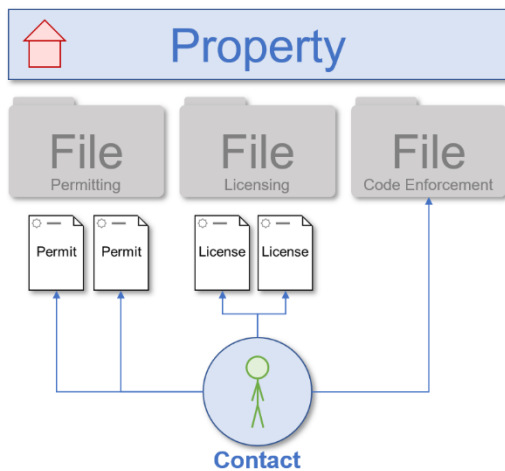


Overview of the Permit Process

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Citizenserve File Hierarchy



- A **PROPERTY** may have multiple files
 - Permitting, Licensing, Code Enforcement
- A **FILE** may have multiple permits or licenses
 - Ex: a construction project (file) requires multiple permits (electrical, plumbing, mechanical, etc.)
 - Ex: a restaurant (file) requires multiple licenses (business, alcohol, alarm, etc.)
 - A Code Enforcement Case is a File
- **PERMITS** and **LICENSES** have an applicant that is a **CONTACT**
- A **CONTACT** may have multiple linked permits or licenses
 - Additional Contacts can be added to a file

Workflow Overview

Building Permit

1. Application is submitted online or created over the counter
2. Initial Application review – Unassigned queue
 - a. Review application for completeness
 - b. Update permit status to Under Review
 - c. Reviewer manually creates In-House or 3rd Party review
 - d. If 3rd Party, send Permit Application Ready for Review
3. Plan Review (In-House to Roy Johnston or 3rd party to Scott Davis)
 - a. Markup documents
 - b. If revisions are needed, set Plan Revision Cycle #
 - c. Send Revisions Required email
4. Review Complete – Unassigned queue
 - a. Collect payment as needed
 - b. Generate Permit Card
 - c. Send Permit Card Ready

Certificate of Occupancy/Temporary Certificate of Occupancy

1. Application is submitted online or created over the counter
2. CO Review activity assigned to Roy Johnston
 - a. Review application
 - b. Generate Certificate of Occupancy or Temporary Certificate of Occupancy letter
 - c. Send Certificate of Occupancy Ready email

Searching

1. Search for a File - search by file information, permit information, or property information tied to a file
2. Search for a Contact – search for a person or company
3. Search for a Property – search your parcel GIS property information. From there, view permit or contact information

Create a Permit or License on the Portal

1. Navigate to the portal: <http://www.citizenserve.com/ucf>
2. If you already have a portal account, login (this is **not** the same as your user account you use to sign in to the internal site)
 - a. Otherwise, register for a new portal account. Make sure to use an email address you have access to
3. Click on Services > Permits. Click Apply Online
4. Follow the application prompts
5. Submit your permit

Create a Permit Internally (over the counter)

1. Fill out top half of permit
2. Select permit type and sub type
 - a. Pop up for workflow. Review the steps. Uncheck any (or all) as needed
3. Click on Applicant > add contact
 - a. Do not use Property Owner (they won't have portal access or an email address)
4. Fill out additional fields
5. Show the permit on the file with the fees (if fees are set up)

Application and Plan Review

1. Navigate to Home Page. Open an Application or Plan Review activity
2. Update permit status to Under Review
 - a. Click on the three blue dots (...) next to the Permit Number to pull up the permit in a separate tab
3. On the Permits or Documents tab, click on the Markup button to markup the plan review
4. On the Review Activity, under Review Comments, click on the piece of paper to add new review comments
5. Update status to Approved (or desired status) and enter completion date

Reviews Complete

1. Navigate to Home Page. Open a Review Complete activity
2. On Permits tab, update permit status to Issued
3. On Permits tab, click on Generate Letter button (blue paper icon) to print permit card
 - a. Click Save
 - b. On the Documents tab, download and print the PDF if needed
4. On the Permits tab, notify applicant using "Permit Card is Ready" Email
 - a. Or call the applicant. Click on the three blue dots (...) next to the applicant to get their phone number
5. On the Reviews tab, complete the activity and close out review route

Fees

1. Open a permit
2. At the bottom, under the Permit Fees section, click on the barcode icon to add manual fees
 - a. Add the Quantity and click Save
 - b. Some fees have an Amount of 1. This means you can enter the exact quantity to charge the fee (e.g. a Misc Fee of \$31.25)
 - c. Some fees have an Amount of some other value (e.g. an Inspection Fee of \$70). Enter a quantity of 1 to charge 1 x \$75 fee
 - d. Use the Credit – Misc to add a credit (negative fee) to the account

Payments

Normal Payment

1. To add a payment to a permit:
 - a. Open the permit
 - b. Scroll to the bottom and click on the Credit Card icon
 - c. Fill out the payment information and click Save
 - i. Reference can be used for check number
 - ii. Note can be used as an extra "note" field if you need to add something
2. To add a payment to a file (can apply to multiple permits):
 - a. Open a file (or an individual permit)
 - b. On the blue bar on the left, click on ADD: Payment
 - c. Fill out the payment information and click Save.
 - i. If you fill out the total payment at the top, it will apply to all payments on the file.
 - ii. You can also specify the amount to go to each permit.
3. To add a payment to a contact (can apply to multiple permits):
 - a. On Search > Search for a Contact, enter the contact information and click Search
 - b. On the blue bar on the left, click on ADD: Payment
 - c. Fill out the payment information and click Save.
 - i. If you fill out the total payment at the top, it will apply to all payments on the file.
 - ii. You can also specify the amount to go to each permit.

Overpayments

1. If issued a check that is an overpayment, return the check if possible (this will avoid creating an overpayment in the system)
2. If you must enter an overpayment, enter the full payment amount. A credit (negative balance due) will show up on the account in Red.
 - a. The GL will pick up the overpayment so long as the refund is not issued on the same day

Refund, NSF

1. To issue a refund
 - a. Open the permit
 - b. Scroll to the bottom and click on the Credit Card icon
 - c. Fill out the payment information regarding the refund
 - i. Payment amount will be negative (equal to the refund amount)
 - ii. Reference can be used for check number
 - iii. In Note add **REFUND** (if you do not add this, the GL will not pick it up)
2. To enter an NSF (insufficient funds)
 - a. Open the permit
 - b. Scroll to the bottom and click on the Credit Card icon
 - c. Fill out the payment information regarding the returned check
 - i. Payment amount will be negative (equal to the refund amount)
 - ii. Reference can be used for check number
 - iii. In Note add **NSF** (if you do not add this, the GL will not pick it up)

Unallocated or Misallocated Payments

If a payment cannot be logically applied to fees, it will be left unallocated. This usually happens in the case of overpayments, partial payments (paying part of a single fee), or adjusting fees after a payment has been made.

1. Open a permit
2. Scroll to the bottom and click on the Allocation button (Node icon next to the Credit Card icon)
3. If the allocation can easily be applied, enter the new allocation amount next to a fee
 - a. If doing this on a payment that has already been partially allocated, you will need to read the allocation for all fees on that payment
4. If the allocation is messed up for multiple payments:
 - a. Click Reset All
 - b. Click Save
 - c. Open the allocation screen again
 - d. Start at the bottom and begin allocating payments

Updating Fees After Payment Has Been Made

If a fee has already been paid (meaning the payment has been allocated to the fee) and the fee is later changed or removed, the payment will need to be manually reallocated to either the new fee or other fees. See [Unallocated or Misallocated Payments](#) section

Schedule Inspections

1. From Home Page, search for permit
2. Click ADD: Inspection
3. Fill out inspection information and save

Perform Inspection

1. Open inspection
 - a. Click on the three blue dots (...) next to the permit number to pull up the permit in another page
2. Under Inspection Comments, click on the blue book icon to add common comments
 - a. Click on the white paper icon to add custom comments
3. Set completion date and status
4. Click on the email icon to generate Inspection Report

Close permit

1. Search for permit
2. Change status to Closed
3. Click Save
4. Run the Certificate of Occupancy/Certificate of Completion report as needed to batch generate the certificates

Add Contact to Existing Permit

1. With the permit application open (permits tab), in one of the team members boxes, click on Add: Contact
2. Enter the contact information and search. If the contact exists, select it. If not, add the contact.