# Workflow Email/Communication Enhancement

## Introduction

We are introducing an exciting new enhancement for Oregon Standard Model (OSM) agencies who are using the New UI! You may now send emails directly from workflow from within Accela. In addition, every workflow email is saved with the record on the Communications page for reference.

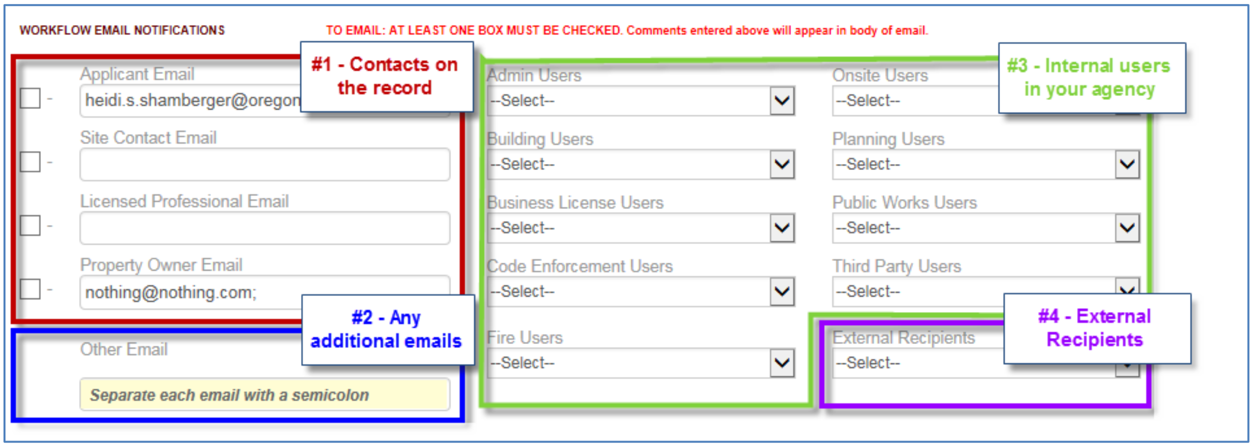
## How It Works

A workflow email can be sent to your customers and/or internal users simply by saving ANY status in the workflow. The content of the email will vary, depending on which status is selected (see "The Email" section for an example of each email). This works for all OSM modules.

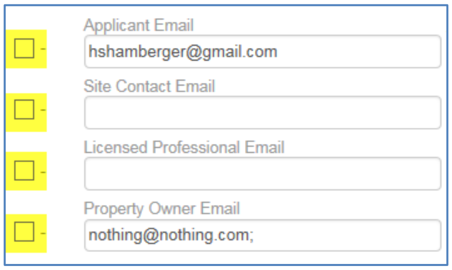
### *Email Recipients*

You will see a new section of task specific information (TSI) for each task, broken into 3 groups of possible recipients of a workflow email:

1. **Contacts on the record** (applicant, site contact, licensed professional, and property owner).
   - Auto-populated from each contact on the record where it is collected/entered.
2. **Other email**.
   - Manually enter each additional email in this field that are a different contact type (i.e. Agent for Applicant, Business Owner, etc.) or aren't associated to the record but should be emailed, separated by a semicolon.
3. **Internal users in your agency**.
   - Internal users in your agency appear in the dropdown according to the Accela department that the user is assigned to. The exception to this is the "External Recipients" If more than one internal user from the same department needs to be emailed, enter all user emails in the Other Email field, separated by a semicolon.
4. **External Recipients.**
   - This is a custom list of commonly emailed external recipients. These would be recipients that don't log into Accela but need to be notified of information regarding a permit like public utilities or DEQ. Send an email ePermitsHelp.BCD@oregon.gov to populate this list.




For contacts on the record, there is a checkbox next to each contact TSI field. When checked, an email will be sent to the email addresses listed, (similar to the functionality when emailing the Permit or Receipt). The checkboxes are unchecked by default.

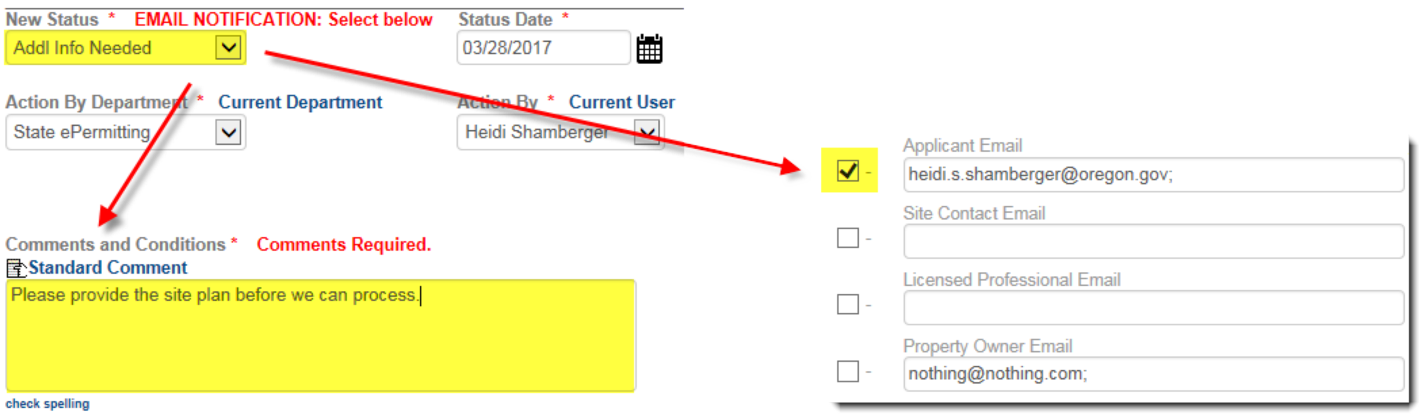


***Required Email Statuses***

There are 3 workflow statuses that require an email to automatically be sent out. ***This is a model configuration that is not customizable.***

1. Addl Info Needed
2. Revisions Needed
3. Ready to Issue

When one of these three workflow statuses is selected, workflow comments are required and the Applicant will automatically be checked (and cannot be unchecked). This means that the Applicant will always receive a template email to include the required comments when one of the above three statuses is selected. If the Applicant does not have an email address, the checkbox will still be checked but no email will be sent (see “Maintaining Contact Information” section for managing contact email addresses).



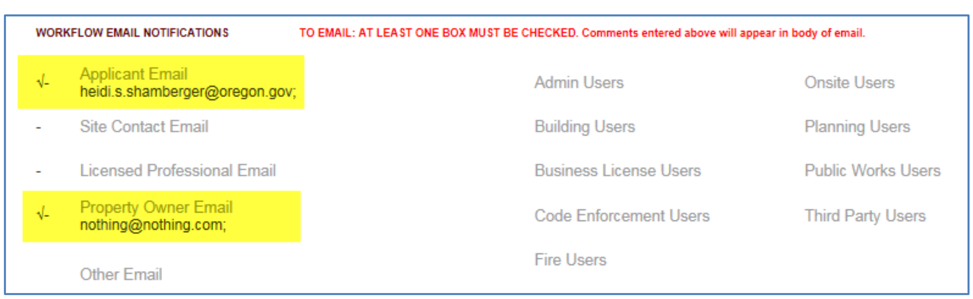

As was done previously, the Applicant will no longer automatically receive an email for the following workflow statuses. However, you can elect to continue sending an email for these statuses using the ***Optional Email Statuses*** section below.

1. Application Accepted
2. Approved
3. Approved with Conditions

***Optional Email Statuses***

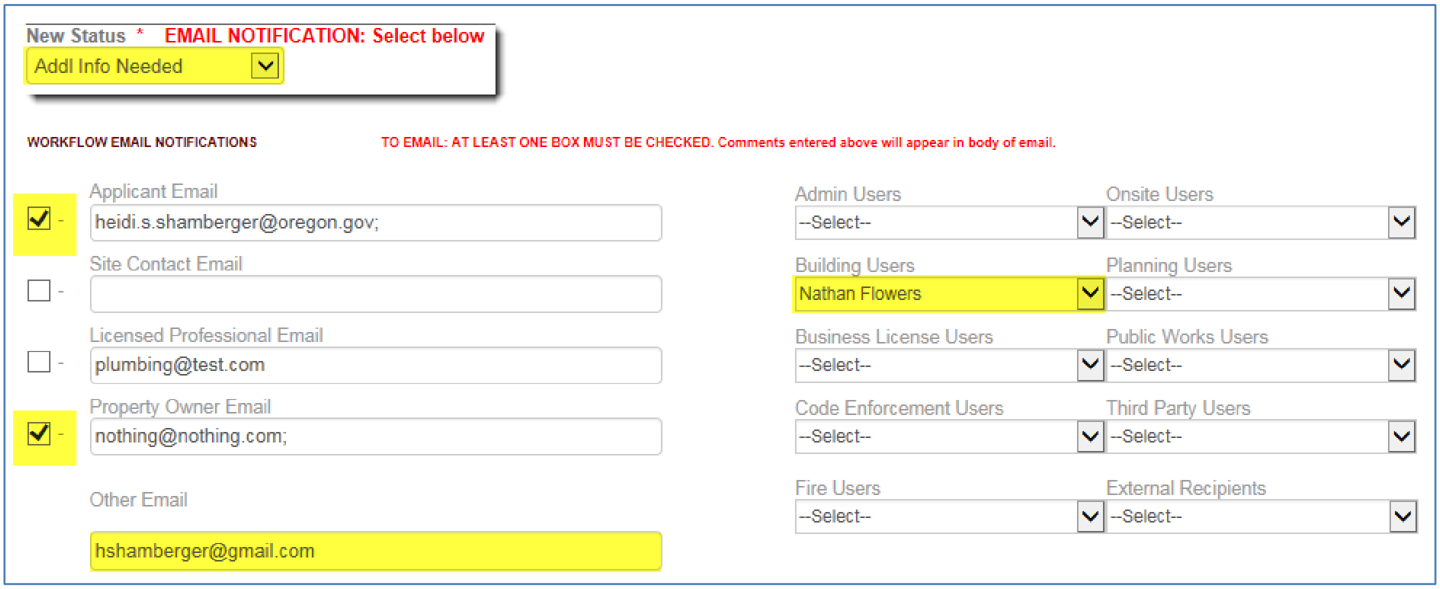
For all other workflow statuses, manually checking the box in front of the contact’s email, typing an email address into the “Other email” field (you may have multiple email addresses here which must be separated by a semicolon), and/or selecting one of the internal users will cause Accela to send a generic template email and that will also be attached to the record under the Communications page (see “The Email” section for an example of the generic template email).

The email options selected for each workflow status are cleared after submitting so you will need to reselect your choices, as needed. However, you can always review your previous selections in workflow history.



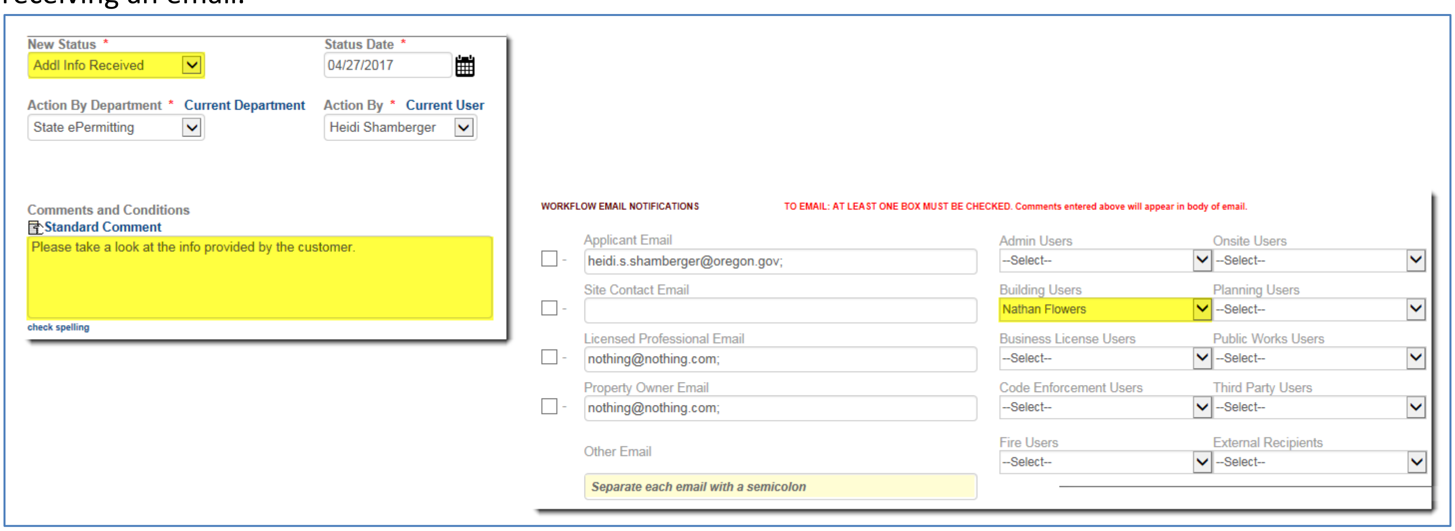
***Example #1:***

In the example below, Addl Info Needed is the selected workflow status. So the Applicant checkbox is automatically checked. Additionally, the Property Owner, the email listed in Other Email, and Nathan Flowers (an internal user), will all receive a copy of the template email to include the required comments. Notice that there is an email listed for the Licensed Professional, however, the checkbox is not checked so this contractor will not be included on the email recipient list.



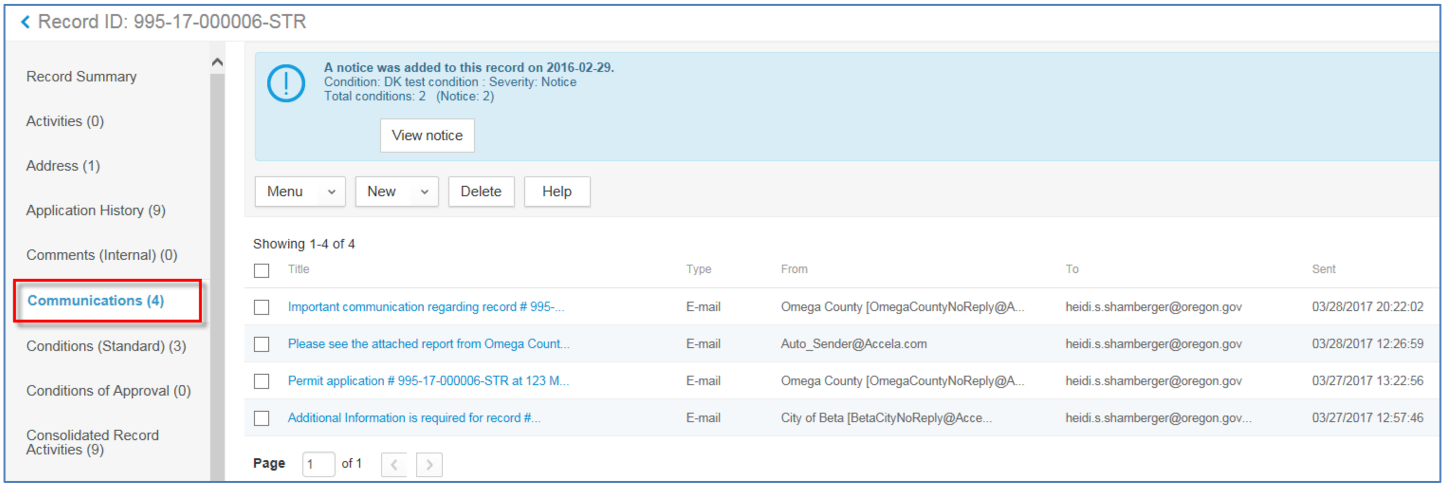

***Example #2***

In this example, Addl Info Received is the selected workflow status. This status does not require that an email be sent to the Applicant so the checkbox is not automatically checked. However, I decided that I would like to communicate with Nathan Flowers, an internal building user in my agency. Nathan will receive the generic template email with the workflow comments I entered. Keep in mind the workflow comments are optional in this scenario, however, we recommend entering comments so that your recipient will know why they are receiving an email.



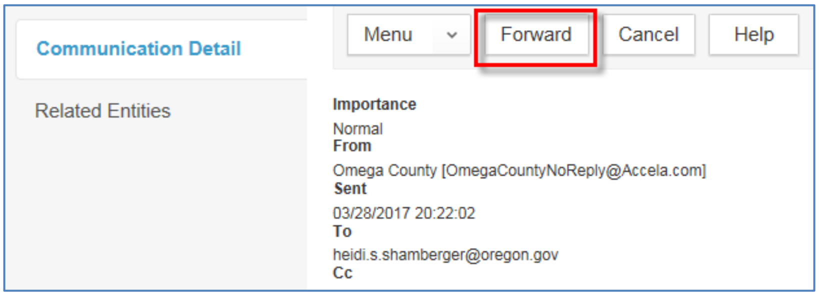
## Communications page on the Record

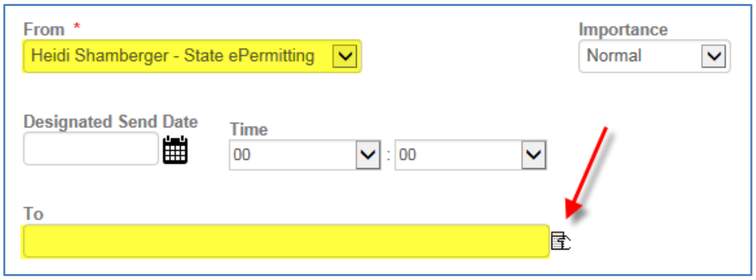
All workflow emails are saved with the record under the Communications page. You can see the content of existing emails, forward existing emails, and even send adhoc emails from the Communications page.




### *Forwarding an Email*

To forward an email, simply click on the email from the Communications page to open it > click **Forward**.

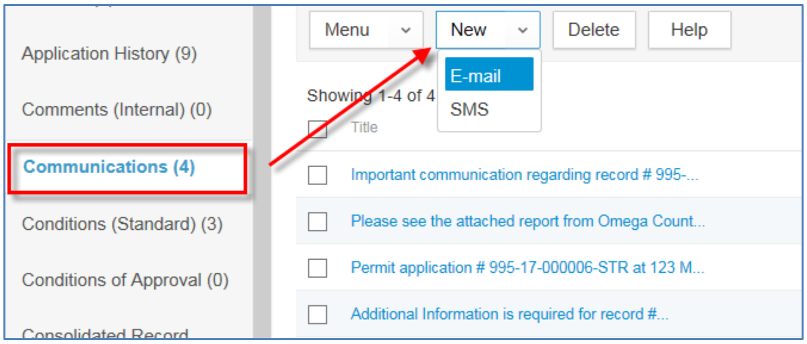


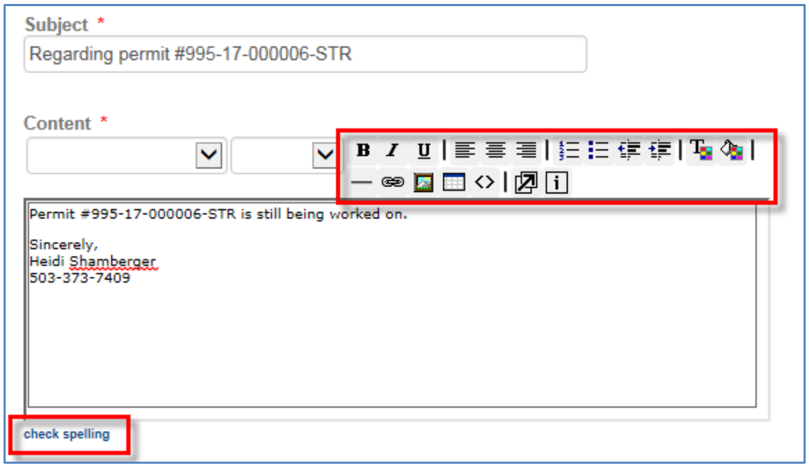

Next, select your name as the sender from the **From** dropdown and either type in the **To** field or click the hand "picker" icon and select a recipient from the contacts on the record.

### *Sending Emails Adhoc Outside of Workflow*

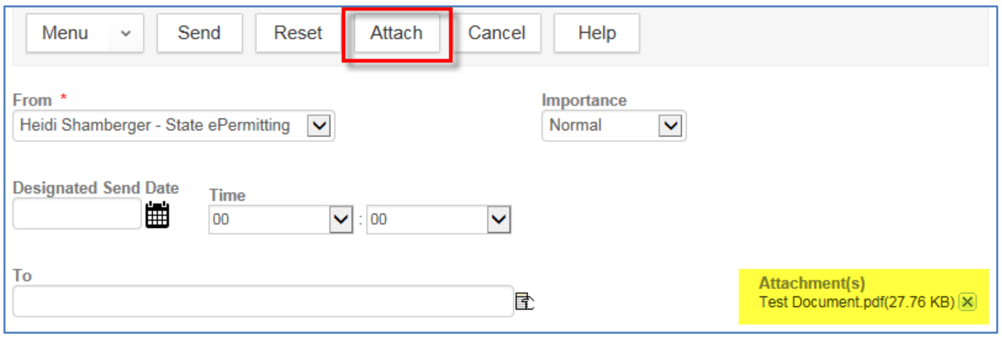
Emails can be sent adhoc, or on the fly, outside of workflow at any time using the Communications page. Go to the Communications page > click **New** > select **Email**. Be sure to select your name as the sender from the **From** dropdown and either type in the **To** field or click the hand "picker" icon and select a recipient from the contacts on the record (see above screenshot).



The subject and content of the email is entirely up to you – no additional details will be added to the email automatically.

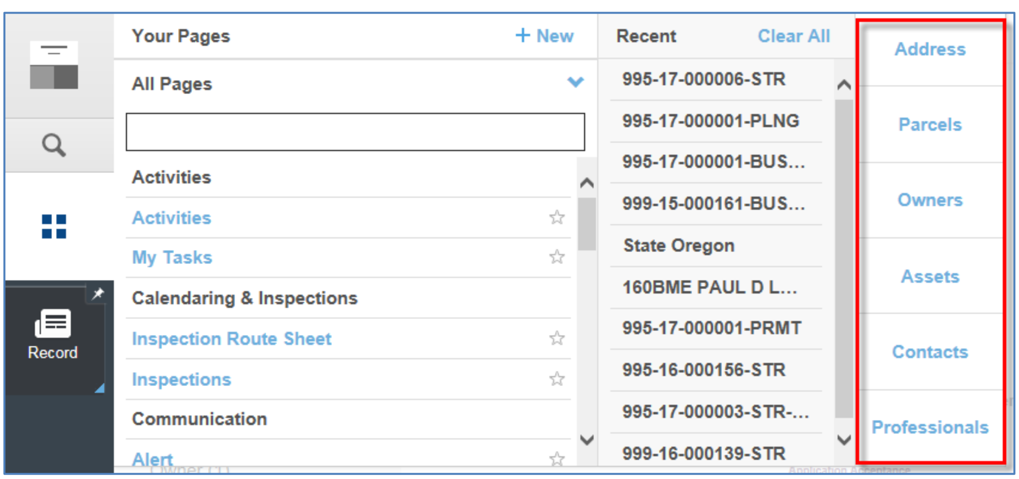

However, as best practice, include the permit number in the subject and content so that the customer is well aware of what permit it is in reference to and sender contact information in your signature (adhoc emails do not pull in agency or user contact information). You can easily select and copy/paste the permit number from the top of the Communications page. Many formatting options are available including a spell check feature.




You can also attach an external document to the email. Click on **Attach** > browse to the file on your computer. Keep in mind the document must be stored on your computer. Unfortunately, it cannot access documents saved in Accela on the record. Attached documents will display on this screen and can be removed by clicking the "**X**" if needed.

## Maintaining Contact Information

It is the responsibility of each agency to maintain the transactional contact information on a permit. If you notice that an email is not correct or missing in the workflow TSI fields, it should be corrected on either the Contacts, Owner, or Licensed Professionals pages on the record. A long term solution is to correct the missing or incorrect information through the associated reference pages, in addition to correcting the record information transactionally. Please keep in mind that reference licensed professional information is maintained by the agency issuing the license (BCD, CCB, LCB, DEQ, etc.) and will be overwritten each night if changes are made in the reference section. In this case, refer the licensed professional to the issuing agency to correct their email long term.



## The Emails

Email content is specific for each status that is selected. However, every workflow email always includes at least these 4 pieces of information:

***#1 – Record number and worksite address***

The email subject line and content includes the record number and the worksite address for easy reference for the customer.

***#2 – Name, phone number, and email address of the logged-in user who updated the workflow***

> If you have questions, please contact **Heidi Shamberger** at 503-373-7409 or heidi.s.shamberger@state.or.us.

This means that agencies will need to diligently maintain user profiles where phone number and email is stored. AdminDaily users can maintain this information for their designated agency or please submit a ticket for ePermitting staff to update user information by emailing ePermitsHelp.BCD@oregon.gov.

If phone number or email information is missing, the customer will see this in the body of the email:

> If you have questions, please contact **Heidi Shamberger** at (phone number not available) or heidi.s.shamberger@state.or.us.

***#3 – Deep link to the specific record in Citizen Access***

We now include a deep link to the specific record in Citizen Access. This not only takes the public user to Citizen Access, it also takes them directly to their record so they no longer need to perform a search to find their record. This is called a "deep link" in Accela terms. However, with a deep link, public users won't see all of the branding and navigation of Citizen Access (also called the "wrapper") they typically do.

> Your record is available online for tracking by clicking here:
>
> https://aca.oregon.accela.com/oregon/Cap/CapDetail.aspx?
> Module=Building&TabName=Building&capID1=17CAP&capID2=00000&capID3=0000J&agencyCod

***#4 – Signature block with module contact information***

A signature block is always included at the bottom of the email content letting the customer know where to go or who to contact for questions (except for adhoc emails). The signature block will display the correct contact information based on the module that the record belongs to.

**Building Record**

Thank you.

OMEGA County Building Department
123 Omega St, Suite 456
Salem, OR 97111
503-555-1212
test.test@oregon.gov
www.veryverylongnameco.omega.or.us

**Onsite Record**

Thank you.

Omega Onsite Department
123 Omega St, PO Box 555
Salem, OR 97000
503-555-1212
onsite@omega.or.us
www.omegaonsite.com

**Planning Record**

Thank you.

Omega Planning Department
123 Omega St, PO Box 555
Salem, OR 97000
503-555-1212
planning@omega.or.us
www.omegaplanning.com

From: Omega County <OmegaCountyNoReply@Accela.com> Sent: Wed 3/29/2017 8:25 AM
To: SHAMBERGER Heidi S * DCBS
Cc:
Subject: Additional Information is required for record # 995-17-000006-STR at 123 MAIN ST, SALEM, OR 97301

Additional information is required to process your permit application **995-17-000006-STR** at job site address **123 MAIN ST, SALEM, OR 97301**. Please see the comments below for details.

*Workflow Task: Application Intake*
*Comment: test*

If you have questions, please contact **Heidi Shamberger** at 503-373-7409 or heidi.s.shamberger@state.or.us.

Your record is available online for tracking by clicking here:

https://aca.oregon.accela.com/oregon/Cap/CapDetail.aspx?
Module=Building&TabName=Building&capID1=17CAP&capID2=00000&capID3=0000J&agencyCod

Thank you.

OMEGA County Building Department
123 Omega St, Suite 456
Salem, OR 97111
503-555-1212
test.test@oregon.gov
www.veryverylongnameco.omega.or.us

***"Addl Info Needed" email***

The main content of this email is contained in the workflow comment. The workflow comment is a way for you to communicate what additional information is being required to the customer.

From: Omega County <OmegaCountyNoReply@Accela.com> Sent: Wed 3/29/2017 9:16 AM
To: SHAMBERGER Heidi S * DCBS
Cc:
Subject: Plan Revisions are needed for record # 995-17-000006-STR at 123 MAIN ST, SALEM, OR 97301

Plan revisions are needed for permit application **995-17-000006-STR** located at job site address **123 MAIN ST, SALEM, OR 97301**. Please see comments below for details.

*Workflow Task: Building Review*
*Comment: Please submit a revision of your plans with the following corrections: 1. xxx 2. xxx*

If you have questions, please contact **Heidi Shamberger** at (phone number not available) or heidi.s.shamberger@state.or.us.

Your record is available online for tracking by clicking here:

https://aca.oregon.accela.com/oregon/Cap/CapDetail.aspx?
Module=Building&TabName=Building&capID1=17CAP&capID2=00000&capID3=0000J&agencyCod

Thank you.

OMEGA County Building Department
123 Omega St, Suite 456
Salem, OR 97111
503-555-1212
test.test@oregon.gov
www.veryverylongnameco.omega.or.us

***"Revisions Needed" email***

This email gives you the opportunity to notify the customer that plan review revisions are needed. A list of what needs to be revised and why should be included in the workflow comment and any other additional information you need to communicate.

From: Omega County <OmegaCountyNoReply@Accela.com> Sent: Wed 5/17/2017 10:59 AM
To: SHAMBERGER Heidi S * DCBS
Cc:
Subject: Permit application # 995-17-000006-STR at 123 MAIN ST, SALEM, OR 97301 is Ready to be Issued

Permit application # **995-17-000006-STR** at job site address **123 MAIN ST, SALEM, OR 97301** is ready to be issued.

*Comment: Current balance = $75.00. Our records show you have an outstanding balance. Please submit payment at the link below or come into our office between 8:00 AM - 4:00 PM.*

Please check for possible balance due and to make payment, if needed, at:

https://aca.oregon.accela.com/oregon/Cap/CapDetail.aspx?Module=Building&TabName=Building&capID1=17CAP&capID2=00000&capID3=0000J&agencyCode=

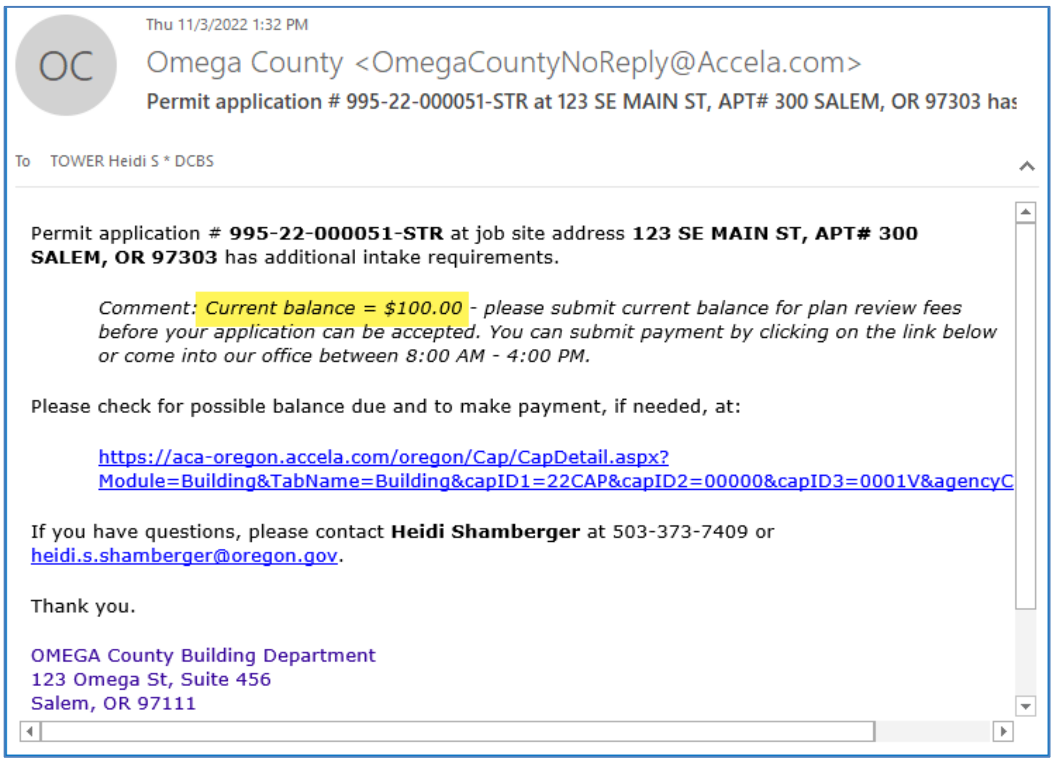
If you have questions, please contact **Heidi Shamberger** at 503-373-7409 or heidi.s.shamberger@state.or.us.

Thank you.

OMEGA County Building Department
123 Omega St, Suite 456
Salem, OR 97111
503-555-1212
test.test@oregon.gov
www.veryverylongnameco.omega.or.us

***"Ready to Issue" email***

The workflow comments will automatically populate with the current balance due on the record. Any additional comments can be appended to the balance such as pertinent issuance information or needs. The comments will be included in the body of the email.



Thu 11/3/2022 1:32 PM
OC
Omega County <OmegaCountyNoReply@Accela.com>
Permit application # 995-22-000051-STR at 123 SE MAIN ST, APT# 300 SALEM, OR 97303 has
To TOWER Heidi S * DCBS

Permit application # **995-22-000051-STR** at job site address **123 SE MAIN ST, APT# 300 SALEM, OR 97303** has additional intake requirements.

*Comment: Current balance = $100.00 - please submit current balance for plan review fees before your application can be accepted. You can submit payment by clicking on the link below or come into our office between 8:00 AM - 4:00 PM.*

Please check for possible balance due and to make payment, if needed, at:

https://aca-oregon.accela.com/oregon/Cap/CapDetail.aspx?Module=Building&TabName=Building&capID1=22CAP&capID2=00000&capID3=0001V&agencyC

If you have questions, please contact **Heidi Shamberger** at 503-373-7409 or heidi.s.shamberger@oregon.gov.

Thank you.

OMEGA County Building Department
123 Omega St, Suite 456
Salem, OR 97111

***"Intake Requirements Needed" email***

This is an entirely optional email. It will only be sent to the Applicant if the status "Intake Requirements Needed" is selected. The workflow comments will automatically populate with the current balance due on the record, similar to the "Ready to Issue" email above. Any additional comments can be appended to the balance. The intent of this email is to make it simple for jurisdictions to notify applicants that plan review fees are owed and any other intake requirements are needed before proceeding. The comments will be included in the body of the email.

From: Omega County <OmegaCountyNoReply@Accela.com> Sent: Wed 3/29/2017 8:26 AM
To: SHAMBERGER Heidi S * DCBS
Cc:
Subject: Important communication regarding record # 995-17-000001-PLNG at 123 MAIN ST, SALEM, OR 97301

This is important communication regarding record # **995-17-000001-PLNG** at job site address **123 MAIN ST, SALEM, OR 97301**.

Record Type: Planning Tracking
Record Status: In Review
Description of Work: Heidi testing import
Workflow Task and Status: Staff Review / In Review
Comment: Heidi test

If you have questions, please contact **Heidi Shamberger** at 503-373-7409 or heidi.s.shamberger@state.or.us.

Your record is available online for tracking by clicking here:

https://aca.oregon.accela.com/oregon/Cap/CapDetail.aspx?Module=Planning&TabName=Planning&capID1=17CAP&capID2=00000&capID3=0000K&agencyCo

Thank you.

Omega Planning Department
123 Omega St, PO Box 555
Salem, OR 97000
503-555-1212
planning@omega.or.us

***Generic email for optional statuses***

This generic template email content will be sent when you elect to send an optional email from any other workflow status, besides the three required statuses. Important record information displays including record type, record status, description of work, workflow task/status, and the workflow comment. The workflow comment in this case is key to the purpose of your email (and another means of communicating additional information to your customer or internal user).