

## Tolemi Feature and Improvement List As of January 2025

This document summarizes recent and planned improvements to the Tolemi platform. These enhancements are designed to improve usability, transparency, efficiency, and overall service delivery for both staff and the public.

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### Registries and Licenses

- **Standardized License Expiration Dates:** Registrations can be set to expire on a fixed calendar date (e.g., June 30) without custom configuration.
  - **Configurable Attestation Acknowledgement:** Agencies can require users to review and accept customized attestation language before submitting a registration.
  - **Improved Registry Form Design:** Registry forms have been redesigned to be clearer, more intuitive, and easier to complete.
  - **Customizable Property Selection Guidance:** Agencies can display tailored instructions and informational banners during property selection to guide users.
  - **Required Identity Search:** Users can be required to search for and select an identity rather than choosing from a dropdown list, improving data accuracy.
  - **Conditional Question Logic:** Questions can be shown or hidden based on prior responses, reducing confusion and unnecessary input.
  - **Controlled Renewal Pre-Population:** Certain fields can be excluded from auto-fill during renewals, ensuring users re-enter critical information.
  - **Enhanced License Table Filtering:** License records can be filtered and sorted across all columns for easier review and auditing.
  - **Advisory Tags on Licenses:** Key compliance notes can be displayed directly on license records.
  - **Registration History Comparison:** Users can view submission history and compare changes side by side.
  - **License Access via Email:** Registrants can view and print licenses directly from confirmation emails.
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### Payments and Finance

- **Improved Payment Checkout Experience:** A redesigned checkout process provides clearer steps and progress indicators.
- **Payment Method Selection First:** Users select a payment method before viewing the total amount due, allowing fees to be calculated accurately.
- **Automatic Processing Fees:** Processing fees (e.g., Stripe or Authorize.net) can be automatically calculated and added as line items.
- **Flexible Fee Application:** Processing fees can be automatically applied or removed depending on the payment method (e.g., checks).
- **Enhanced Payment Reporting:** Reports now include payer names to support reconciliation.
- **Editable Payment Records:** Authorized staff can adjust payment amounts and completion dates to align with financial records.
- **Partial Refund Capability:** Staff can issue partial refunds, which are clearly reflected in payment records.
- **Restricted Payment Adjustments:** Positive payment adjustments can be blocked to reduce

errors and strengthen financial controls.

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### Inspections and Scheduling

- **Configurable Scheduling Buffers:** Agencies can add time buffers between inspections to account for travel and logistics.
  - **Defined Booking Windows:** Minimum and maximum scheduling windows can be set to enforce policy requirements.
  - **Optimized Scheduling Interface:** Improved time slot displays make scheduling easier for users while maximizing inspector efficiency.
  - **Automatic Load Balancing:** Appointments can be distributed evenly across inspectors.
  - **Location-Based Clustering:** Inspections can be grouped by proximity to improve routing and reduce travel time.
  - **Enhanced Appointment Notifications:** Emails can include property location details for better coordination.
  - **Calendar and Map Views:** Staff can view appointments in a monthly calendar and daily map with optimized routing.
  - **Offline Functionality:** Inspection tasks can be completed without internet access and synced later.
  - **SMS Reminders:** Users can opt-in to text message reminders and opt out at any time.
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### External User Experience (Mobile and Access)

- **Mobile-Friendly Landing Page:** Users can start registrations, check status, and continue drafts from mobile devices.
  - **Improved Mobile Functionality:** Mobile access supports profiles, scheduling, and appointment management.
  - **Clear Sign-In Access:** A prominent sign-in option is available for returning users.
  - **Consistent Landing Page Layout:** Improved alignment and design for a more user-friendly experience.
  - **Seamless Navigation from BuildingBlocks:** Users can access Slate directly for more efficient workflows.
  - **Passwordless Sign-In Option:** Magic link sign-in is available, while still supporting traditional passwords.
  - **Task Search by Address:** Users can search for tasks using a property address.
  - **Vendor Task Filtering:** Vendors can filter assigned tasks for easier navigation.
  - **Updated User Profile Interface:** Profiles are reorganized and include notification preferences.
  - **Calendar Sync Options:** Users can select which Outlook calendar to sync.
  - **Account Verification Options:** Email and phone verification can be enabled to improve account accuracy and security.
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### Workflow Automation and Configuration

- **Unit Data Continuity Across Workflows:** Unit information can automatically carry over into related workflows.
- **Multi-Unit Property Support:** All units can be preserved and managed across workflows.
- **Selective Unit Updates:** Users can update only specific units within a property.
- **Detailed Unit-Level Management:** Workflows support viewing and editing unit-level data,

including addresses and attributes.

- **Automated Document Population:** Unit-level and externally submitted data can populate documents and emails automatically.
  - **Eligibility Rules for Workflows:** Properties can be automatically excluded from workflows if they do not meet defined criteria.
  - **Multiple Triggered Workflows:** Completing one workflow can automatically initiate up to two follow-up workflows.
  - **Automatic Task Assignment:** Tasks can be assigned to the designated workflow lead.
  - **Workflow Tracking Enhancements:** Tasks can be filtered by workflow lead and grouped by completion status.
  - **Role-Based Permissions:** Editing access to task fields can be restricted based on user roles.
  - **Configurable Recurring Tasks:** Recurring tasks can be set up without custom scripting.
  - **Improved Search in Tasks:** Users can search property addresses within cloned tasks.
  - **Resubmission of Failed Registrations:** Administrators can resubmit registrations from saved snapshots in case of system errors.
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#### **Mailers and Outreach**

- **Physical Mailers with QR Codes:** Agencies can create and send customizable mailers with QR codes linking recipients directly to their registry.
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#### **Reporting and Data**

- **Searchable Custom Reports:** Users can search within reports to quickly find relevant data.
  - **Expanded Data Export Capacity:** Increased limits for exporting property data between systems.
  - **Improved Translation Tools:** Enhanced interface for managing multilingual content and accessibility.
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#### **Internal Administration and Tools**

- **Log Management:** Certain system logs can be deleted to maintain clean records.
- **Workflow Transfer Capability:** Workflows can be reassigned when ownership changes.
- **Task Duplication Tools:** Tasks and their attributes can be copied across workflow stages.
- **Configurable Task Deletion:** Tasks can be removed directly within the system configuration.
- **Flexible Workflow Management:** Administrators can move workflows to any stage when exceptions are required.