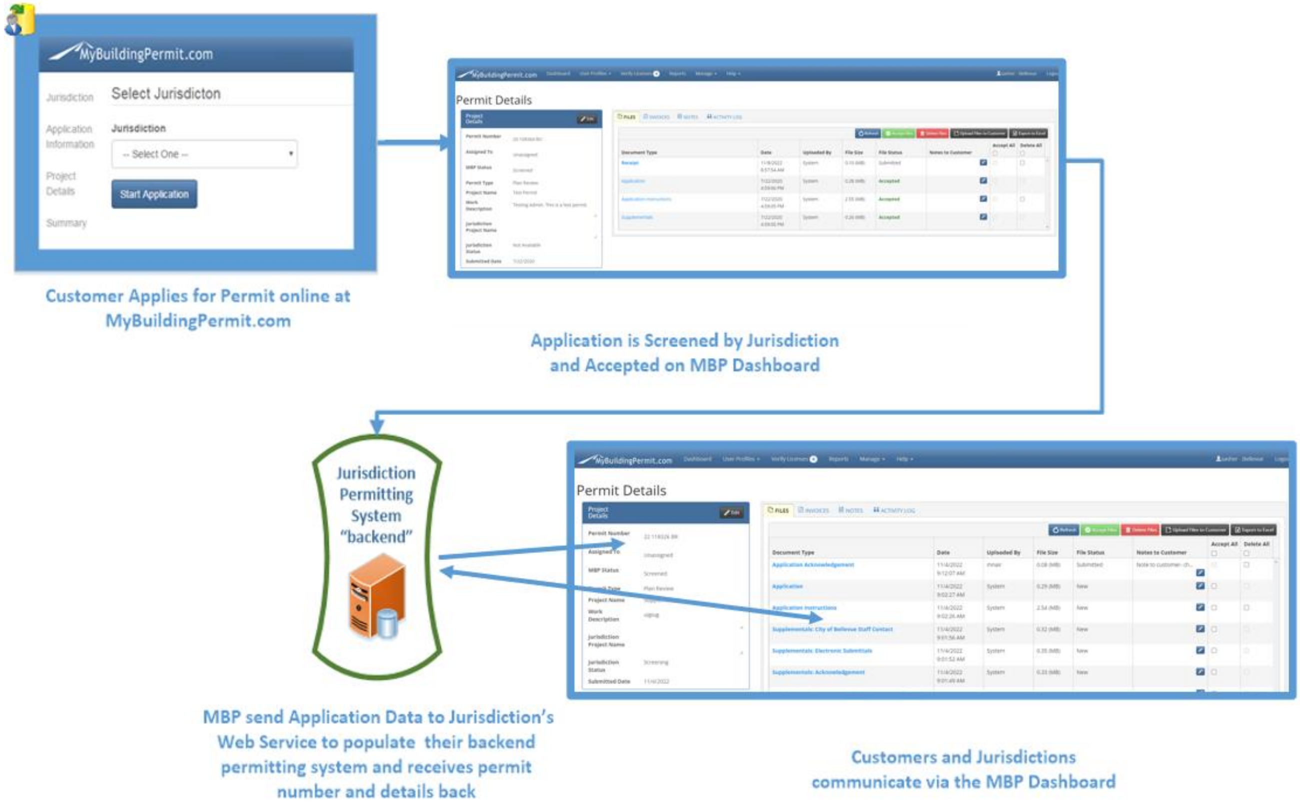
Application Integration

When integrating with MBP, the application configuration – along with SKU details and fees – will be included in the XML output sent to the jurisdiction via Web Services. It's essential to map this data 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 overview of MBP OTC permit integration with jurisdiction backend systems



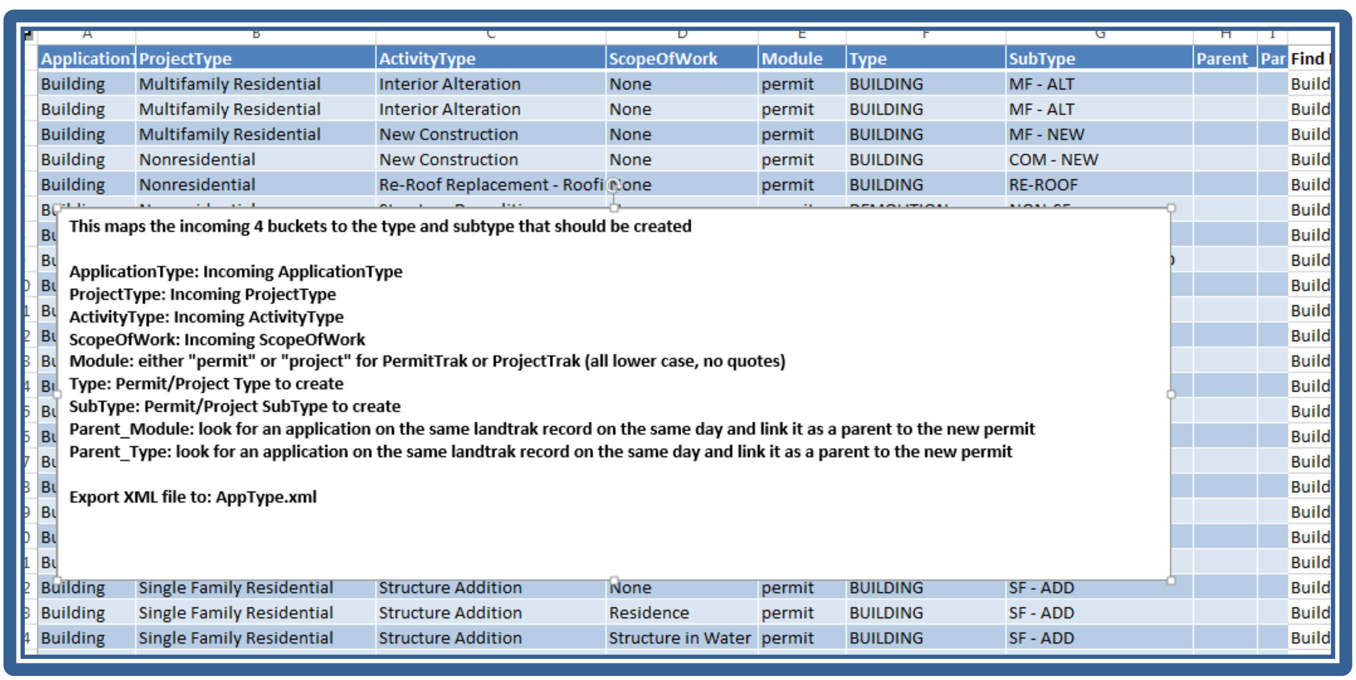
High level overview of MBP PR permit integration with jurisdiction backend systems



Considerations when Configuring Applications

- Mark an application configuration as 'Active' to make it available to applicants. Mark configurations 'Inactive' until they're complete. This allows you to save configurations without displaying them on the applicant screen until you're ready. This is useful for testing or preparing to roll out new applications in the future or when updating existing ones (e.g., when your permit fees change).
- Consider the typical applicant's thought process when applying. Provide information and options that guide them to the correct permit.
- Align configurations with your jurisdiction's workflow and backend processes.
- Determine which permits can be obtained as OTC (non-Plan Review).
- Create a spreadsheet of your permit types and how they map to MBP buckets. Indicate whether Plan Review is required and specify 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

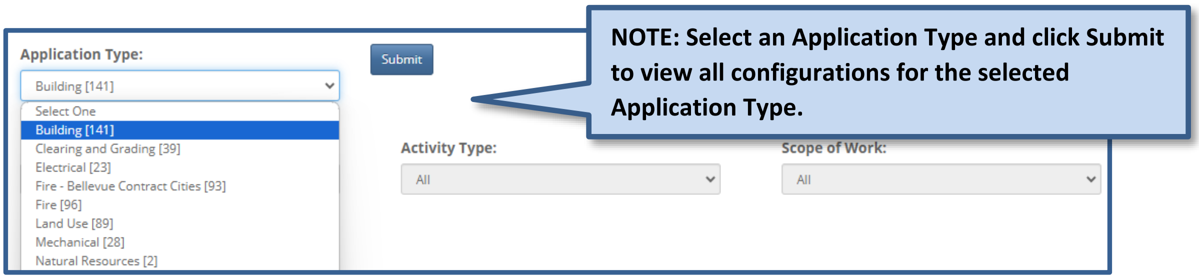
ApplicationType: Incoming ApplicationType
ProjectType: Incoming ProjectType
ActivityType: Incoming ActivityType
ScopeOfWork: Incoming ScopeOfWork
Module: either "permit" or "project" for PermitTrak or ProjectTrak (all lower case, no quotes)
Type: Permit/Project Type to create
SubType: Permit/Project 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

Application Configuration Landing Page

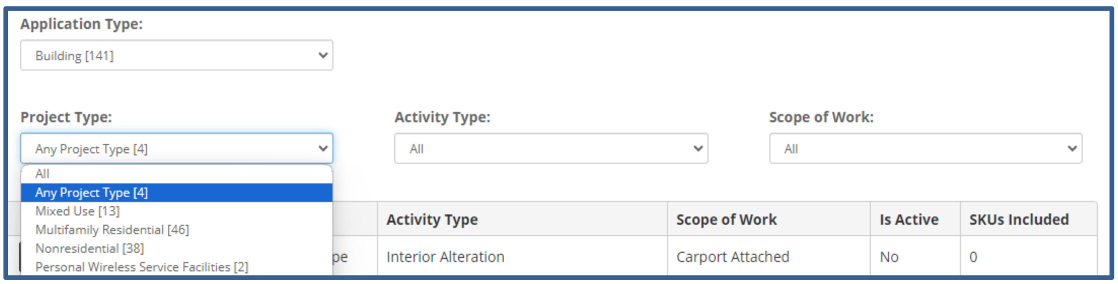
For all application configurations you must first select one type from each of the four buckets:

APPLICATION Type



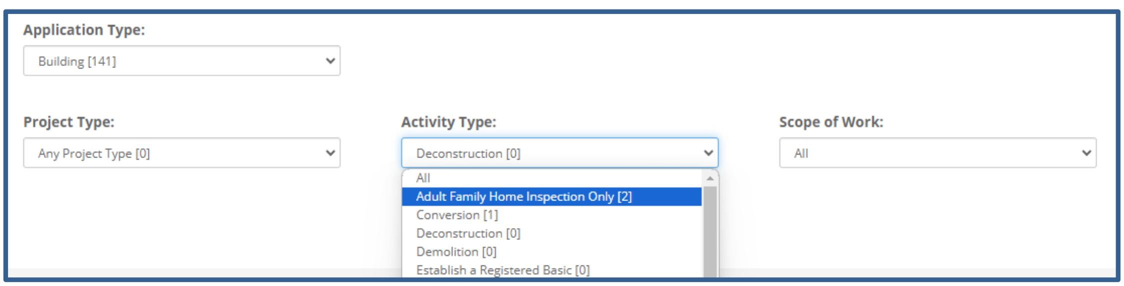
Choose an application type and click **Submit**. The number in brackets next to the Application Type indicates how many configurations you already have for that type.

PROJECT Type



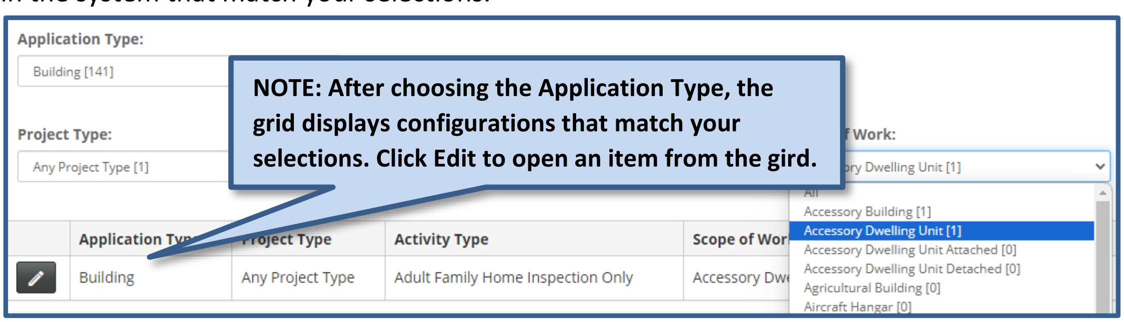
Once you select an Application Type, you can choose the other three buckets in any order.

ACTIVITY Type

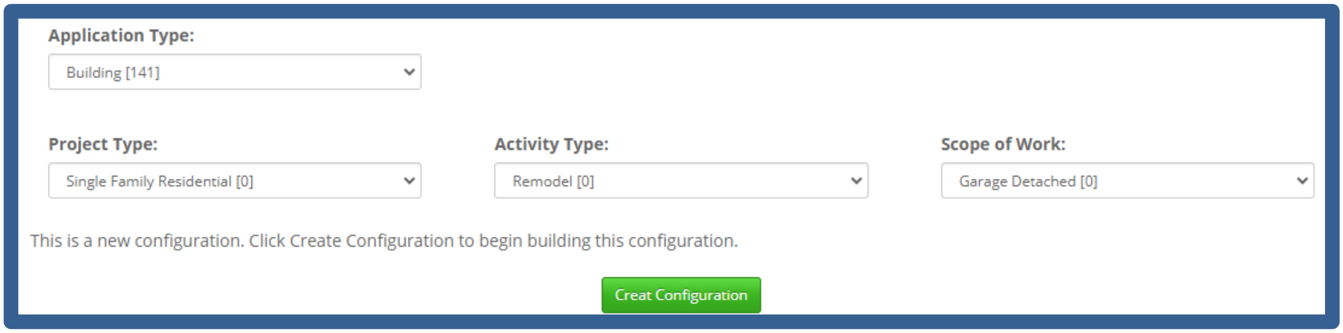


All bucket selections display a counter in brackets which shows the number of configurations in the system that match your selections.

SCOPE of Work



With each bucket selection, the grid populates with configurations that match your choices.
If no configurations match your selections, the **Create Configuration** button appears.

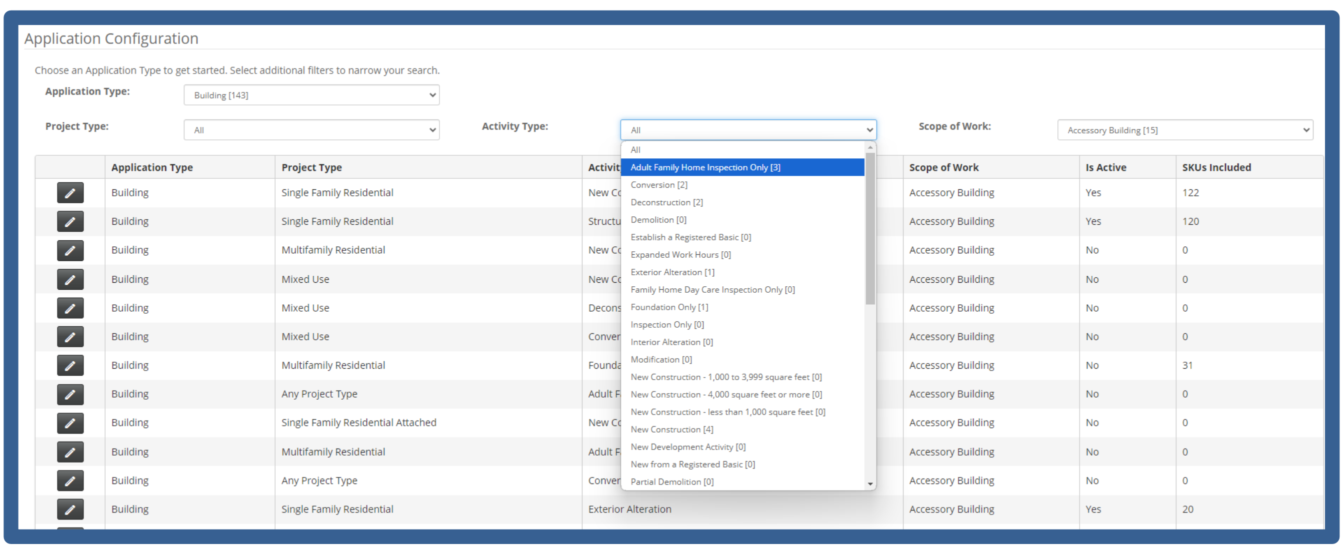


Using the Landing Page

Follow these steps to select a configuration manage your application settings.

Steps:

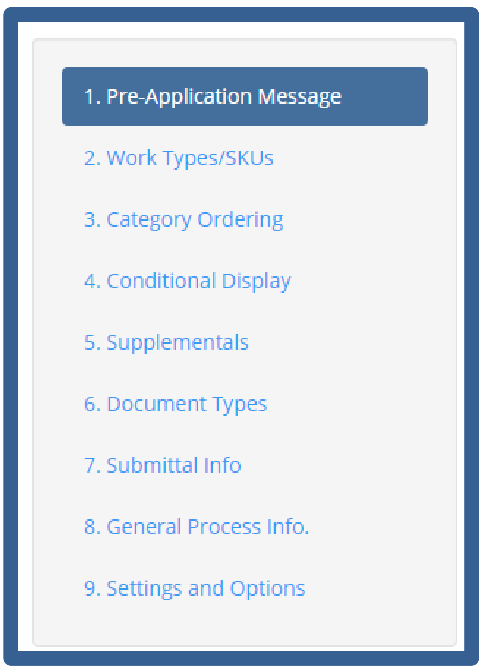
1. On the menu, select Manage > Applications.
2. On the Application Configuration landing page, choose the desired **Application Type**. The counter in brackets indicates the number of configurations already saved for the selected application type.
3. Click **Submit**. The grid displays all configurations for the chosen Application Type, and the dropdown values for the remaining buckets are populated.
4. Select the remaining buckets in any order. The counters dynamically respond to each dropdown selection, and the grid displays all saved configurations that match your selections.
5. The grid displays the 4 bucket selections, along with the Active/Inactive status and the number of SKUs saved for each configuration.
6. Click **Edit** to modify a configuration from the grid or click **Create Configuration** to start working on a new one.



The Configuration Workflow

Once you have selected the buckets, use the links on the left navigation of the configuration workflow to build your configuration.

The configuration workflow opens with the Pre-Application Message page. For new configurations, it is recommended to follow the steps in the order shown on the left navigation to complete all steps of the configuration workflow. When editing existing configurations, use the active page links to update any page in the configuration workflow.



Consider the following best practice guidelines when working in the configuration workflow:

- Complete all steps on the left navigation to build a complete configuration. The numbered steps on the left navigation provide a suggested order.
- When editing existing configurations, make them Inactive on the Settings and Options page until you've saved all necessary changes.
- Build and test your configurations in the test environment prior to making them available to external customers in production.
- Apply for the permit in the ePermit test environment to verify the customer experience.

Pre-Application Message

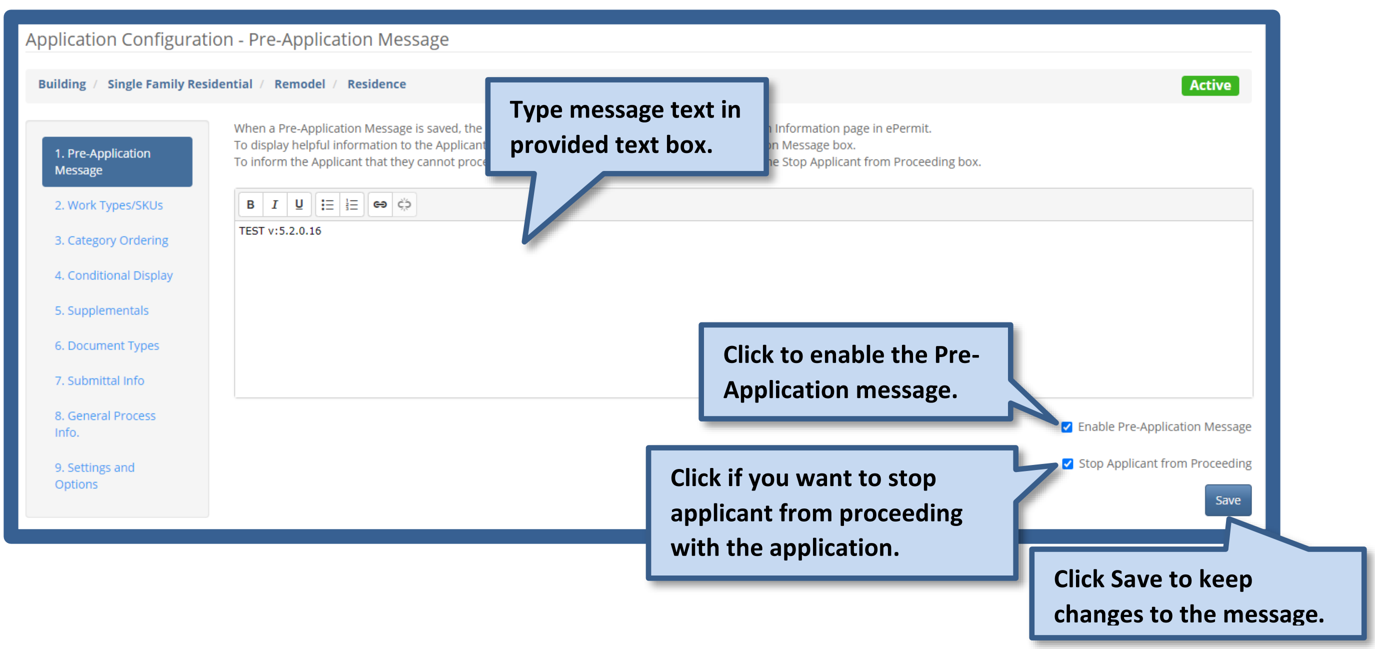
The Pre-Application message provides information that the jurisdiction wants to display to the applicant right after they make their bucket selections on the Application Information page of ePermit. The Pre-Applicant message is optional.

Steps:

1. Click the **Pre-Application Message** link on the left navigation.
2. On the Pre-Application Message page, add the message in the text box and click **Enable Pre-Application Message**.
3. To prevent the applicant from proceeding past the Application Information page, click **Stop Applicant from Proceeding**.
4. To both stop the applicant and display a message, enter your message and select both checkboxes.
5. Click **Save**. A save success message will appear.

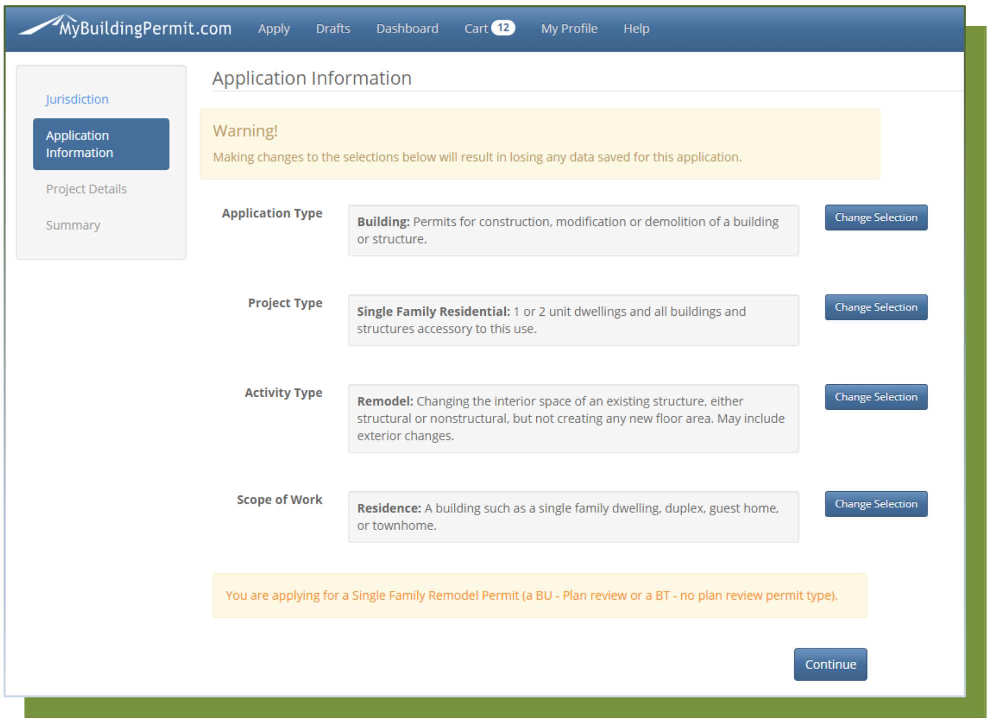
It is recommended that you use the **Stop Applicant from Proceeding** check box only in conjunction with the **Enable Pre-Application Message**. Failing to provide a message to the customer when blocking their progress can cause confusion and result in support issues.

You can edit the Pre-Application message at any time, including modifying the message body or adjusting the checkbox settings.



NOTE: Click the "Stop Applicant from Proceeding?" box to block the applicant's progress on the Application Information page. This can 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



Work Types/SKUs

Work Types/SKUs are specific to each permit type. For example, the choices available for BUILDING permits will differ from those for FIRE permits. These Work Types are displayed on the Project Details page during the application process, allowing you to gather detailed information about the work to be completed under the selected permit.

Each Work Type has a unique identifier known as a SKU. When combined with your jurisdiction's short name (e.g., KL for Kirkland) and permit type, a specific code is formed (e.g., KL_MECH_5476). This SKU is sent to your backend permitting system via an XML text file. Your Web Service integration will then translate this information into your backend system.

Work Types/SKUs are also associated with a particular Category when the SKU is created by the Service Delivery Team. This association determines how they are organized on the customer application screen. If you need additional Categories or Work Types/SKUs for your configurations, please request them from the Service Delivery Team via the Manage menu (Manage > Settings > SKU Request).

When adding Work Types/SKUs to your configuration, consider the following:

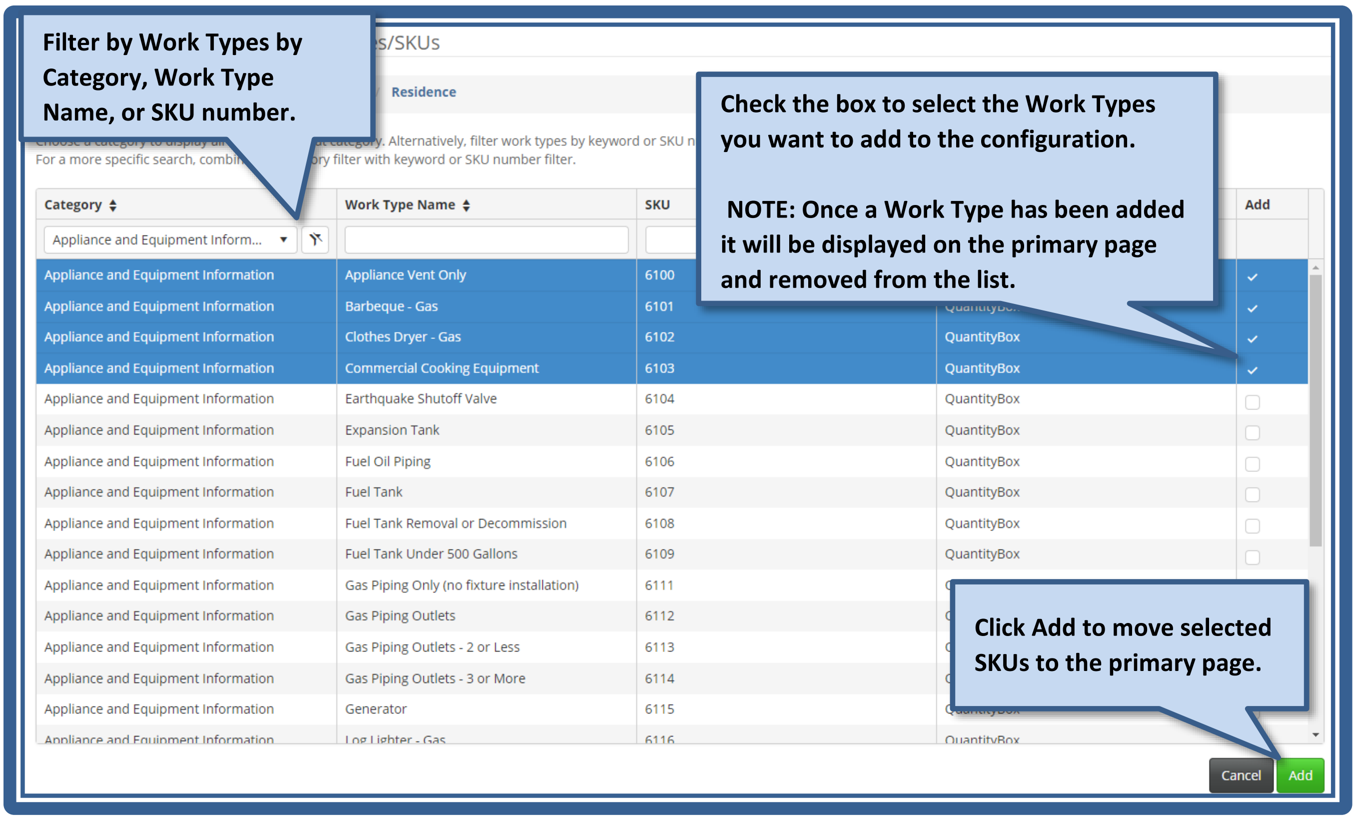
- If using radio list control types, do not combine them with check box control types in the same category.
- For OTC applications, at least one SKU must have a Fee Code assigned.
- All configurations must contain at least one SKU. Where Valuation is used, there must be at least two SKUs in the configuration.

Adding Work Type/SKUs

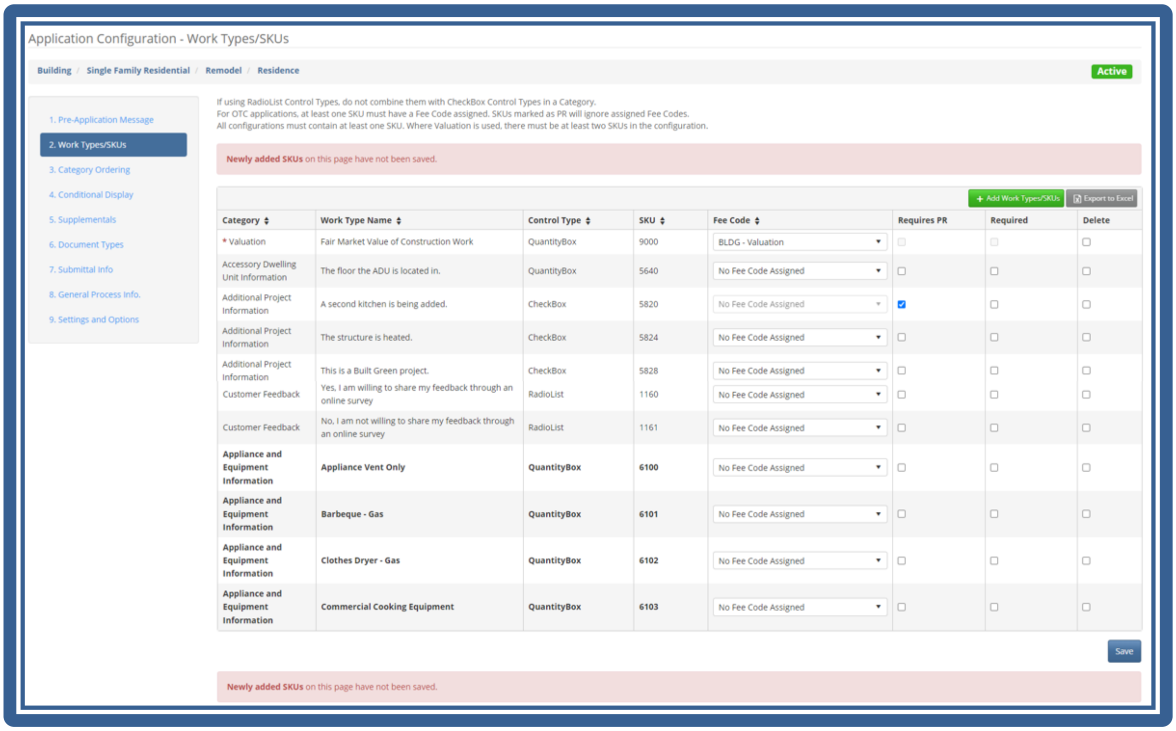
Work Types/SKUs are managed and saved on the primary page, with a secondary page used to add new Work Types/SKUs to the configuration.

Steps:

1. Click the **Work Types/SKUs** link on the left navigation.
2. Click the **Add Work Types/SKUs** button to view a secondary page displaying all available Work Types/SKUs. Check the box to select the SKUs you want to add to the configuration.
3. To find specific Work Types/SKUs, filter by **Category**, **Work Type Name**, or **SKU Number**.



4. Check the box in the **Add** column for all Work Types/SKUs you want to include in the configuration.
5. Click **Add**. Focus returns to the primary page. Newly added SKUs appear at the bottom of the primary page in bold/italic font, with red messages alerting you of unsaved changes on the page.
6. Make any other changes on the grid and click **Save**. A save success message appears.



Plan Review SKUs (Requires PR)

Use the grid to identify which Work Types/SKUs in the configuration will trigger a PR Application process.
NOTE: The Requires PR? check box will be disabled for SKUs that have Fee Codes assigned.

Steps:

1. On the Work Types/SKUs primary page, identify the Work Types/SKUs that should trigger a Plan Review when the applicant selects them.
2. Check the **Requires PR** check box.
3. Make any other changes on the grid and click **Save**. A save success message appears. The application will be submitted as a Plan Review when the customer selects any PR SKUs during the application process.

Assiging Fee Codes to SKUs

Assign Fee Codes to OTC SKUs to apply appropriate fees to SKUs selected by customers on OTC permits.
NOTE: Fee Codes will be disabled on SKUs that are marked Requires PR.

Steps:

1. On the Work Types/SKUs primary page, click the **Fee Code** box to activate it.
2. From the list, select the Fee Code you want to assign to the Work Type/SKU.
3. Make any other changes on the grid and click **Save**. A save success message appears. The Fee Code that was assigned will be added to the OTC permit when the Work Type/SKU is selected by the customer, which will be paid by the customer during checkout.

Marking a Work Type/SKU as Required

Required Work Types/SKUs indicate the selections that the applicant is required to make on the Project Details page of ePermit. Work Types/SKUs that are Required display a red asterisk on the Project Details page in ePermit.

Steps:

1. On the Work Types/SKUs primary page, check the **Required** box for any SKUs that must be selected during the application process. Required SKUs will display with a red asterisk to indicate required status. The following SKU types cannot be marked as required selections; the Required check box will be disabled for:
   - Radio List control type SKUs
   - Globally Required SKUs
   - SKUs that are in required categories
2. Make any other changes on the grid and click **Save**. A save success message appears.

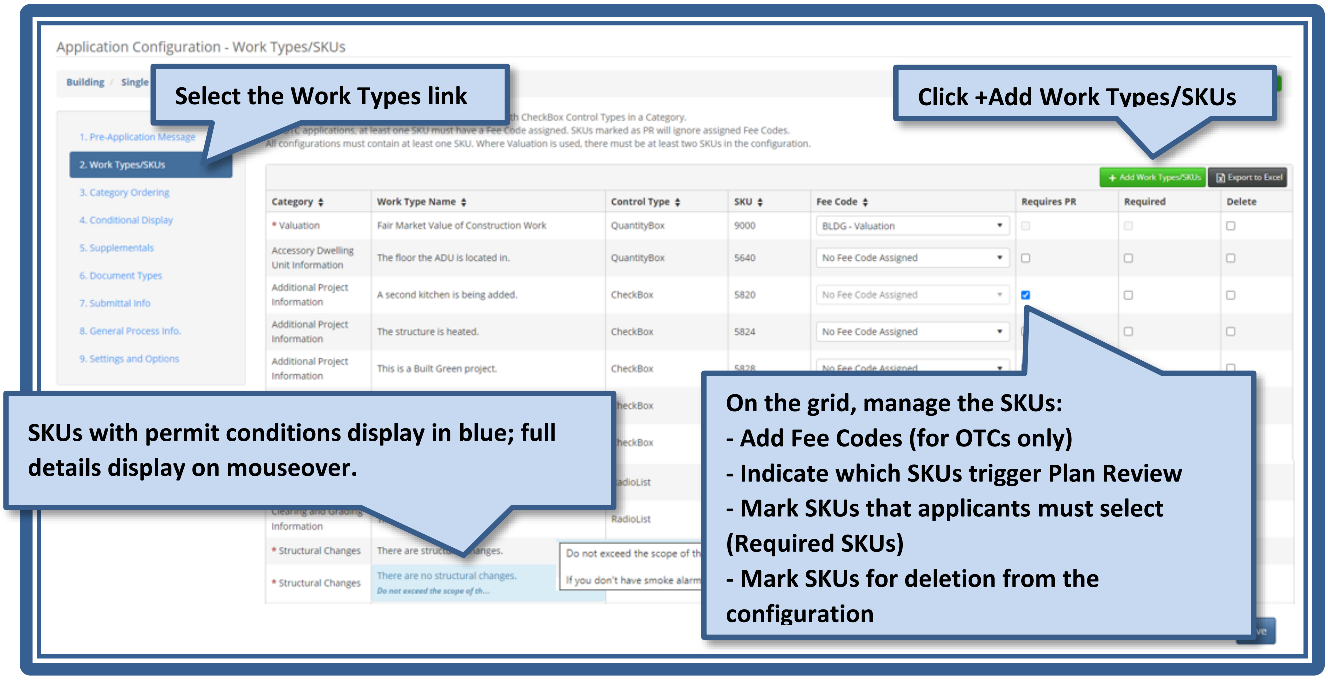
Removing Work Types/SKUs from a Configuration

You can remove any Work Types/SKUs that were previously added to a configuration. Once SKUs are removed from a configuration, they can be added again if desired by clicking Add Work Types/SKUs.

NOTE: If you delete a SKU that has been saved as a Trigger SKU in Conditional Display, you will be alerted.

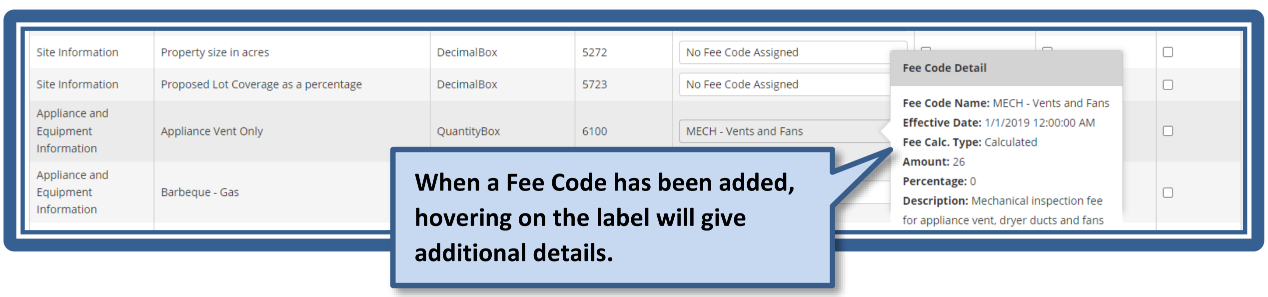
Steps:

1. On the Work Types/SKUs primary page, identify the Work Types/SKUs that you want to remove from the configuration.
2. Check the **Delete** check box. Multi-select is supported.
3. Make any other changes on the grid and click **Save**. The Work Types/SKUs are removed from the configuration, and are restored to the list on the secondary page, Add Work Types/SKUs.



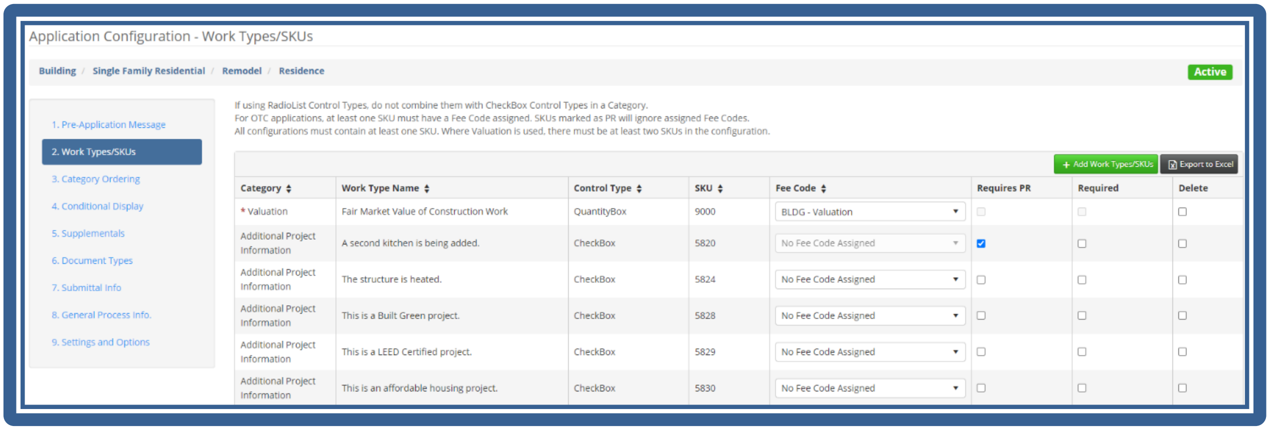
NOTE: Plan Review configurations will not use Fee Codes—jurisdictions will Invoice for any fees due.

REMINDER: When a Work Type is marked as Required in the configuration, the categories will be marked with a Red Asterisk * in the Application process, which means an applicant must fill in at least one of the options in that category. Note that Radio Button control types are meant to indicate a single selection is required. Radio Button control types cannot be marked as Required.

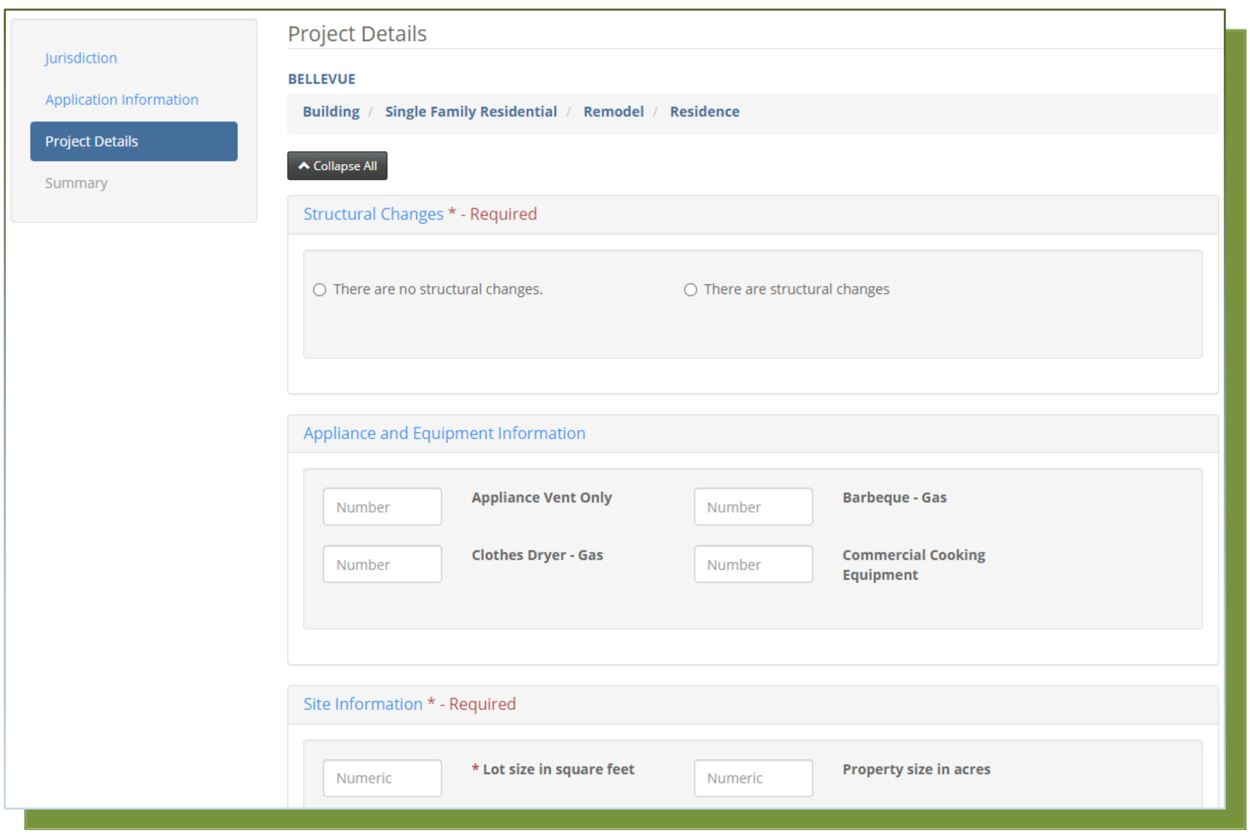


NOTE: See FEE CODES Section in this document for detailed instructions on creating Fee Codes.

Example of a Jurisdiction Application Configuration



The Work Types/SKUs display to the Customer on the Project Details Screen



Category Ordering

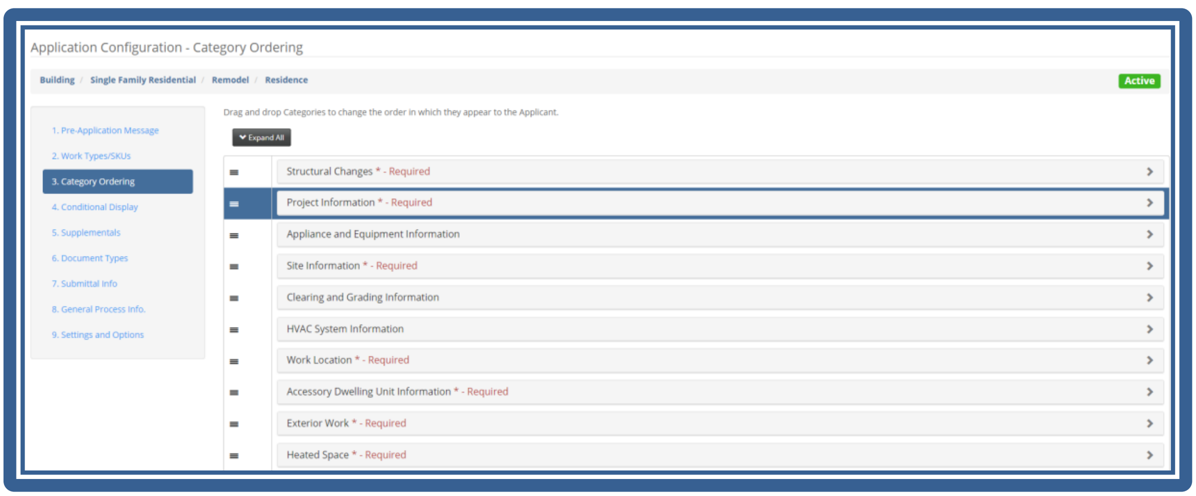
Click and drag categories to control the order in which they display to applicants in ePermit. If you want to add Conditional Display to the configuration, complete the Category Ordering step before adding Conditional Display.

NOTE: Categories that have Conditional Display relationships established will display with a jagged blue outline. Care should be taken when reordering Conditional Categories. See "Conditional Display" section for detailed instructions.

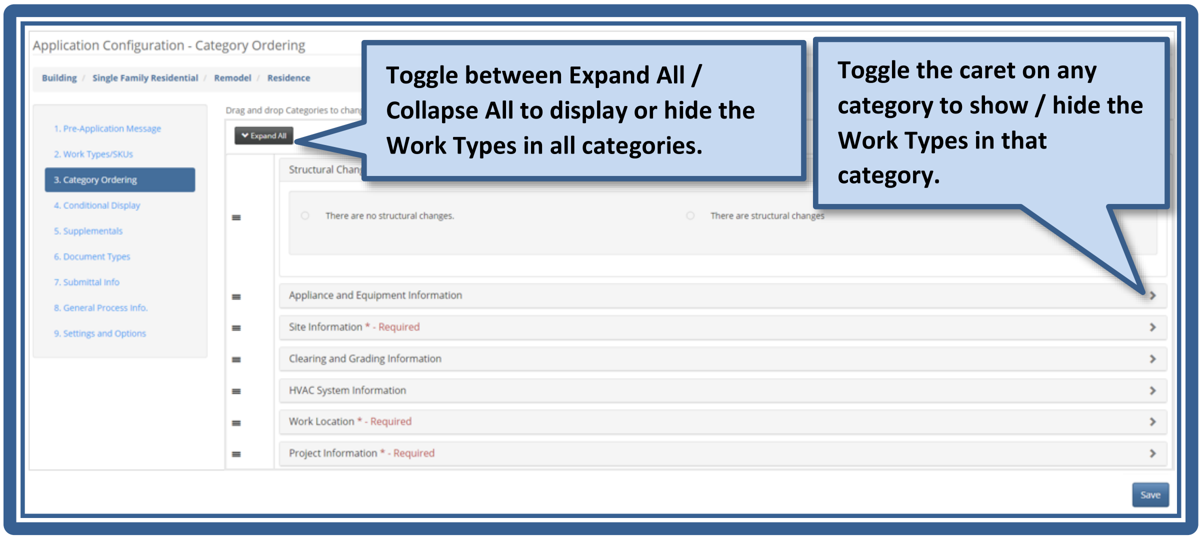
Steps:

1. Click **Category Ordering** on the left navigation.
2. Click and drag the categories to place them in the desired display order. This is the order in which the categories will appear to applicants on the Project Details page in ePermit.

NOTE: This changes the display order to applicants only. The categories are not reordered on the Work Types/SKUs page.



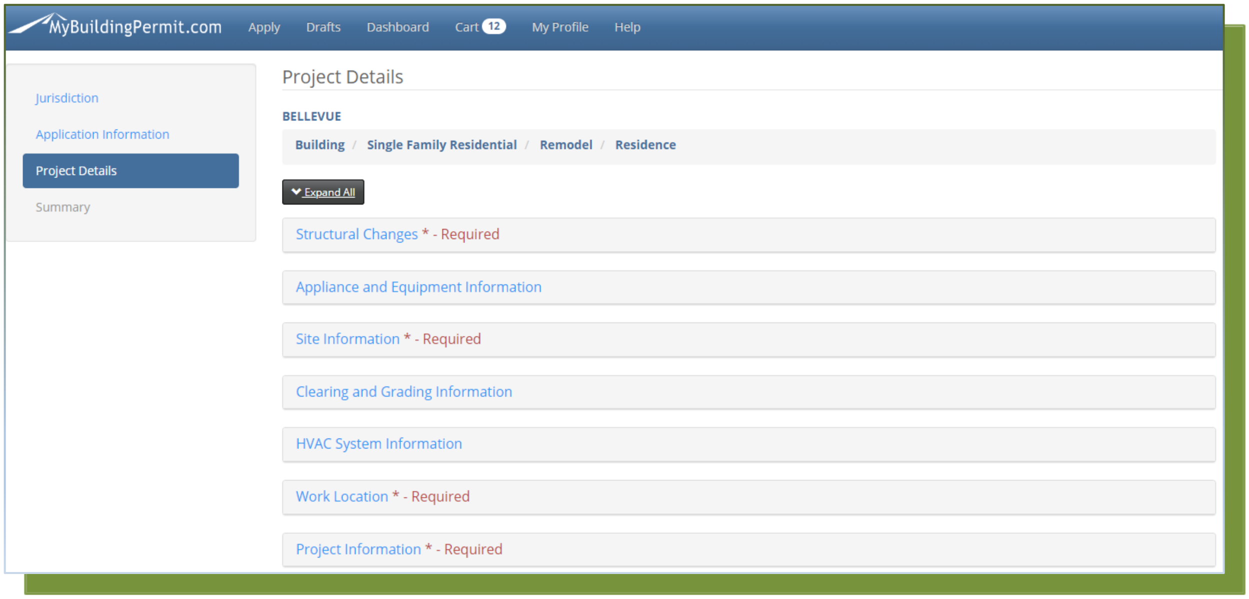
3. Expand the categories to view the SKUs in a similar presentation to the Project Details page.
   a. Toggle the **Expand All / Collapse All** button to show or hide the Work Types in all categories.
   b. Use the caret on any category header to show or hide the Work Types in a specific category.



4. Click **Save** when you've arranged the categories in the desired order. Note that the categories are saved in the collapsed state. A success message appears when your changes are saved.

NOTE: Category ordering is optional. If you choose not to change the display order, all SKUs in the configuration will appear in their default order during the application process.

Categories Display in Order on the Project Details Screen in ePermit



Conditional Display

Conditional Display is a powerful feature within the configuration workflow designed to optimize the user experience by making applications more responsive to customer selections. Incorporating Conditional Display into a configuration helps minimize unnecessary questions during the application process.

Conditional Display relationships are established when categories are associated with specific SKUs, known as Trigger SKUs. These Trigger SKUs are added to a category, transforming it into a Conditional Category. The Conditional Category remains hidden and will only be displayed to the user if the applicant selects the Trigger SKU during the application process. This results in applications that are better tailored to the specific needs of the applicant.

Key Terms

- **Trigger SKUs**: SKUs that are part of the configuration and assigned to categories to control their display. Note that removing a Trigger SKU from a category does not remove the SKU from the configuration.
- **Conditional Categories**: Categories with Trigger SKUs assigned to them. Conditional Categories will display to the applicant only if the Trigger SKU is selected by the applicant.

Important Considerations - Before you Begin Working with Conditional Display

By default, all SKUs and Categories saved to a configuration will display in ePermit. Because this behavior changes the default display behavior, you must have a solid understanding of your configurations before you begin.

Please note several important considerations when working with Conditional Display:

- **Optional Use:** Conditional Display is optional. If not used, applicants will continue to see all Categories and SKUs. There is no obligation to change configurations. Admins who want to control category display can add Conditional Display to new or existing configurations in the Configuration Workflow.
- **Establish Category Order:** Conditional Display relies on the display order of categories and SKUs. Before assigning Trigger SKUs to categories, ensure the Category Ordering step is completed in the Configuration Workflow. Key points to note:
  - Only SKUs that precede a category in the display order can be assigned as Trigger SKUs for that category.
  - Once Trigger SKUs are assigned to a Conditional Category, you cannot reposition the Trigger SKU to display below its Conditional Category; doing so will clear the Trigger SKU.
- **Testing:** Always test your Conditional Display configurations in the STG environment before moving them to PROD. This involves selecting the saved Trigger SKUs and validating that the appropriate Categories are displayed when the Trigger SKUs are selected.
- **SKU Eligibility:** Only SKUs preceding a category in the display order are eligible to use as Trigger SKUs for that category. Some SKU types are not eligible for use as Trigger SKUs, including:
  - Fair Market Value SKUs
  - OTC Fee SKUs
- **Category Eligibility:** Categories can only be Conditional Categories based on the SKUs that precede them in the display order. However, some Categories are not eligible to be Conditional Categories, including:
  - The Category that appears first in the configuration and displays at the top of the page.
  - Categories that contain Fair Market Value SKUs.

Establishing the Category Display Order

Determining the display order of your Categories before adding Trigger SKUs to Conditional Categories is crucial. Changing the Category Display after setting up Conditional Display may result in Trigger SKUs being cleared. Follow these steps to establish the Category order:

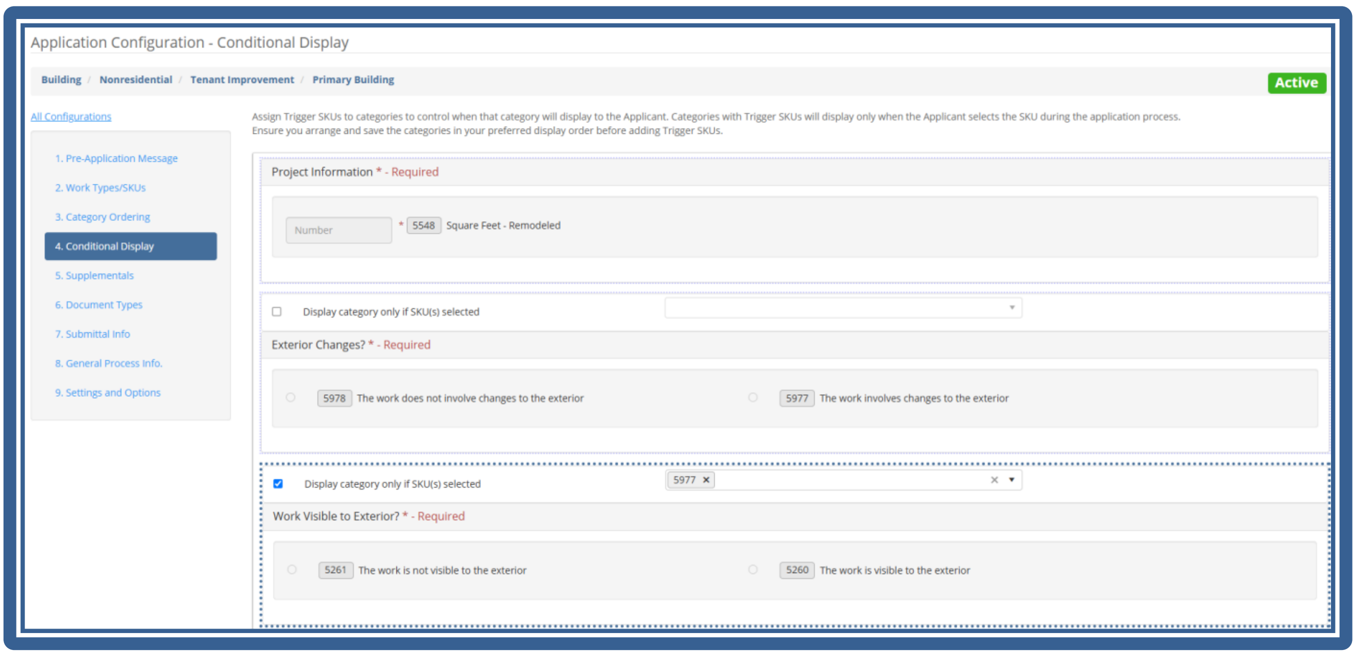
1. Navigate to the configuration you are working on and click **Category Ordering**.
2. Click and drag categories into the desired order, ensuring that Conditional Categories are positioned below the Trigger SKUs you want to assign.
3. Once the Categories appear in the desired order, click **Save**. You can now proceed to set up Conditional Display.

Adding Conditional Display to a Configuration

To add Trigger SKUs to categories and control category display, follow these steps:

1. Save categories in the desired display order on the Category Ordering page and click **Conditional Display** in the left navigation.
2. Review the Categories and SKUs and identify the Trigger SKU(s) and the Conditional Category relationships you want to assign.

3. In the Conditional Category header, click the check box for **Display Category only if SKU(s) selected.** This action will outline the category and activate the dropdown.
4. Click the dropdown to display all SKUs available to add as Trigger SKUs.
    - Only SKUs that preceded the category in the display order can be Trigger SKUs.
    - You can assign one or more available SKUs as Trigger SKUs to a Category.
    - A SKU can be used as a Trigger SKU in multiple categories, provided it precedes each Conditional Category in the display order.
5. After adding all desired SKUs to the categories, click **Save**. Applicants will now only see Conditional Categories when the Trigger SKU is selected on the Project Details page of the application process.



Removing Conditional Display from a Configuration

Categories without Trigger SKUs will always display in the application. Follow these steps to remove Conditional Display from a category:

1. Click **Conditional Display** in the left navigation of the Configuration Workflow.
2. Scroll to the Category from which you want to remove Conditional Display.
3. Click the “x” in the right corner of the SKU. This removes the SKU from the category.
4. Click **Save**.

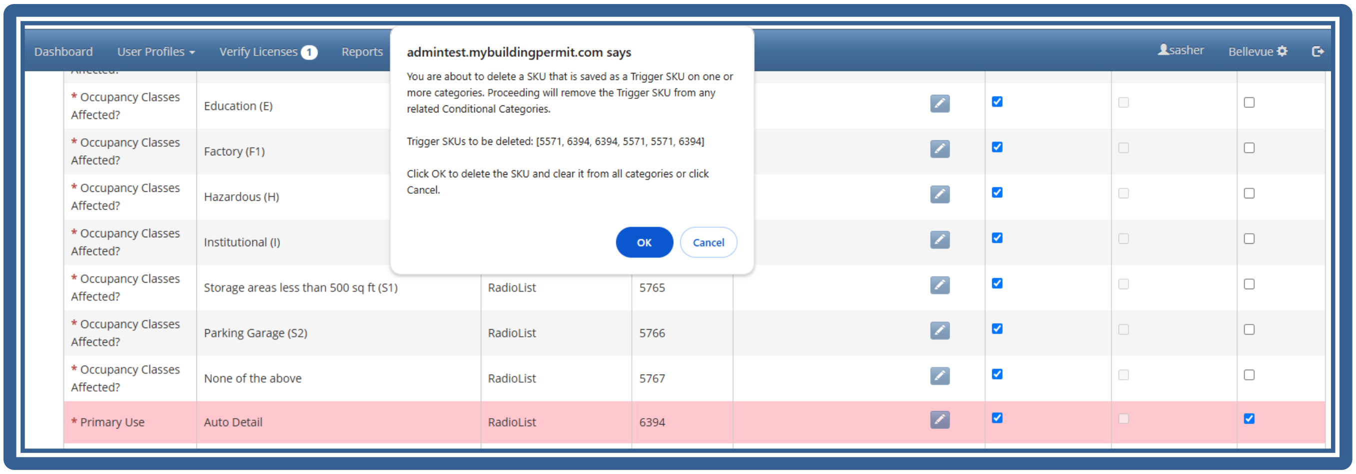
Workflow changes that affect Conditional Display

Once Conditional Display relationships are saved in a configuration, certain changes to the SKUs and categories within those relationships can clear them. Deleting SKUs or altering the display order of categories can clear conditional relationships. You will be alerted when attempting to make configuration changes that impact Conditional Display. However, it is advisable to review Conditional Display before making any other configuration changes.

Work Types/SKUs: Deleting Trigger SKUs from a Configuration

When you make changes to Conditional Categories and Trigger SKUs in other areas of the Configuration Workflow, you will be alerted.

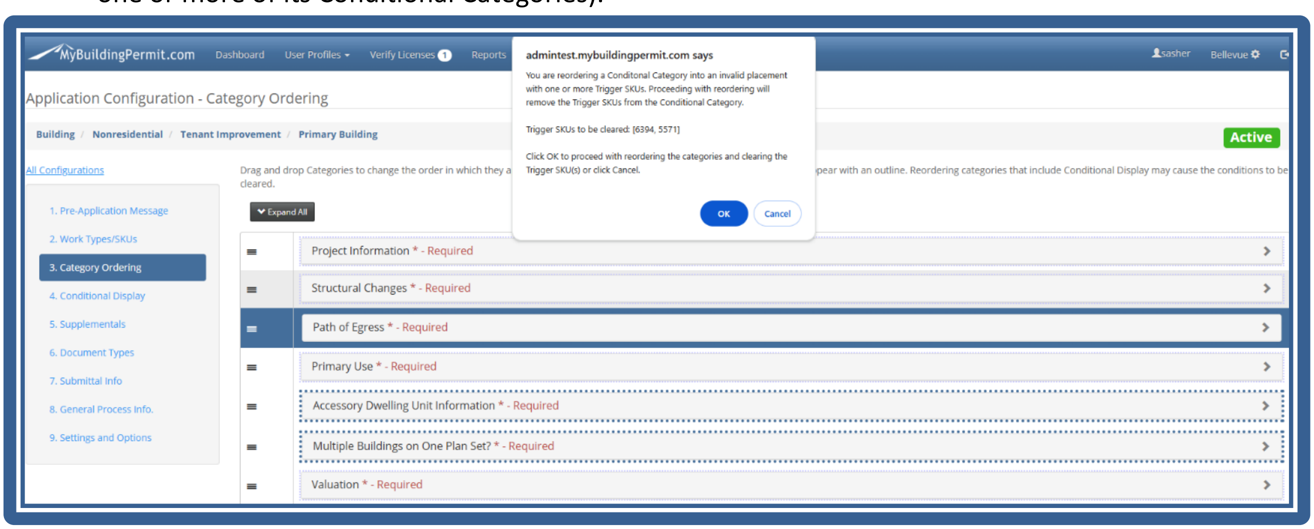
- You'll see an alert dialog on the Work Types/SKUs page if you try to delete a SKU that is in use as a Trigger SKU. Click OK to confirm deleting the Trigger SKU(s) or click Cancel.



Category Ordering: Changing Display Order with Conditional Display

When making changes to Conditional Categories and Trigger SKUs in other areas of the Configuration Workflow, you will be alerted. On the Category Ordering page, a staggered blue line indicates all Conditional Categories. If you move Conditional Categories into invalid placement relative to their Trigger SKUs, you will be alerted on the Category Ordering page:

- An alert dialog will appear when you move a Conditional Category into an invalid placement with a Trigger SKU (e.g., placing the Conditional Category above one or more of its Trigger SKUs)
- An alert dialog will appear if you move a category containing a Trigger SKU into an invalid placement with the Trigger SKU's Conditional Category (e.g., placing a category containing a Trigger SKU below one or more of its Conditional Categories).



Conditional Display – ePermit User Experience

When Conditional Logic is applied to a configuration, the user experience works as follows:

- Conditional Categories appear only when Trigger SKUs are selected.
- If a Trigger SKU is selected and then cleared, the Conditional Category will toggle accordingly, showing or hiding based on the Trigger SKU's selection status.
- If an applicant enters data into SKUs within a Conditional Category, then clears the Trigger SKU, any data entered will be erased when the Conditional Category is hidden.

Supplementals

For Plan Review applications, you can use Supplementals to provide applicants with more information or ask applicants additional questions. Supplementals can be added to specific application configurations, and display on the Supplementals page in ePermit. Supplementals can be configured to always display, or to only display only when specific SKUs are selected during the application process. When the application is submitted, the Supplementals are saved to the Jurisdiction Dashboard for jurisdiction review during the Plan Review process.

Before adding Supplementals to your configurations, ensure you've created them in the system. Once created, you can include them during the configuration process. For detailed information see Managing Supplementals – Creating New Questionnaires.

Consider the following when adding Supplemental to configurations:

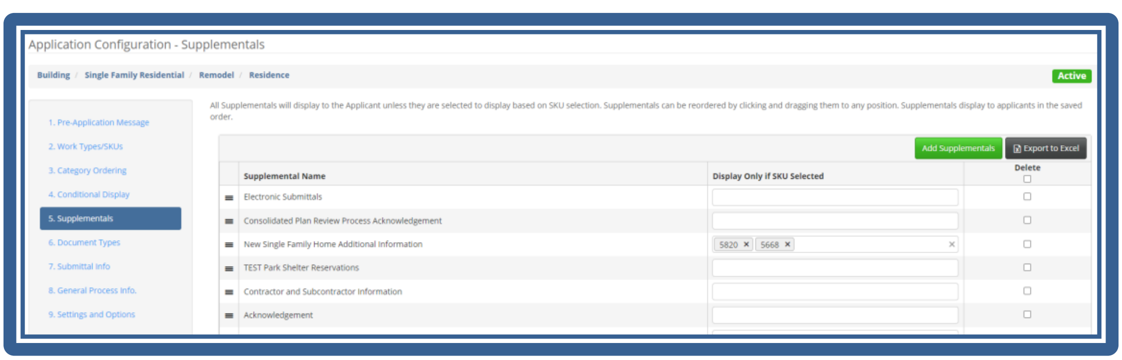
- All Supplementals will display to the applicant unless they are selected to use SKU-specific display.
- Supplementals can be reordered by clicking and dragging them to any position.
- Supplementals display to the applicant in the order in which they are saved.

Adding Supplemental

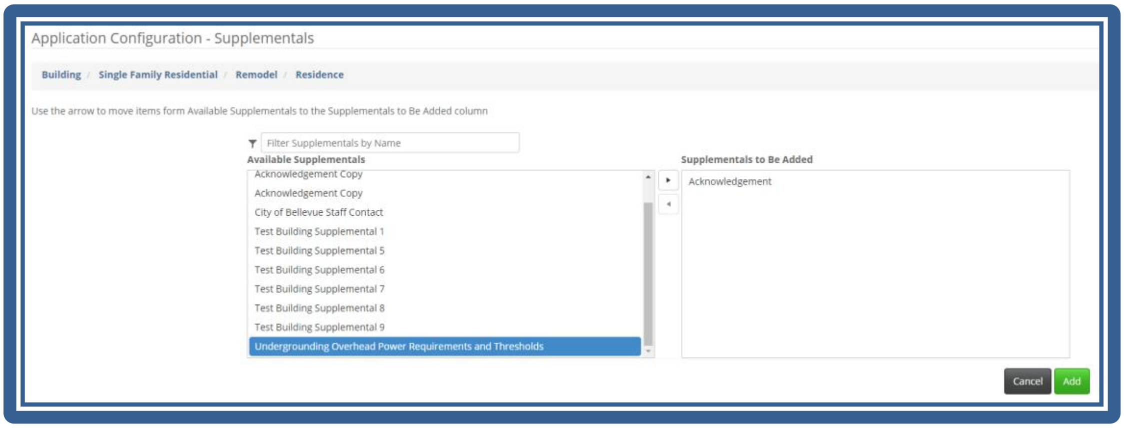
You can add as many Supplementals as desired.

Steps:

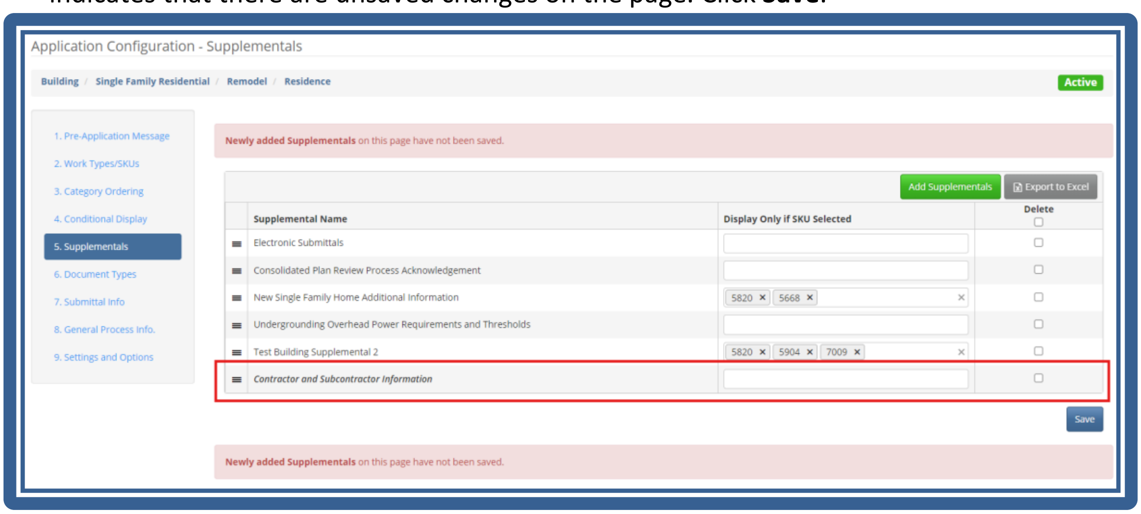
1. Click the **Supplementals** link on the left navigation.
2. Cick the **Add Supplementals** button.



3. On the secondary page, choose the Supplementals you want from the **Available Supplementals** pane (left) and move them to the **Supplementals to Be Added** pane (right). You can also double-click to move Supplementals between panes.
4. Use the filter to search for Supplementals by name.



5. Click **Add** to return to the primary page. The focus returns to the Supplementals primary page. Newly added Supplementals appear at the bottom of the grid in bold font. An alert message appears that indicates that there are unsaved changes on the page. Click **Save**.

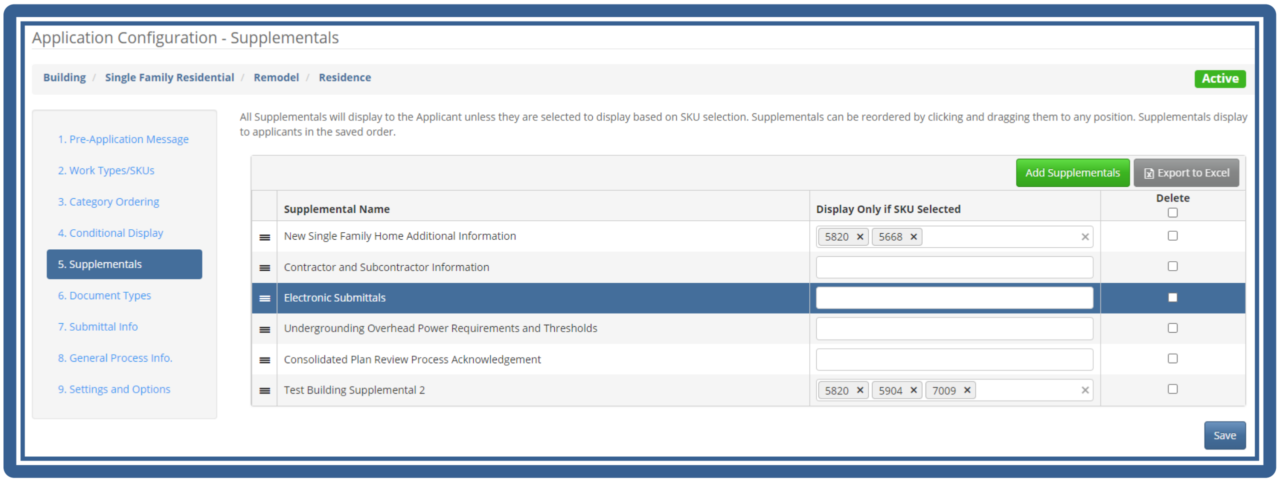


Reordering Supplemental Display

Supplemental reordering is optional. All Supplementals will display to the customer in the order saved.

Steps:

1. On the Supplementals page primary page, click and drag any Supplemental to the desired order.
2. Make any other necessary changes and click **Save**. A save success message appears. Supplementals will display to the applicant in the order in which they were saved.

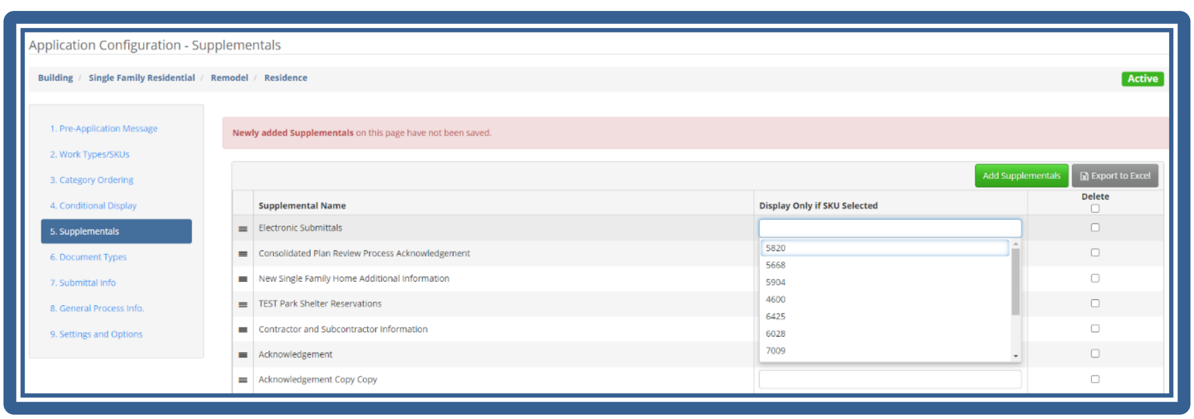


Setting SKU-Specific Display

For SKU-specific display, you can associate Supplementals with one or more trigger SKUs. When a trigger SKU is assigned, the Supplemental will display only when the applicant selects the trigger SKU during the application process. When Supplementals are saved to a configuration, they will always display to the applicant unless you limit their display by assigning trigger SKUs.

Steps:

1. Click the **Supplementals** link on the left navigation.
2. Click the field for **Display Only if SKU Selected** field to activate it.



3. Select one or more PR SKUs from the drop-down list for each Supplemental to which you want to add trigger SKUs. **NOTE:** Supplementals are only available on Plan Review permits. Only SKUs marked 'Requires PR' on the Work Types/SKUs page will display in the drop-down list.
4. Click the **x** beside any SKU number to remove it from Supplemental.
5. Make any other changes on the grid and click **Save**. The trigger SKUs are saved for the Supplemental.

Removing Supplementals from a Configuration

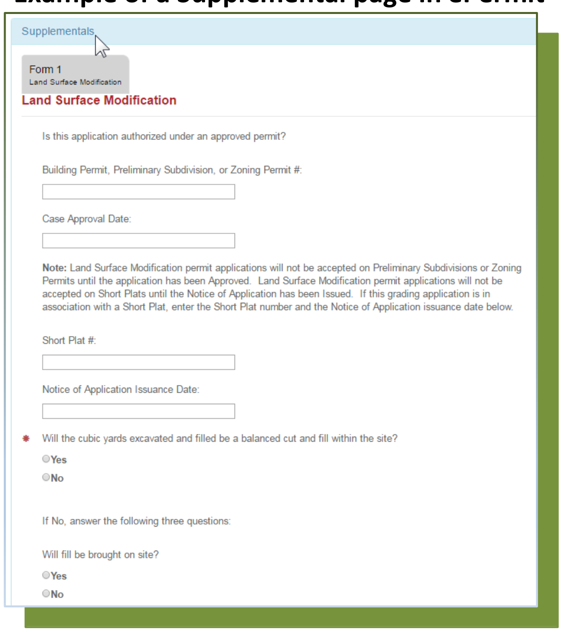
You can remove any Supplementals that were previously saved to a configuration. Once Supplementals are removed from a configuration, they can be added again if desired by clicking Add Supplementals.

Steps:

1. On the Supplementals primary page, identify the Supplementals that you want to remove from the configuration.
2. Check the **Delete** check box. Multi-select is supported
3. Make any other changes on the grid and click **Save**. A save success message appears, and the Supplementals are removed from the configuration.

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 Supplemental page in ePermit



Document Types

For Plan Review applications, you can include both required and optional/additional Document Types in your configurations. All documents in the configuration display in either the Required or Additional Documents section of the File Upload page in ePermit.

- **Required Documents** - Document types that are flagged as Required when you build the configuration must be uploaded by applicants during application process.
- **Additional Documents** - Documents that are not marked as Required when you build the configuration will display to the applicant as Additional Documents on the File Upload page in ePermit. These are optional documents for the application.
- **Exception SKUs** – Documents with Exception SKUs cause the Required/Not Required status to change when the SKU is selected by the applicant.

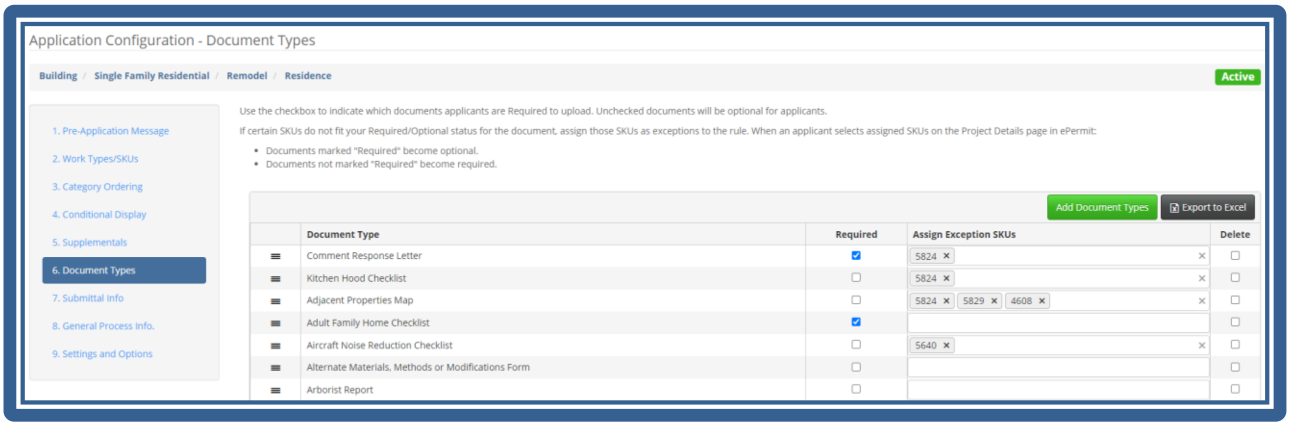
The Document Types list is a fixed list created by the MBP team. If you need a new Document Type created, submit a request on the Admin site under Manage > Settings > Document Request.

Adding Document Types

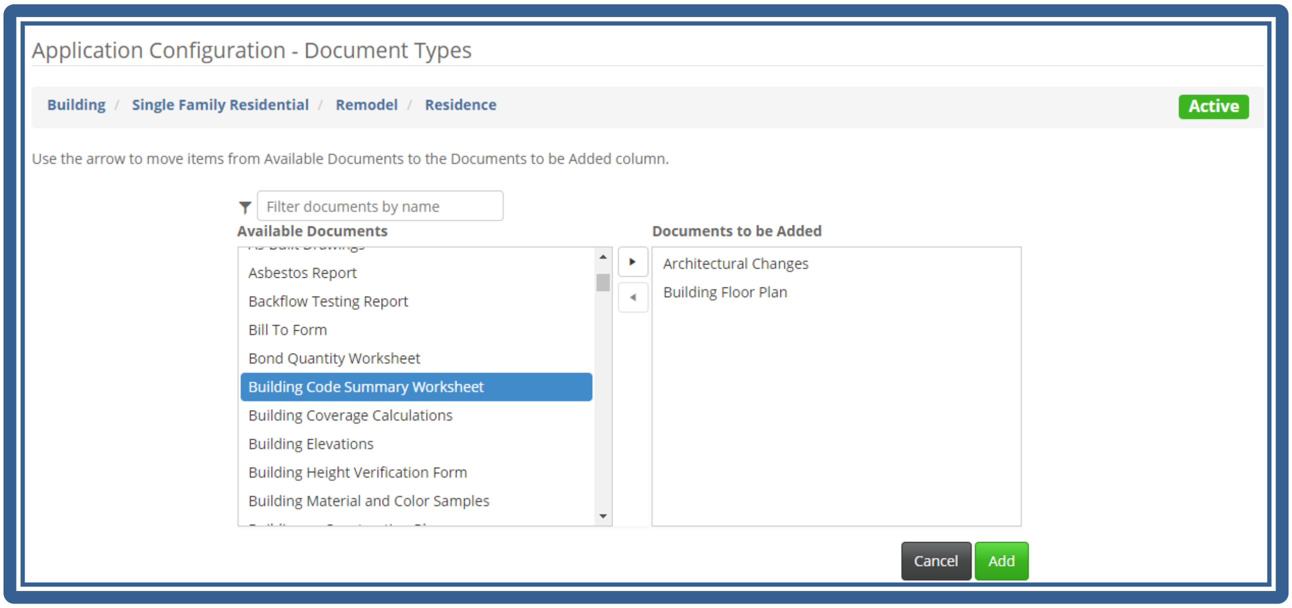
You can add Document Types to a configuration and indicate which ones are required and which are optional for the applicant to upload.

Steps:

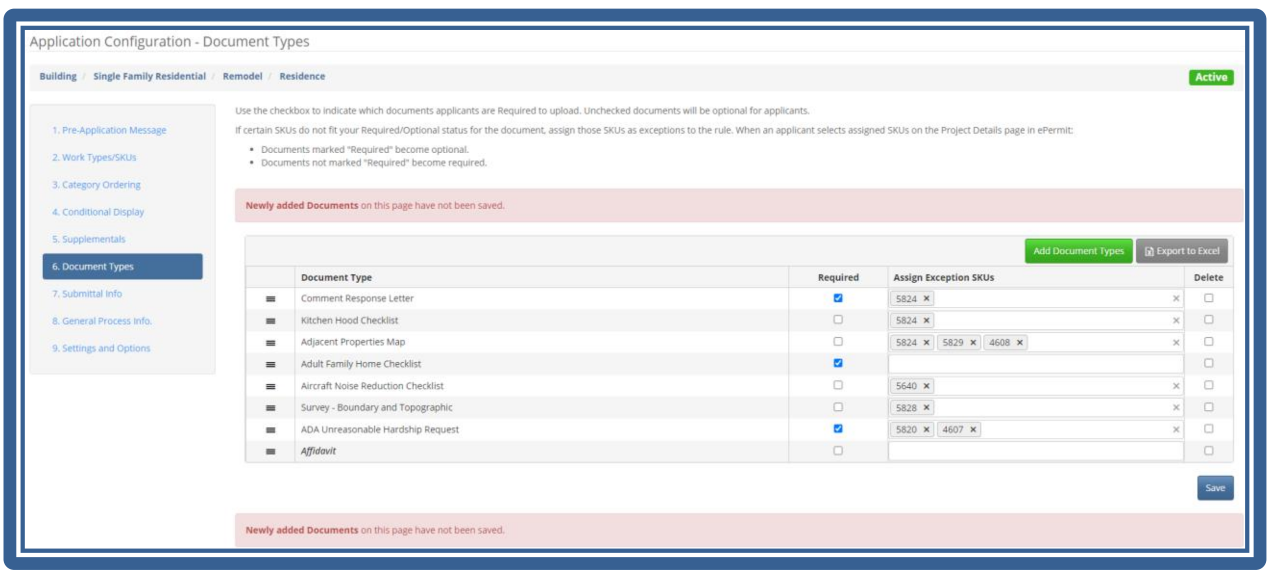
1. Click the **Document Types** link on the left navigation. The grid displays all documents already saved to the configuration (if any).



2. Click the **Add Document Types** button. On the secondary page, choose the Document Types you want from the “Available Documents” pane (left) and use the arrows to move them to the “Documents to Be Added” pane (right). You can also double-click to move Documents between panes.
3. Use the filter to find Document Types by name.



4. Click **Add** to return to the primary page. The newly added Document Types appear at the bottom of the grid in bold font. A red alert message displays, reminding you of unsaved changes on the page.
5. Check the **Required** check box to indicate which documents must be uploaded by the applicant.



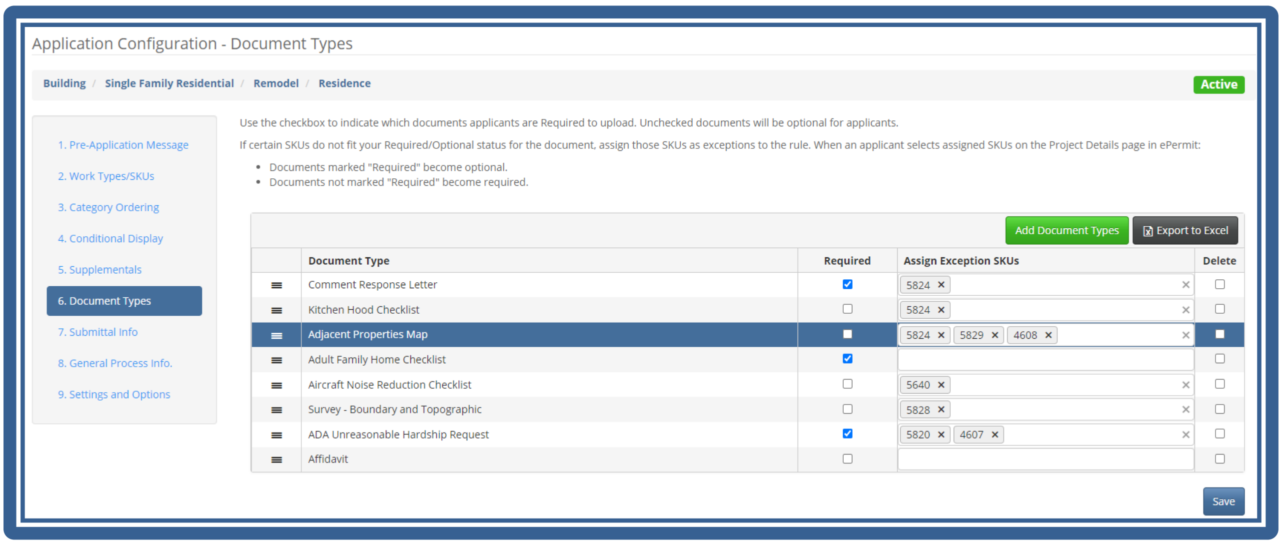
6. Clear the **Required** check box to specify which documents are optional (Not Required) during the Application process.
7. After making all necessary adjustments to the page, click **Save**. A save success message appears.

Reordering Document Display

Document Type reordering is optional. Document Types will display to the applicant in the order saved, grouped by the Required/Not Required status of each Document Type.

Steps:

1. On the Document Types primary page, click and drag any Document Type to the desired order.
2. Make any other necessary changes and click **Save**. A success message appears. Documents will display to the customer in the order in which they were saved.



Assigning Exception SKUs to a Document Type

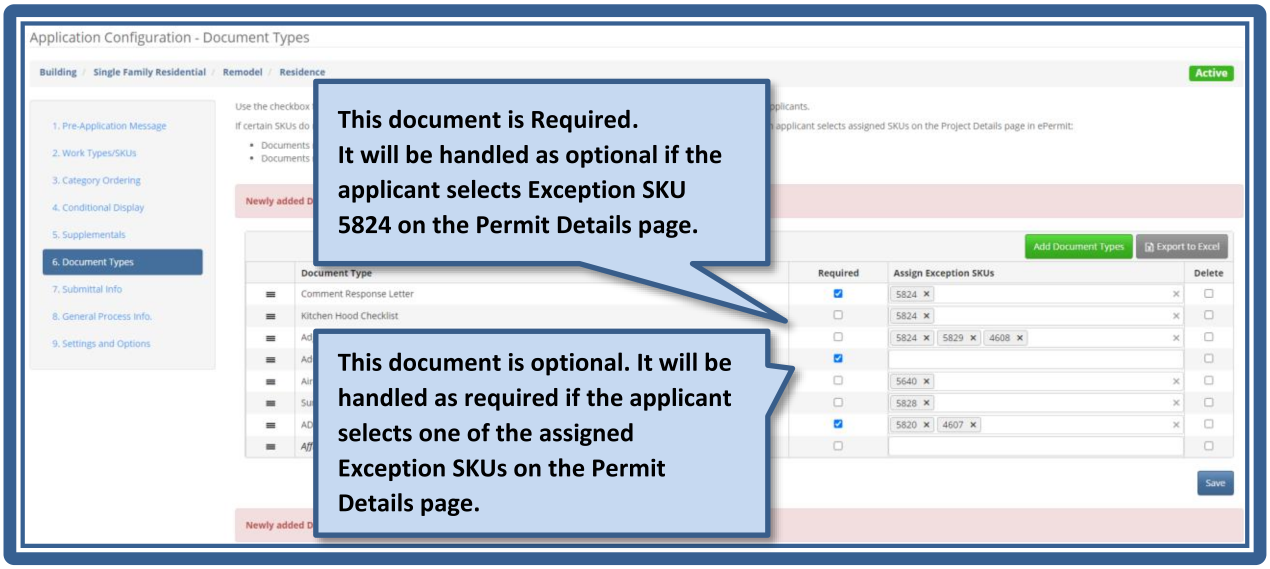
Documents can be either Required or Not Required and will display in the appropriate section of the File Upload page. You can also use exception SKUs to change the required status of a Document Type when applicants choose the SKU during the application process.

Exception SKUs can reverse the default Required/Not Required status saved in the configuration.

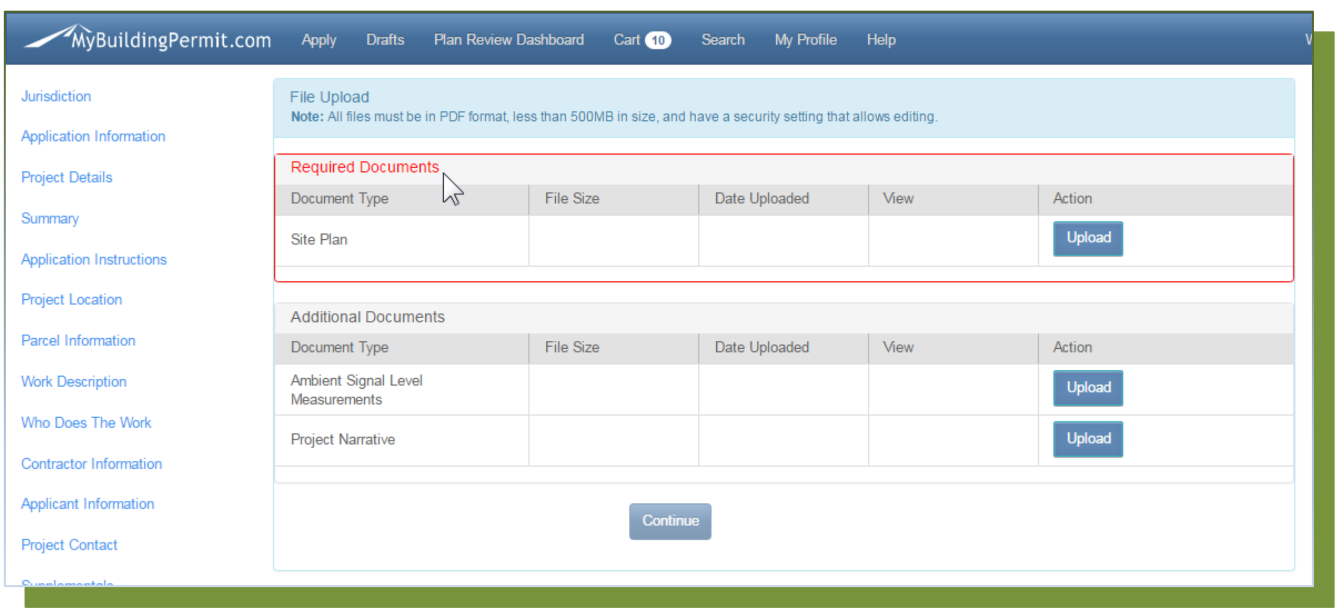
- **If a document is marked as Required** SKUs assigned as exceptions will change it to optional when selected by the applicant.
- **If a document is marked as Not Required** SKUs assigned as exceptions will change it to required when selected by the applicant.

Steps:

1. Clear or check the box to set the default Required/Not Required status for the document.
2. Click **Edit** on the **Assign Exception SKUs** field for the Document Type.
3. Select SKUs from the list to identify the PR SKUs that you want to add as Exceptions to the default required status.
4. Click the **x** on any SKU to remove it as an Exception SKU.
5. Click **Save** when you have completed your changes. A save success message appears.



Example of a Customer Application File Upload Screen



Removing Documents from a Configuration

You can remove any Document Types that were previously saved to a configuration. Once Document Types are removed from a configuration, they can be added again if desired by clicking Add Documnts.

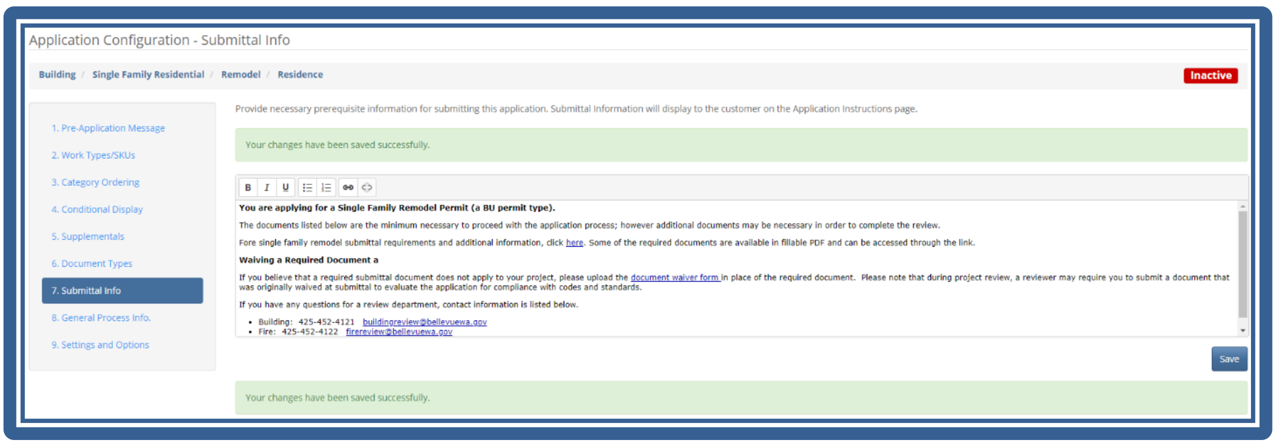
1. On the Document Types primary page, identify the Documents that you want to remove from the configuration.
2. Check the **Delete** check box. **NOTE**: Multi-select is supported
3. Make any other changes on the grid and click **Save**. A save success message appears, and the Documents are removed from the configuration.

Submittal Info

You can provide important information about submitting the application, such as additional details to communicate to the applicant, and links to other documents and relevant information.
The Submittal Info message is optional. If a message is saved, it will display to the Application Instructions page in ePermit.

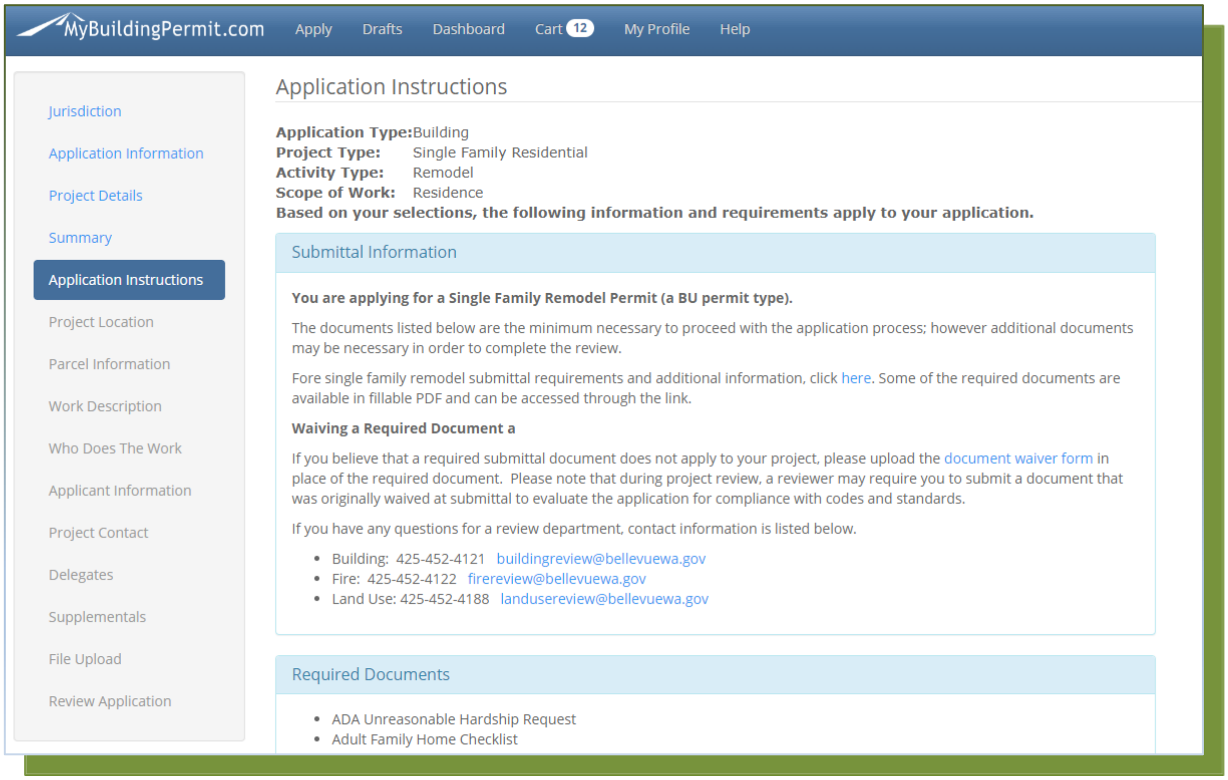
Steps:

1. Click **Submittal Info** on the left navigation.
2. To display a message to applicants, add the message in the text box.
3. Click **Save**. A save success message will appear.



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

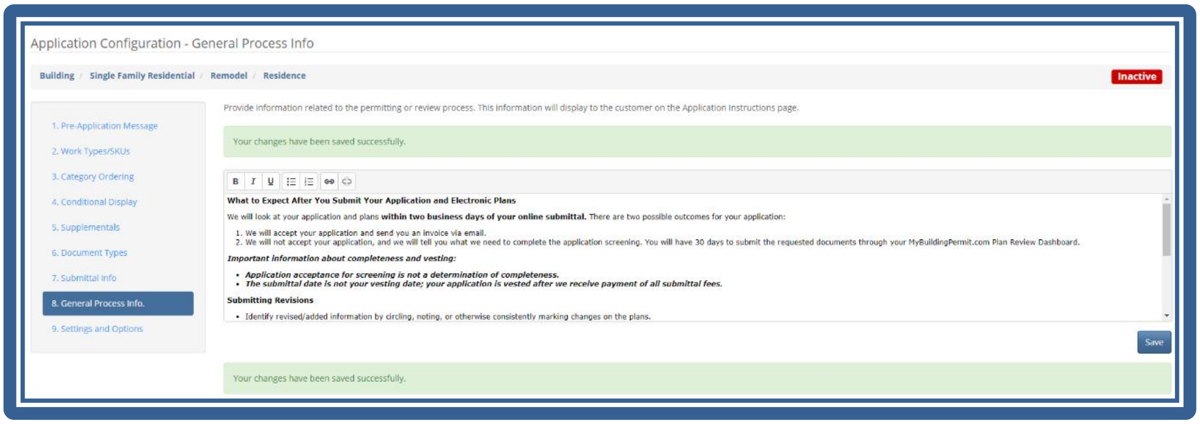


General Process Info

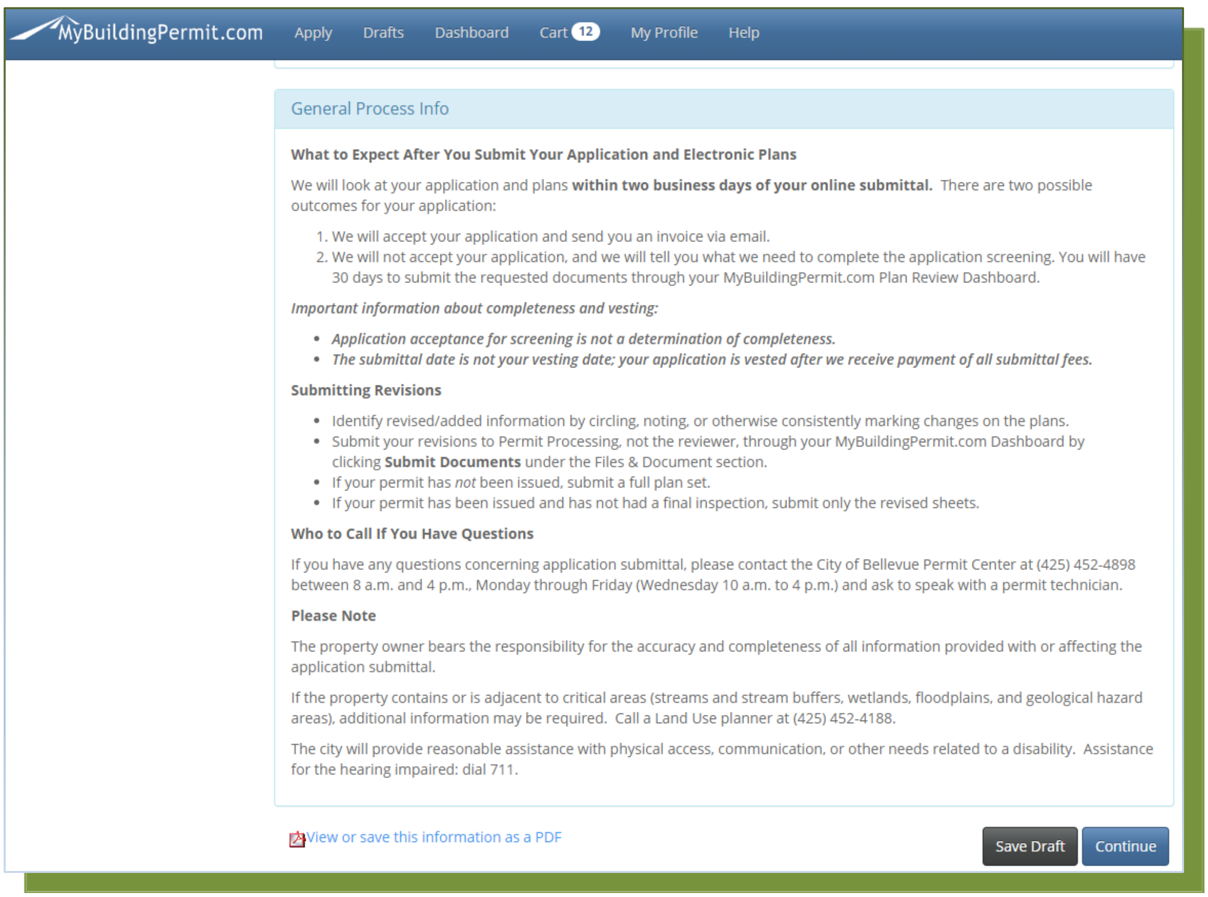
You can provide the applicant with helpful information about the application review process, such as a description of the jurisdiction's permit review process, helpful links, or contact information to direct applicants' questions. The General Process Information message is optional. If a message is saved, it will display on the Application Instructions page in ePermit.

Steps:

1. Click **General Process Info** on the left navigation.
2. To display a General Process Info message to applicants, add the message in the text box.
3. Click **Save**. A save success message will appear.



Customer Application Instructions Screen – contains the Submittal Info from configuration



Settings and Options Page

The Settings and Options page helps you manage and track numerous aspects of your configuration. On the Settings and Options page, you can:

- Activate your configuration when it is ready to make available to customers.

- Delete configurations that are no longer viable.
- Copy a configuration, including all messages, SKUs, Documents, and Supplementals to use as the basis for a new configuration.

NOTE: Unlike the other pages in the Configuration Workflow, the Settings and Options page does not have a Save button. Actions on this page will be immediately implemented.

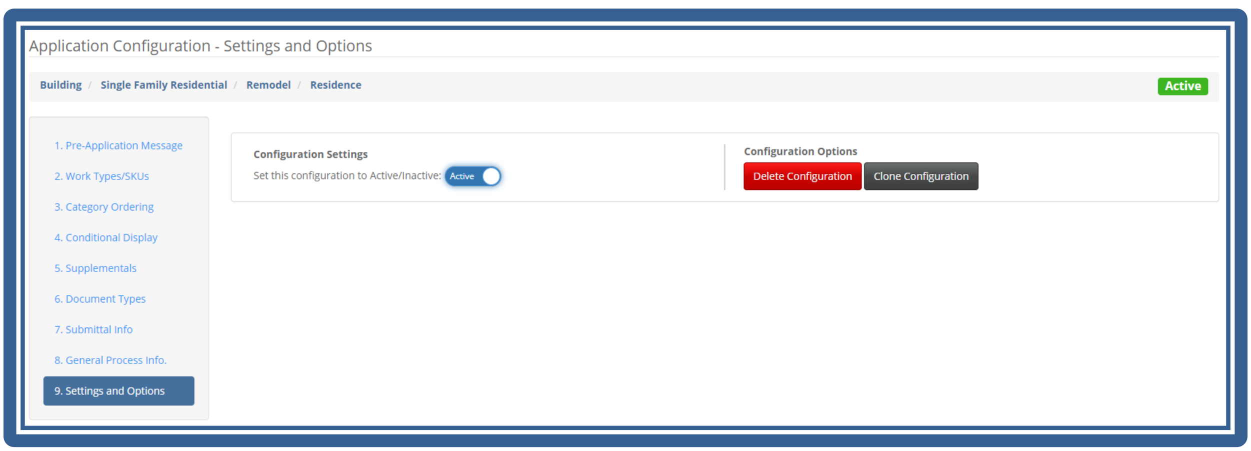
If you delete a configuration that has applications in Draft or Resubmitted status, you will be alerted. However, you cannot delete configurations with applications that are in-progress.

Activating a Configuration in ePermit

Once you've built your application configuration you must mark it as Active in the system. Only Active application configurations will be visible to customers.

Steps:

1. On the **Settings and Options** page, click the slider under Configuration Settings to change to **Active**. The Active indicator in the upper right corner of the page reflects the status that you set.
2. You can toggle the slider to **Inactive** to make it unavailable to customers.



Cloning or Copying an Application Configuration

Once you have built a configuration, you can clone it to another configuration. Cloning is useful when you want to build a new configuration for the Application Type that is like an existing one. The Application Type must be the same (such as Building to Building), but the other 3 "buckets" may be different from the original.

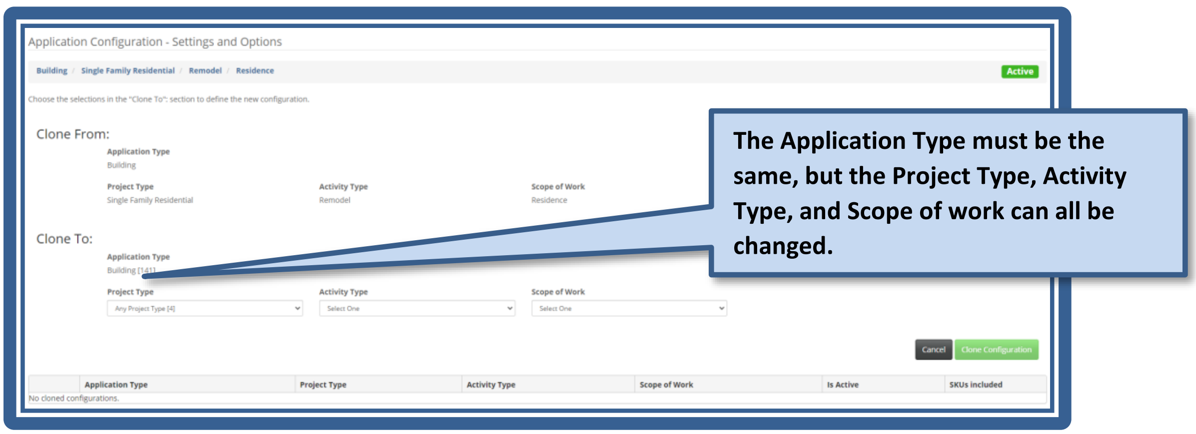
All elements of the configuration will be copied when you clone a configuration, including:

- Work Types,
- Category Ordering
- Supplementals
- Document Types
- Submittal Info
- General Process Info

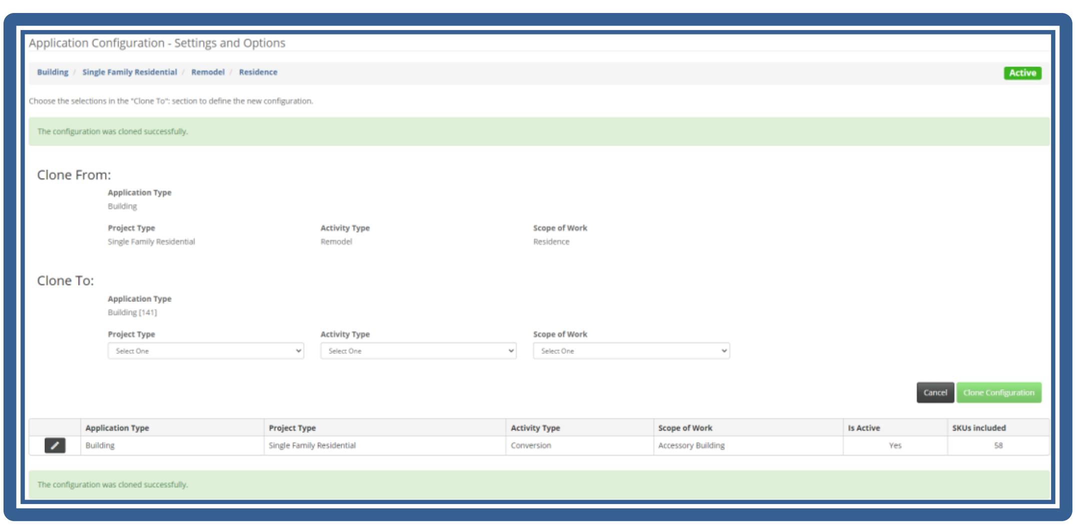
Once the configuration is cloned, the new configuration can be modified as needed to suit the needs of the new application. As with all new configurations, you must activate it to make it available to customers.

Steps:

1. On the **Settings and Options** page, click **Clone Configuration** under Configuration Options to begin the clone process.
2. The **Clone From** section of the page displays the 4 bucket types of the parent configuration. These cannot be changed.
3. In the **Clone To** section, the Application Type is fixed, and the dropdown lists for the remaining 3 buckets are active. Each bucket selection displays a counter, indicating the number of configurations already in the system that match your selections.



4. Once you've made selections for a new configuration, the Clone Configuration button will be enabled. That the button will remain disabled if your bucket selections match an existing configuration.
5. Click **Clone Configuration**. A success message appears, and the newly created configuration displays in the grid.



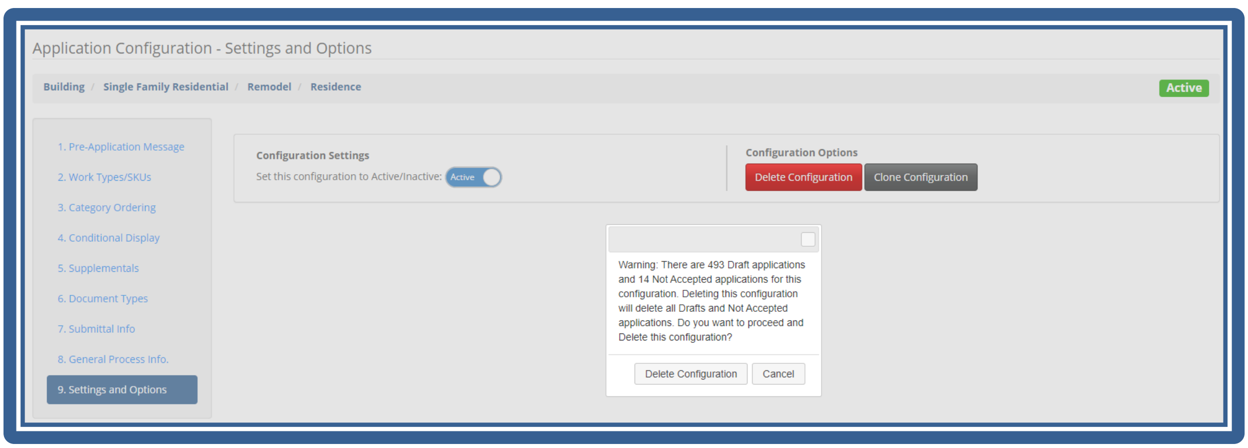
6. Click the **Edit** pencil icon to open the new configuration in the Application Configuration workflow.
7. To create another cloned configuration based on the same parent, make appropriate selections from the 3 buckets.

Deleting an Application Configuration

You can delete a configuration when you no longer need it. This will remove it from the system, and it will no longer be available to applicants.

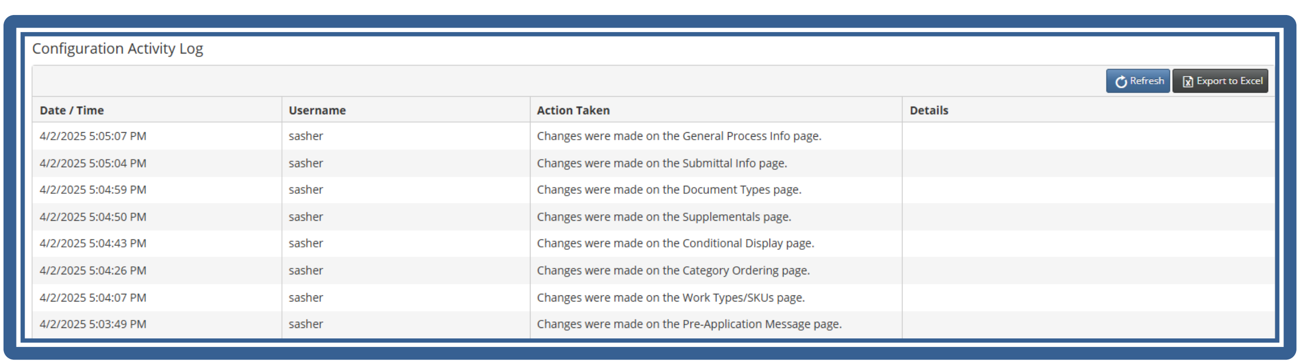
Steps:

1. Click the **Settings and Options** link on the left navigation.
2. On the Settings and Options page, click the **Delete Configuration** button under Configuration Options delete the configuration from the system. A confirmation message appears.
3. The modal informs you if there are outstanding Draft or Not Accepted applications for the application being deleted. Click **Delete Configuration** to proceed, or **Cancel** to return focs to the Settings and Options page.



View the Configuration Activity Log

You can view a history of configuration changes on the Settings and Options page. The Configuration Activity Log shows the pages on which changes were saved, along with the record of who made the changes and a date and time stamp.



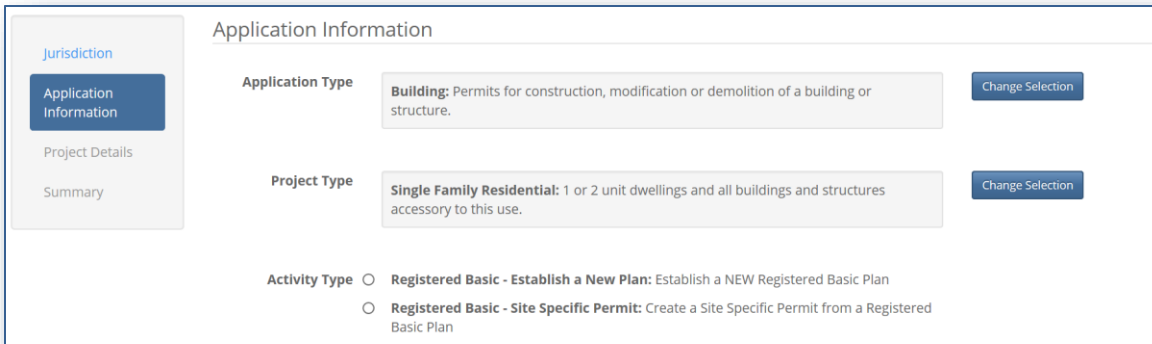
Configuration Activity Log

Refresh | Export to Excel

Date / Time	Username	Action Taken	Details
4/2/2025 5:05:07 PM	sasher	Changes were made on the General Process Info page.	
4/2/2025 5:05:04 PM	sasher	Changes were made on the Submittal Info page.	
4/2/2025 5:04:59 PM	sasher	Changes were made on the Document Types page.	
4/2/2025 5:04:50 PM	sasher	Changes were made on the Supplementals page.	
4/2/2025 5:04:43 PM	sasher	Changes were made on the Conditional Display page.	
4/2/2025 5:04:26 PM	sasher	Changes were made on the Category Ordering page.	
4/2/2025 5:04:07 PM	sasher	Changes were made on the Work Types/SKUs page.	
4/2/2025 5:03:49 PM	sasher	Changes were made on the Pre-Application Message page.	

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:

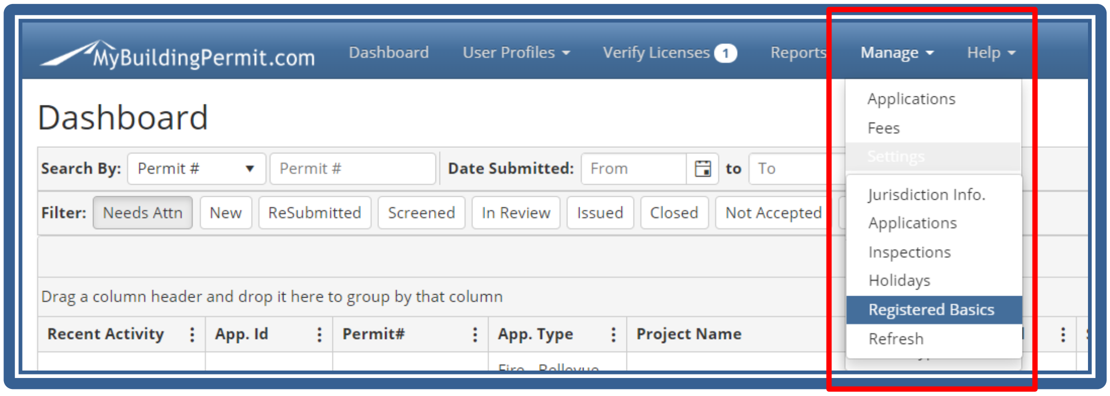
- Configure Jurisdiction Registered Basics Settings
- Create Registered Basics Application Configurations

Configuring Registered Basics Settings

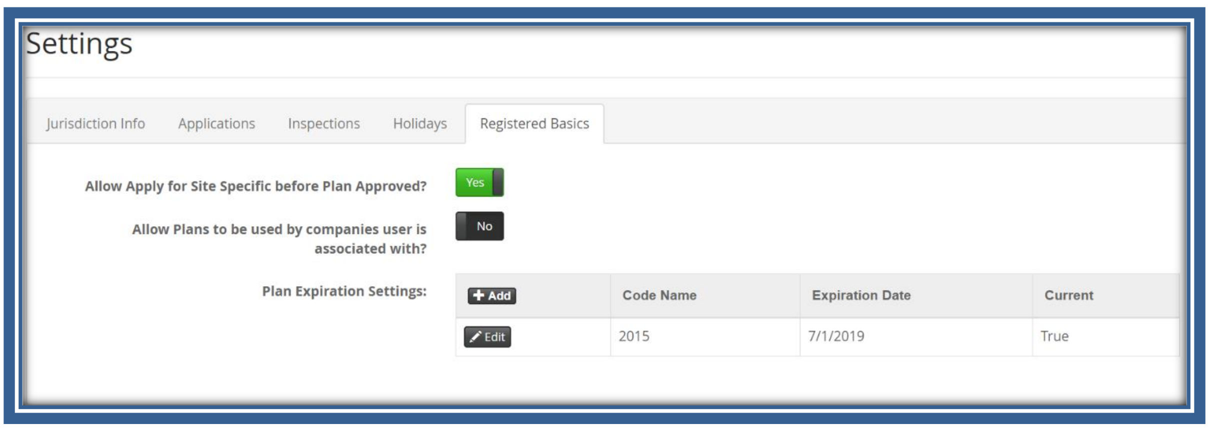
NOTE: Only a JurisdictionAdmin user role has access to manage a Jurisdiction's settings.

Steps:

1. Log in to the Admin site, select Manage → Registered Basics:

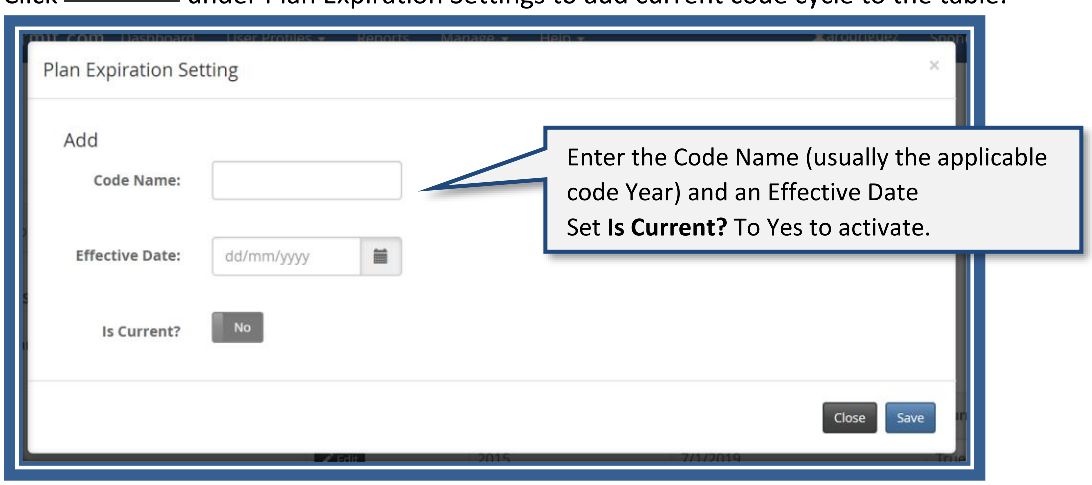


2. Select the applicable settings:

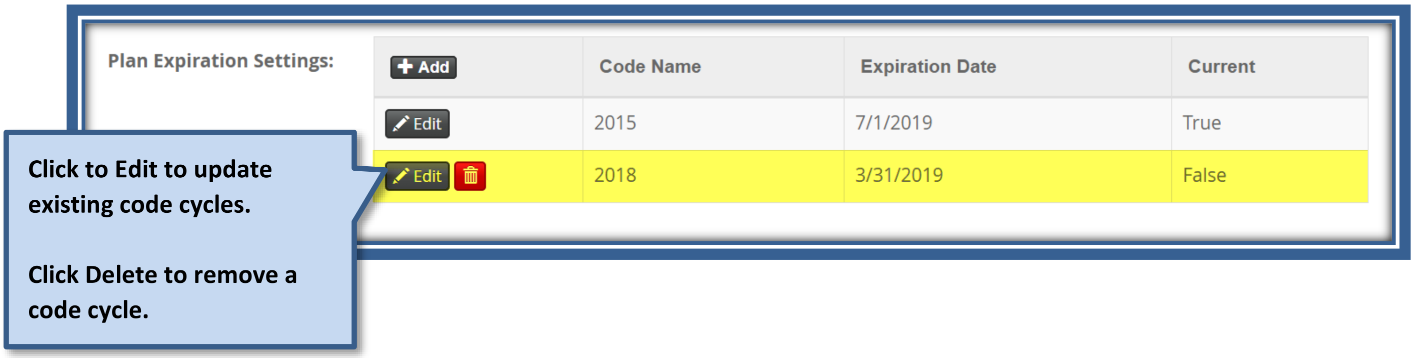


- **Allow Apply for Site Specific before Plan Approved?** – This setting allows/disallows a contractor to be able to apply for a Site-Specific permit before a Base Plan is approved.
- **Allow Plans to be used by companies' user is associated with?** - This setting allows/disallows the sharing of basics 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:



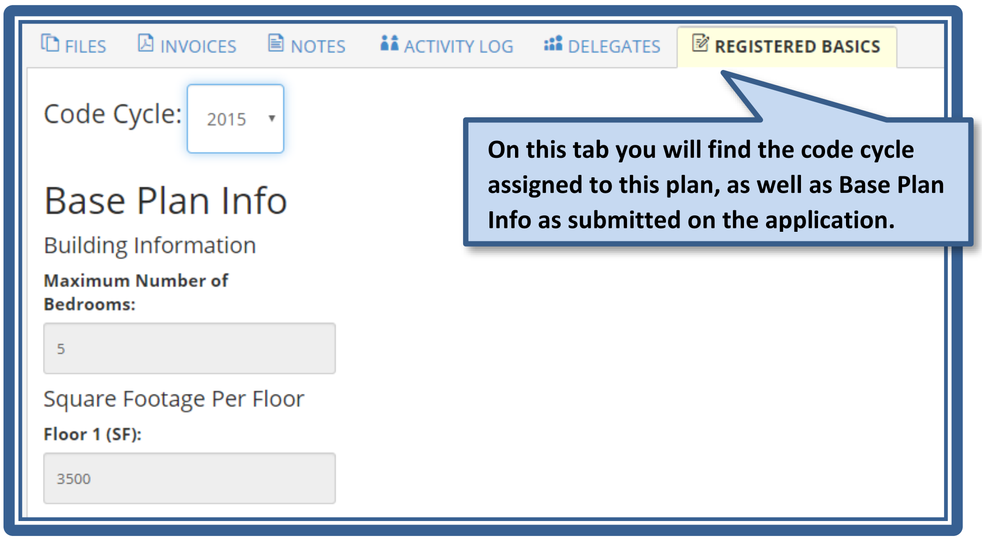
NOTE: You can only delete a code cycle if it has not been referenced on an open basic plan. The assigned code cycle will be added to all Base plan applications.

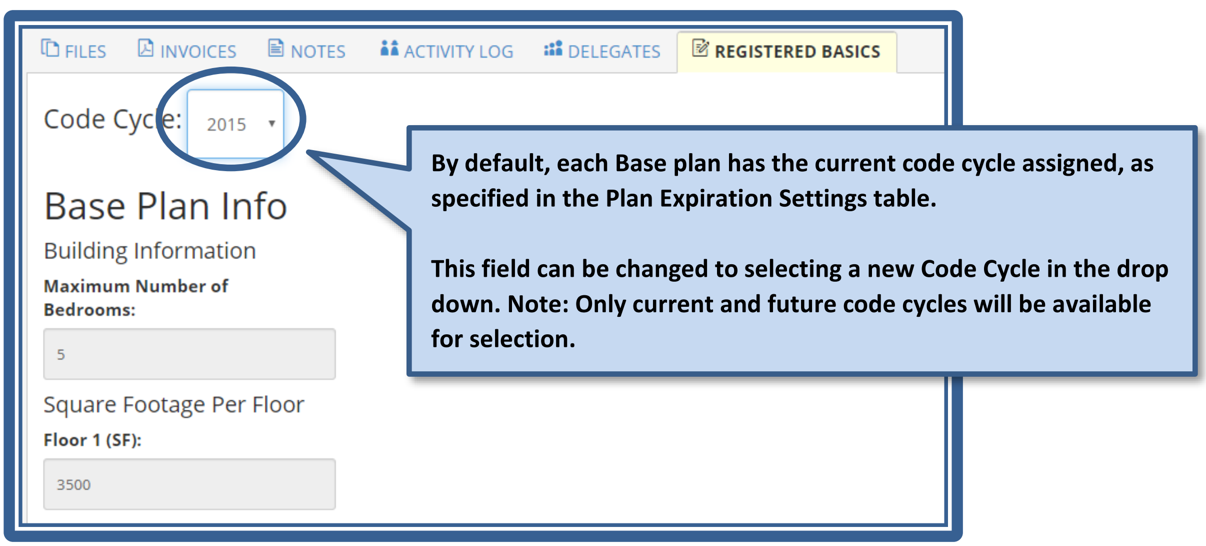
Considerations before Configuring Registered Basics settings:

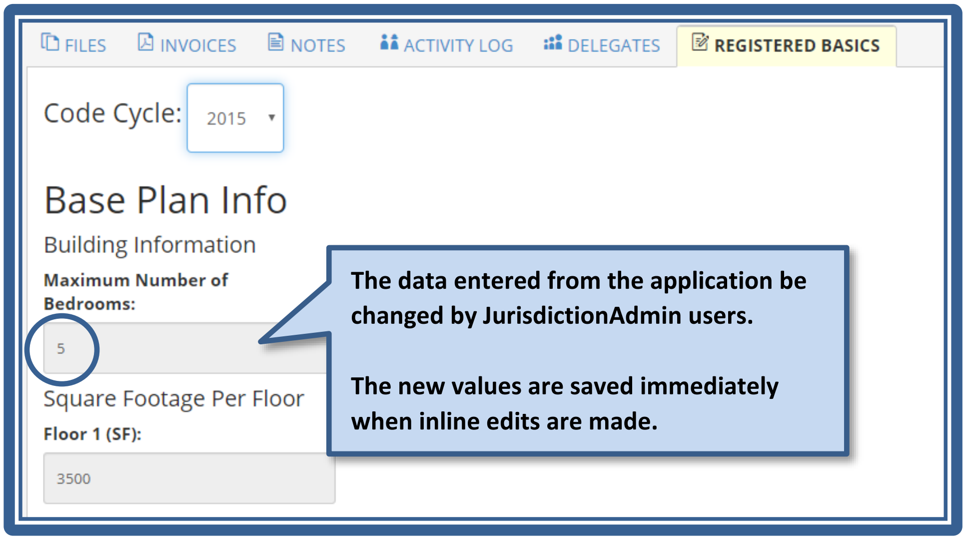
- Know whether your jurisdiction allows applying for site specific applications using plans that are accepted (not approved plans yet).
- Know whether your jurisdiction allows plans sharing among companies where user is associated with all of them.
- Come up with intuitive and easy Code Name. It is good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







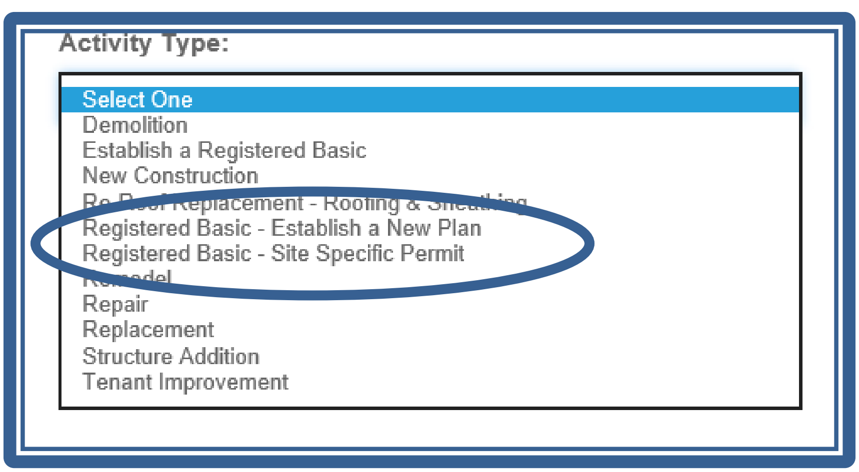
NOTE: These fields on the Registered Basics tab can only be edited when the application is in the following MBP statuses: ***New/Submitted, Not Accepted, Screened, and In Review***.

Configuring Registered Basics Permit Applications

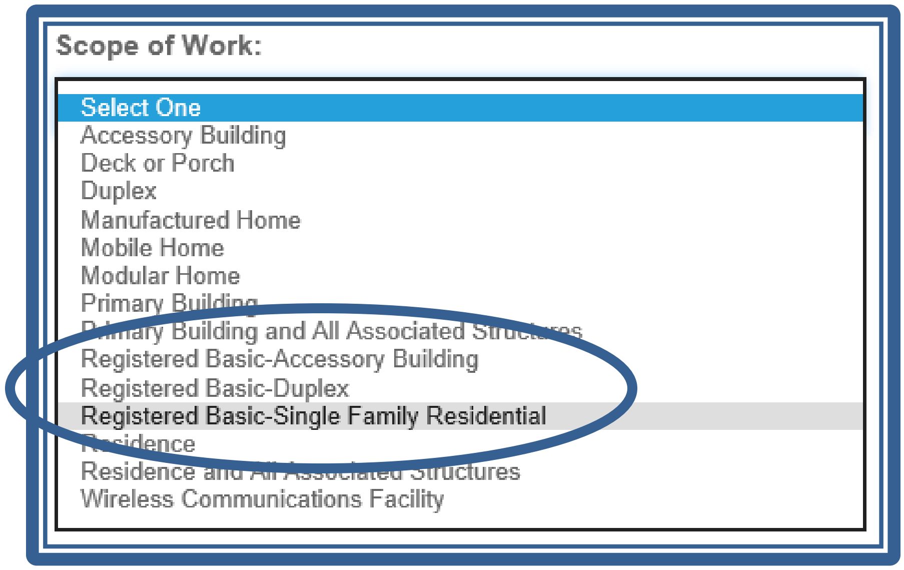
The process to configure an application to Establish a New Plan and Site-Specific permit is the same as any other application—see here for instructions. The following exceptions apply to a Registered Basic application:

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.

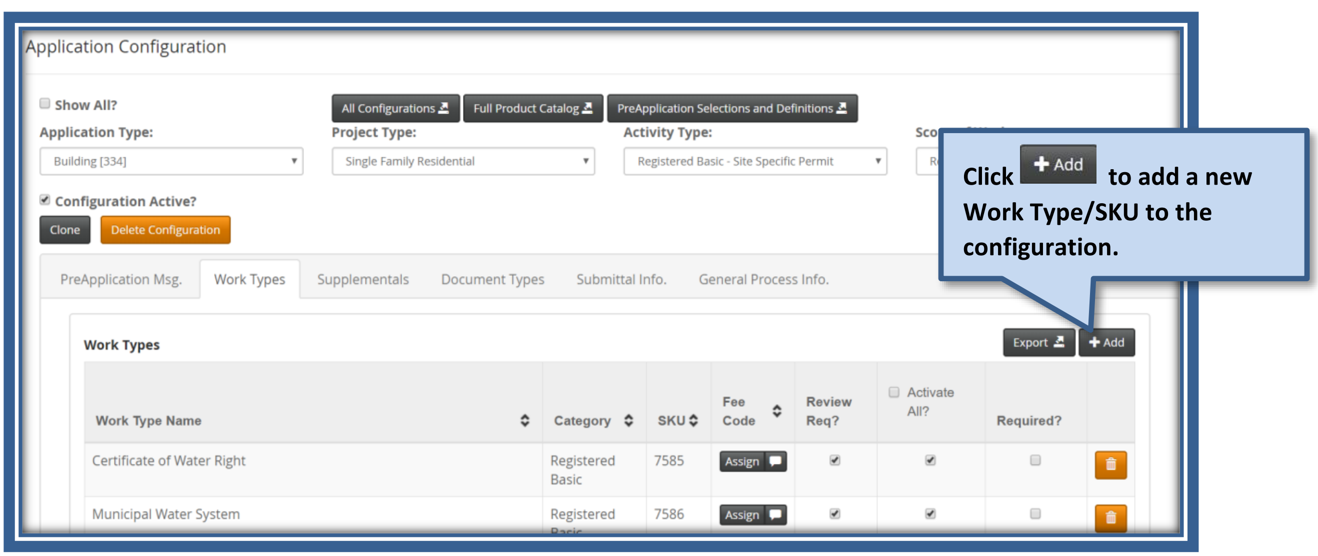
Registered Basics Work Types/SKUs

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.

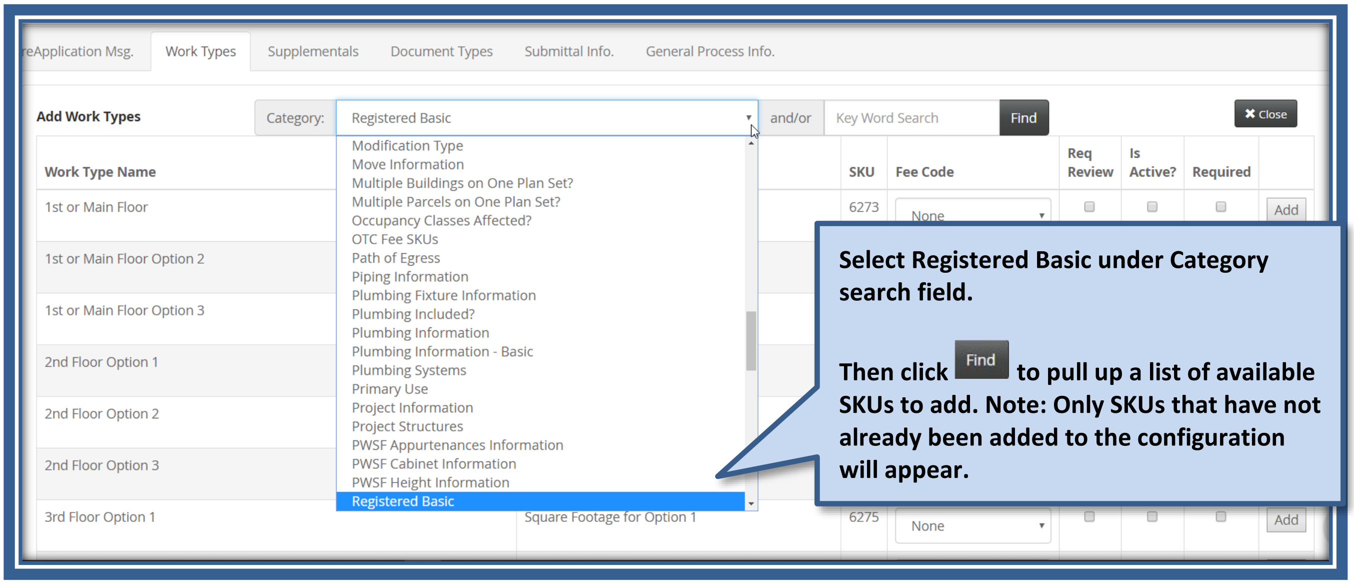
To add a Registered Basic SKU to your Establish a New Plan or Site-Specific application configuration, do the following:

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

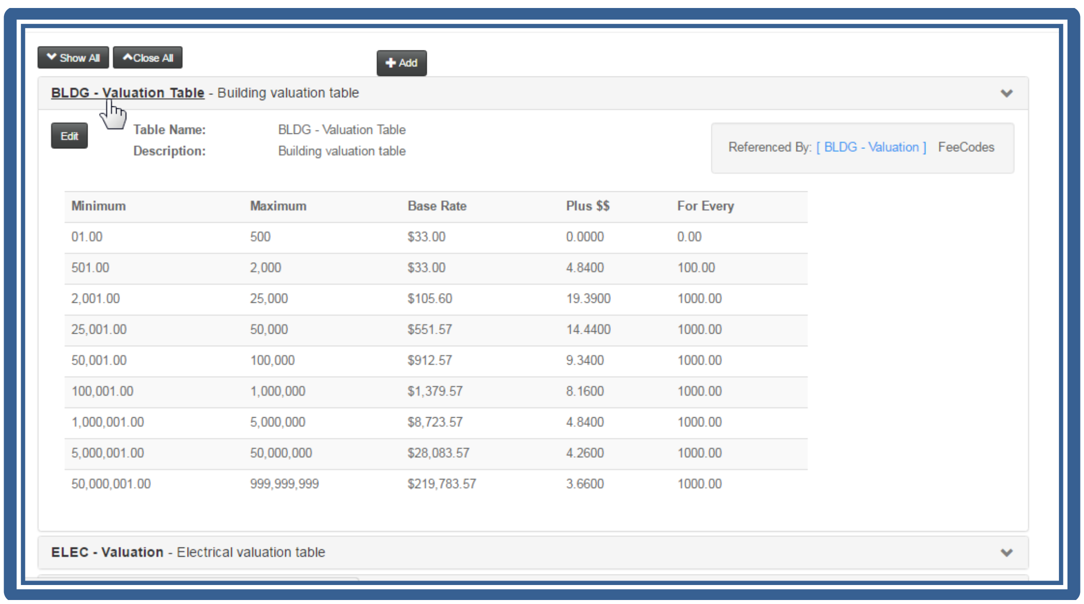
Valuation/Range Tables—Overview

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)



Show All   Close All   + Add

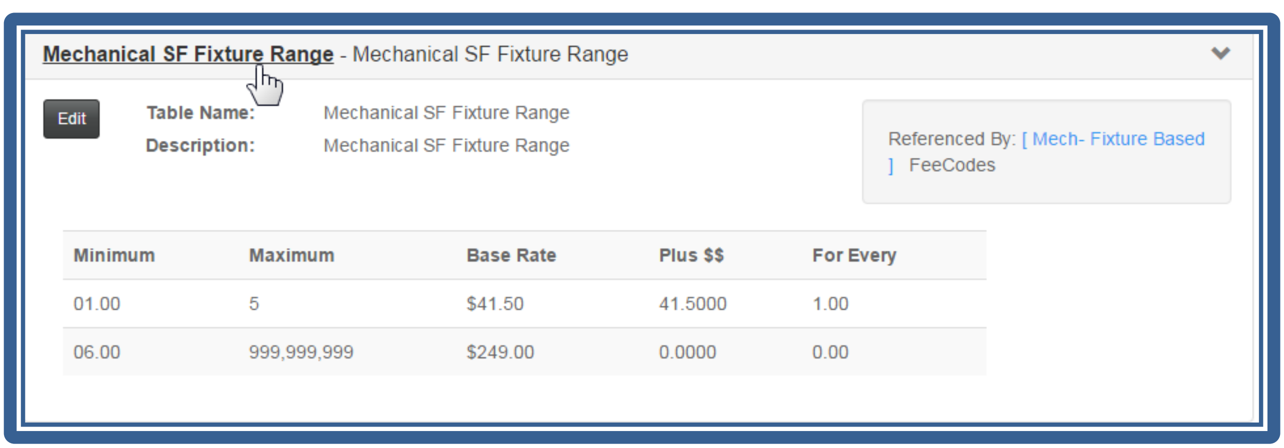
BLDG - Valuation Table - Building valuation table

Edit
Table Name: BLDG - Valuation Table
Description: Building valuation table
Referenced By: [BLDG - Valuation] FeeCodes

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

ELEC - Valuation - Electrical valuation table

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

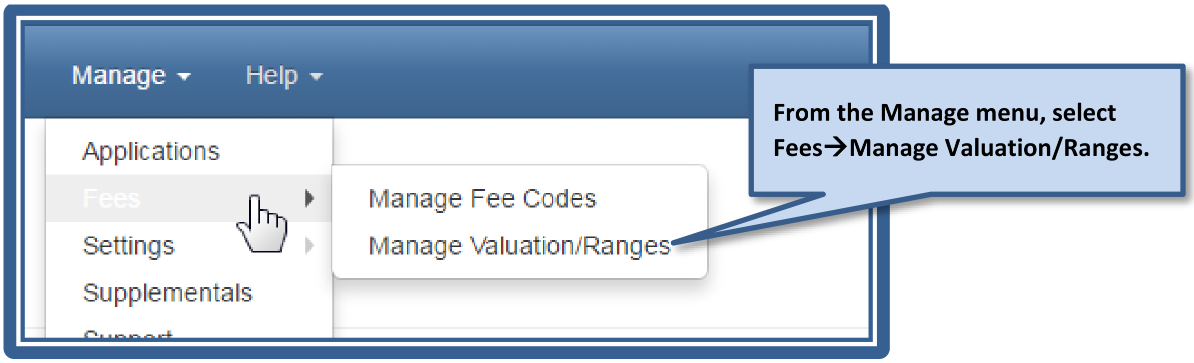


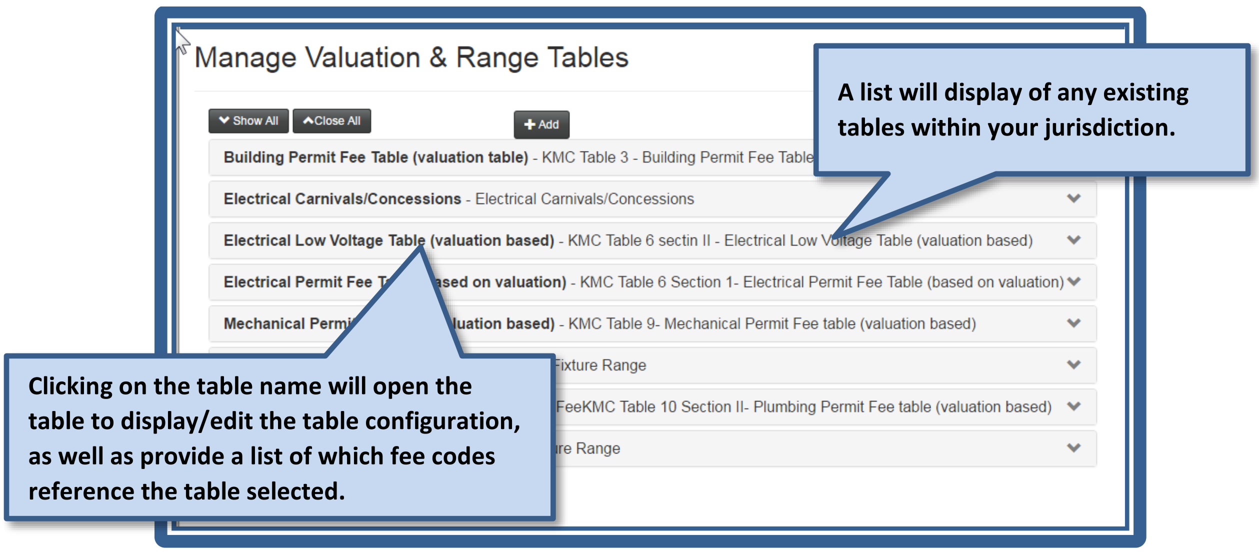
Mechanical SF Fixture Range - Mechanical SF Fixture Range

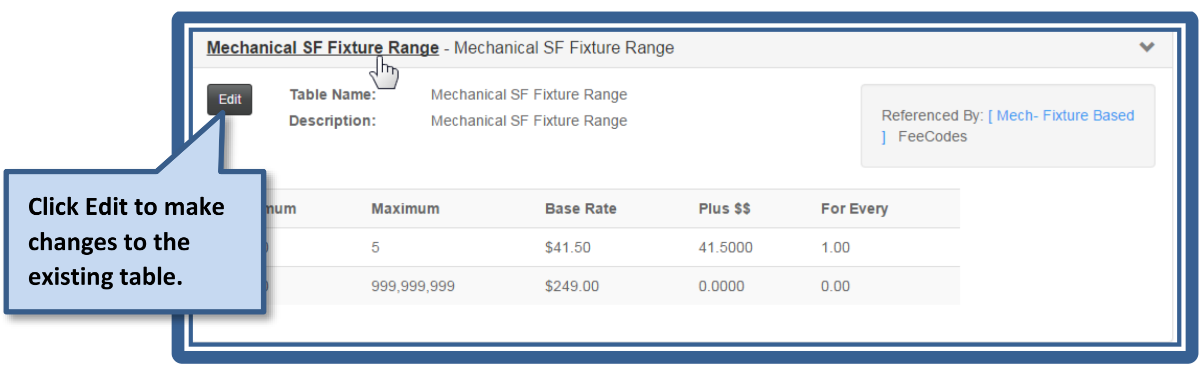
Edit
Table Name: Mechanical SF Fixture Range
Description: Mechanical SF Fixture Range
Referenced By: [Mech- Fixture Based] FeeCodes

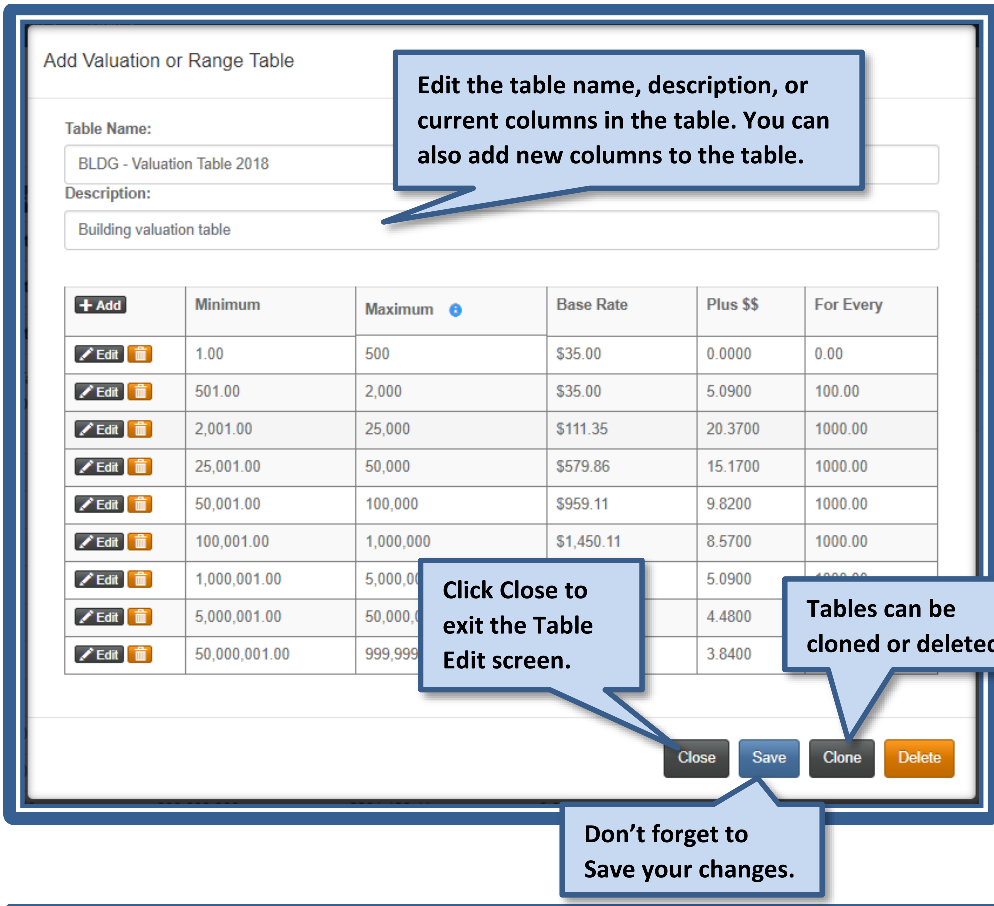
Minimum	Maximum	Base Rate	Plus $$	For Every
01.00	5	$41.50	41.5000	1.00
06.00	999,999,999	$249.00	0.0000	0.00

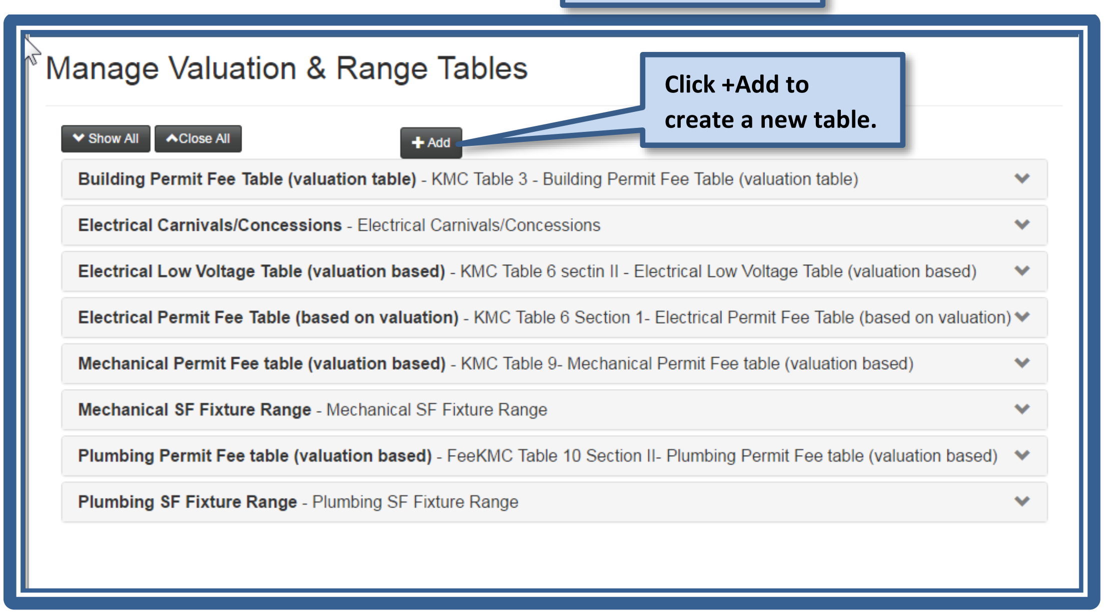
Creating or Editing Valuation or Range Tables

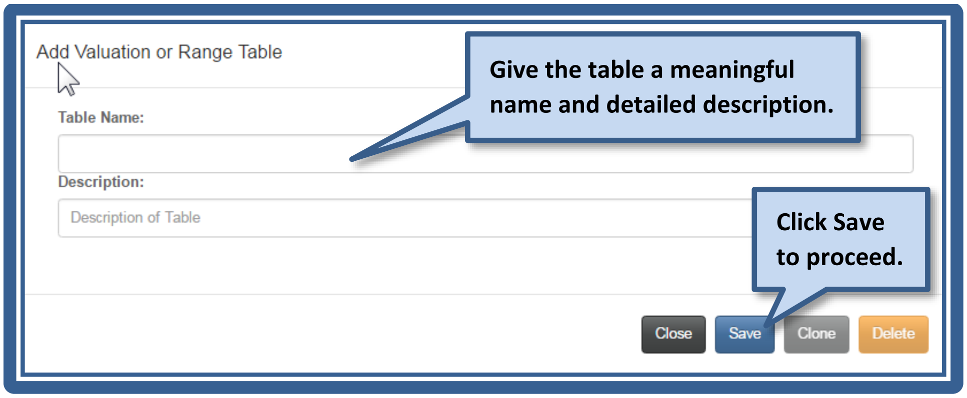


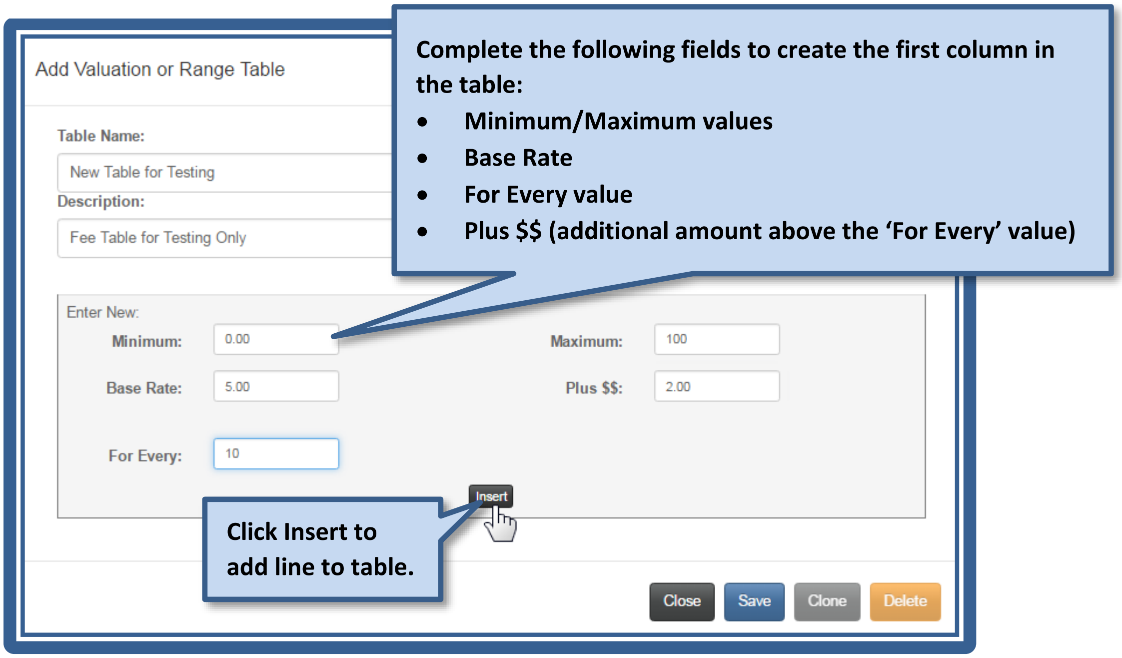


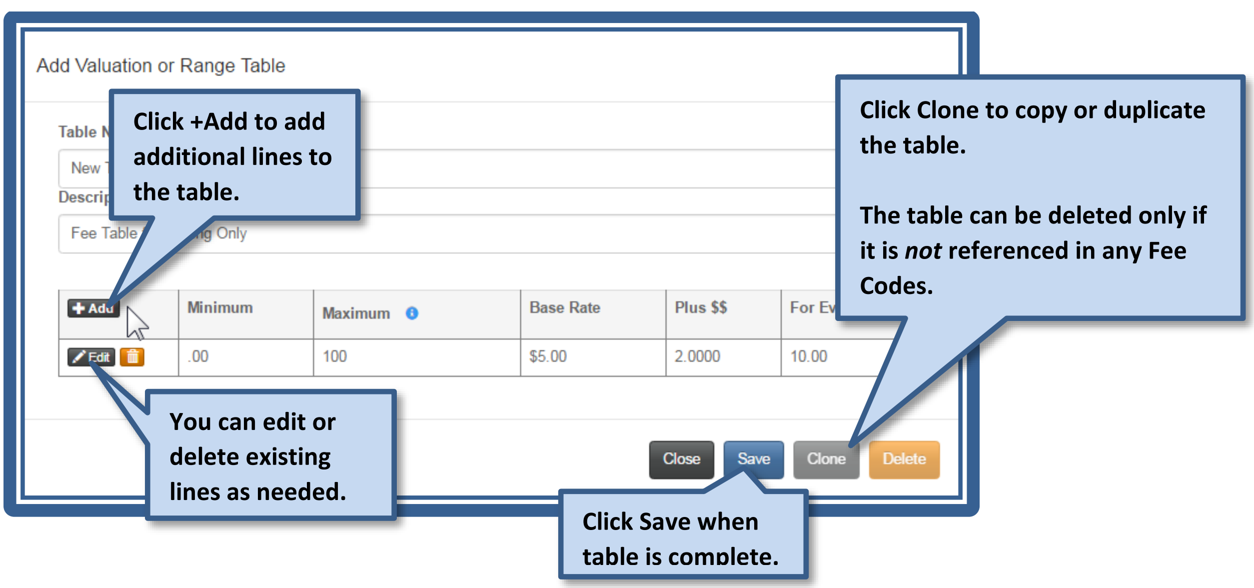


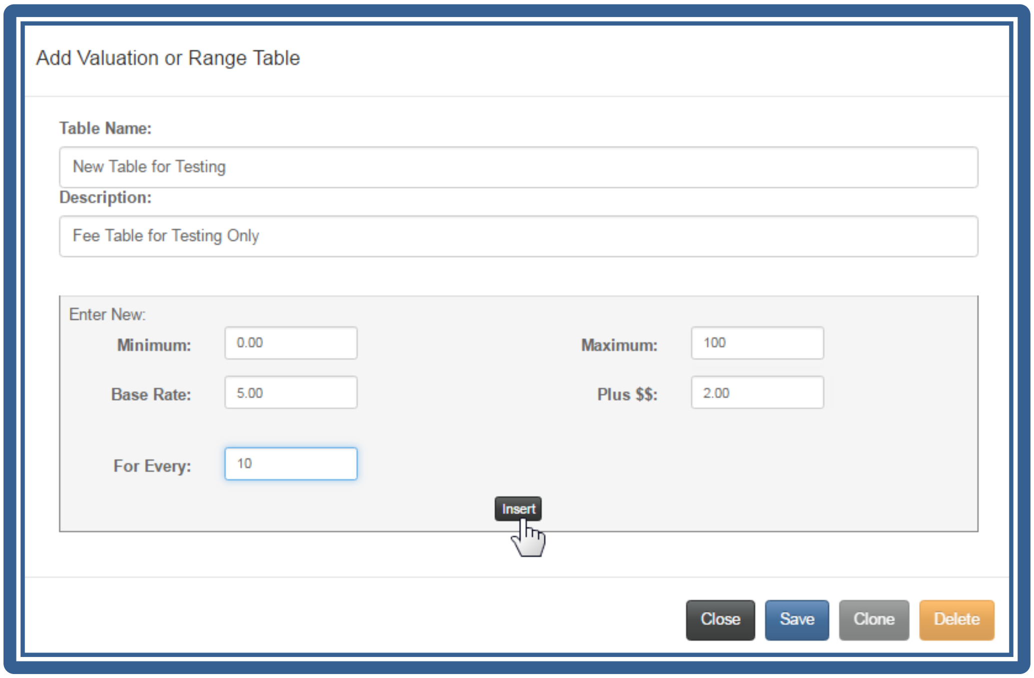

Add Valuation or Range Table
Edit the table name, description, or current columns in the table. You can also add new columns to the table.
Table Name:
BLDG - Valuation Table 2018
Description:
Building valuation table
+ Add
Minimum
Maximum
Base Rate
Plus $$
For Every
Edit
1.00
500
$35.00
0.0000
0.00
501.00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


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

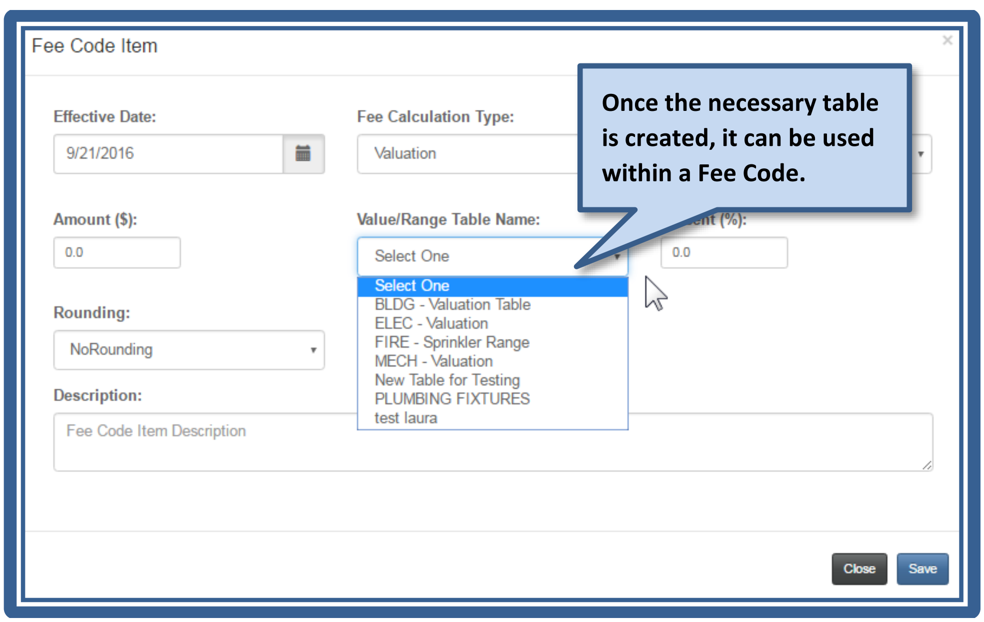

Add Valuation or Range Table
Click +Add to add additional lines to the table.
Click Clone to copy or duplicate the table.
The table can be deleted only if it is not referenced in any Fee Codes.
+ Add
Minimum
Maximum
Base Rate
Plus $$
Edit
.00
100
$5.00
2.0000
10.00
You can edit or delete existing lines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

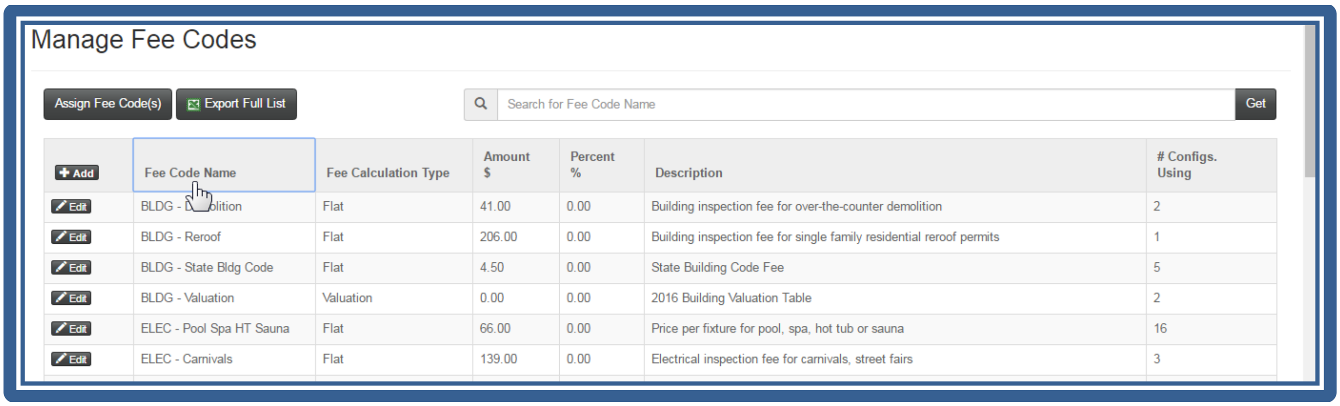
Example of a Fee Code using a Valuation Table



Fee Codes—Overview

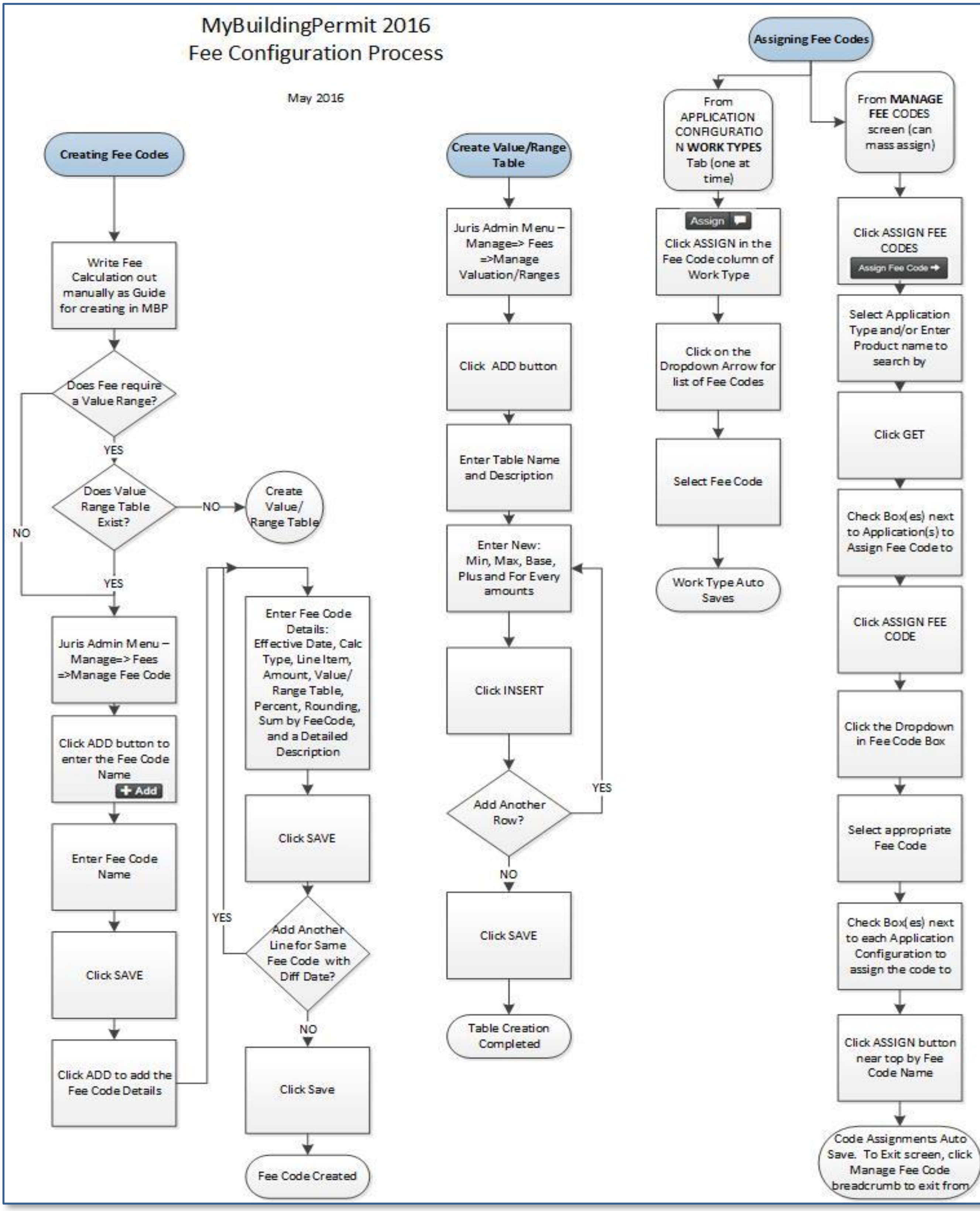
Fees Codes include the following information: Fee Code name, calculation type, dollar amount, valuation and range tables, screen name label in the Cart, rounding options, and a brief description. Fee codes are used instead of hard coded calculations to allow ease of modifications and adjustments when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

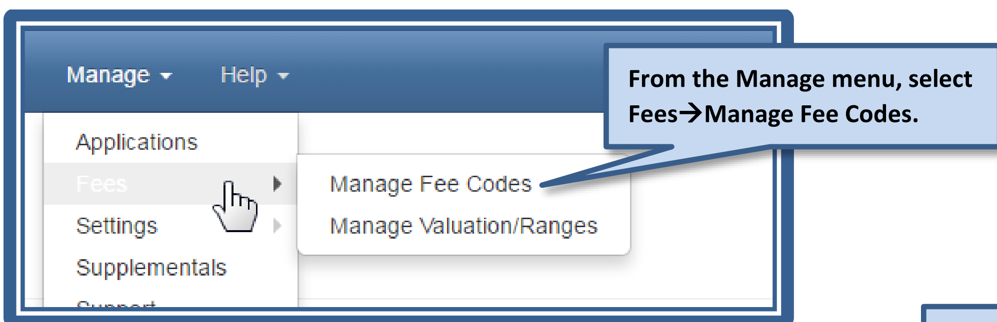
Fee Codes are assigned to Work Types that do ***not*** require Plan Review within an Application Configuration. (see Configuring Applications)

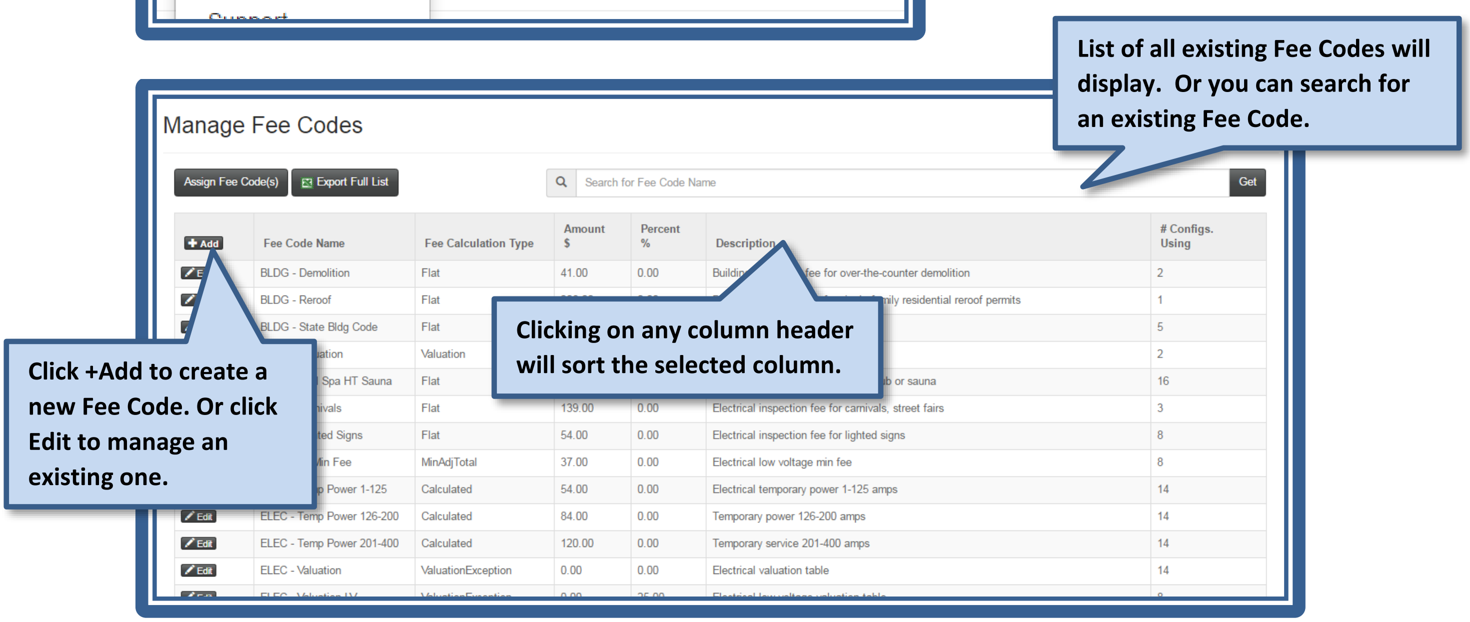
You can assign Fee Codes while configuring your Applications, or from the **MANAGE** Fee Code screens. A single named Fee Code can have multiple calculations, each with a different "Effective Date".

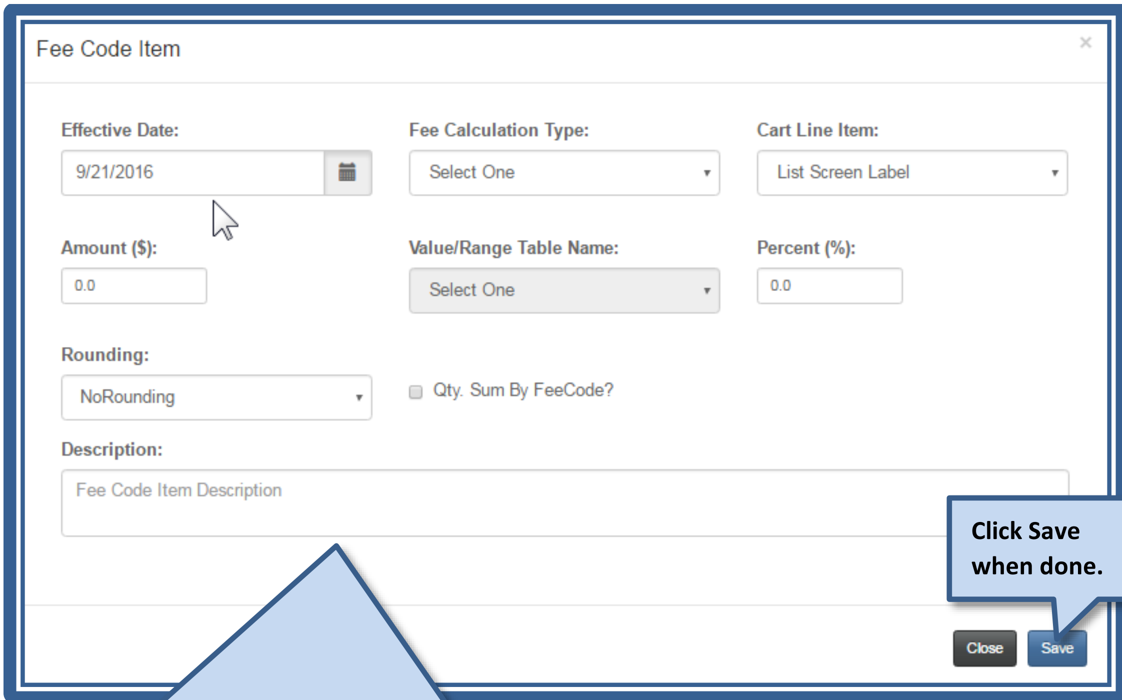
Order for creating Fee related items:

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).

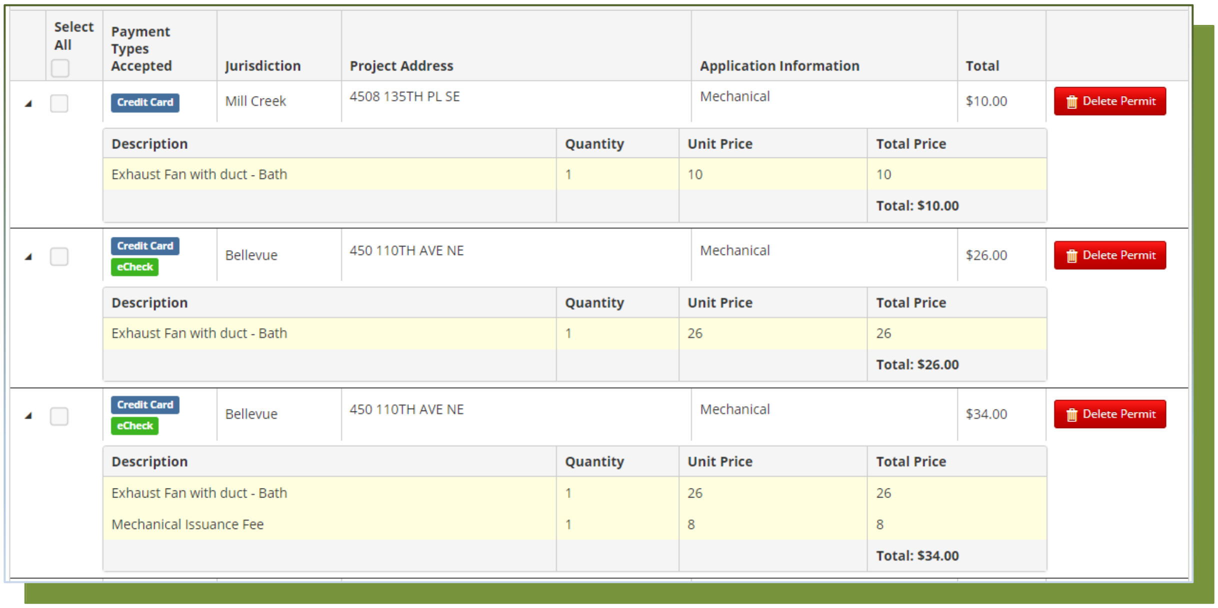
Calculation Type:

- **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



Select All	Payment Types Accepted	Jurisdiction	Project Address	Application Information	Total	
	Credit Card	Mill Creek	4508 135TH PL SE	Mechanical	$10.00	Delete Permit

Description	Quantity	Unit Price	Total Price
Exhaust Fan with duct - Bath	1	10	10
			Total: $10.00

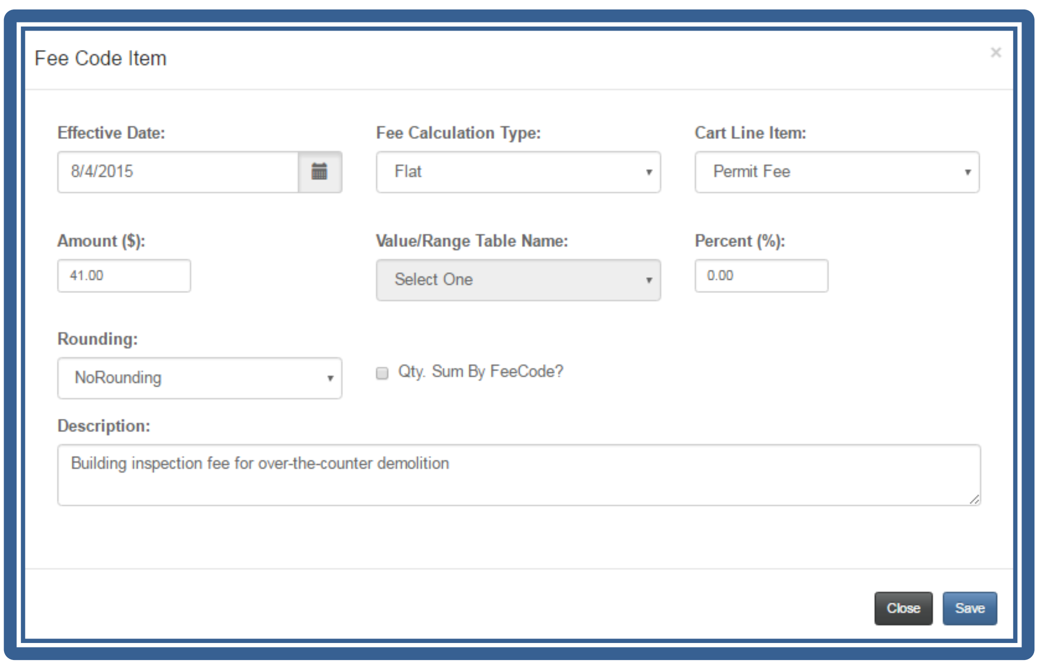
Select All	Payment Types Accepted	Jurisdiction	Project Address	Application Information	Total	
	Credit Card eCheck	Bellevue	450 110TH AVE NE	Mechanical	$26.00	Delete Permit

Description	Quantity	Unit Price	Total Price
Exhaust Fan with duct - Bath	1	26	26
			Total: $26.00

Select All	Payment Types Accepted	Jurisdiction	Project Address	Application Information	Total	
	Credit Card eCheck	Bellevue	450 110TH AVE NE	Mechanical	$34.00	Delete Permit

Description	Quantity	Unit Price	Total Price
Exhaust Fan with duct - Bath	1	26	26
Mechanical Issuance Fee	1	8	8
			Total: $34.00

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

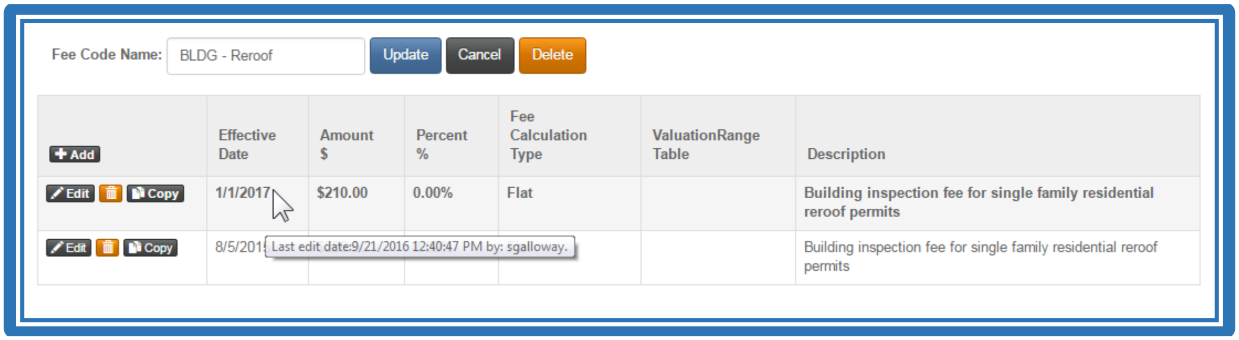


Fee Code Item

Effective Date: 8/4/2015
Fee Calculation Type: Flat
Cart Line Item: Permit Fee
Amount ($): 41.00
Value/Range Table Name: Select One
Percent (%): 0.00
Rounding: NoRounding
Qty. Sum By FeeCode?
Description: Building inspection fee for over-the-counter demolition
Close
Save

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

Example of a Fee code with multiple Effective Dates

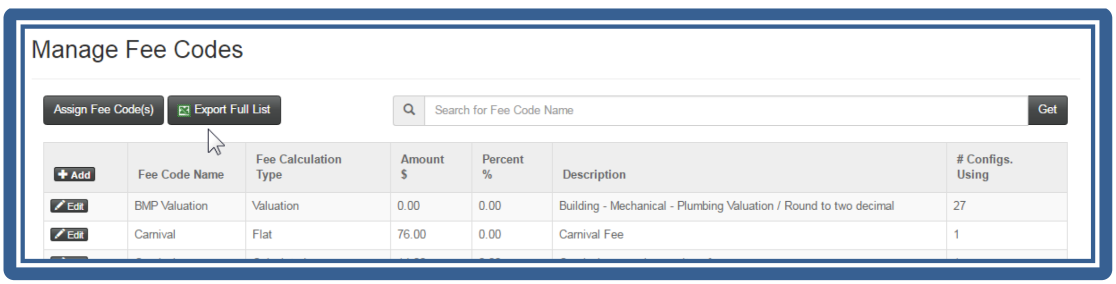


Fee Code Name: BLDG - Reroof   Update   Cancel   Delete

+ Add	Effective Date	Amount $	Percent %	Fee Calculation Type	ValuationRange Table	Description
Edit / Copy	1/1/2017	$210.00	0.00%	Flat		Building inspection fee for single family residential reroof permits
Edit / Copy	8/5/201					Building inspection fee for single family residential reroof permits

Exporting your Fee Code List

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

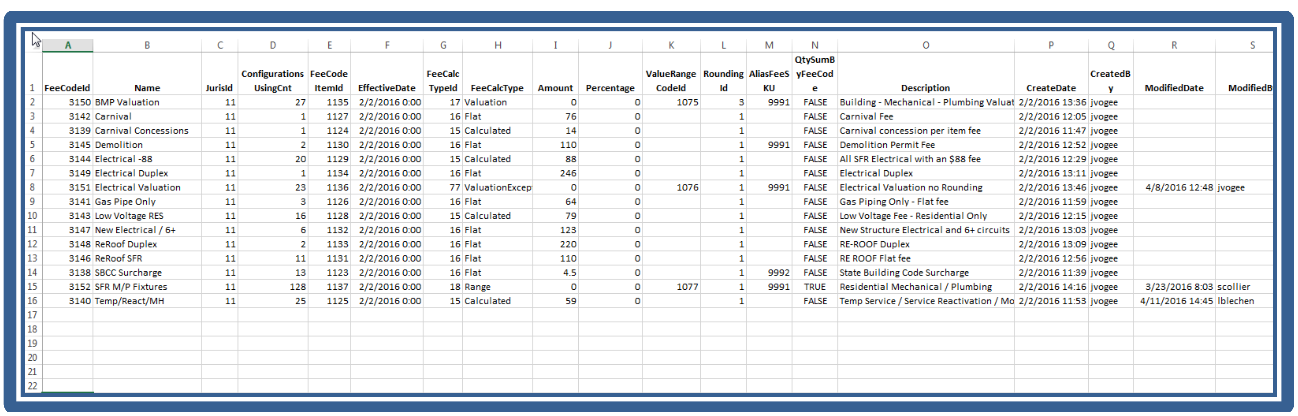


Manage Fee Codes

Assign Fee Code(s)   Export Full List   Search for Fee Code Name   Get

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

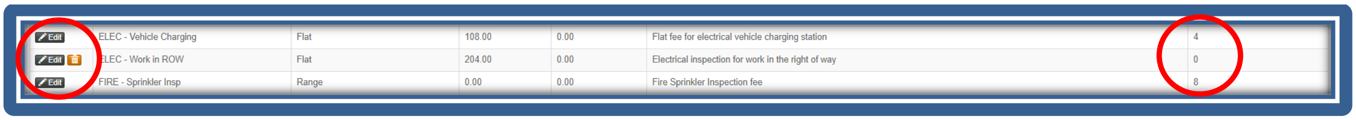
Example of the Fee Code Export



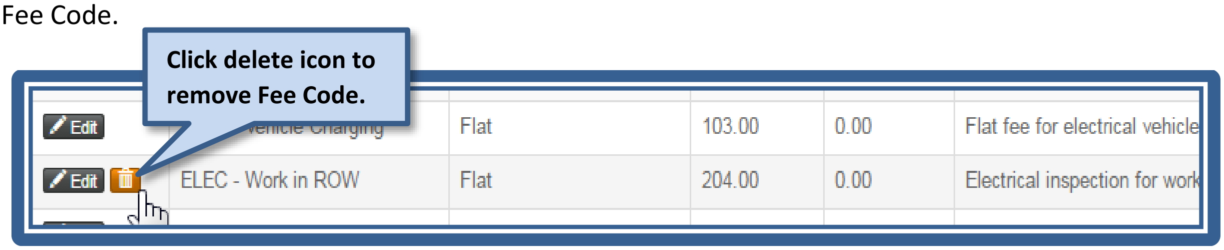
1	FeeCodeId	Name	JurisId	ConfigurationsUsingCnt	FeeCodeItemId	EffectiveDate	FeeCalcTypeId	FeeCalcType	Amount	Percentage	ValueRangeCodeId	RoundingId	AliasFeeSKU	QtySumByFeeCode	Description	CreateDate	CreatedBy	ModifiedDate	ModifiedB
2	3150	BMP Valuation	11	27	1135	2/2/2016 0:00	17	Valuation	0	0	1075	3	9991	FALSE	Building - Mechanical - Plumbing Valuat	2/2/2016 13:36	jvogee		
3	3142	Carnival	11	1	1127	2/2/2016 0:00	16	Flat	76	0		1		FALSE	Carnival Fee	2/2/2016 12:05	jvogee		
4	3139	Carnival Concessions	11	1	1124	2/2/2016 0:00	15	Calculated	14	0		1		FALSE	Carnival concession per item fee	2/2/2016 11:47	jvogee		
5	3145	Demolition	11	2	1130	2/2/2016 0:00	16	Flat	110	0		1	9991	FALSE	Demolition Permit Fee	2/2/2016 12:52	jvogee		
6	3144	Electrical -88	11	20	1129	2/2/2016 0:00	15	Calculated	88	0		1		FALSE	All SFR Electrical with an $88 fee	2/2/2016 12:29	jvogee		
7	3149	Electrical Duplex	11	1	1134	2/2/2016 0:00	16	Flat	246	0		1		FALSE	Electrical Duplex	2/2/2016 13:11	jvogee		
8	3151	Electrical Valuation	11	23	1136	2/2/2016 0:00	77	ValuationExcep	0	0	1076	1	9991	FALSE	Electrical Valuation no Rounding	2/2/2016 13:46	jvogee	4/8/2016 12:48	jvogee
9	3141	Gas Pipe Only	11	3	1126	2/2/2016 0:00	16	Flat	64	0		1		FALSE	Gas Piping Only - Flat fee	2/2/2016 11:59	jvogee		
10	3143	Low Voltage RES	11	16	1128	2/2/2016 0:00	15	Calculated	79	0		1		FALSE	Low Voltage Fee - Residential Only	2/2/2016 12:15	jvogee		
11	3147	New Electrical / 6+	11	6	1132	2/2/2016 0:00	16	Flat	123	0		1		FALSE	New Structure Electrical and 6+ circuits	2/2/2016 13:03	jvogee		
12	3148	ReRoof Duplex	11	2	1133	2/2/2016 0:00	16	Flat	220	0		1		FALSE	RE-ROOF Duplex	2/2/2016 13:09	jvogee		
13	3146	ReRoof SFR	11	11	1131	2/2/2016 0:00	16	Flat	110	0		1		FALSE	RE ROOF Flat fee	2/2/2016 12:56	jvogee		
14	3138	SBCC Surcharge	11	13	1123	2/2/2016 0:00	16	Flat	4.5	0		1	9992	FALSE	State Building Code Surcharge	2/2/2016 11:39	jvogee		
15	3152	SFR M/P Fixtures	11	128	1137	2/2/2016 0:00	18	Range	0	0	1077	1	9991	TRUE	Residential Mechanical / Plumbing	2/2/2016 14:16	jvogee	3/23/2016 8:03	scollier
16	3140	Temp/React/MH	11	25	1125	2/2/2016 0:00	15	Calculated	59	0		1		FALSE	Temp Service / Service Reactivation / Mo	2/2/2016 11:53	jvogee	4/11/2016 14:45	lblechen

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:

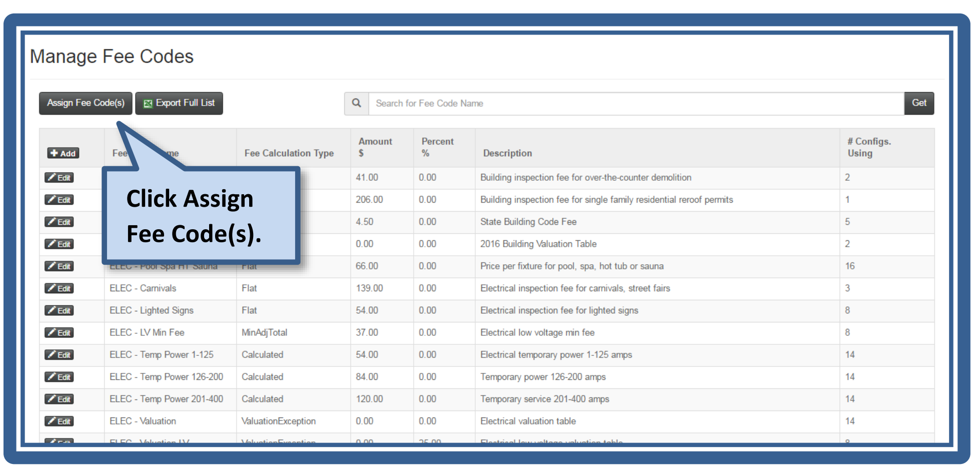
1. **MANAGE**=> Fees=>Manage Fee Codes then click the **ASSIGN FEE CODES** button.

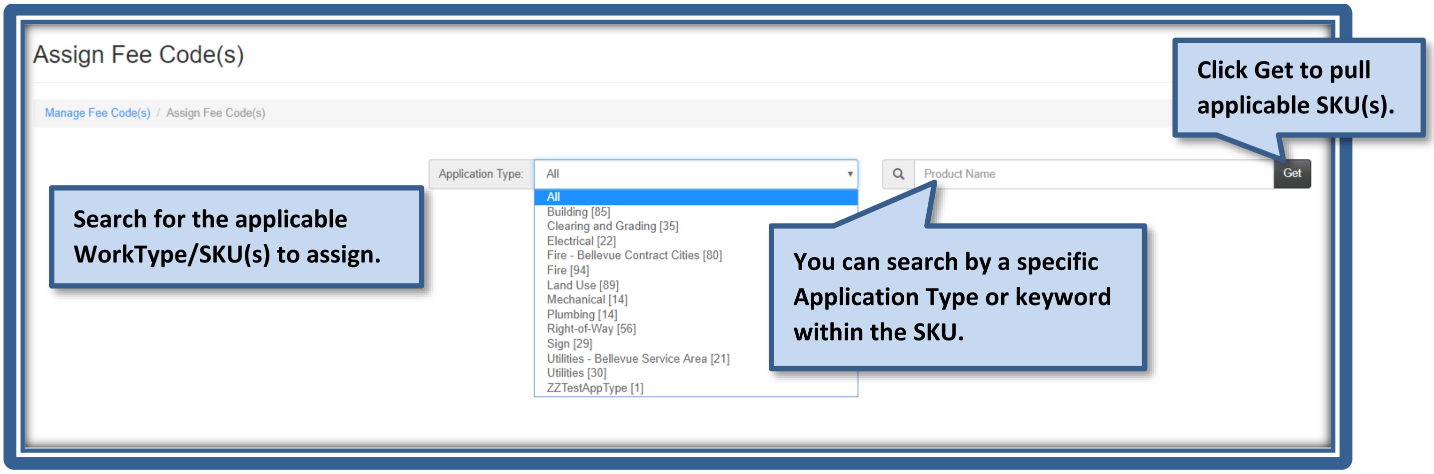
Or

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

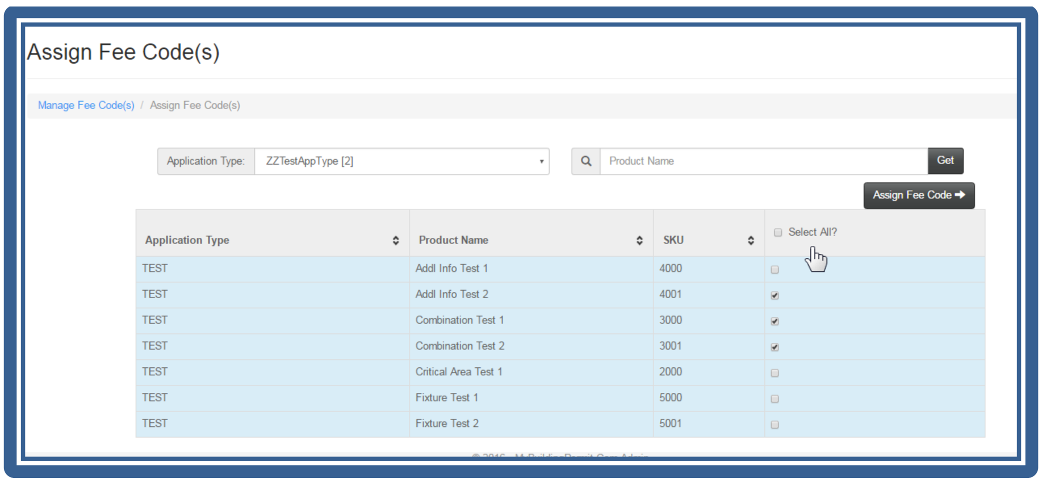
Option #1:

From the MANAGE→Fees→Manage Fee Codes

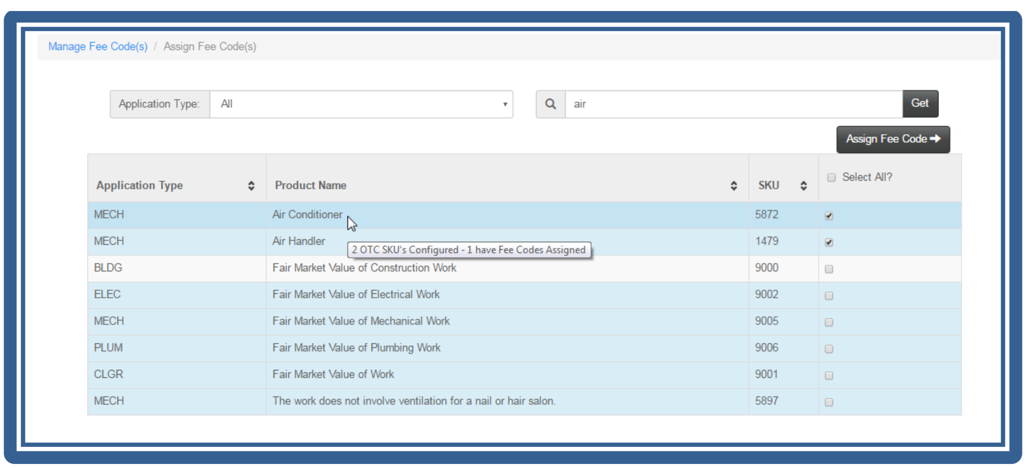


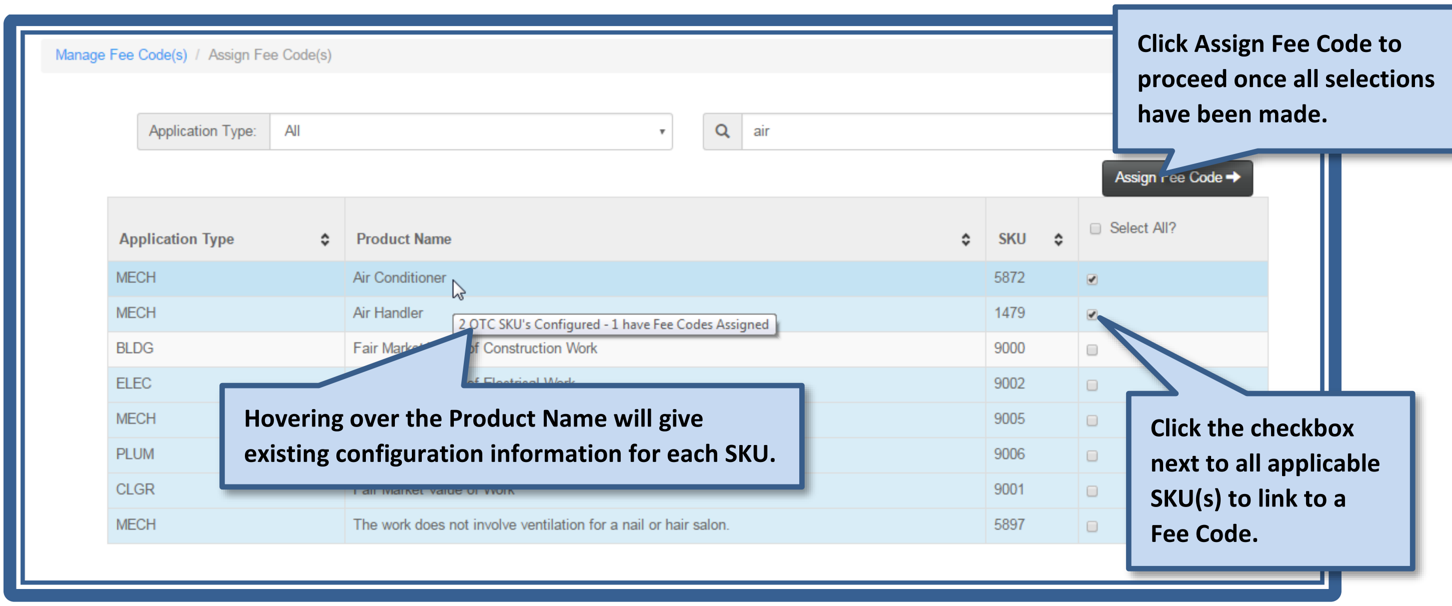


Example of a completed search by Application Type:

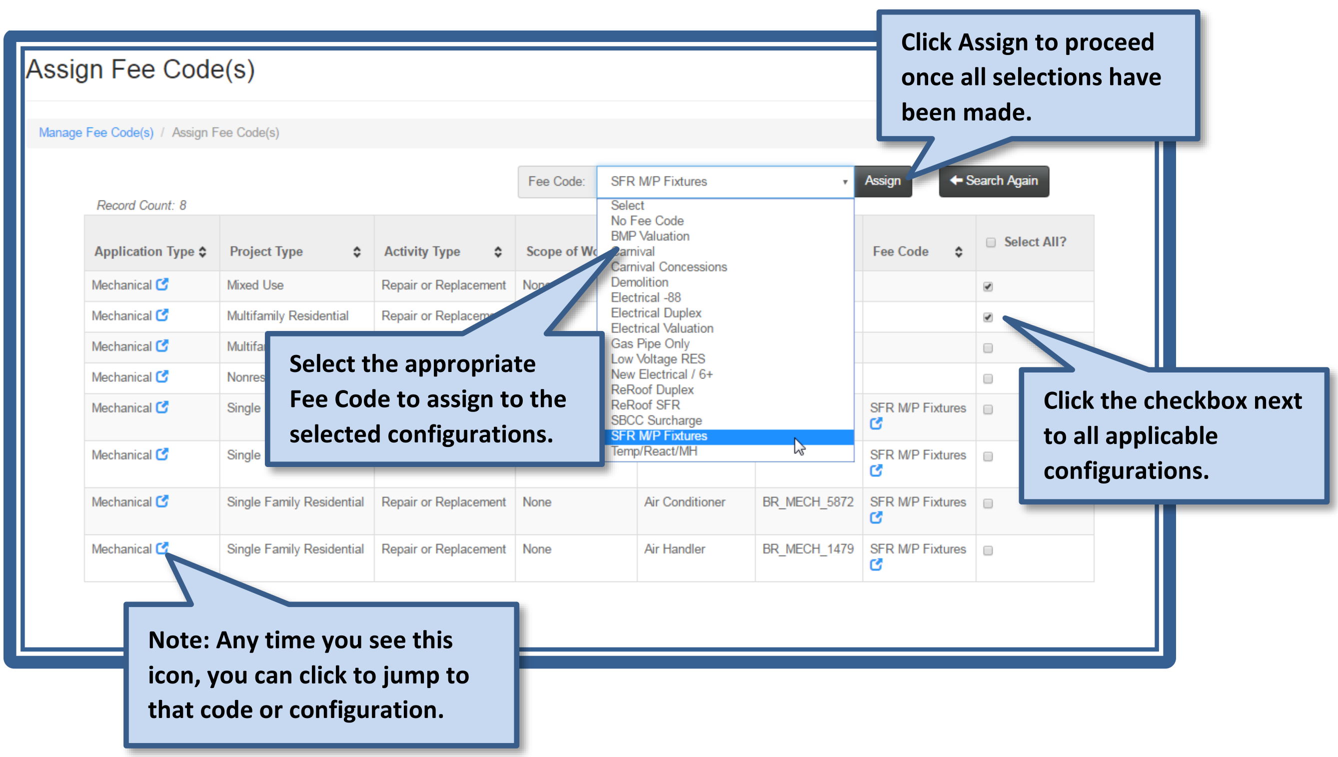


Example of a completed search by a Keyword



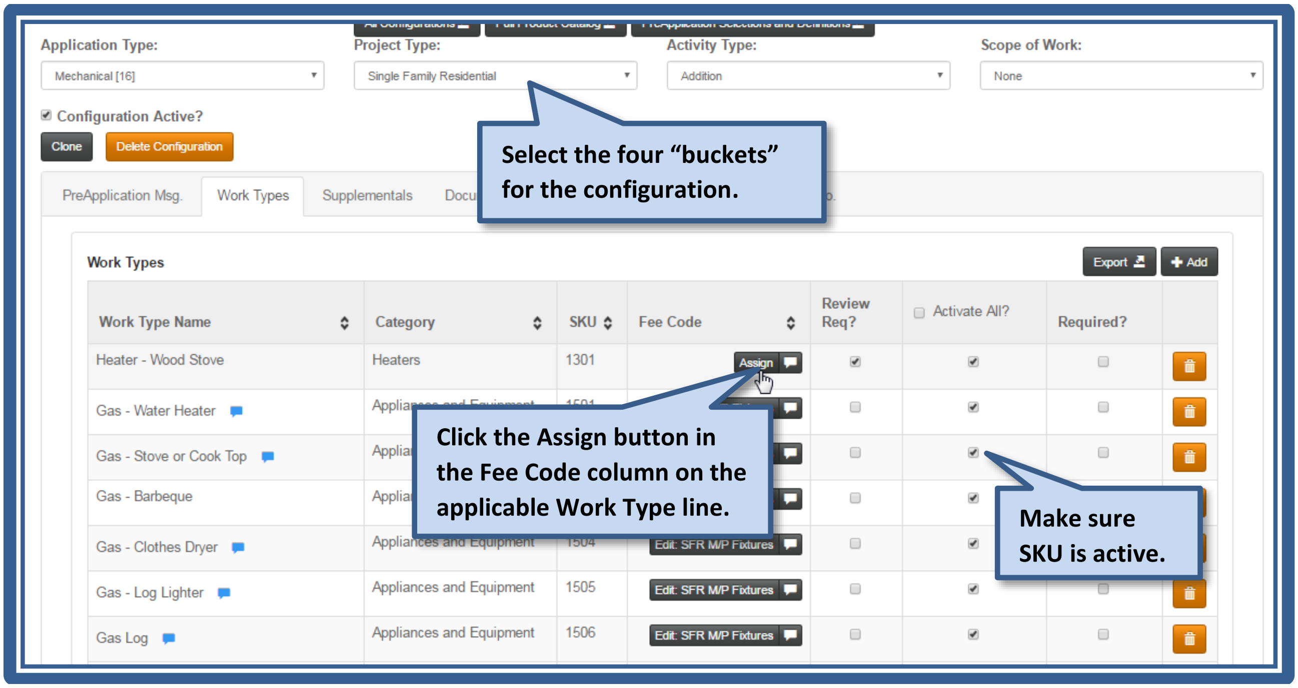


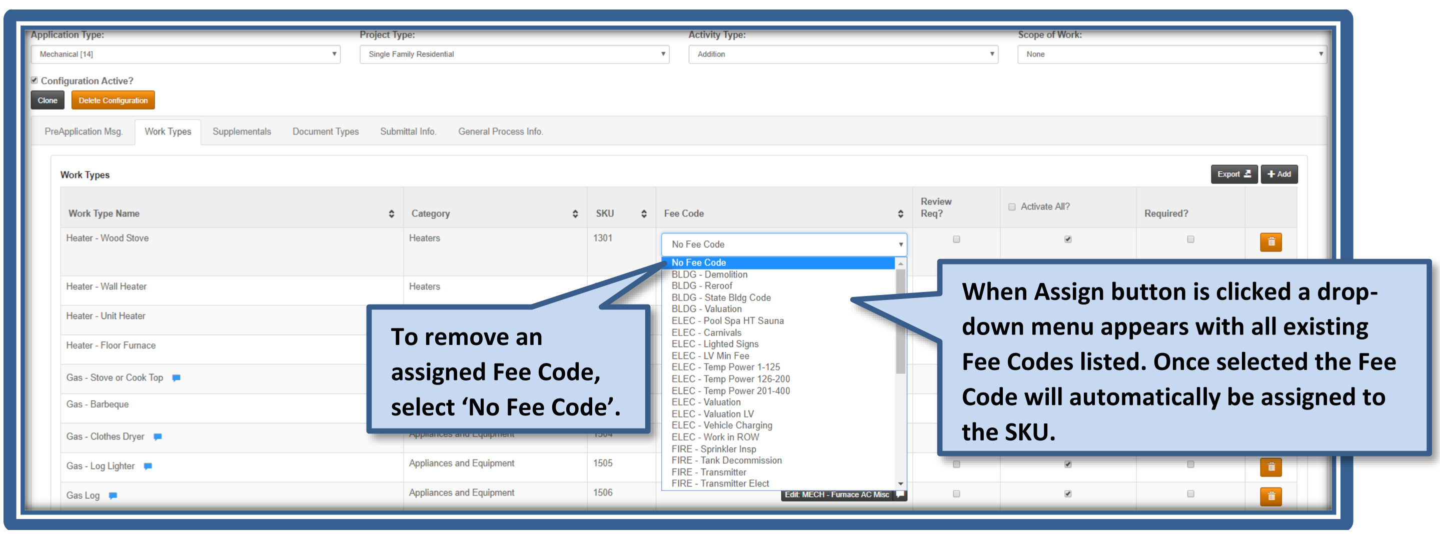
After clicking the Assign Fee Code button, a listing of all configurations containing those previously selected SKU(s) will appear:



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.

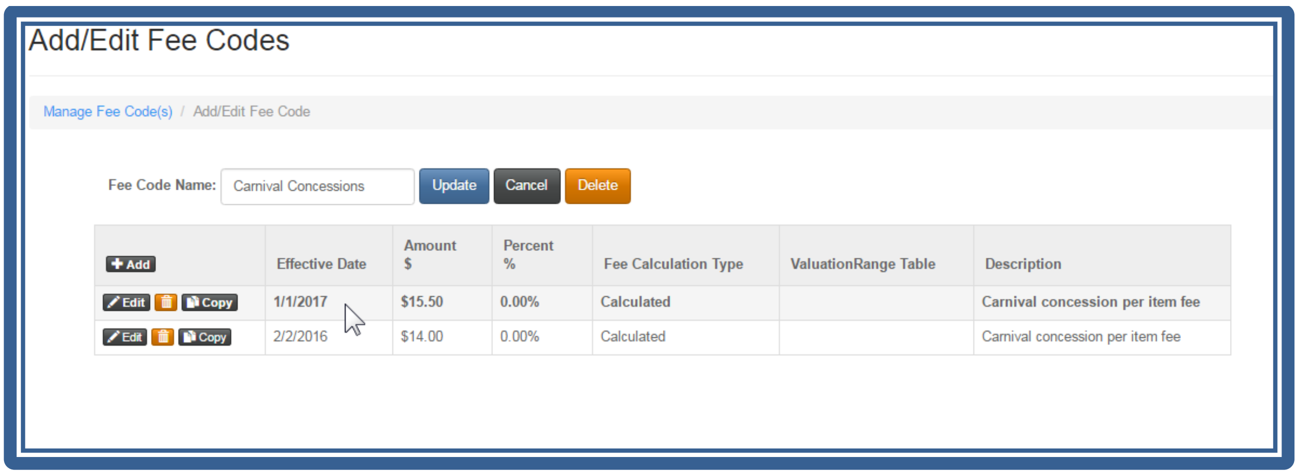
Fee Maintenance—Increases, New Fees

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



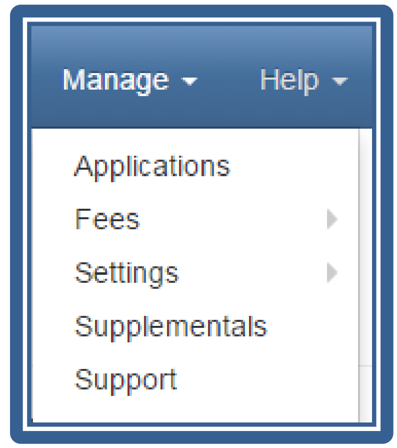
NOTE: If you've created a new Valuation/Range Table that will be used with your new Fee Code, be sure to change the Table Name in the Fee Code setup as well.

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.

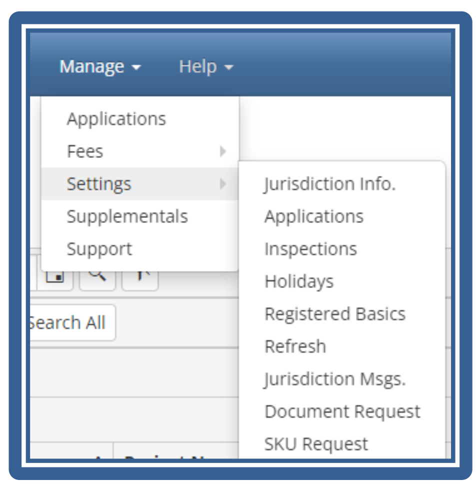
Settings – Jurisdiction Information, Application Types you will accept on MBP, Inspection Information and Holidays (only if this information isn't available from your backend permitting system).

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.

Document Request – Request a new document for use in application configurations.

SKU Request – Request a new SKU or Category for use in application configurations.

Jurisdiction Info

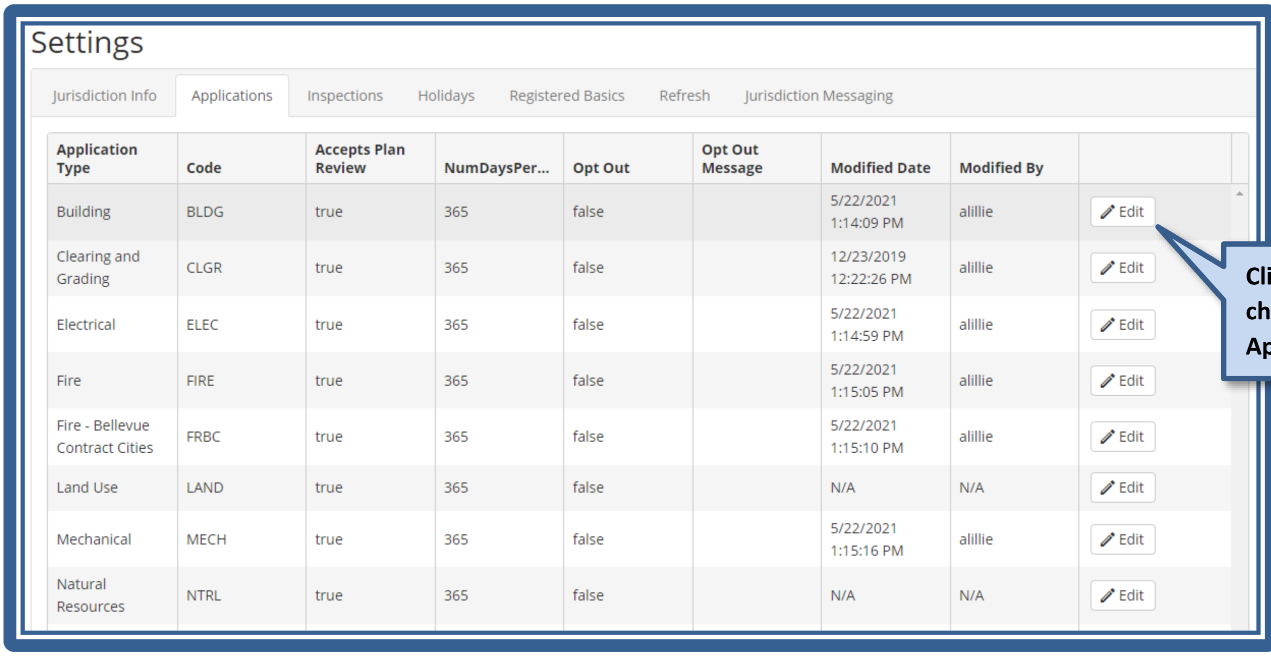
Control information specific to your jurisdiction through this tab:

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.

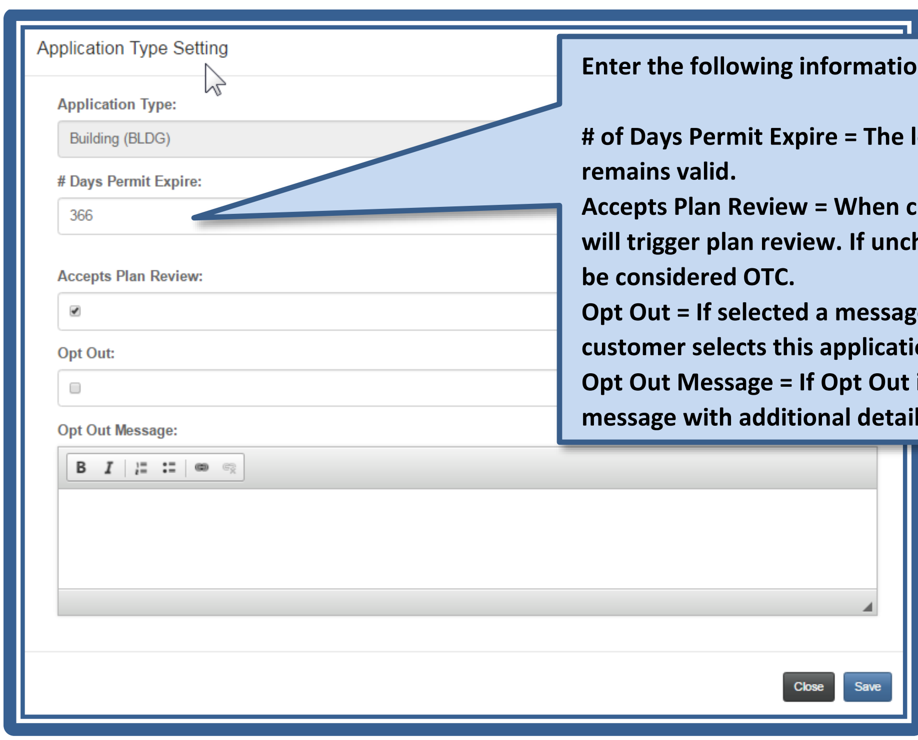
Applications

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

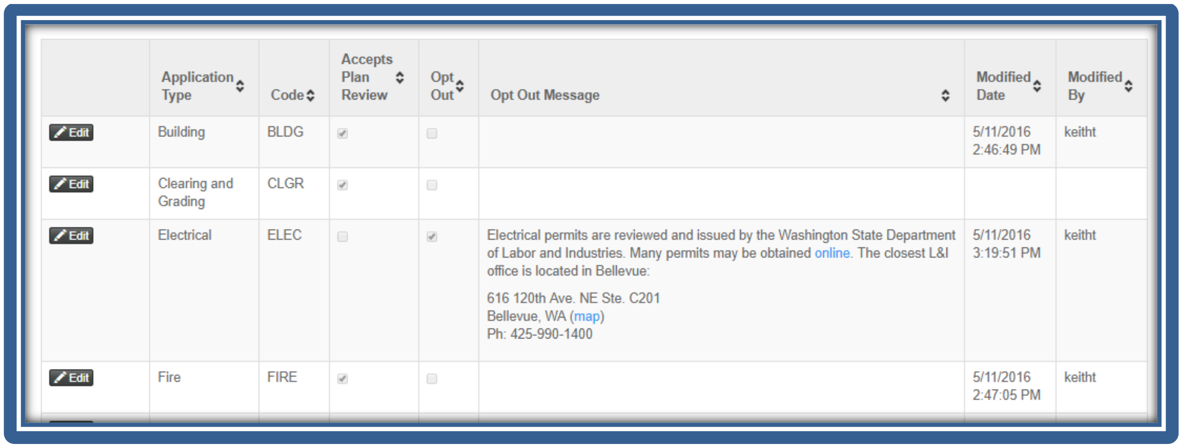
Click Edit to make changes to any Application Type.



Enter the following information:

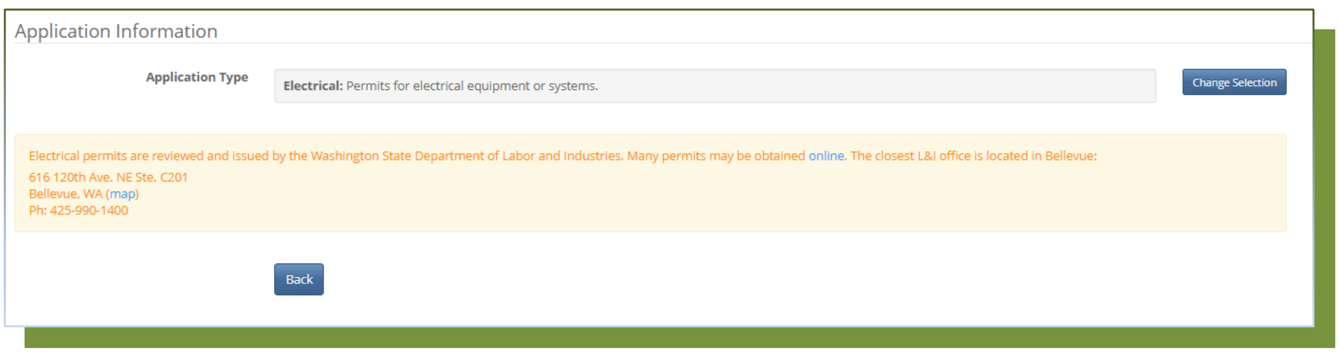
# of Days Permit Expire = The length of time a permit remains valid.
Accepts Plan Review = When checked, the application will trigger plan review. If unchecked, application will be considered OTC.
Opt Out = If selected a message will appear when customer selects this application type when applying.
Opt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

Example of an Opt Out message in Jurisdiction Settings:

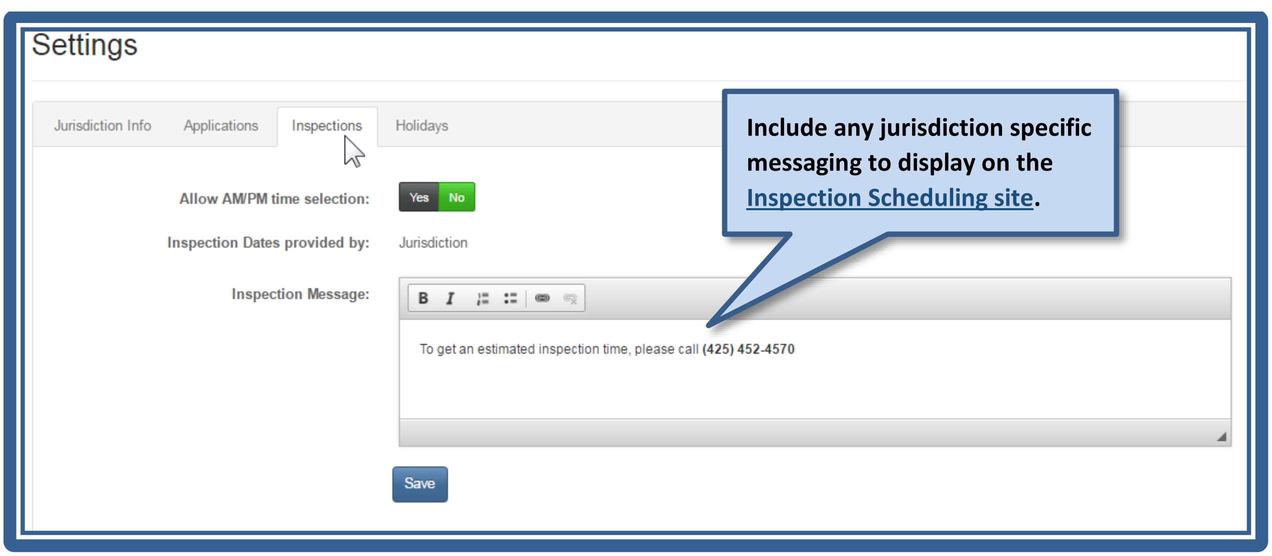


	Application Type	Code	Accepts Plan Review	Opt Out	Opt Out Message	Modified Date	Modified By
Edit	Building	BLDG	✓			5/11/2016 2:46:49 PM	keitht
Edit	Clearing and Grading	CLGR	✓				
Edit	Electrical	ELEC		✓	Electrical permits are reviewed and issued by the Washington State Department of Labor and Industries.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

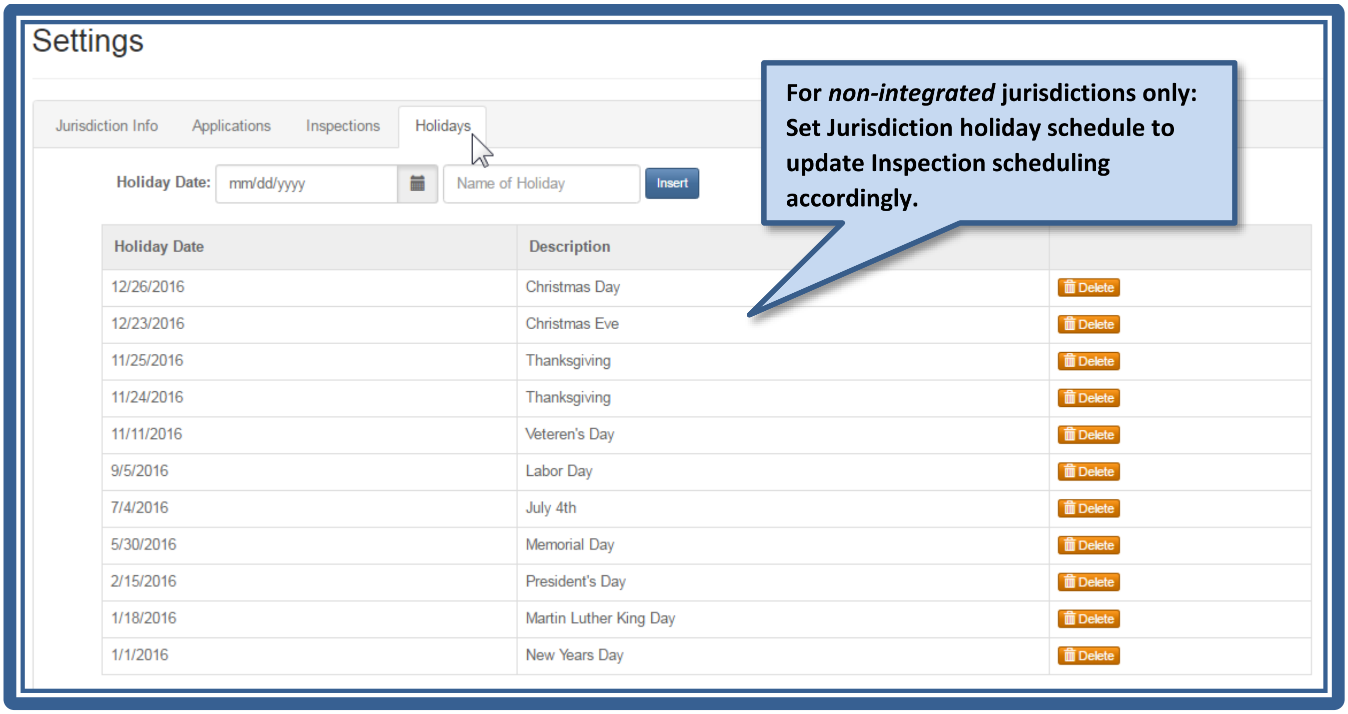
Example of an Opt Out message as displayed to customer:



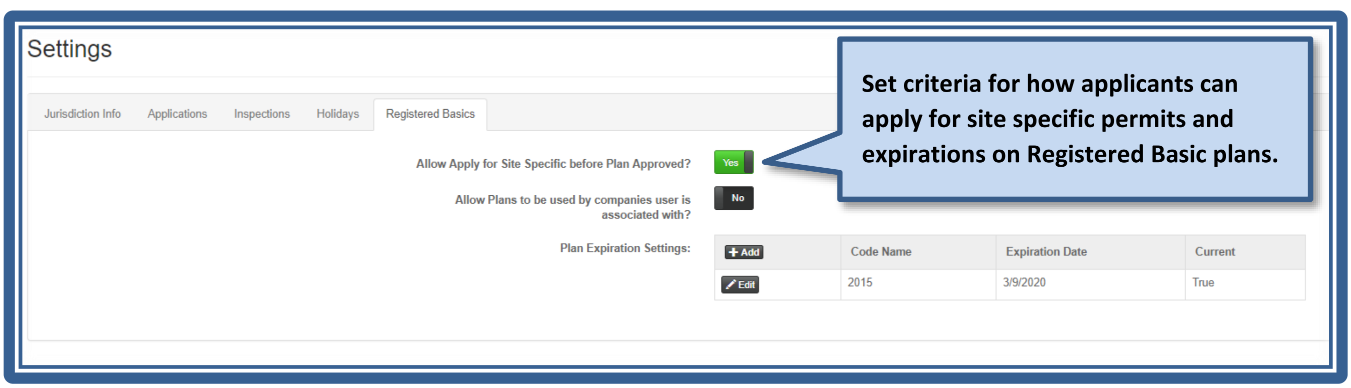
Inspections—Messaging



Holidays—Non-integrated Jurisdictions Only

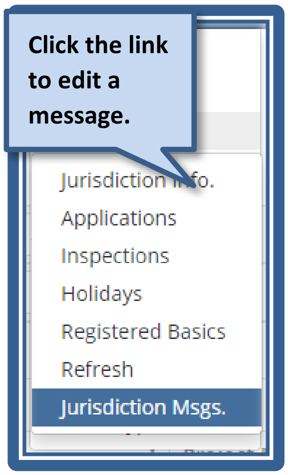


Registered Basics

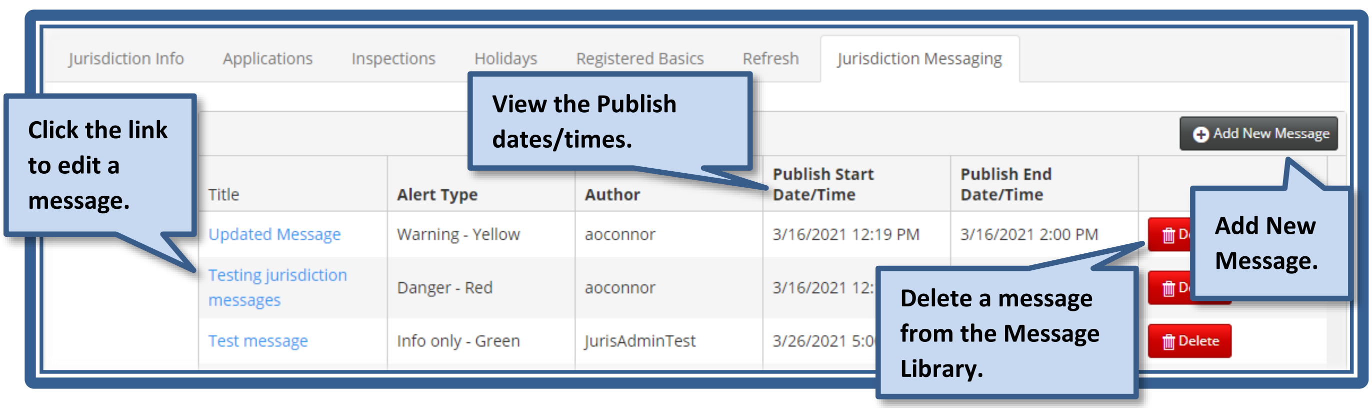


Jurisdiction Messages

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

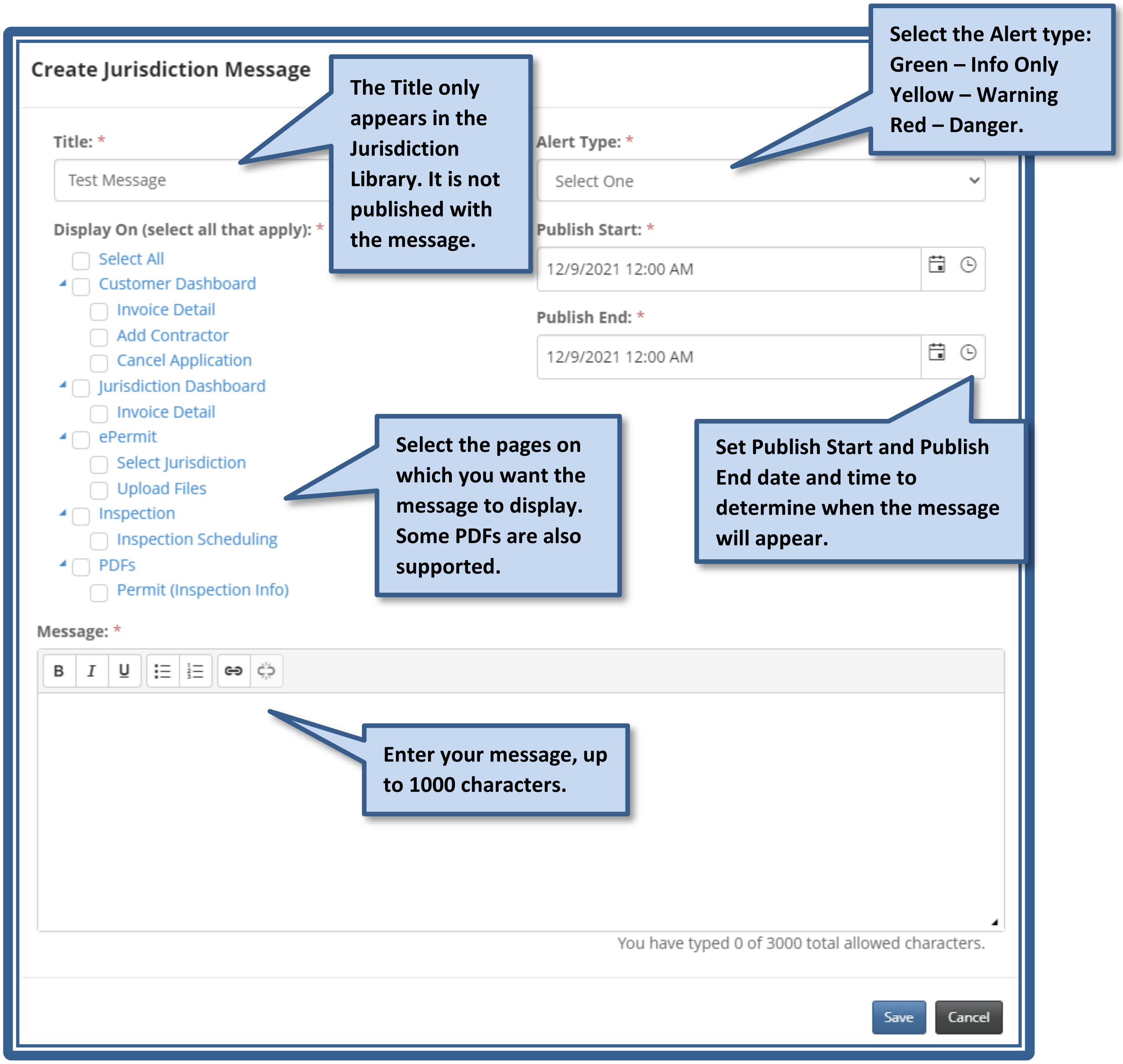


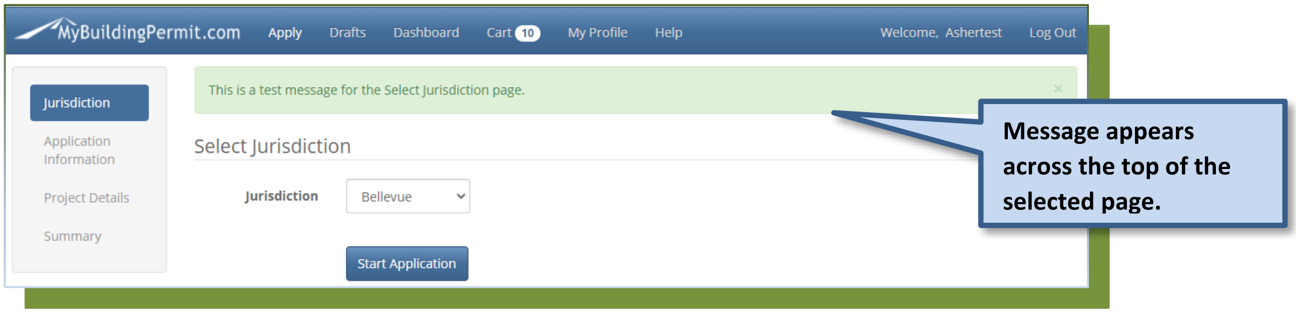
You can create new messages or edit existing ones and specify the pages and timing for the messages to display.



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

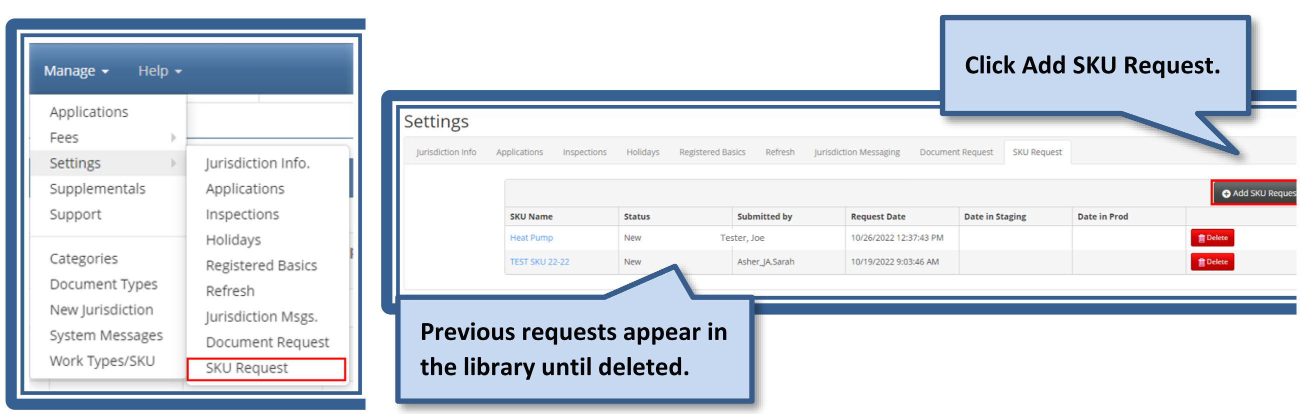
SKU (WorkType) and Category Requests can be made via MBP Admin under **Manage > Settings > SKU Request**. When the request is submitted, an email is generated and routed to MBP Support. Once received, the eGov Service Delivery team will review and implement the request in Staging. After the requestor 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

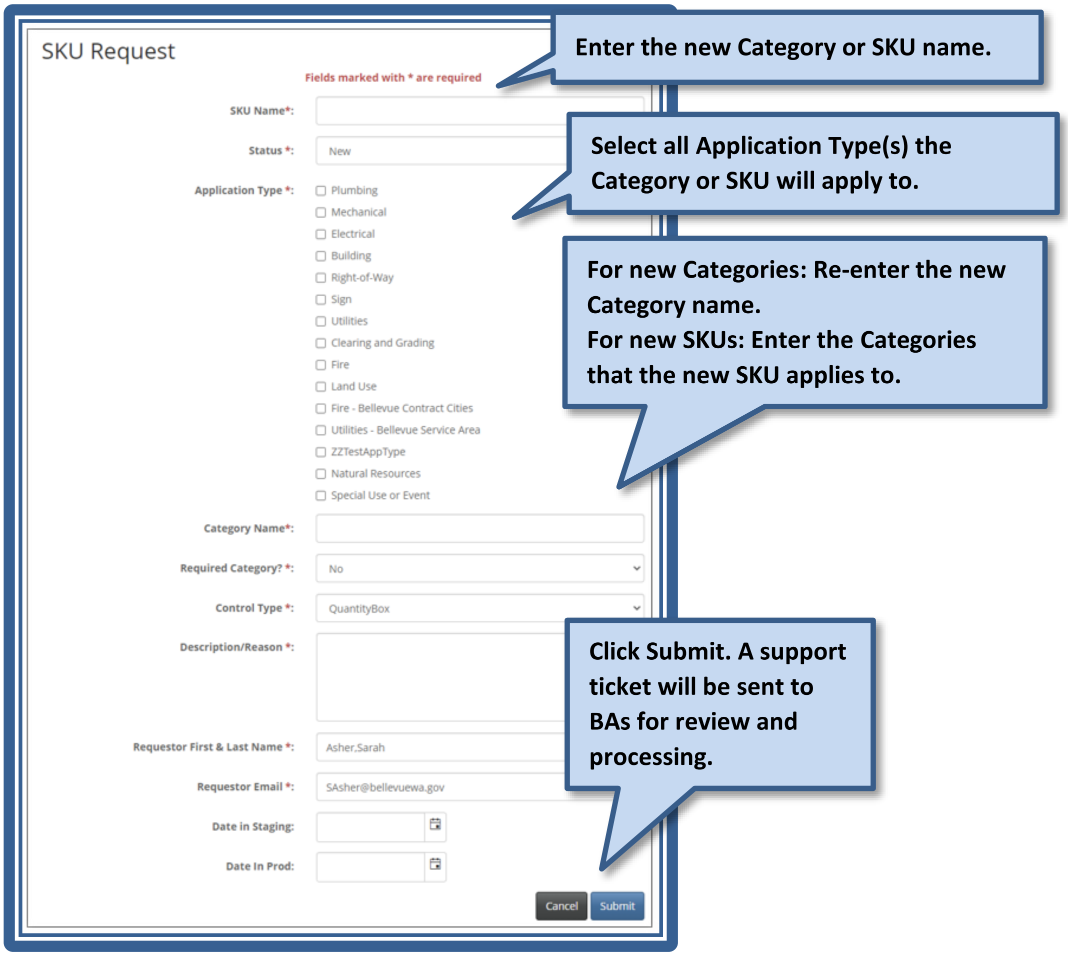
The following table describes the information required and the process by which you submit a request:

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) (**NOTE:** You must create a unique SKU for each application type it applies to) • 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.

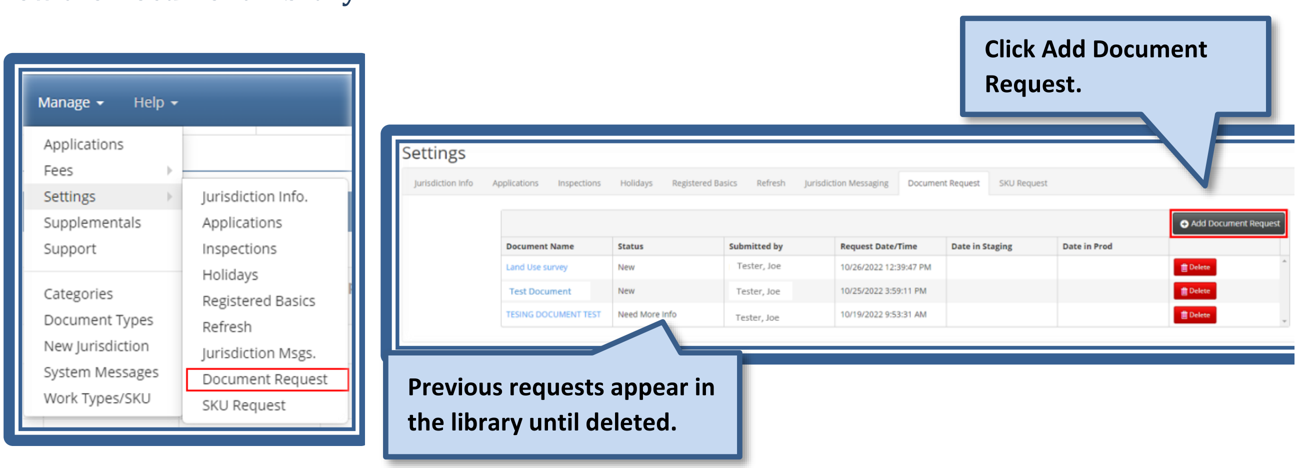
NOTE: To reduce potential duplicate Document and Work Types, we search current inventory lists of documents and SKUs to identify a similar, already existing match. In these instances, we will contact the original requestor to verify if we can use the existing type or if a new one is still needed.

Prepare the Document Request

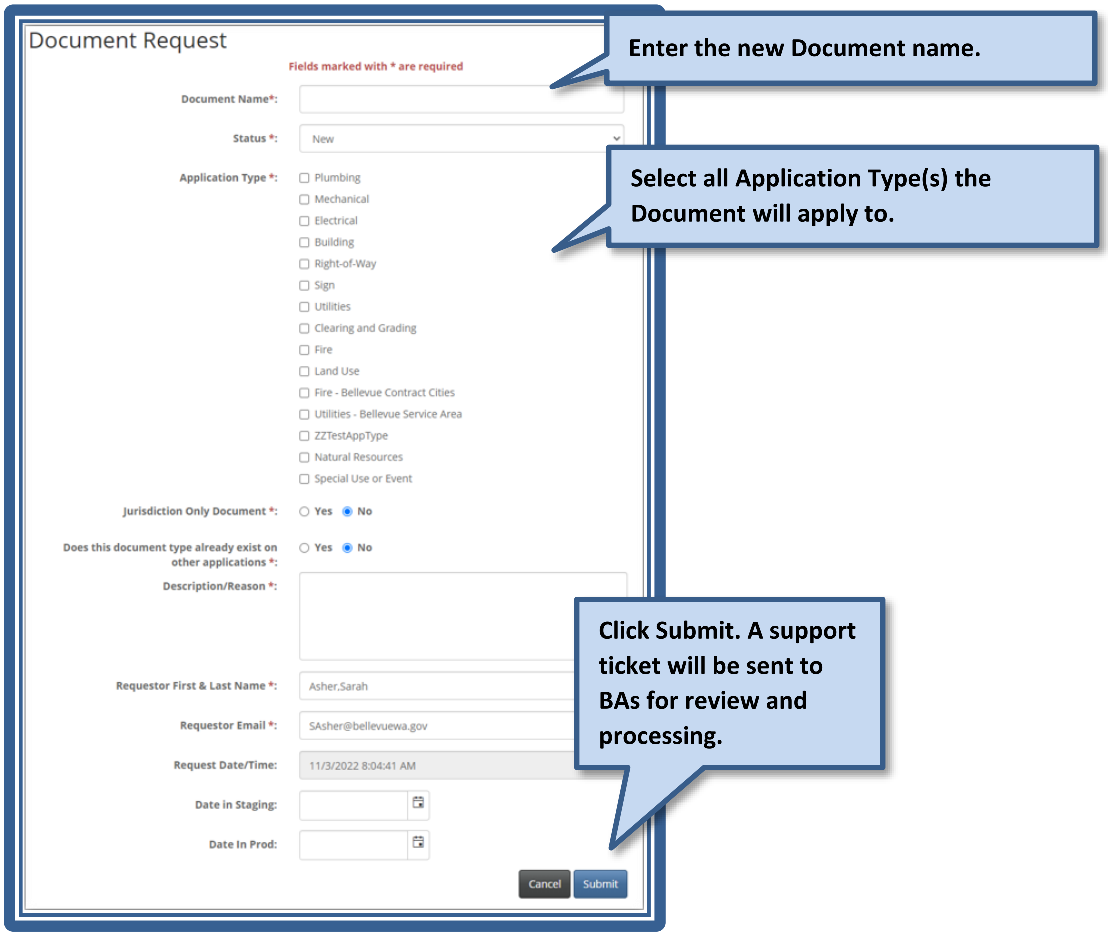
Gather the following information before submitting a Document Request.

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


Document Request

Fields marked with * are required

Document Name*:

Status *: New

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

Jurisdiction Only Document *: Yes No

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

Description/Reason *:

Requestor First & Last Name *: Asher,Sarah

Requestor Email *: SAsher@bellevuewa.gov

Request Date/Time: 11/3/2022 8:04:41 AM

Date in Staging:

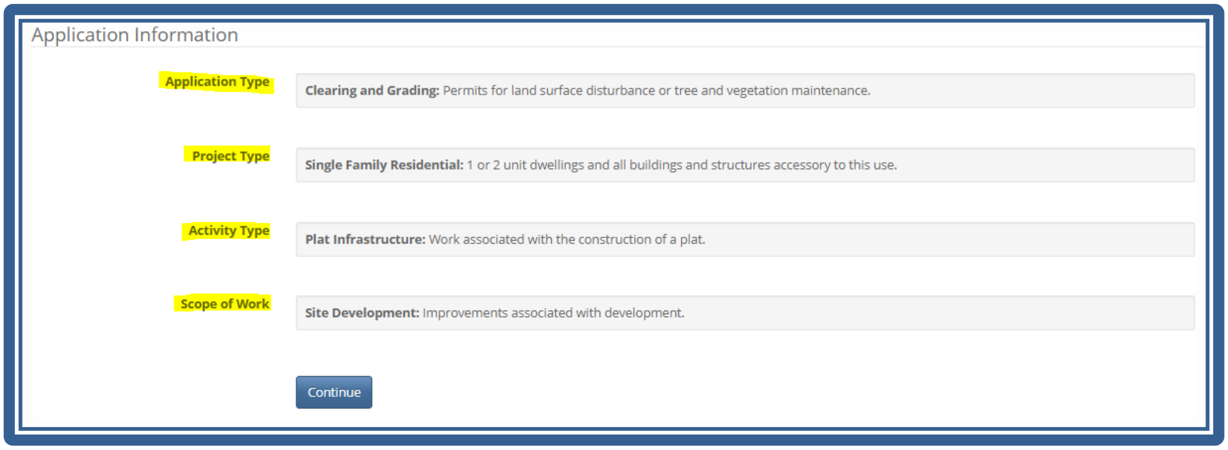
Date In Prod:

Cancel Submit

“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 (1^{st} Bucket)	**Program Committee**	Support Ticket (egovsupport@ecitygov.net)	Requires the following information: • Application Type • Application Type Description (these appear to the Applicant)
Project Type (2^{nd} 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 (3^{rd} 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 Chapter Conditional Display – ePermit User Experience
When Conditional Logic is applied to a configuration, the user experience works as follows:

- Conditional Categories appear only when Trigger SKUs are selected.
- If a Trigger SKU is selected and then cleared, the Conditional Category will toggle accordingly, showing or hiding based on the Trigger SKU's selection status.
- If an applicant enters data into SKUs within a Conditional Category, then clears the Trigger SKU, any data entered will be erased when the Conditional Category is hidden.

Supplementals

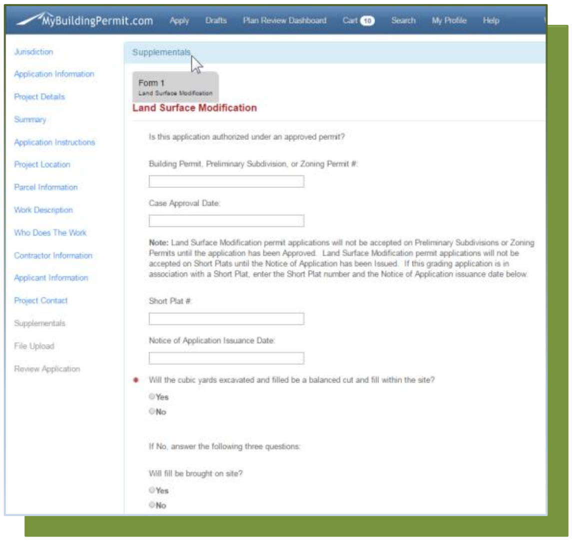
for detailed instructions on adding Supplementals to a configuration.

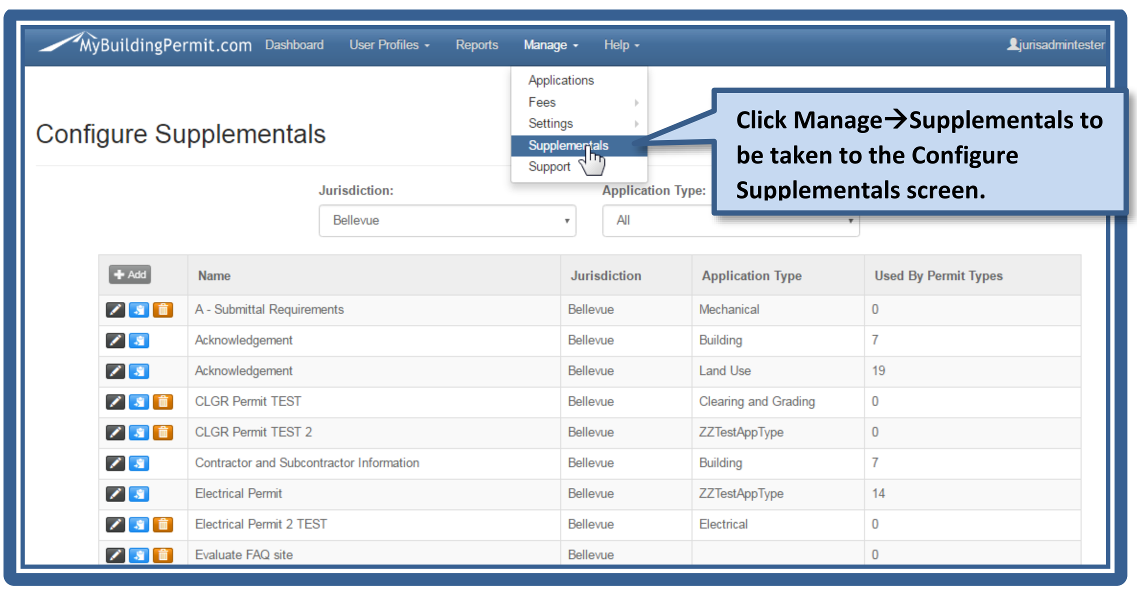
Creating New Questionnaires

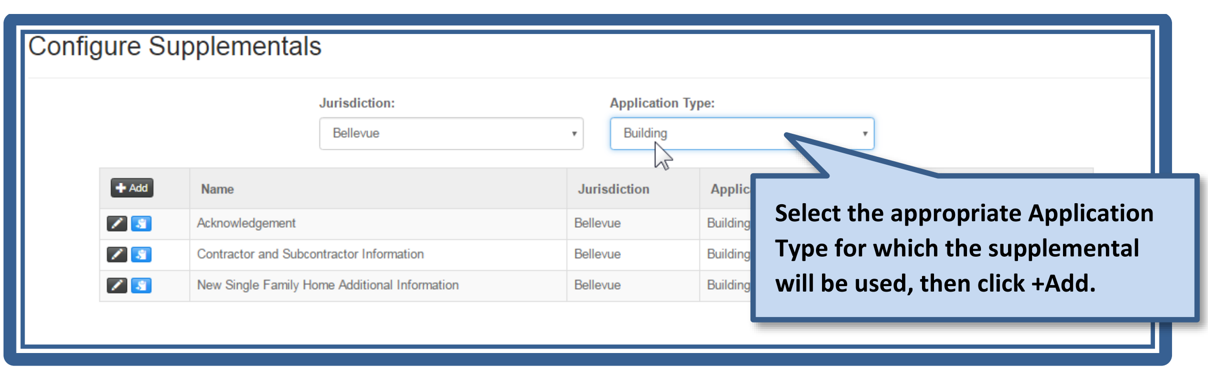
Supplementals are a way a jurisdiction can request additional information or provide more detail to an applicant on Plan Review applications. Supplementals must be created first in the Jurisdiction Admin **MANAGE**→Supplementals menu, then assigned to an Application Configuration.

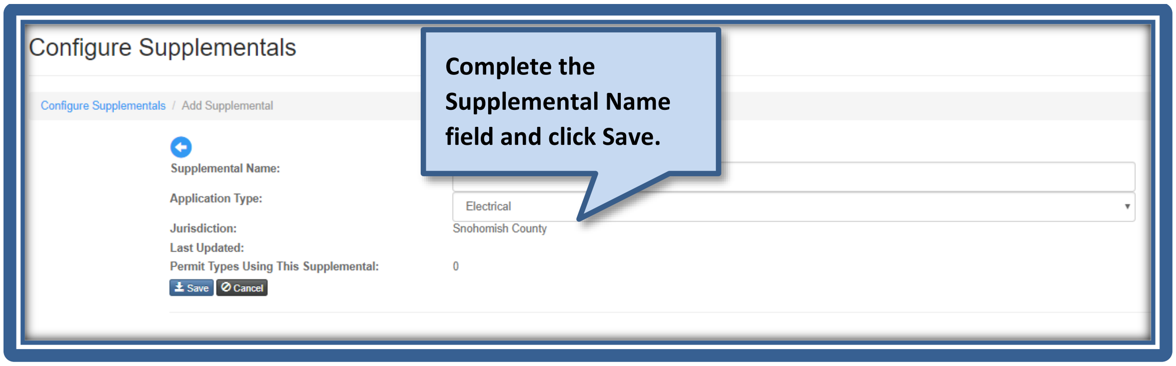
Questions within the Supplemental can have different types of answers, be set as required to be completed, put in specific order, and can also contain hyperlinks.

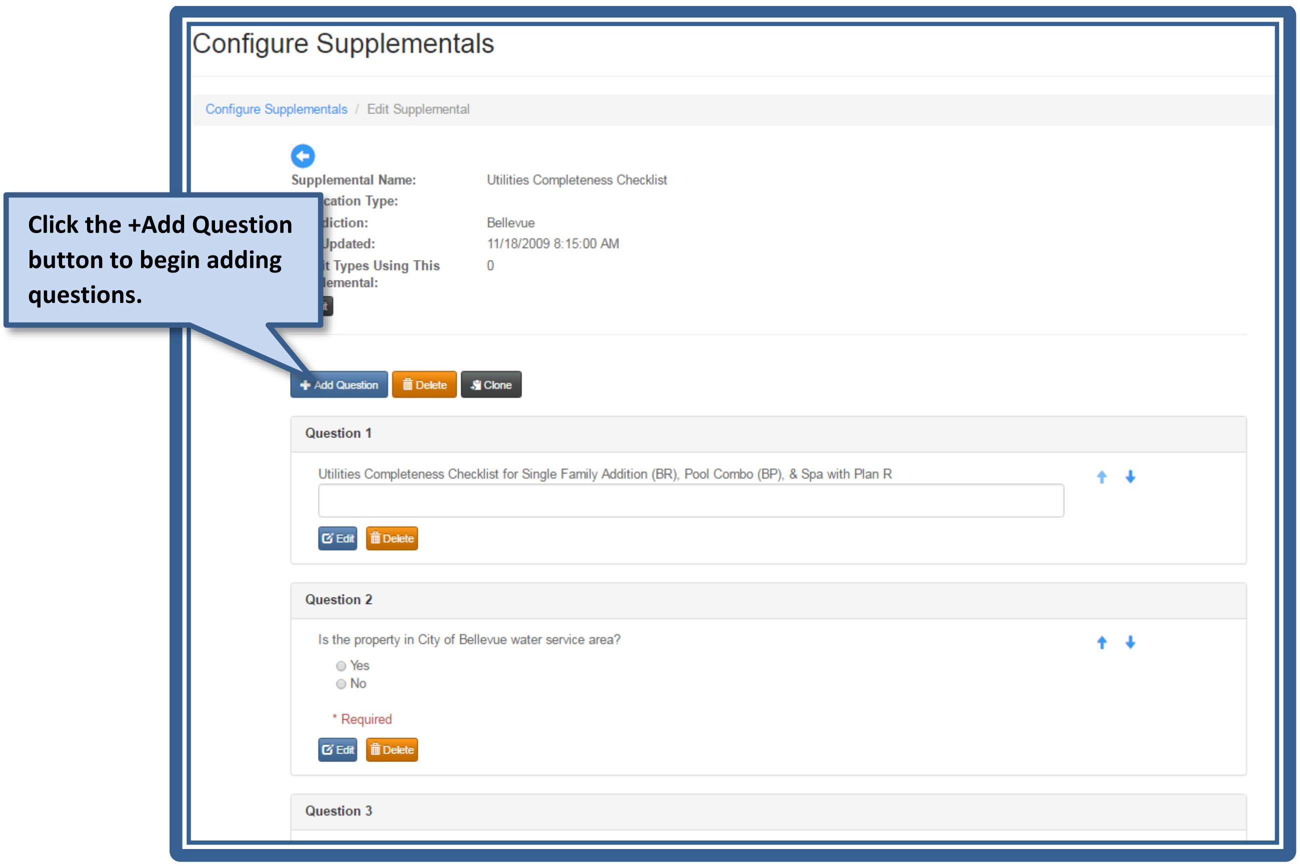
Example of a Customer Application Supplemental view

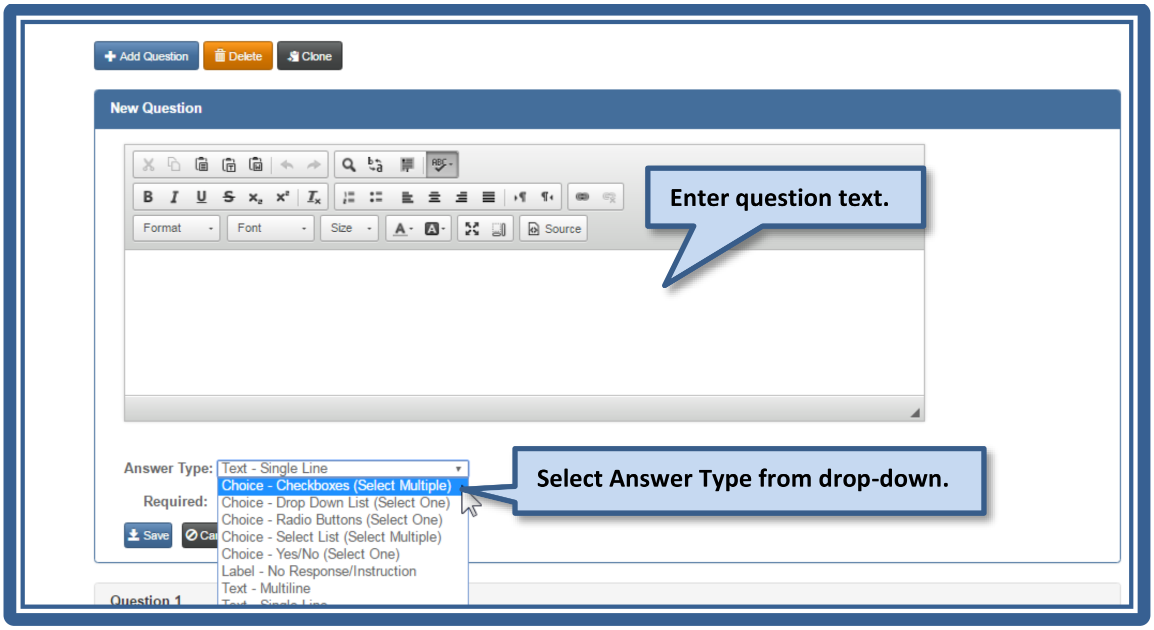

MyBuildingPermit.com
Apply
Drafts
Plan Review Dashboard
Cart
Search
My Profile
Help
Jurisdiction
Application Information
Project Details
Summary
Application Instructions
Project Location
Parcel Information
Work Description
Who Does The Work
Contractor Information
Applicant Information
Project Contact
Supplementals
File Upload
Review Application
Supplementals
Form 1
Land Surface Modification
Is this application authorized under an approved permit?
Building Permit, Preliminary Subdivision, or Zoning Permit #:
Case Approval Date:
Short Plat #:
Notice of Application Issuance Date:
Will the cubic yards excavated and filled be a balanced cut and fill within the site?
Yes
No
If No, answer the following three questions:
Will fill be brought on site?
Yes
No

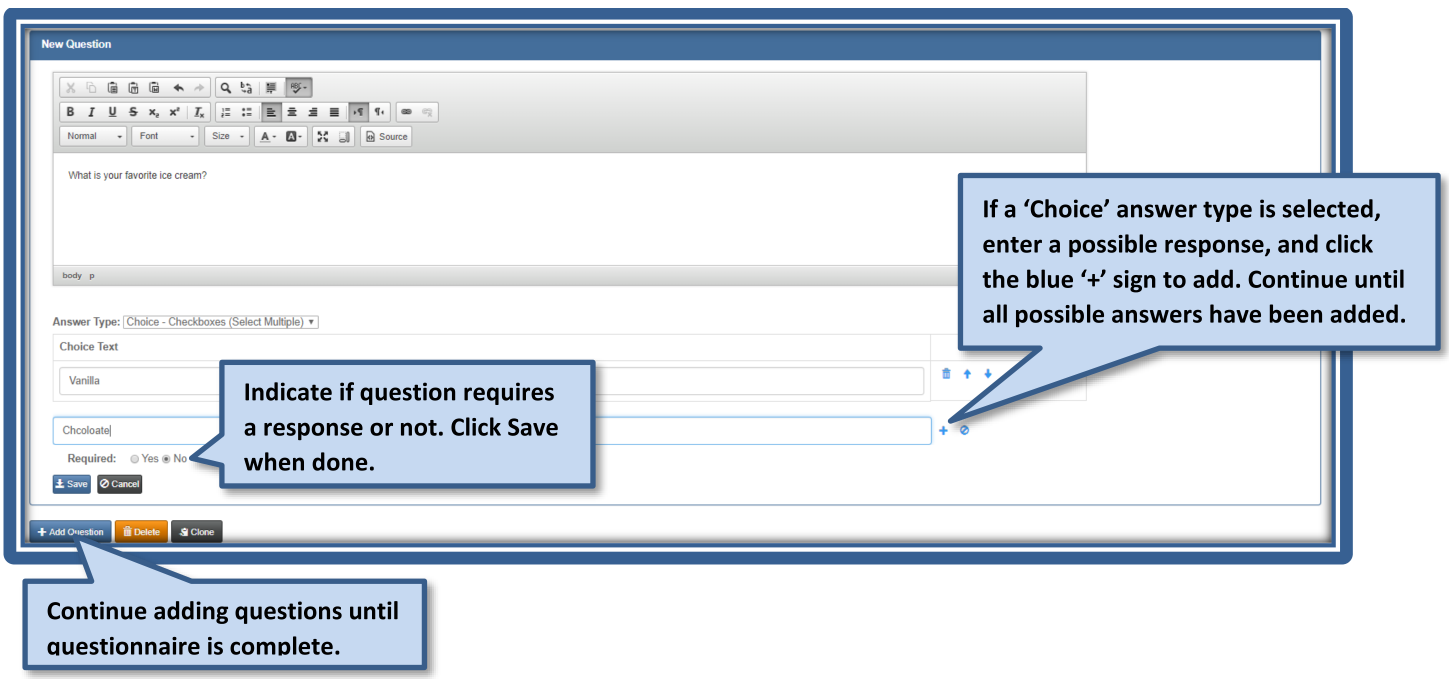

MyBuildingPermit.com
Dashboard
User Profiles
Reports
Manage
Help
jurisadmintester
Applications
Fees
Settings
Supplementals
Support
Configure Supplementals
Jurisdiction:
Bellevue
Application Type:
All
Add
Name
Jurisdiction
Application Type
Used By Permit Types
A - Submittal Requirements | Bellevue | Mechanical | 0
Acknowledgement | Bellevue | Building | 7
Acknowledgement | Bellevue | Land Use | 19
CLGR Permit TEST | Bellevue | Clearing and Grading | 0
CLGR Permit TEST 2 | Bellevue | ZZTestAppType | 0
Contractor and Subcontractor Information | Bellevue | Building | 7
Electrical Permit | Bellevue | ZZTestAppType | 14
Electrical Permit 2 TEST | Bellevue | Electrical | 0
Evaluate FAQ site | Bellevue | | 0
Click Manage→Supplementals to be taken to the Configure Supplementals screen.


Configure Supplementals
Jurisdiction:
Bellevue
Application Type:
Building
Add
Name
Jurisdiction
Applic
Acknowledgement | Bellevue | Building
Contractor and Subcontractor Information | Bellevue | Building
New Single Family Home Additional Information | Bellevue | Building
Select the appropriate Application Type for which the supplemental will be used, then click +Add.

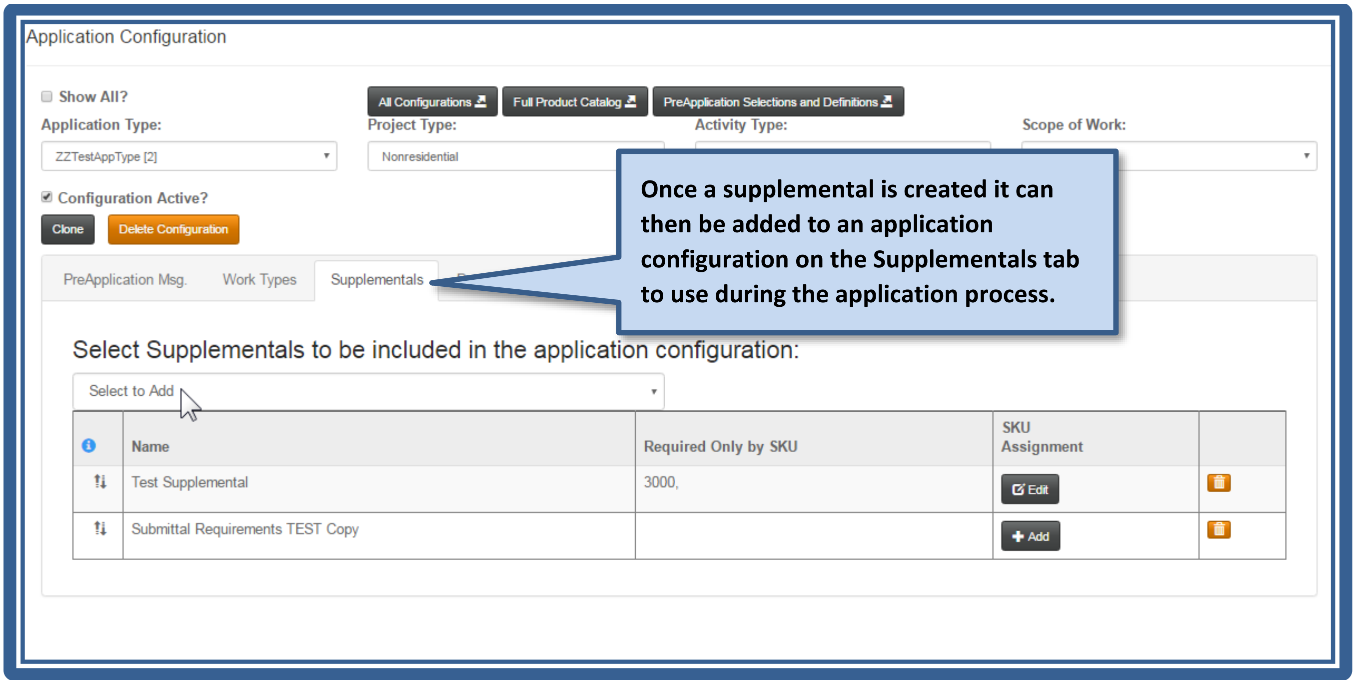

Configure Supplementals
Configure Supplementals / Add Supplemental
Complete the Supplemental Name field and click Save.
Supplemental Name:
Application Type:
Electrical
Jurisdiction:
Snohomish County
Last Updated:
Permit Types Using This Supplemental:
0
Save
Cancel


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





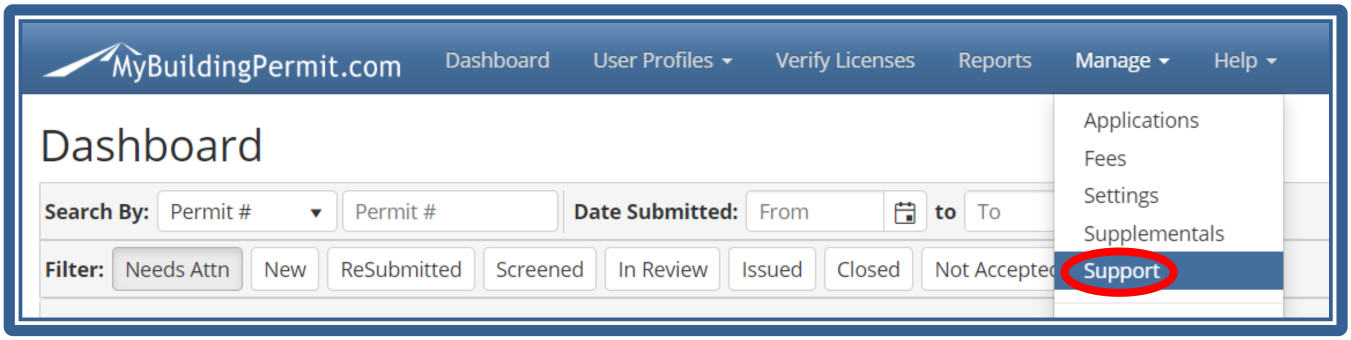
NOTE: Use Answer Type 'Label – No Response/Instruction' is selected no answer is needed from the customer. This type is used to provide information only to the customer on the questionnaire.

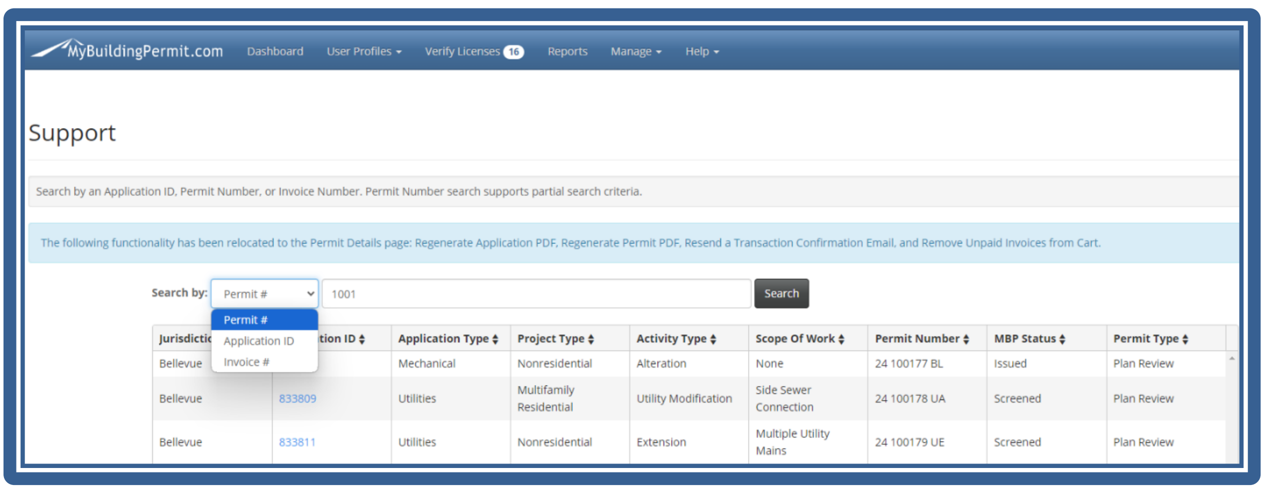

Application Configuration
Show All?
All Configurations
Full Product Catalog
PreApplication Selections and Definitions
Application Type:
ZZTestAppType [2]
Project Type:
Nonresidential
Activity Type:
Scope of Work:
Configuration Active?
Clone
Delete Configuration
PreApplication Msg.
Work Types
Supplementals
Once a supplemental is created it can then be added to an application configuration on the Supplementals tab to use during the application process.
Select Supplementals to be included in the application configuration:
Select to Add
Name
Required Only by SKU
SKU Assignment
Test Supplemental
3000,
Edit
Submittal Requirements TEST Copy
Add

Support Menu

The Support function is available to Jurisdiction and System Admins only. Searching by the Application ID, Permit, or Invoice number you can see various details of a permit, application, or invoice.

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.

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:

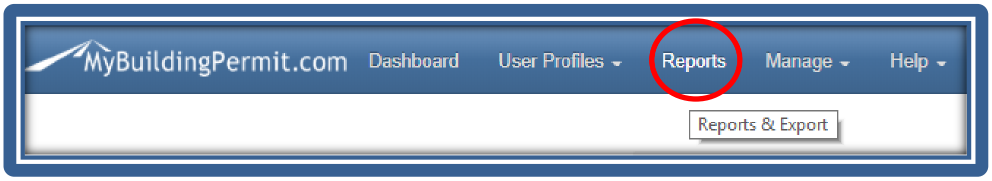
Action	Email Text
New Documents Uploaded	One or more documents have been uploaded to this application. To clear the recent activity status on the application and remove the application from the **Needs Attention** tab on the Jurisdiction Dashboard, accept or delete the document(s).
Invoice added to a 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



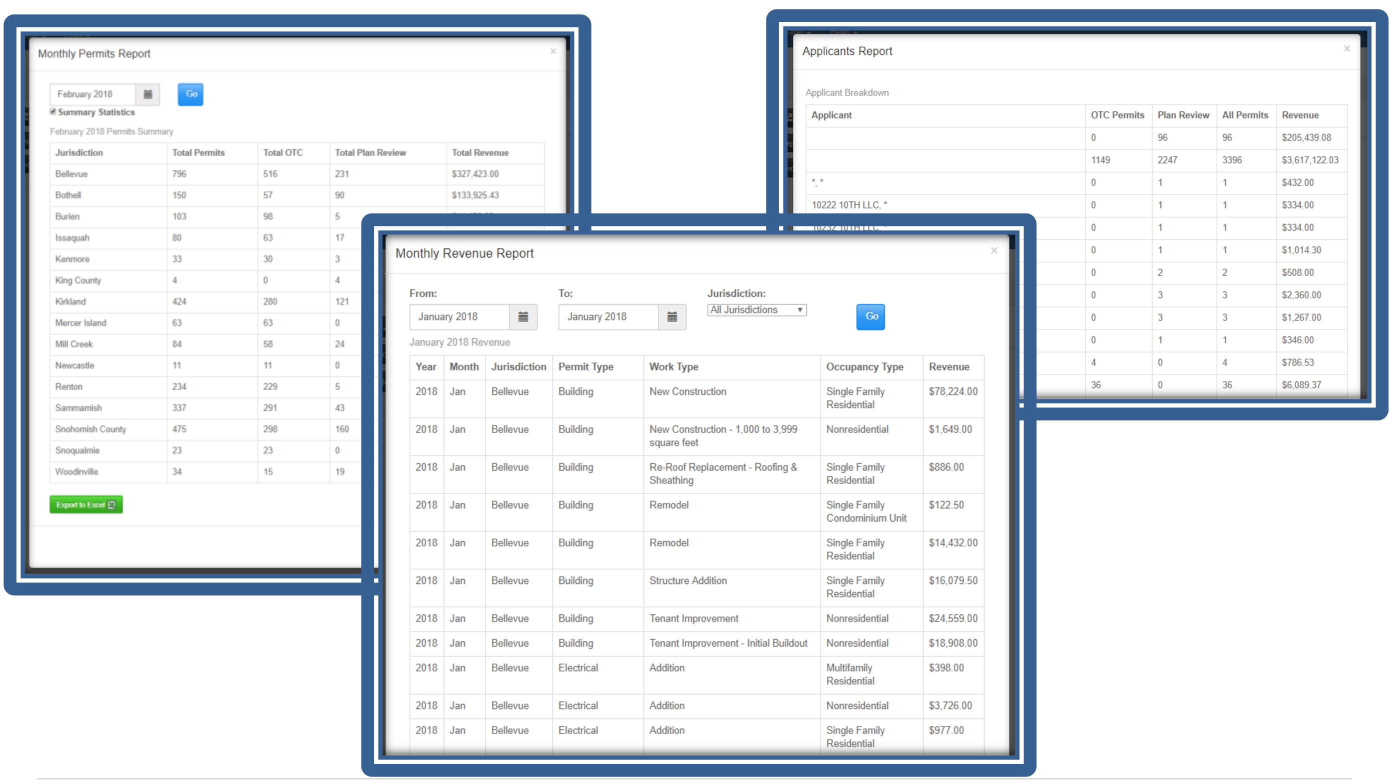
MyBuildingPermit Reporting

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:

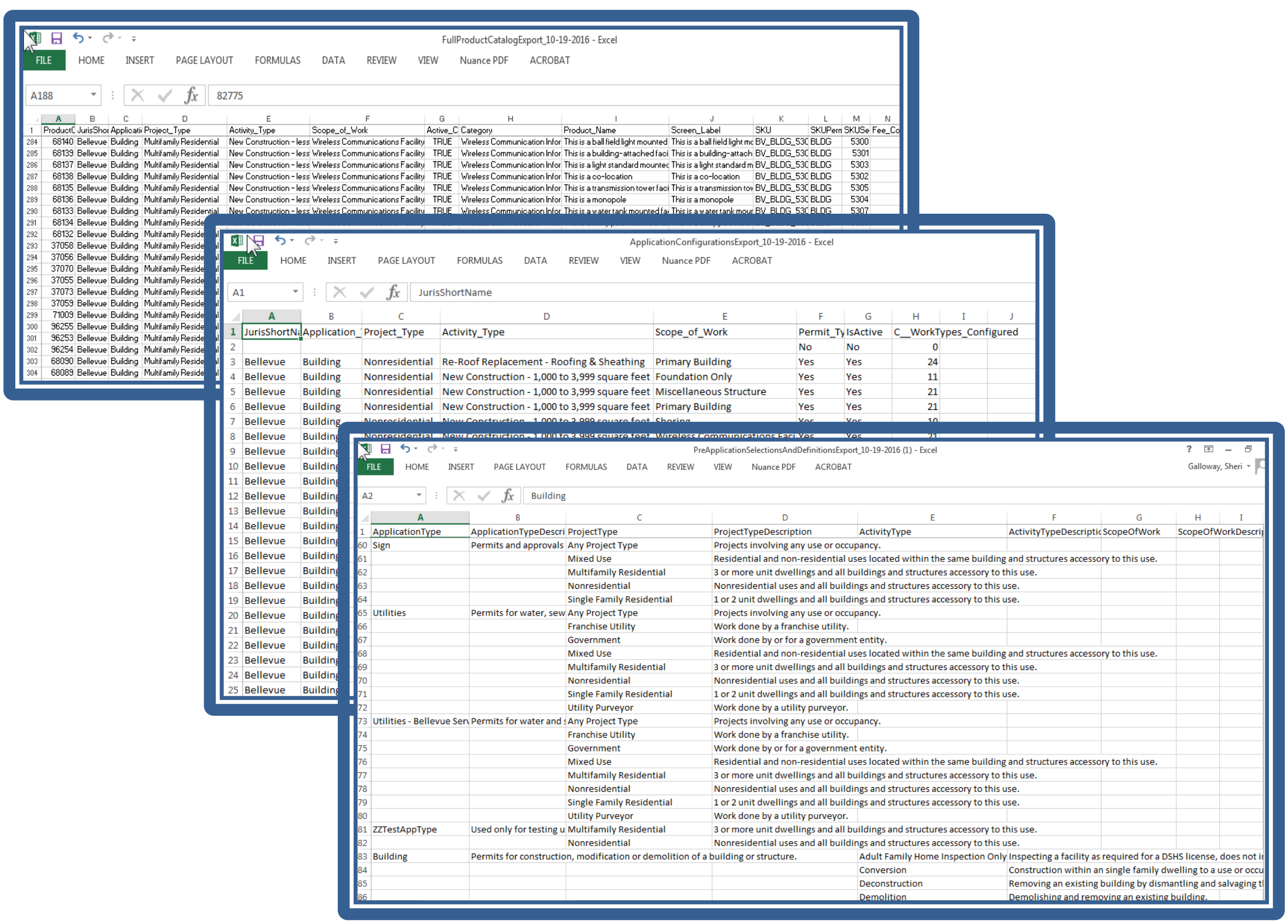


Exports

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.

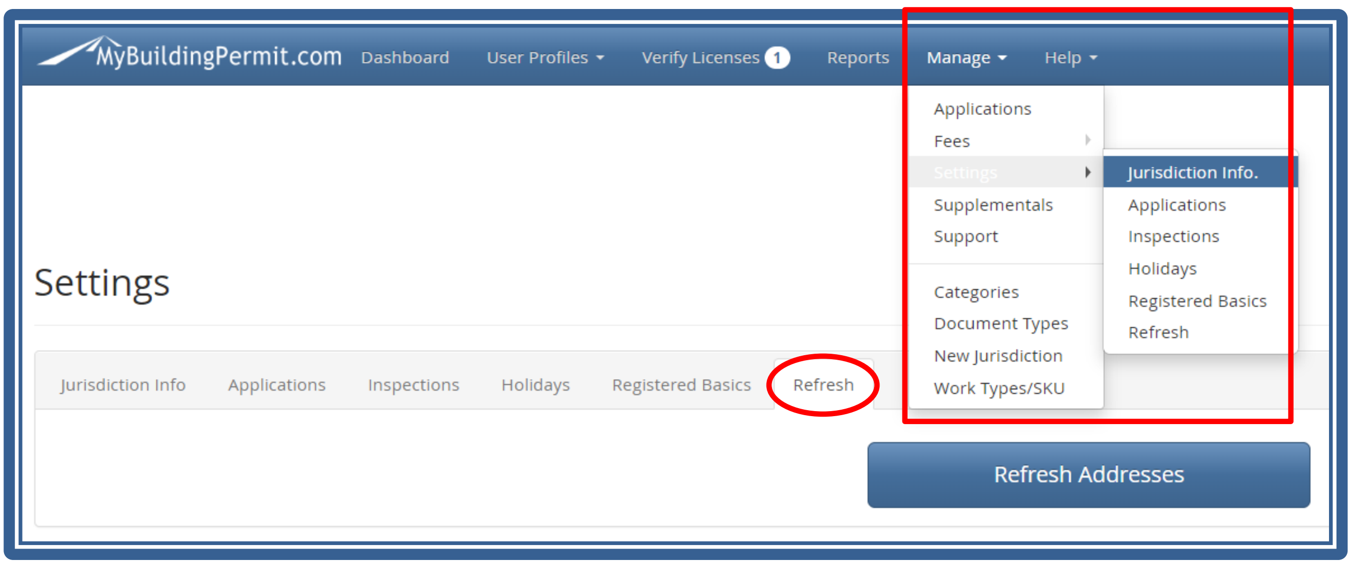
Managing Addresses

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

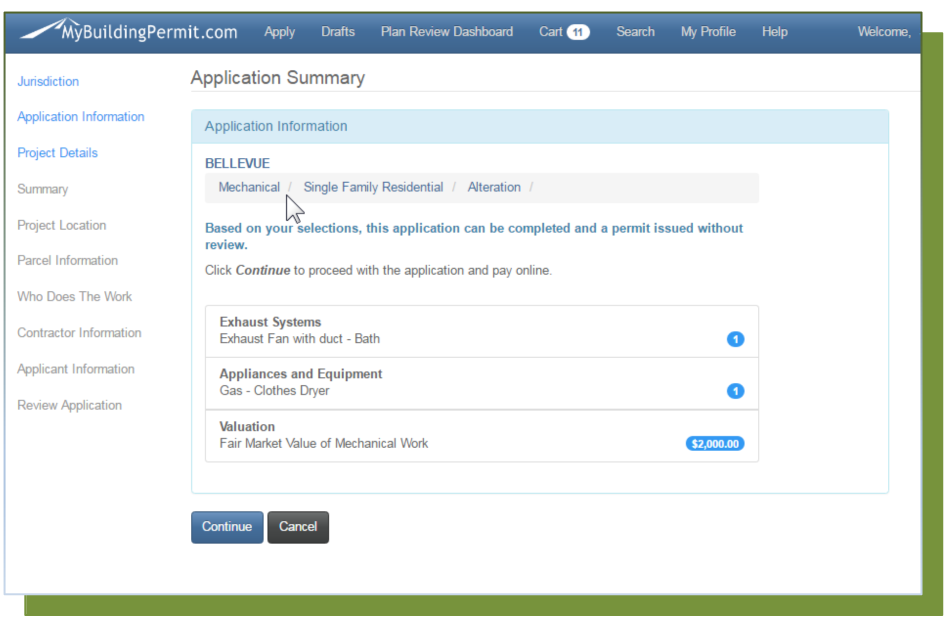
MyBuildingPermit.com sends permit application data to the member jurisdictions' permitting system (referred to as "backend permitting system") and then displays information from the backend such as status, activity, invoice data, etc.

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.

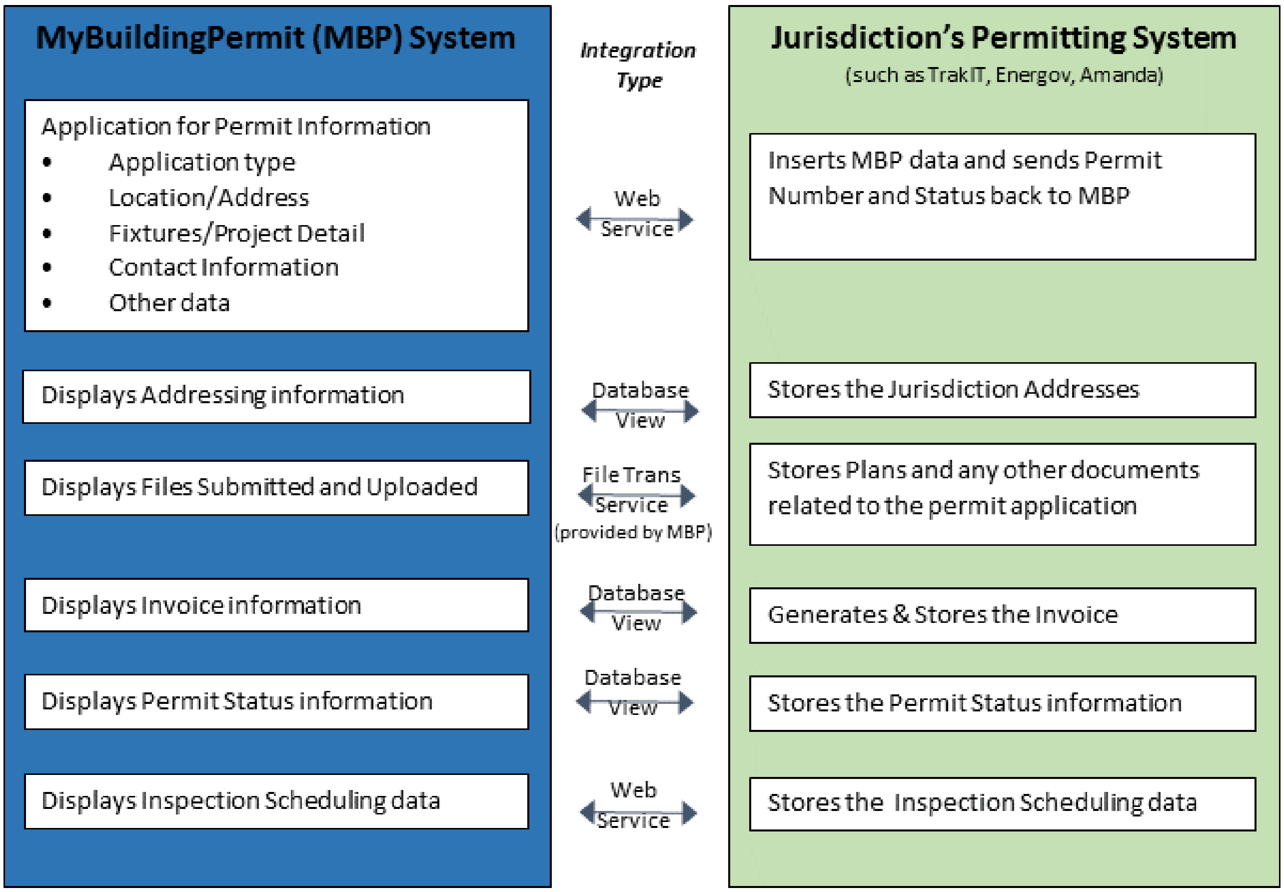
Each jurisdiction's backend permitting system is the official 'system of record' and stores all application and permit data. This information is not stored in MBP, as it only connects to your backend to display the data.

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)

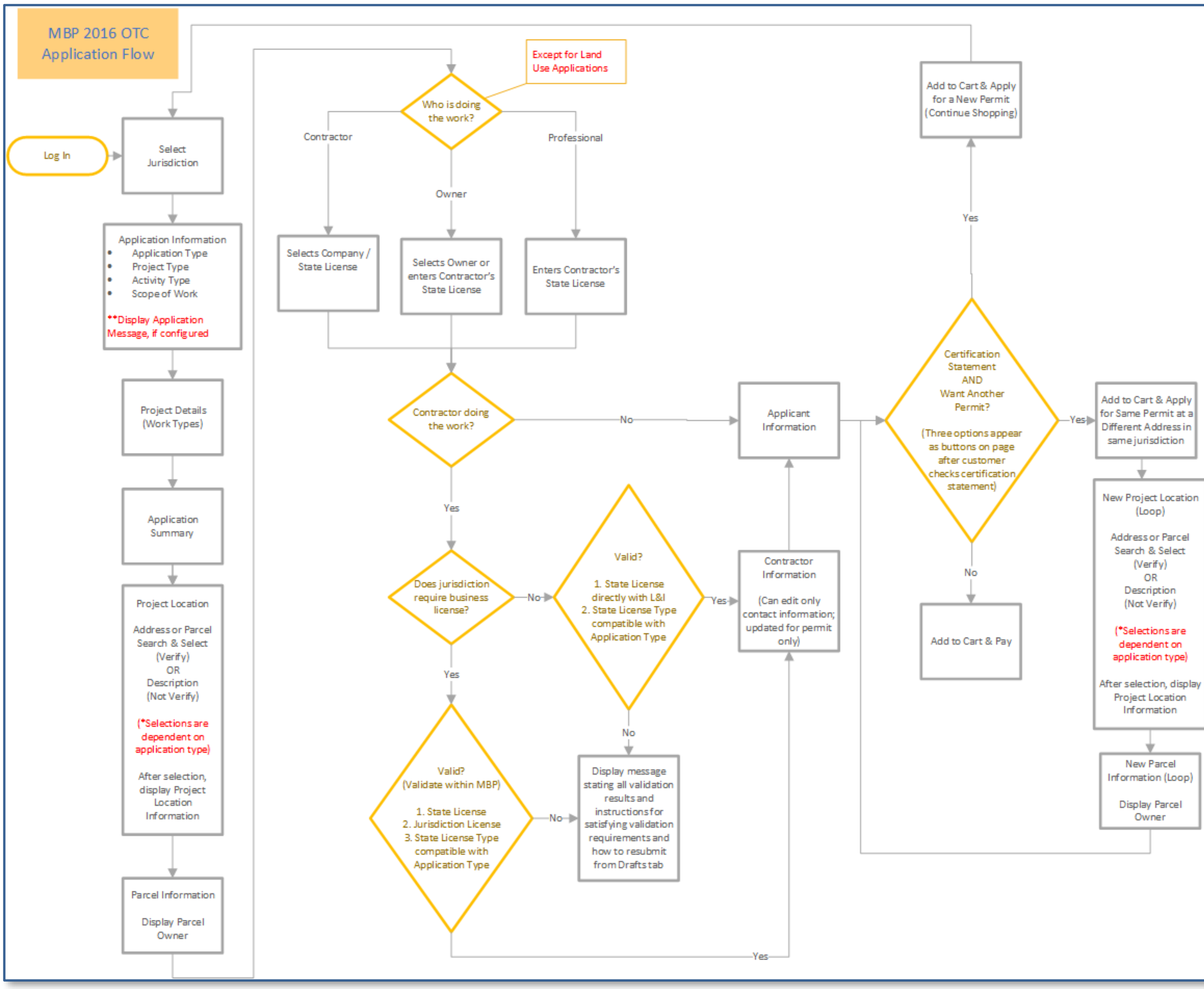
Database View – a ***subset of read-only table data*** in your backend database

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.

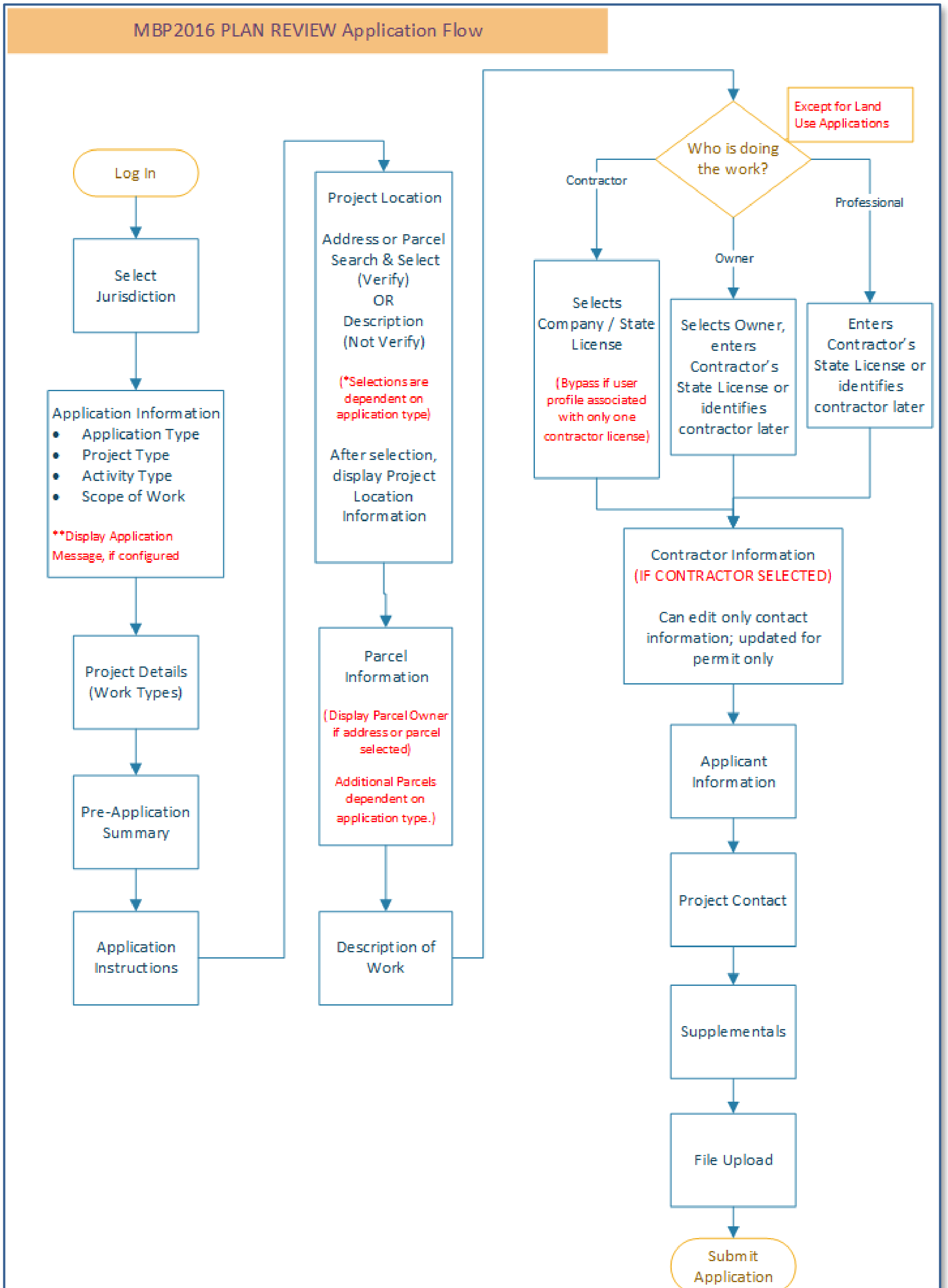
XML – the standardized ***format of the data*** that is sent from MBP to the backend permitting system via a Web Service

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?

- 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?

- 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?

- 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?

- 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?

- 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 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?

- 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?

- 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?

- 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?

- Email egovsupport@ecitygov.net to request to have the failed file removed from their Jurisdiction Dashboard.

Why are reject emails not generating?

- 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?

- 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.
- 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?

- 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?

- 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"?

- 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)?

- 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?

- 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.
- 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?

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

