

# CityBase Serve

The CityBase platform makes it easier for constituents to pay a bill, request a benefit, and engage with their local government.

The CityBase Serve product suite helps government agencies collect more accurate forms, improve service and transparency to constituents, automate common back-office tasks, and track all activities related to a case at a glance.



## Improve Data Collection

Intuitive and mobile-responsive online forms replace paper processes, making it easier for residents to submit information. Forms integrate directly to your underlying databases, so a form will validate information like a person's address before they even hit submit, and records stay up to date in real-time without manual data entry.



## Increase Government Responsiveness

Automatic messaging features allow you to update people via email immediately for things like confirming their information was received, requesting follow-up information, or letting them know a status update to their request. All communication with a constituent is tracked alongside the person's request.



## Automate The Government Workflow

Save staff time for common, repetitive tasks by automating hand-offs and tracking all interactions related to a case. Automated workflows are available on a central staff dashboard, where agency admins can see all constituent requests, or just the ones assigned to them.



Learn more at [thecitybase.com/digital-services](https://thecitybase.com/digital-services)

# Case Management

The Case Management Dashboard is the central command center for government agencies to track and manage service requests, automate workflows and communications with citizens, and collaborate with teammates and across agencies.

## Improve Customer Service

- Streamline complex processes like business permitting
- See all requests at a glance, or click into someone's case to view more details
- Add labels to track the status of requests
- Assign a team member to take on the next stage, or move the applicant on to the next agency (for instance, in business permitting, an applicant may need to get approvals from Planning, Police, and Fire departments before opening a new business)
- Send follow-up forms to proactively move people to the next stage of a process, with pieces of information that were collected from the last form already filled in, like a proposed business address and the owner's contact information
- If an agency staff member wants to figure out which stage an applicant is in the process, they can click on the applicant's name and see which forms they have filled out and what needs to be sent to them next

Case Management for Business Permits

Responses Settings

Search responses MORE...

Label Status Assign More Edit columns

#	FORM	RESPONDENT NAME	STATUS	LABELS
#9	Business Plan Details	Nadia	Processing	Affidavit PLN: Not compliant TTX fine
#8	Inspection Criteria	Nadia	Received	Closed TTX issues
#7	Community Outreach and Good Neighbor Policy	Nadia	Received	Application sent Shared manuf
#1	Business Permit	Nadia	Received	Affidavit PLN: Not compliant



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