License Division Accela LMS Update

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# Agenda

- Status of Accela LMS Project and Timeline
- Public User Experience
- Cross-departmental Workflows
- Alderperson Workflow
- Alderperson Tools
- Questions/Feedback

# License Division Online Licensing Platform Status and Timeline

- Individual Licenses:
  - Class D Operators (Bartenders) are live.
  - Municipal Identifications are also processed by in Accela by the License Division. Using Accela LMS allows us to include signatures on the cards, a key feature in increasing the utility of the cards.
- Business Licenses
  - We are currently in Phase III of the project, which involves testing the product as public users and administrators to identify bugs, such as incorrect fields, workflow errors, and report creation.
    - Critical the success of the launch is training with License Specialists and other City personnel.
  - The License Division is creating guides for public users and staff to assist with navigating the new interface.
  - The goal is to take the Business Licenses live in early 2025, with the understanding that this may be delayed in order to ensure the product is ready for public users.

Public User Experience

- The transition to Accela presents **significant time savings for applicants**, who will no longer have to visit City Hall to submit applications, and allows for **streamlined communication between City personnel and applicants.**

- Applicants will be able to submit and manage applications and licenses online at www.Milwaukee.gov/lms.

- In their account, applicants can apply for new licenses, renew existing licenses, pay fees, update their contact information, review the status of their applications and amend licenses.

- Applicants applying for multiple licenses can easily incorporate existing information, such as premises data and hours of operations, into supplemental application, reducing redundancies in the application process, and ensuring consistency in information across applications.
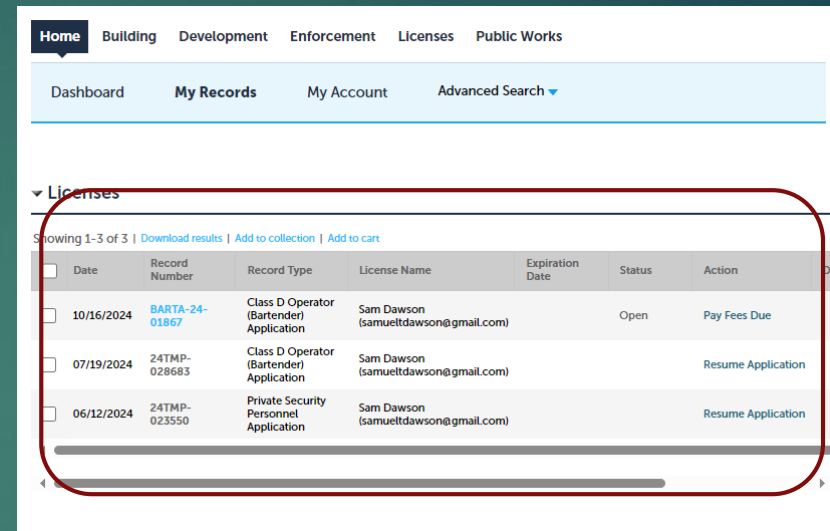

This is an example of what users see. In the top image, a user can review actions needed for applications or licenses.
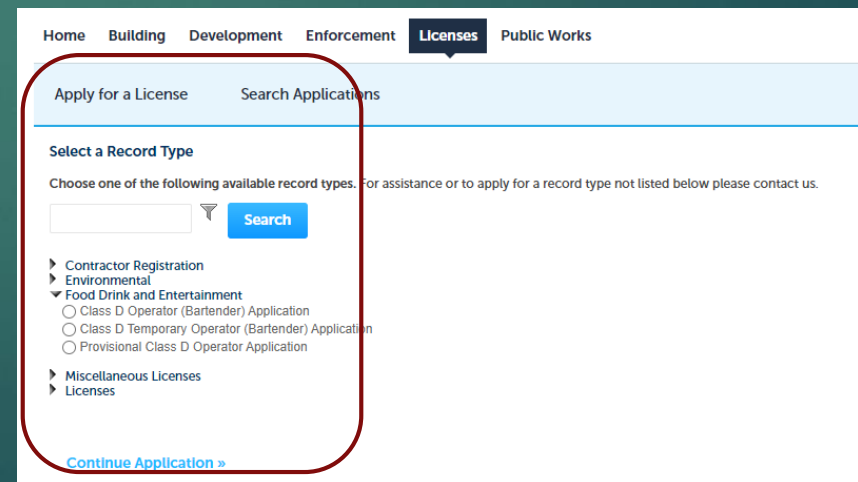

In the bottom image, a user can select the type of License they wish to apply for.

Cross-Departmental Workflows

▶ Once applications are submitted, the License Division will certify the application before advancing it to other departments in the workflow.

▶ Other departments, such as the Department of Neighborhood Services, will be able to sign-off on the status of the application as it relates to their department, **ensuring that licenses are not issued without proper departmental approvals.**
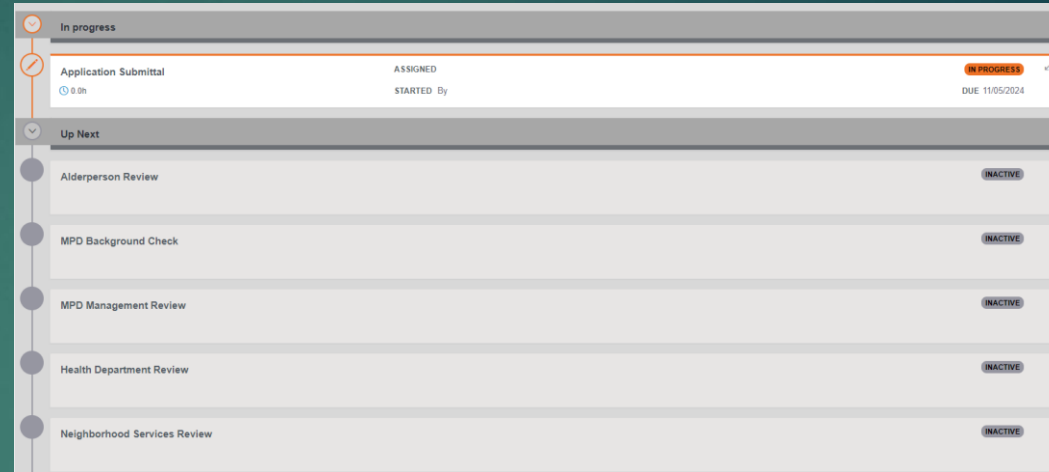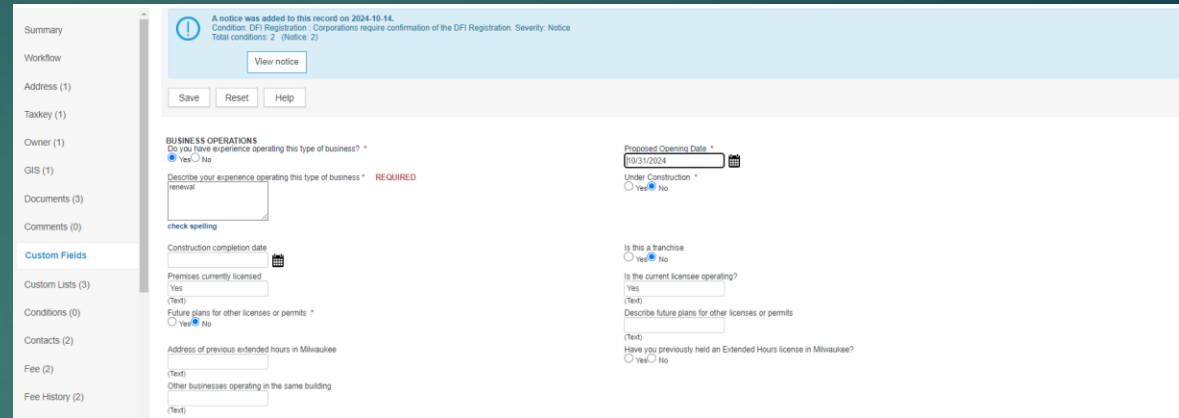

This image shows an overview of an application workflow.
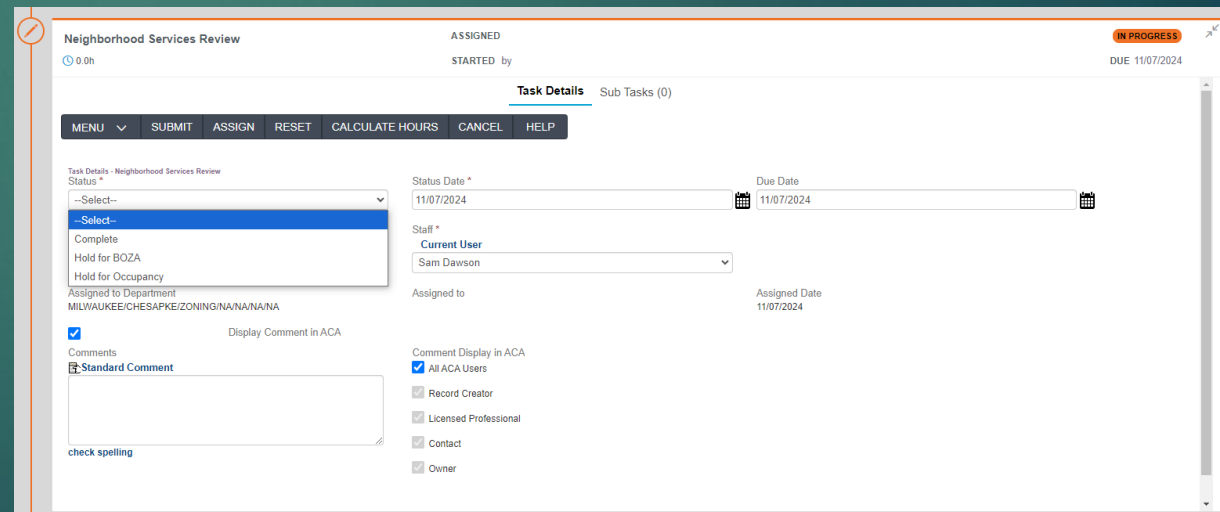
This image shows the Neighborhood Services Review Workflow step.
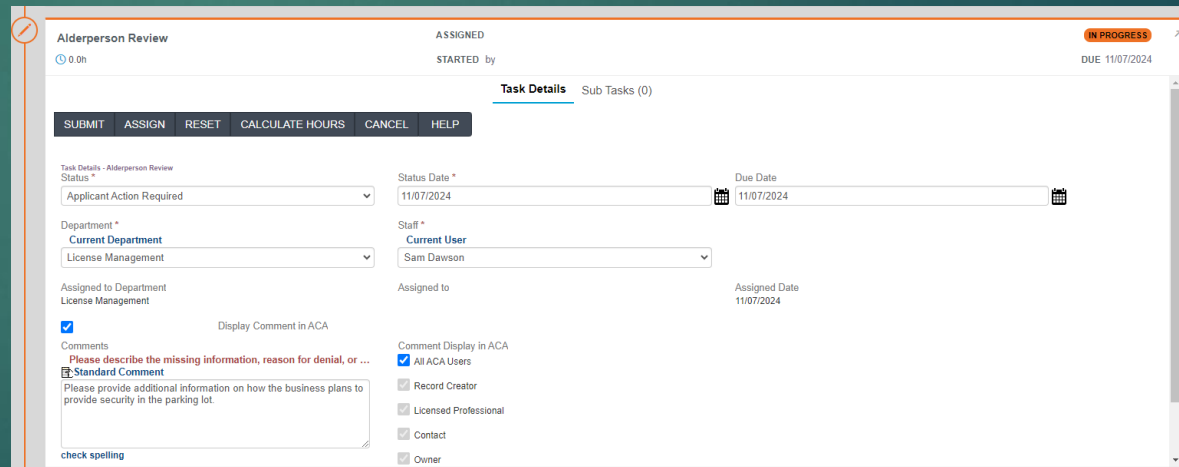
Alderperson Review

- When an application is ready for Alderperson review, the Alder will be notified. The **Alder can review applications and request additional action by the applicant if needed.**

- Once reviewed, Alders are able to advance the application through the workflow.

This image shows the Custom Fields tab for an application. This is where information on operations are saved.

This image shows the Alderperson Review Workflow. In this example, the Alder wishes the applicant to share more information about security. By submitting this request, the applicant will receive an email asking them to address the matter.

Alderperson Tools

- **Ebook Report**: when a license application is brought to committee, the License Division will generate an Applicant Ebook. This document will incorporate **the plan of operation and attach any relevant documents, including police reports, concentration maps, and objections**.

- **License Renewal Changes Report**: this report will **highlight all changes to the plan of operation between the existing license and the renewal application**, such as hours of operations and persons involved in the business.

This excerpt from a Ebook Report shows a summary of the plan of operation. The Ebook also includes attached documents, such as floor plans and objections.

This excerpt from a License Renewal Changes Report compares the existing license information with the changes presented on the renewal application.

ITMD – Accela LMS Mobile Functionality

- **Mobile Device Support**: On mobile devices, Accela LMS is accessed through a web browser. There is no dedicated app. The site loads with a mobile-friendly interface that automatically adjusts based on screen size.

- **Future Improvements:** ITMD will be exploring the product roadmap with Accela for increased mobile usability.
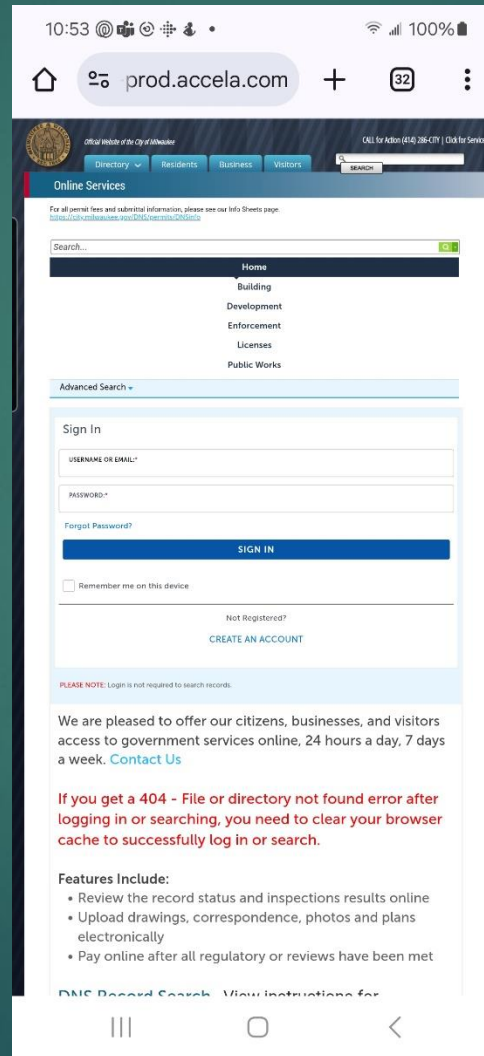
This image shows the LMS home page as seen on an Android smartphone.
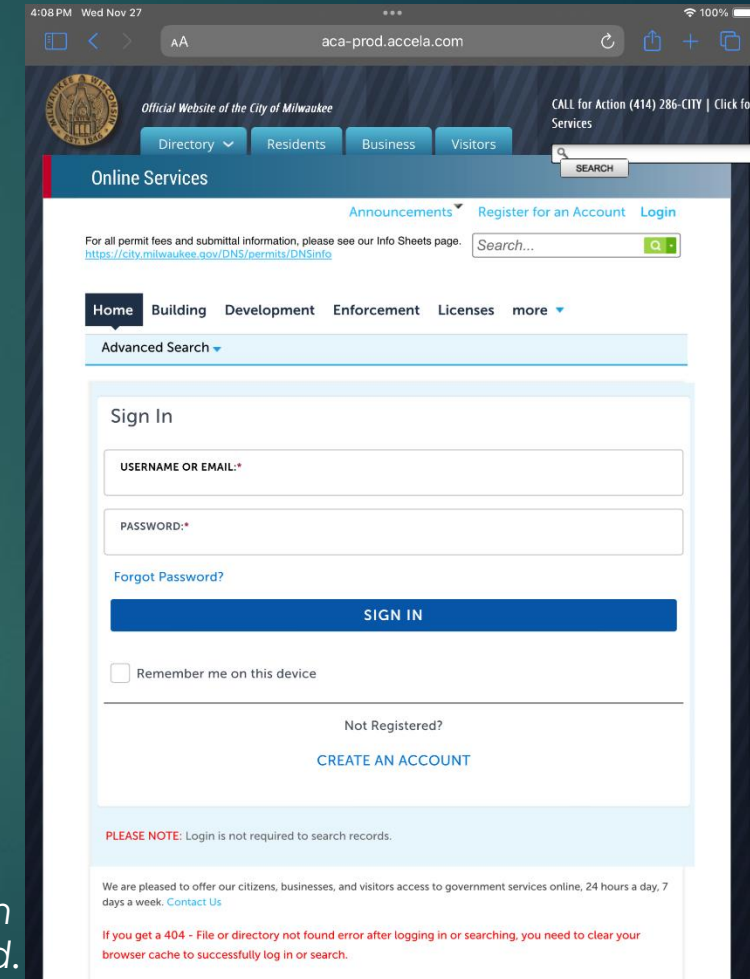
This image shows the LMS home page as seen on an Apple iPad.

ITMD – Accela LMS Multi-Language Support

- **Multi-Language Support**: Accela LMS offers multi-language support through web-browser or device settings.

- **City Template Translation**: City website offers a translation option prominently on top of pages, but this hasn't yet been implemented for Accela LMS hosted solution.

- **Future Improvements:** ITMD will be exploring the product roadmap with Accela for increased multi-language functionality and commits to updating the Accela LMS page style to match current City site style that includes the translation option by go-live of remaining License Division licenses.
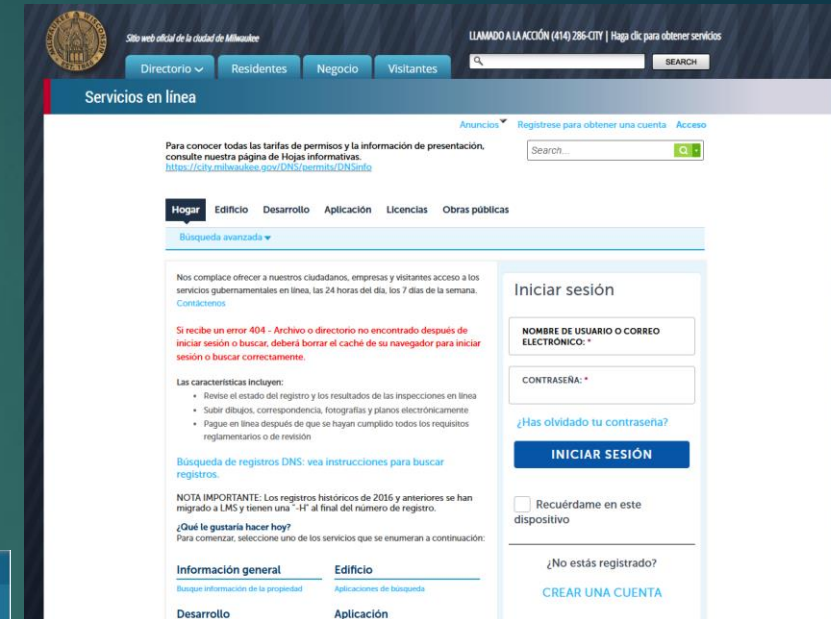
This image shows the LMS home page as seen on a desktop computer.

This image shows the Common Council home page as seen on a desktop computer.

ITMD – OpenCounter Permit Discovery

▶ **OpenCounter Study:** In Summer/Fall 2023, the City of Milwaukee engaged UW-M Lubar School of Business to review options to improve the license/permitting experience. The study recommended OpenCounter or a similar product.

▶ **OpenCounter Features:** OpenCounter acts as a guided service for someone interested in a project from the initial questions, "Where is my project allowed? Which permits will I need? How much will it cost? How do I apply?" through project completion.

OpenCounter
Business Portal
Help entrepreneurs to understand the costs and requirements of starting a business.

Discover the Business Portal

OpenCounter
Residential Portal
Show homeowners how to stay in compliance on home improvement projects.

Discover the Residential Portal

OpenCounter
Special Events Portal
Guide event planners through the process of organizing large-scale events in public spaces.

Discover the Special Events Portal

OpenCounter
ZoningCheck
Help applicants to understand how the zoning ordinance will impact site selection and project requirements.

Discover ZoningCheck

This image from the OpenCounter website shows the service modules they offer.

ITMD – OpenCounter Permit Discovery (cont.)

▶ **OpenCounter Follow-Up:** ITMD had separate discussions and demos with OpenCounter and Accela following up on the study. Accela indicated they had plans and we might want to wait for future announcements. Accela announced the acquisition of OpenCounter in July 2024 and started discussing plans for OpenCounter in October.

▶ **OpenCounter Next Steps:** OpenCounter advertises they provide "24/7/365 answers online to relevant questions (in any language, on mobile, or desktop)." Accela indicates they are rolling out advanced features in the near future. ITMD wishes to focus on a successful migration of licensing to Accela LMS through go-live and one year of the licensing application/renewal cycle. Further enhancements would likely happen no earlier than 2026 or beyond.

What to Expect

In the near future, we will be rolling out these enhanced solutions to our customers. This integration will bring about numerous benefits, including:

- **Simplified Licensing and Permitting:** Accela and OpenCounter will provide an intuitive, step-by-step guide, ensuring residents and businesses obtain the correct licenses and permits with clear cost information, enhancing transparency and ease of use.

- **Increased Efficiency and Accuracy:** The user-friendly interface reduces errors and saves time, minimizing the need for rework and allowing agency staff to focus on more critical tasks.

- **Enhanced Satisfaction and Productivity:** By simplifying the process and reducing administrative burdens, OpenCounter boosts satisfaction while improving operational efficiency for municipalities.

This image from the Accela website describes how they will integrate OpenCounter.

Thank you!

Any questions or feedback?