**RFP 3178 – Permit Tracking and Plans Review Software Solution**

**Exhibit E – Functional and Technical Requirements / Capabilities**

The following table describes specific functionalities the City of Lynnwood has identified as important features for the new permit tracking software. Proposers are instructed to complete the table below (fill in with an “X”) to identify whether the proposed software system solution has this functionality.

Letters in the columns on the tables below correspond to the following:

A – Functionality included “out of the box” without configuration (4 points)  
B – Functionality configurable with user configuration tools (3 points)  
C – Functionality can be added through programmer-level tools such as Visual Studio (2 points)  
D – Functionality available through additional third-party software (1 point)  
E – Functionality not available (0 points)

A separate sheet of paper may be used for additional comments, if necessary. All additional comments must be identified with the corresponding Item Number.

| **Item #** | **Functionality** | **A** | **B** | **C** | **D** | **E** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **A. GENERAL CAPABILITIES AND SPECIFICATIONS** | | | | | | | |
|  | Provide online and printed user guides, tutorials and “help” functions |  |  |  |  |  |  |
|  | User defined and adjustable “dashboard” functionality |  |  |  |  |  |  |
|  | Project management/task lists: Personalized dashboard view of current work assignments and due dates |  |  |  |  |  |  |
|  | Support for internal mobile applications (for field personnel) and external mobile applications (for customers/the public) regardless of internet connection |  |  |  |  |  |  |
|  | User friendly, web-based design that can track all activity, such as application status, review time, submittals, etc. |  |  |  |  |  |  |
|  | Ability for internal and external users to create accounts and access information |  |  |  |  |  |  |
|  | Track internal and external changes, in-person and on-line interactions with the public and user actions in real time and provide automated notifications to internal and external users |  |  |  |  |  |  |
|  | Quality design features that utilize software industry standards and non-proprietary language |  |  |  |  |  |  |
|  | Ability to merge duplicate records while maintaining data integrity of associated permit and other records |  |  |  |  |  |  |
|  | Various tools for building, address and property information management to track land use application and permit history |  |  |  |  |  |  |
|  | Provide industry standard API, adapter development kits or similar enterprise application integration (EAI) tools to facilitate transmission and exchanges with systems such as Tyler Munis financials, Washington State L&I, and Washington State Business License System (BLS) |  |  |  |  |  |  |
|  | Ability to call and use results from external services or API as part of workflow in the permitting system |  |  |  |  |  |  |
|  | Public facing interface should support major web browsers’ latest version, such as Google Chrome, Mozilla Firefox, Safari, Microsoft Internet Explorer, and Microsoft Edge |  |  |  |  |  |  |
|  | Public facing interface should not require any personal information, social security number, bank information, etc. by the user in an email or survey response. Only standard traffic-tracking data such as IP address and browser/device information will be collected |  |  |  |  |  |  |
|  | If any installations or configurations are required on staff desktops or tablet computers to support this software, such installation or configuration is to be compatible with management through Microsoft Configuration Manager 2007+, which is the City standard for personal computer management. |  |  |  |  |  |  |
|  | Public-facing services offered on the internet (such as on-line permit application, issuance, fee payment, inspection requests, notification subscription features and customer-related personal portals) |  |  |  |  |  |  |
|  | Provide a proximity search feature within the GIS mapping, this will allow for the identification of owners for the purpose of mailing or e-mailing notices and information |  |  |  |  |  |  |
|  | Provide a knowledge database to support questions submitted electronically regarding the development requirements. Responses can be template-based from the knowledge database. |  |  |  |  |  |  |
|  | Built-in GIS application and geospatial data system that tracks all data in real time and links to permits |  |  |  |  |  |  |
|  | Program must comply with federal and state regulations, including ADA accessibility standards for viewing and reading capabilities |  |  |  |  |  |  |
|  | Public portal can translate multiple languages for the applicant use, such as Google Language. |  |  |  |  |  |  |
|  | Ability for all data fields to be searchable/queried by end user without assistance of vendor or City’s IT staff. |  |  |  |  |  |  |
|  | Other (include additional functionalities the software provides) | Not Scored | | | | |  |
| **B. PERMIT REVIEW / PERMIT PROCESSING** | | | | | |  | |
|  | Ability to manage inter-departmental application prerequisites, set specific requirements per project and track progress in real time. |  |  |  |  |  |  |
|  | Provide a workflow engine that is user-configurable to business processes, supports basic workflow features including sequential and parallel steps, recognition of events to trigger further actions and branching/decision logic based on the data involved and, on the user, performing the action. Permit workflows should be through the life of the permit process (pre-application through appeals) and should include concurrent review by multiple technical reviewers |  |  |  |  |  |  |
|  | Ability to track multiple revisions/resubmittals cycles |  |  |  |  |  |  |
|  | Ability to implement, add or change workflows by permit type/group and generate reports using a report writer like Exago |  |  |  |  |  |  |
|  | Permit relationship management – grouping of permits by overall project (i.e.- parent/child relationships) |  |  |  |  |  |  |
|  | Automatic “Time in Possession” tracking and notification |  |  |  |  |  |  |
|  | Electronic application/plan submittal and resubmittals/corrections – ability to transmit full permit application materials with various document types (pdf, word docs, jpegs, videos, etc.) online. Accept new applications and electronic plans and documents for review and manage subsequent routing, review, mark-up and approvals |  |  |  |  |  |  |
|  | Ability to create customized questions by permit type during the portal application process in order to use as an application or checklist. |  |  |  |  |  |  |
|  | Ability for external users to upload required and optional electronic plans and supporting documents, such as, specification, site plans, letters, and any other required information through the user portal at intervals in the review process when submittals are allowed and to block uploads when not allowed. |  |  |  |  |  |  |
|  | Ability to automatically screen and identify uploaded documents/attachments for malware. Any such documents/attachments identified would be stopped and an alert message notification would be generated. |  |  |  |  |  |  |
|  | Ability for the public to access and view, through the portal, public notices and related processes. |  |  |  |  |  |  |
|  | Collect and manage public comments and party of record requests. Automatically distribute information to parties of record as required. Collection and management process will need to comply with State of Washington Chapter 42.56 RCW, Public Records Act. |  |  |  |  |  |  |
|  | Ability to record written contacts for auditing purposes with applicants including notes about conferences and coaching sessions, tracking questions and answers, and exemption/exception processes resolved prior to formal permit application |  |  |  |  |  |  |
|  | Ability to generate templates and/or forms (MS Word, MS Excel, Adobe, SeamlessDocs, etc.). Templates/forms are auto-populated with information from GIS and permit tracking system data fields (such as mailing lists and labels, completeness determination, zoning verification letter, affidavit of posting, decisions, hearing notices, etc.) |  |  |  |  |  |  |
|  | Ability to start a permit, land use application, or code enforcement case by selecting one or more addresses and/or parcels from a map, in both the desktop and portal versions. |  |  |  |  |  |  |
|  | Ability for GIS to automatically route an application for special review if it falls within an environmentally-sensitive area or within a certain distance of a location or feature on a map layer. |  |  |  |  |  |  |
|  | Ability to generate mailing labels for an application based on a radius distance from the subject properties. |  |  |  |  |  |  |
|  | Ability to provide multiple maps on the public portal, to allow citizens to look at pending development projects in the city and drill down on individual projects for more information. |  |  |  |  |  |  |
|  | Electronic plan review/mark-up process will include the following components:   * Integrated with markup/review software tools * Provide automated review correction letters and markups from multiple reviewers * Transmittal of reviews back to applicants |  |  |  |  |  |  |
|  | Ability to transfer, open, review, and mark up very large document sets consisting of hundreds of pages of drawings without bogging down or crashing. |  |  |  |  |  |  |
|  | Ability to associate a document set to a particular step in the review process and to do automatic versioning of documents for multiple cycles of review |  |  |  |  |  |  |
|  | Ability for multiple reviewers to access and markup documents simultaneously, while seeing each other’s markups. |  |  |  |  |  |  |
|  | Ability to overlay and compare different versions of a document to detect differences |  |  |  |  |  |  |
|  | Ability to create user- or workgroup-specific “rubber stamps” to affix to document pages. |  |  |  |  |  |  |

| **Item #** | **Functionality** | **A** | **B** | **C** | **D** | **E** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Ability to gather the text of each reviewer’s comments, corrections, and markups into a consolidated correction letter to be emailed automatically to contacts for the application, upon completion of a round of review. |  |  |  |  |  |  |
|  | Ability for each reviewer to track the satisfactory completion of each correction item and require resubmittal of corrected documents in a new review cycle that includes only outstanding corrections. |  |  |  |  |  |  |
|  | Notification to internal and external users of review completion or corrections required |  |  |  |  |  |  |
|  | Ability for the system to notify contacts by email about completion of a review cycle and enable downloading of that review cycle’s marked-up plans for a stated period. |  |  |  |  |  |  |
|  | Ability to notify contacts by email when uploading of revised plans is permitted and to terminate upload capability when the next plan review cycle begins. |  |  |  |  |  |  |
|  | Ability for contacts to upload only document pages that have been added or revised, instead of uploading the entire plan set. |  |  |  |  |  |  |
|  | Ability to insert new and revised pages into the complete document set, while retaining previous versions of replaced pages. |  |  |  |  |  |  |
|  | Ability to “burn in” corrections and approval stamps to pages in the final approved document set. |  |  |  |  |  |  |
|  | Documentation and tracking of conditions of approval (and inheritance), for example conditional use permits, development agreement, plats, and other land use decisions |  |  |  |  |  |  |
|  | Automated permit issuance and close-out |  |  |  |  |  |  |
|  | Ability to notify contacts by email when downloading of approved plan sets is available and to terminate download capability at an appropriate step in the process. |  |  |  |  |  |  |
|  | Tracking of covenant and document recording |  |  |  |  |  |  |
|  | System to manage issuance, renewal and expiration of trade licenses, business licenses, etc., including license status and integration from the State of Washington at <http://bls.dor.wa.gov/file.aspx> or look up a business at <https://www.dol.wa.gov/business/checkstatus.html> |  |  |  |  |  |  |
|  | Accept and manage post-issuance submittals (revisions, shop drawings, etc.) |  |  |  |  |  |  |
|  | Ability to modify and document submittal requirements and workflow process |  |  |  |  |  |  |
|  | Exceptions to start-to-finish process flows (such as cancellation, on hold, and expiration overrides) |  |  |  |  |  |  |
|  | Ability to track various types of city codes |  |  |  |  |  |  |
|  | Other (include additional functionalities the software provides) | Not Scored | | | | |  |
| **C. INSPECTIONS** | | | | | |  | |
|  | Permit issuance, inspection and monitoring |  |  |  |  |  |  |
|  | Register or request specific information to an inspection type |  |  |  |  |  |  |
|  | Site and location attributes and their description |  |  |  |  |  |  |
|  | Contractor licensing verification at time of inspection request |  |  |  |  |  |  |
|  | Periodic recurring billing |  |  |  |  |  |  |
|  | Wireless inspection capabilities (City and non-City staff) |  |  |  |  |  |  |
|  | Inspection auditing |  |  |  |  |  |  |
|  | Ability to schedule inspections online using a calendar-based program that allows for identifying available days and ability to set number of daily inspections |  |  |  |  |  |  |
|  | Ability to notify of cancellations and status changes. Notification to customers regarding time changes/delays. |  |  |  |  |  |  |
|  | System to track registration, inspection and billing of installations with required regular periodic inspections (such as annual inspections) by City and non-City inspectors |  |  |  |  |  |  |
|  | Ability for plan reviewers to attach required inspections to a permit, based on their respective review specialty. |  |  |  |  |  |  |
|  | Ability to automatically open the workflow process to allow inspection requests to be accepted on the public portal at the appropriate time and send email notification to contacts on the case. |  |  |  |  |  |  |
|  | Ability to follow a given inspection sequence or workflow. |  |  |  |  |  |  |
|  | Ability for contacts on the case to request inspections, based on calendars of available dates and limits on numbers of inspections that are allowed each day |  |  |  |  |  |  |
|  | Ability for inspectors to download inspection requests, create new inspection requests, enter inspection results, and upload results to the main system while connected via cellular or available Wi-Fi network.  Ability to locally store data on the device when offline (no cellular or Wi-Fi connection is available).  Information stored on device when offline automatically updates when connection to cellular or Wi-Fi is re-established. |  |  |  |  |  |  |
|  | Ability to download and view electronic plans and documents in the field. |  |  |  |  |  |  |
|  | Ability for inspector to choose the order of inspections for the day using a map function and the ability to re-order inspection stops at any time. Changes in inspection order is automatically updated to the main system when connected via cellular or Wi-Fi. |  |  |  |  |  |  |
|  | Ability for a supervisor to add or change inspection staff assignments at any time. Updates will be real-time when connected via cellular or Wi-Fi. |  |  |  |  |  |  |
|  | Ability for a list of required inspection types to include those originally required by the workflow and ability to add inspection types as needed in while in the office or in the field. |  |  |  |  |  |  |
|  | Ability to utilize predefined inspection checklists of critical items and to add custom corrections. |  |  |  |  |  |  |
|  | Ability to capture one or more signatures and affix to an inspection record. |  |  |  |  |  |  |
|  | Ability to upload photos or videos from any device (android, apple, Microsoft, etc.) and associate the picture or video with the corresponding inspection item. |  |  |  |  |  |  |
|  | Ability to automatically send an inspection results email to contacts, when that inspection item is completed. |  |  |  |  |  |  |
|  | Ability to print an inspection report using a portable field printer, such as a thermal handheld or portable inkjet. |  |  |  |  |  |  |
|  | Ability to see all corrections from all previous inspections by all inspectors while performing an inspection. |  |  |  |  |  |  |
|  | Ability to filter only open correction items and move them into new versions of the same correction as many times as needed to obtain compliance. |  |  |  |  |  |  |
|  | Ability to view a selection of maps from a GIS map service. |  |  |  |  |  |  |
|  | Ability to record mileage between stops during the day. |  |  |  |  |  |  |
|  | Other (include additional functionalities the software provides) | Not Scored | | | | |  |
| **D. CODE ENFORCEMENT** | | | | | |  | |
|  | Online code enforcement component which interfaces with GIS mapping |  |  |  |  |  |  |
|  | Ability to use code enforcement workflow, tracking, auditing, record monitoring, and ad-hoc reporting tool (such as Exago) |  |  |  |  |  |  |
|  | Ability to add inspection requirements as part of an investigation |  |  |  |  |  |  |
|  | Ability to track issuance of citations and other enforcement tools such as notices, orders, compliance demands, etc. |  |  |  |  |  |  |
|  | Ability to accept appeals |  |  |  |  |  |  |
|  | Ability to track case resolution and close out |  |  |  |  |  |  |
|  | Ability to track city liens filed on a property |  |  |  |  |  |  |
|  | Other (include additional functionalities the software provides) |  |  |  |  |  |  |

| **Item #** | **Functionality** | **A** | **B** | **C** | **D** | | **E** | **Comments** | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **E. LICENSING PROGRAM** | | | | | | |  | | |
|  | Business license issuance, renewal and closing of business |  |  |  |  | |  |  | |
|  | Seamless integration with State of Washington Business Licensing Service (dor.wa.gov) |  |  |  |  | |  |  | |
|  | Other (include additional functionalities the software provides) | Not Scored | | | | | |  | |
| **F. FINANCIAL/BILLING CAPABILITIES** | | | | | |  |  | |  |
|  | Bonds and insurance tracking, such as expiration dates, dollar amounts, etc. |  |  |  |  | |  |  | |
|  | Automated calculation of fees (impact fees, review fees, etc.), including ability to calculate fees based on multiple variables such as valuation, component, or any combination. |  |  |  |  | |  |  | |
|  | Handling of all payment transactions in person or through the portal using (cash, card, e-check, or written check) |  |  |  |  | |  |  | |
|  | Permit tracking system is fully compatible and integrates with Tyler Munis Cashiering, and Bridge Pay (the City’s financial cashiering systems) |  |  |  |  | |  |  | |
|  | Ability to monitor an escrow account |  |  |  |  | |  |  | |
|  | Ability to monitor all payments made until close out |  |  |  |  | |  |  | |
|  | Ability to trace and reconcile all records pertaining a permit. |  |  |  |  | |  |  | |
|  | Ability to track impact fees, impact fee credits, and other fee changes |  |  |  |  | |  |  | |
|  | Allow configuration of new and revised fee schedules which would automatically take effect on the scheduled date and maintain the details of all previous fee schedules. |  |  |  |  | |  |  | |
|  | Other (include additional functionalities the software provides) | Not Scored | | | | | |  | |
| **G. PUBLIC INFORMATION** | | | | | | |  | | |
|  | View all details and current status of any permit or complaint when searching by project number, applicant name, parcel number or address and identify all associated permits, projects, licenses, code complaints and other information on the built-in, GIS system. Information is be available/updated in real time. |  |  |  |  | |  |  | |
|  | Ability to create an online account and track current status and activity of all associated permits and applications under one account. |  |  |  |  | |  |  | |
|  | Ability to provide a public-facing portal for applicant/public to view permit information and status, initiate actions, make submittals and resubmittals online |  |  |  |  | |  |  | |
|  | Other (include additional functionalities the software provides) | Not Scored | | | | | |  | |
| **H. DATA TRACKING, REPORTS, AND EMPLOYEE RESOURCE MANAGEMENT** | | | | | | |  | | |
|  | Real-time permit and process auditing to record who entered, modified, and deleted data and when, and record data values pre-and post-editing |  |  |  |  | |  |  | |
|  | Ability to assign work for an individual employee or work group, each assignment and process utilization are tracked for future reference or audits |  |  |  |  | |  |  | |
|  | Ability for management to track any information in the program through a search function or reporting tool (such as Exago) |  |  |  |  | |  |  | |
|  | Provide automatic industry-standard reporting, such as Census Bureau reports |  |  |  |  | |  |  | |
|  | Ability to query and or search all information within the system |  |  |  |  | |  |  | |
|  | Provide customizable reporting tools for end users to create and share reports, without the aid of vendor or IT support, such as Exago reports |  |  |  |  | |  |  | |
|  | Ability to monitor the status of applications and use alter tools to communicate the workflow and routing information thorough various phases of a project such as workflow steps (incomplete, complete, pending, approved, etc.). The ability to establish deadline dates for responses by users within the project. |  |  |  |  | |  |  | |
|  | Provide tools to calculate estimated staffing time per project and supervisors to make assignments, set completion targets and monitor progress |  |  |  |  | |  |  | |
|  | Provide a calendar features for workgroups which allows management of both workgroup and individual schedules, status and due dates |  |  |  |  | |  |  | |
|  | Ability to monitor the status of permits, applications, inspections and customer service through the different phases to extract performance timelines |  |  |  |  | |  |  | |
|  | Other (include additional functionalities the software provides) | Not Scored | | | | | |  | |