

How to Resolve the Wrong Record Type in Accela

There is no way to change the actual record type in Accela once created. When the record type is selected, for example Commercial Plumbing versus Residential Plumbing, the record details are all determined by that specific selection when the record is created.

To resolve the wrong record type you will need to follow the instructions below:

1. Go into Workflow on the incorrectly initiated record, open the active (orange) task, result it as **'Voided'** or **'Withdrawn.'**

Note:

Voided is only available as a Workflow status result under the Application Intake task. Voided is typically right out of the gate such as the wrong record type, like in this situation, or other agency error, etc.

Withdrawn is from the customer side where the customer has to withdraw their application for some reason such as their construction loan wasn't funded, they changed their minds, they couldn't build as desired, etc.

The screenshot displays the Accela workflow interface for a record with ID 547-22-000085-STR. The record title is "Enclose the 20x20 carport...". The status is "App Submitted" with a date of 04/20/2022. The location is "320 EDMUND LN, MANZANITA, OR 97131" and the contact is "Ceno Matteucci".

The main task is "Application Intake" with a status of "ASSIGNED" and a start time of "0.0h". The task started on 4/20/2022. The task details section includes a menu with options: MENU, SUBMIT, ASSIGN, RESET, CALCULATE HOURS, CANCEL, and HELP.

The task details table shows the following information:

Task Details - Application Intake			
Assigned to	Assigned to Department	Assigned Date	Status Date
	Building	04/20/2022	04/20/2022
Current Status	Action By Department	Action By	
Application Submitted	State ePermitting		
In Possession Time (hrs)	Time Tracking Start Date		
New Status *	Current Department	Status Date *	Display E-n
--Select--		05/05/2022	<input checked="" type="checkbox"/>
--Select--			
Addl Info Needed			
Addl Info Received			
Application Accepted			
Application Submitted			
Expired			
Permit Issued			
Ready for Plan Review			
Ready to Issue			
Void			
Withdrawn			
Action By *	Current User		Display C
	Stacey Thias		<input checked="" type="checkbox"/>
			Comment Dis
			<input checked="" type="checkbox"/> All ACA Us
			<input type="checkbox"/> Record Cr
			<input type="checkbox"/> Licensed F
			<input type="checkbox"/> Contact

How to Resolve the Wrong Record Type in Accela

- Next, you will need to create the correct record type. Go to the record you just voided/withdrew, click on the Description of Work/Copy Recs (unrelated) tab, select the Menu button and select the Clone option.

The screenshot shows the Accela application interface for record 547-22-000085-STR. The record title is "Enclose the 20x20 carport ...". The status is "App Submitted" and the location is "320 EDMUND LN, MANZANITA, OR 97131". The record was submitted on 04/20/2022. The left sidebar shows a navigation menu with "Description of Work/Copy Recs(Unrelated)" highlighted. The main content area shows a "Menu" dropdown with "Clone" selected. Other options in the menu include "Report", "Edit View", and "Print Page". The record details show "Status: Void" and "Record Type: Building/Resident". The "IVR Reference Number" is 547029093594 and "Generated by Cloning" is set to "No". The "Project Name" field is empty. The "KEY DATES" section shows "Opened Date: 04/20/2022" and "Issued Date" is empty.

- The screen will refresh to initiate an UNRELATED clone (copy) record - select the CORRECT record type (what they should have pulled), select the double-headed arrows to move your selection over to the selection window, Submit.

The screenshot shows the "Clone To Set" dialog box in the Accela application. The "Submit" button is highlighted. The "Clone To Set" field is empty, and the "Clear" button is visible. The "Please select the Record Type" section shows a list of record types: Building Appeal, Commercial, Inquiry, Post Disaster, Residential, 1 & 2 Fam Dwelling (New Only), Deferred Submittal, Demolition, Dwelling Fire Sprinkler System, Investigation, Manufactured Dwelling, Mechanical, Comprehensive, Phased, and Plumbing. The "Mechanical" category is expanded, and "Comprehensive" is selected. The "Clone To Set" field is empty, and the "Clear" button is visible. The "Please select the Record Type" section shows a list of record types: Building Appeal, Commercial, Inquiry, Post Disaster, Residential, 1 & 2 Fam Dwelling (New Only), Deferred Submittal, Demolition, Dwelling Fire Sprinkler System, Investigation, Manufactured Dwelling, Mechanical, Comprehensive, Phased, and Plumbing. The "Mechanical" category is expanded, and "Comprehensive" is selected. The "Clone To Set" field is empty, and the "Clear" button is visible. The "Please select the Record Type" section shows a list of record types: Building Appeal, Commercial, Inquiry, Post Disaster, Residential, 1 & 2 Fam Dwelling (New Only), Deferred Submittal, Demolition, Dwelling Fire Sprinkler System, Investigation, Manufactured Dwelling, Mechanical, Comprehensive, Phased, and Plumbing. The "Mechanical" category is expanded, and "Comprehensive" is selected.

How to Resolve the Wrong Record Type in Accela

- The copy options will load - these are the pieces of the original record that you might want to copy to the new record - **select ONLY parcel, owner, address, professionals, and contacts**, click Submit.

Submit Cancel Help

Record Type - Specific Information

- Fee Items ([Select](#))
- Workflow Status
- Inspection ([Select](#))
- Custom Fields ([Select](#))
- Additional Info
- Valuation Calc
- Workflow Task Specific Information
- Status or New Status:
- Status History

General Record Information

- Record Details ([Set Application Description](#))
- Record Conditions ([Select](#))
- Inspection Conditions ([Select](#))
- Conditions of Approval ([Select](#))
- Education
- Continuing Education
- Examination
- Record Comments
- Activities

Parcel

Owner

Address

Licensed Professionals ([Select](#))

Contact ([Select](#))

Assets

Document

Preserve Dates

- A new record will be created with a NEW RECORD NUMBER, it will include the copied pieces from the original voided record - open the new record from the record list. You will need to manually add the fees - fees don't automate when created through a clone/copy - Fee tab, select ADD, and add the fees for the items/services they are purchasing the permit for.

547-22-000092-MECH STATUS LOCAT

> 05/05/2022 by Stacey Thias > 31 M

Menu **Add** Delete Void Invoice ReCalc

Expiration Date

Fees (0)

Fee History (0)

Inspections (0)

Fee Calc. Factor: Job Value(Contractor)\$0.00 Fee Total \$0.00

Fee Item

0 record(s) found.

How to Resolve the Wrong Record Type in Accela

6. Once the fees are added on the new record, invoice them so they can be paid.

The screenshot shows a software interface with a sidebar on the left containing menu items: Expiration Date, Fees (5), Fee History (5), Inspections (0), Owner (1), Parcel (1), and Payment. The main area has a top toolbar with buttons: Menu, Add, Undo, Delete, Void, Invoice (highlighted with a yellow box and a mouse cursor), ReCalc, and Help. Below the toolbar, it displays 'Fee Calc. Factor: Job Value(Contractor)\$0.00' and 'Fee Total \$146.25'. A table lists five fee items, each with a checked checkbox in the first column:

Fee Item	Qty	Unit	Fees	Status	Balance Due
Air conditioner	1	Ea	\$56.00	NEW	\$56.00
Attic/crawl space fans	1	Ea	\$28.00	NEW	\$28.00
Clothes dryer exhaust	1	Ea	\$41.00	NEW	\$41.00
Technology Fee	125	Automatic	\$6.25	NEW	\$6.25
State of Oregon Surcharge - Mech (12% of applicable fees)	125	Ea	\$15.00	NEW	\$15.00

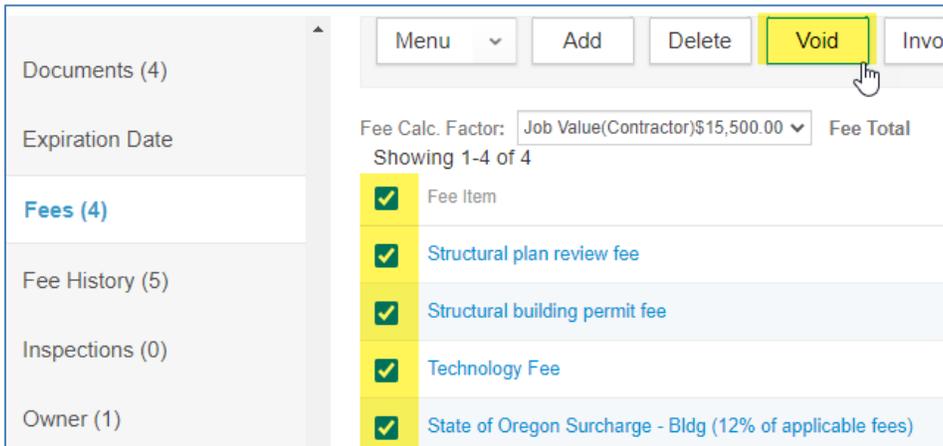
7. You will also need to add/edit the Description of Work and other ASI (application specific information). These are required fields that will need to be filled in in order to be able to issue the permit.

The screenshot shows a software interface with a sidebar on the left containing menu items: Consolidated Record Activities (1), Contacts (2), 01-Residential Mechanical, 02-Post Disaster, Custom Tables (2), Description of Work/Copy Recs(Unrelated) (highlighted with a blue box), Documents (0), Expiration Date, Fees (5), and Fee History (5). The main area has a top toolbar with buttons: Menu, Save (highlighted with a yellow box and a mouse cursor), Reset, Summary, and View. Below the toolbar, it displays 'PERMIT INFORMATION' with fields for Permit Number (547-22-000092-MECH), Status (App Submitted), IVR Reference Number (547099722556), and Generated by Cloning (Yes). A Project Name field is empty. The Description of Work field contains the text 'New conditioner, attic fan, and clothes dryer vent.' and is highlighted with a yellow box. A 'check spelling' link is visible below the field.

The screenshot shows a software interface with a sidebar on the left containing menu items: Consolidated Record Activities (1), Contacts (2), and 01-Residential Mechanical (highlighted with a yellow box). The main area has a top toolbar with buttons: Save (highlighted with a yellow box and a mouse cursor), Reset, and Help. Below the toolbar, it displays 'GENERAL INFORMATION' with fields for Category of Construction (Single Family Dwelling) and Type of Work (New).

How to Resolve the Wrong Record Type in Accela

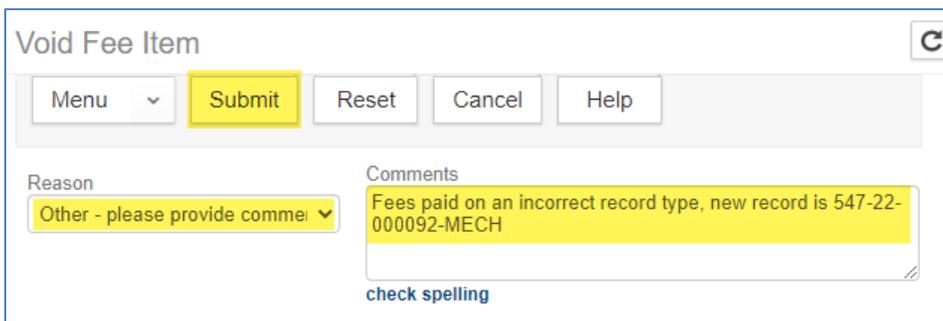
- Now return to original voided record, go to the Fee tab, checkbox all the fees on the record and click the Void button.



The screenshot shows the Accela interface with the 'Fees (4)' tab selected. The 'Void' button is highlighted in yellow. The list of fees includes:

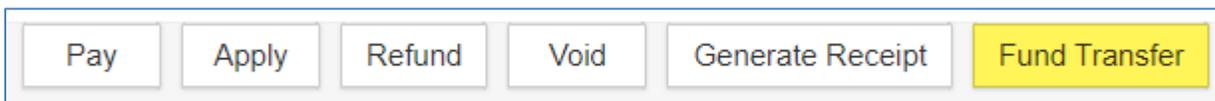
Fee Item	Fee Total
<input checked="" type="checkbox"/> Fee Item	
<input checked="" type="checkbox"/> Structural plan review fee	
<input checked="" type="checkbox"/> Structural building permit fee	
<input checked="" type="checkbox"/> Technology Fee	
<input checked="" type="checkbox"/> State of Oregon Surcharge - Bldg (12% of applicable fees)	

- Voiding the original fees to credit will release the monies paid on them. Select a void reason and you should now see an unapplied credit for the full amount of the paid fees.



The 'Void Fee Item' dialog box is shown with the 'Submit' button highlighted. The 'Reason' dropdown is set to 'Other - please provide comment'. The 'Comments' field contains the text: 'Fees paid on an incorrect record type, new record is 547-22-000092-MECH'. A 'check spelling' link is visible below the comments field.

- Once done with the void of fees, go to the newly created record, go to the Payment tab - select the Fund Transfer button, this will open a search screen.



The screenshot shows the Payment tab with the 'Fund Transfer' button highlighted in yellow. Other buttons visible include 'Pay', 'Apply', 'Refund', 'Void', and 'Generate Receipt'.

How to Resolve the Wrong Record Type in Accela

11. In the search screen, enter the original record number, then click Submit.

The screenshot shows the Accela search interface. On the left is a sidebar with navigation options: Fees (18), Fee History (20), Inspections (0), Owner (1), Parcel (1), Payment (highlighted in blue), Payment History, and Professionals (1). The main search area contains several sections: 'FILTER BY MODULE' with a 'Module Name' dropdown set to '--Select--'; 'SEARCH BY ADDRESS' with fields for 'Street #', 'Street Name', and 'Unit #'; 'SEARCH BY PARCEL' with a 'Parcel #' field; and 'SEARCH BY RECORD INFORMATION' with fields for 'Record Number' (containing '547-22-000085-STR'), 'IVR Reference #', and 'Status' (set to '--Select--'). A 'Submit' button is highlighted in yellow at the top of the search area.

12. This will pull up the original record, click the checkbox and click Select.

The screenshot shows the search results table. At the top, there are buttons for 'Menu', 'Select' (highlighted in yellow with a mouse cursor), 'Search', 'Cancel', and 'Help'. The table has the following columns: 'Permit Number', 'Record Type', 'Number', and 'Street Name'. The first row shows a checked checkbox, the record number '547-22-000085-STR', the record type 'Residential Structural', the number '320', and the street name 'EDMUND'.

<input type="checkbox"/>	Permit Number	Record Type	Number	Street Name
<input checked="" type="checkbox"/>	547-22-000085-STR	Residential Structural	320	EDMUND

How to Resolve the Wrong Record Type in Accela

13. You will then be asked how much you want to transfer, assuming you want to transfer the full amount, enter that amount in the Transfer Amount field, then Submit. Now the voided record is a done deal. Note, if for any reason you do not need the full amount to pay fees on the new record, then only transfer the amount needed and refund the remaining unapplied balance on the original record or transfer it to any other related record with an outstanding balance.

The screenshot shows a web form for transferring funds. At the top, there are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. The 'Submit' button is highlighted in yellow. Below the buttons, the form displays the following information:

- Application: 547-22-000085-STR
- Available Amount: \$668.37
- Method: Fund Transfer (selected from a dropdown)
- Transfer Amount: 668.37
- Comment: A large empty text area with a 'check spelling' link below it.

14. With the new record opened, go to Payment tab - you will now see the transferred monies showing as an unapplied Fund Transfer payment - checkbox that payment in the Transactions section, select the Apply button.

The screenshot shows the 'Payment' tab in the Accela system. The 'Apply' button is highlighted in yellow. A yellow banner at the top of the main content area reads 'Fund transfer completed successfully.' Below this, the following summary information is displayed:

- Total Invoice Amount: \$808.47
- Total Payment: \$668.37
- Total Balance: \$140.10
- Amount Not Applied: \$668.37
- Terminal #: [blank]
- Cashier ID: STHIAS
- Date: 05/31/2022

The 'Invoices' section contains the following table:

Invoice #	Amount	Paid in Full	Balance
4028	\$146.25	N	\$125.00
4037	(\$15.00)		\$0.00
4038	(\$6.25)		\$0.00
4039	\$683.47	N	\$683.47

The 'Transactions' section contains the following table:

Transaction Code	Transactions	Method	Receipt #	Not Applied	Amount	Status	Received	Trust Account ID
<input checked="" type="checkbox"/>	Fund Transfer	Fund Transfer	3746	\$668.37	\$668.37	Paid		

How to Resolve the Wrong Record Type in Accela

15. Once you initiate applying this credit, you will see a list of all the record fees displayed, enter the amount outstanding for each fee that you wish to pay. If you do not have enough from the transfer to cover all the new fees - make sure to apply a portion of the transferred monies to fully pay the State surcharge first so you do not put your State Surcharge out of balance, then use the remainder to pay as much as you can on the remaining fees, and collect the difference still outstanding from the customer.

<input type="button" value="Menu"/> <input type="button" value="Submit"/> <input type="button" value="Full Pay"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>										
Amount Not Applied: \$668.37										
<input type="checkbox"/>	Invoice #	Priority	Payment Period	Fee Code	Fee Item	Quantity	Fee	Paid	Outstanding	Amount
<input type="checkbox"/>	4028		STANDARD	B_MECH_620	Clothes dryer exhaust	1	\$41.00	\$0.00	\$41.00	41.00
<input type="checkbox"/>	4028		STANDARD	B_MECH_550	Attic/crawl space fans	1	\$28.00	\$0.00	\$28.00	28.00
<input type="checkbox"/>	4028		STANDARD	B_MECH_500	Air conditioner	1	\$56.00	\$0.00	\$56.00	56.00
<input type="checkbox"/>	4039		STANDARD	B_MECH_690	Gas or wood fireplace/insert	1	\$41.00	\$0.00	\$41.00	41.00
<input type="checkbox"/>	4039		STANDARD	B_MECH_700	Gas fuel piping outlets	1	\$23.00	\$0.00	\$23.00	23.00
<input type="checkbox"/>	4039		STANDARD	B_MECH_710	Heat pump	1	\$73.00	\$0.00	\$73.00	73.00
<input type="checkbox"/>	4039		STANDARD	B_MECH_720	Hood served by mechanical exhaust, including ducts for hood	1	\$41.00	\$0.00	\$41.00	41.00
<input type="checkbox"/>	4039		STANDARD	B_ST_SRCHGME	State of Oregon Surcharge - Mech (12% of applicable fees)	691	\$82.92	\$0.00	\$82.92	82.92