

How the Town of Okotoks Streamlined Permitting

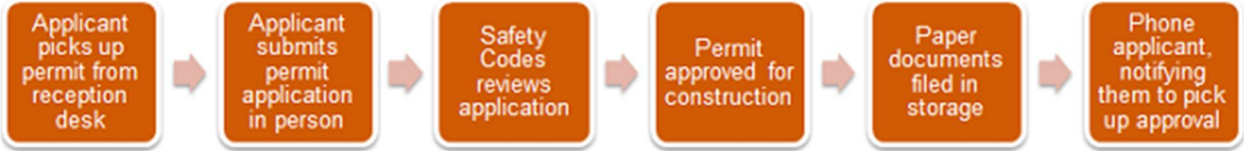
Marty Gaffney, Network Technician at the Town of Okotoks, AB, describes how the Safety Codes Department uses Laserfiche to streamline the permit approval process.

Contributed by: Marty Gaffney, Network Technician, Town of Okotoks

The Okotoks Safety Codes Department handles 2,000 permits for infrastructure such as plumbing, gas, electrical, building heating and ventilation annually. With the town’s population growing rapidly, permit applications are steadily increasing. Here is how we use Laserfiche to reduce permit processing time while complying with municipal and national records archiving standards—despite a four-fold increase in permit applications.

Legacy Process

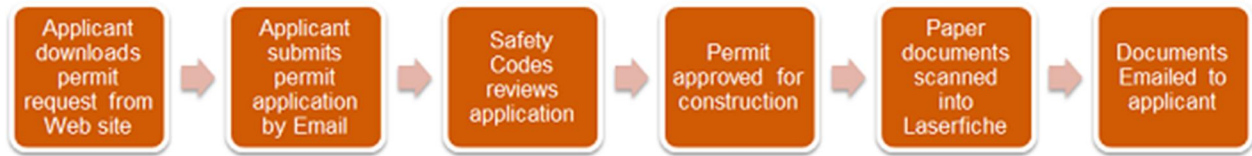
Before Laserfiche our whole permitting process was very manual and paper-driven. This is what it looked like:



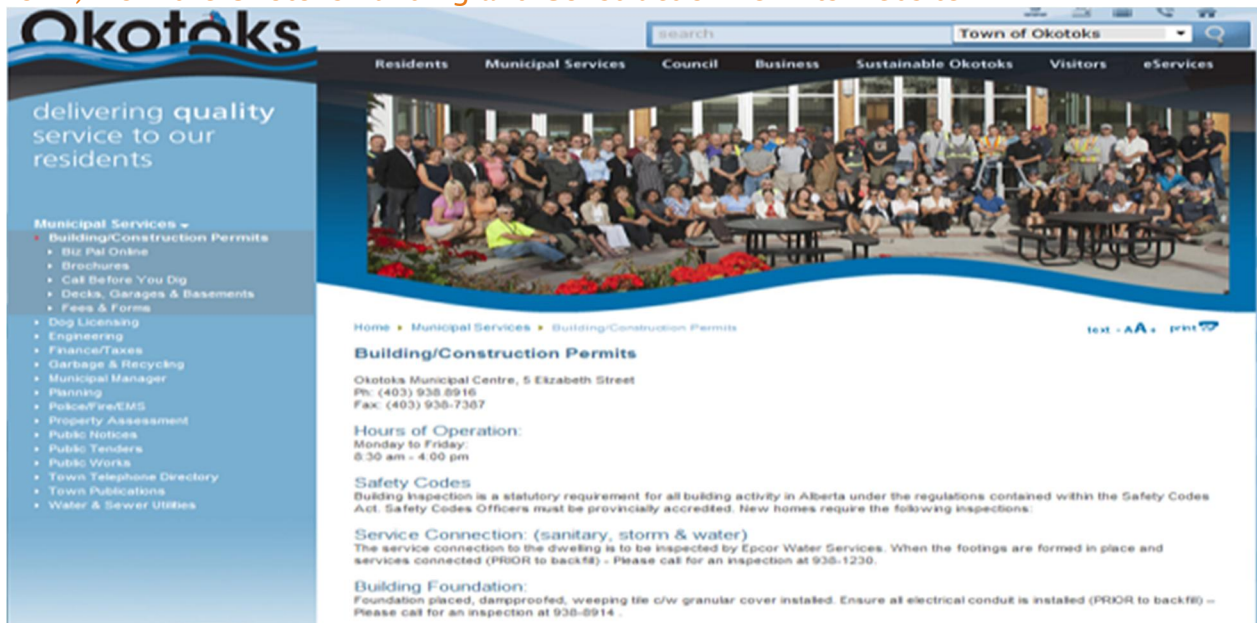
Applicants had to make multiple visits to the department in order to submit materials and pick up finalized permits. When applications for permits increased, we found it difficult to approve them all within the two-week timeframe mandated by the province.

Current Process

Implementing Laserfiche allowed us to streamline the whole permitting process. Our process now looks as follows:



1. The permit applicant downloads the appropriate permit application (a fillable PDF form) from the Okotoks Building and Construction Permits Website.



After filling out the form, the applicant submits it to the Safety Codes Department as an e-mail attachment.



TOWN OF OKOTOKS
NEW RESIDENTIAL
CONSTRUCTION APPLICATION

APPLICATION NUMBER:
APPLICATION DATE:

Safety Codes Services • Town of Okotoks • Box 20 5 Elizabeth St Okotoks AB T1S 1K1 • Ph 403-938-8916 • Fax 403-938-7387 • safetycodes@okotoks.ca

CLASSIFICATION Single Detached Dwelling Semi Detached Dwelling
DISCIPLINE Building Plumbing Gas Electrical HVAC
OCCUPANCY Residential Group C Part 9

1. PROJECT LOCATION

MUNICIPAL ADDRESS	Street Number	Street Name	City/Town	Province	
	<input type="text"/>	<input type="text"/>	OKOTOKS	AB	
LEGAL DESCRIPTION	Lot	Block	Plan	Zoning	Roll Number
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

2. APPLICANT

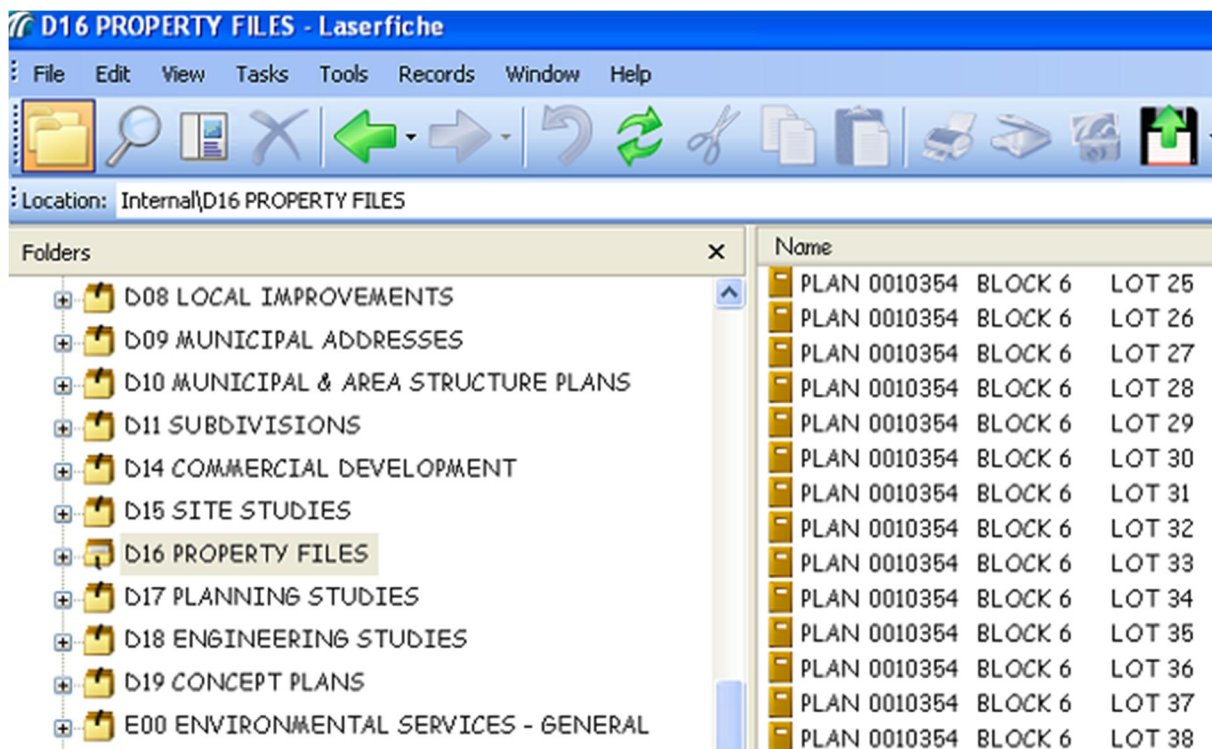
NAME	Last Name/Company	First Name			
	<input type="text"/>	<input type="text"/>			
MAILING ADDRESS	Street Number	Street Name	City/Town	Province	Postal Code
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CONTACT NUMBER	Contact Number(Office)	Fax Number	Email Address		
	<input type="text"/>	<input type="text"/>	<input type="text"/>		

3. REGISTERED PROPERTY OWNER

PROPERTY OWNER	Last Name/Company	First Name			
	<input type="text"/>	<input type="text"/>			
MAILING ADDRESS	Street Number	Street Name	City/Town	Province	Postal Code
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CONTACT NUMBERS	Contact Number (Office)	Fax Number	Email Address		
	<input type="text"/>	<input type="text"/>	<input type="text"/>		

Any supplemental information that needs to be included with this application, such as architectural drawings or blueprints, can be either e-mailed as an attachment or submitted in hard copy to the Safety Codes Department.

2. The Safety Codes Department reviews the application and any supplemental information that has been submitted. If there have been changes to the project before the permit is approved, a new application must be submitted with the changes. During the review process, the legal information including the building address is verified in our Microsoft Dynamics CRM.
3. After the permit for construction has been approved, the entire application and supplemental documents (including the actual permit) are scanned into Laserfiche using Laserfiche Scanning. These files are all stored in one records folder in the Laserfiche repository based on the plan, block and lot number associated with the permit.



The appropriate records retention is then automatically applied to any document within a particular record series.

Record Series Properties

Use record series to collect records with similar retention schedules.

Code: D16

Name: PROPERTY FILES

Description: Includes: Records and information relating to centralized documentation for a specific property within the Town, such as variances, zoning, assessments, and development stop orders. Also includes properties encroaching on municipal lands, permits, Real Property Reports (surveys),

Designate records within this collection as permanent

Cutoff Instruction

Name: (None)

Type: N/A **Cycle:** N/A

Interval: N/A **Location:** N/A

Linked Document Action: N/A **Document Relationship:** N/A

Retention Schedule

Name: PERMANENT

Final Disposition Type: None **Retain for:** 25 year(s), 0 month(s)

Final Disposition Location: N/A **Keep Metadata:** N/A

Alt. Retention Event: N/A **Alt. Ret. Schedule:** N/A

Vital Records

Designate records within this collection as vital

Review Cycle: []

Review Interval: [] []

Disposition Authority: []

Apply changes to child record series and record folders

OK Cancel Help

Different record series have different retention requirements. All of these retention rules are specified in the Laserfiche Administration Console.

Laserfiche 8 Administration Console

File Action View Window Help

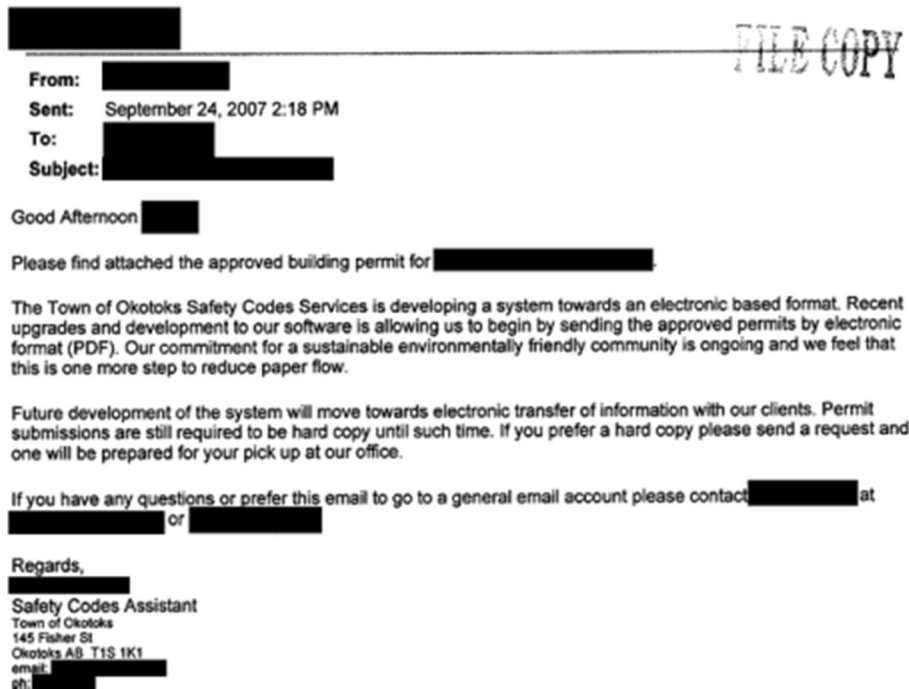
Laserfiche 8 Administration Console

- Isfserver
 - Repositories
 - Archives
 - External
 - Internal
 - Activity
 - Sessions
 - Checked Out Documents
 - Current Actions
 - Entry Locks
 - Users and Groups
 - Metadata Management
 - Recycle Bin
 - Volumes
 - Index
 - Auditing
 - Records Management
 - Cycle Definitions
 - Locations
 - Retention Schedules
 - Cutoff Instructions
 - Repository Options
 - Custom Views
 - Server Settings
 - System Managers
 - All Sessions
 - Named Users and Devices

Name	Description	Retain	Transfer Schedule	Final Disposition
C + 1 Years	Current + 1	1 year, 0 months	Current file area, 12, A	Destruction
C + 10 Years	Current + 10	1 year, 0 months	Town Hall Archives , 108, A	Destruction
C + 2 Years	Current + 2	2 years, 0 months	Town Hall Archives , 12, A	Destruction
C + 25 Years	Current + 25	0 years, 0 months	Current file area, 300, A	None
C + 3 Years	Current + 3	1 year, 0 months	Town Hall Archives , 24, A	Destruction
C + 4 Years	Current + 4	2 years, 0 months	Town Hall Archives , 36, A	Destruction
C + 5 Years	Current + 5	2 years, 0 months	Town Hall Archives , 48, A	Destruction
C + 6 Years	Current + 6	1 year, 0 months	Town Hall Archives , 48, A	Destruction
C09	KEEP FOR EVER	0 years, 0 months		None
E + 1 Year	Event + 1	1 year, 0 months		Destruction
E + 10 Years	Event + 10 Years	1 year, 0 months	Town Hall Archives , 108, A	Destruction
E + 2 Years	Event + 2 Years	2 years, 0 months		Destruction
E + 30 Years	Event + 30	30 years, 0 months		Destruction
E + 6 Years	Event + 6	0 years, 0 months	Town Hall Archives , 48, A	Destruction
E+ 5 Years	Event + 5	1 year, 0 months	Current file area, 60, A	Destruction
PERMANENT		25 years, 0 months	Town Hall Archives , 0, M	None
UNTIL OBSOLETE OR ...	UNTIL OBSOLETE OR SU...	0 years, 0 months		Destruction

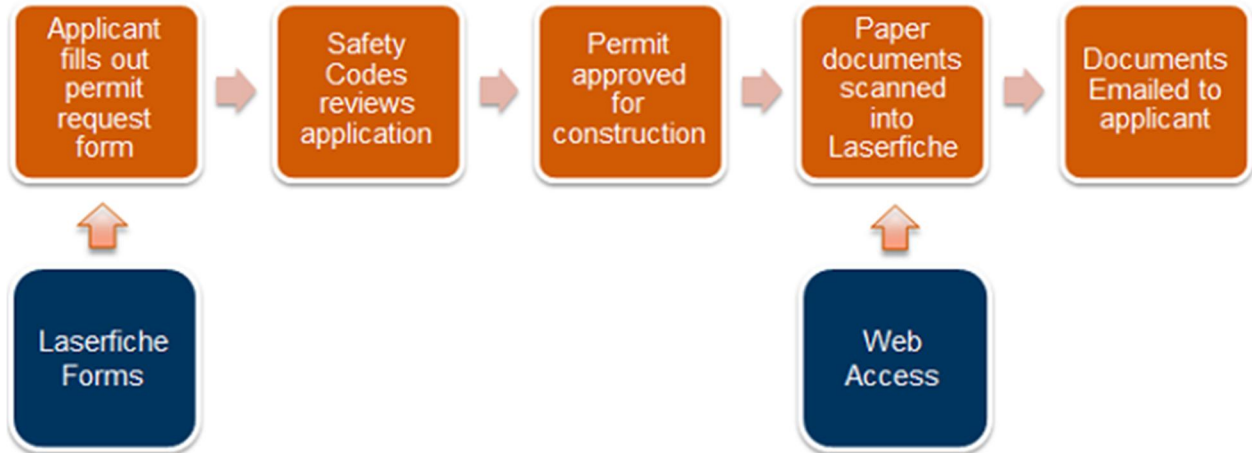
Click image to enlarge.

- The final step in the permitting process involves sending the electronic version of the permit to the applicant as an e-mail attachment.



Next steps

We are constantly improving our permitting process and in the near future anticipate making it completely paperless from start to finish. Our future process looks like this:



Instead of applicants filling out a PDF form and e-mailing it to the Safety Codes Department, we plan on using Laserfiche Forms, a new e-forms product scheduled for release toward the middle of 2012, to create an electronic form that applicants will be able to fill out and submit online.

New Residential Construction Application

Safety Codes Services, Town of Okotoks
Box 20 5 Elizabeth St., Okotoks AB T1S 1K1
Ph: 403-938-8916 • Fax 403-938-7387
safetycodes@okotoks.ca



Classification Single Detached Dwelling Semi Detached Dwelling
Discipline Building Plumbing Gas Electrical HVAC

1. Project Location

Municipal Address

Street Number

Street Name

City/Town Okotoks

Province AB

Legal Description

Lot

Block

Plan

Zoning

Roll Number

2. Applicant

Name

Once the form is submitted, Laserfiche Workflow will route the form and supplemental information to the required storage area in Laserfiche where employees would review the documents before approving the permit. Employees would also use Laserfiche Web Access to access these files in Laserfiche without needing to have the program installed directly on their computers.

Benefits of Laserfiche

Optimizing our permitting process with Laserfiche helps the Safety Codes Department:

- Increase customer satisfaction by reducing both traffic to the front counter and printing/copying requests.
- Consistently meet the two-week permit approval turnaround time.
- Save one week of staff time per month on information management, allowing staff members to expand their roles.

- Improve information sharing between departments.
- Eliminate the need for third-party applications such as plan drawing software, since the actual plans can now be easily scanned and viewed in Laserfiche.

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