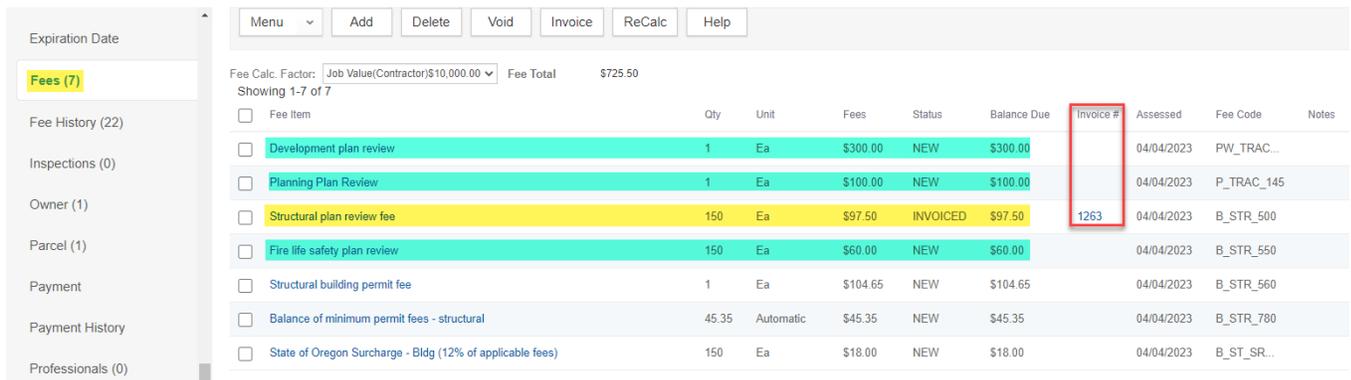# Processing Plan Review Payments at Intake

This document will walk the user through the collection of payment at Intake (versus at Issuance) and how to further process the application from there.

Once an application is created, either through the back office by staff or ACA by a customer, proceed with the following steps:

1. Open the record. When applicable, if the valuation calculator is entered at intake, then do so at this stage in the process - otherwise go to the next step.

2. Go to the Fees tab - invoice ONLY the plan review fees that should be collected (for example: Structural plan review, Fire life safety plan review, Development plan review, Planning plan review, etc.). By Invoicing only the plan review fee(s), it will be the only fee(s) available to be paid through ACA (or over the counter) by the customer.

3. Now that the fees are available to be paid online, the customer needs to be notified. Go to the Workflow tab and open the Application Intake task.

4. Select a new status of 'Intake Requirements Needed' - this status will keep the record's workflow at the current task. Note, the 'Current balance' will be displayed in the task comment, where comments are indicated as required.

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5. In the task comment - a standard comment from your jurisdiction's comment library regarding intake fees can be added – or, enter a comment letting the customer know that plan review won't be started until after the required intake payment is made, i.e. "Please pay intake fees as required to allow plan review to commence. A direct link to this record and to pay fees is provided below in this email."

6. While the Applicant of record is automatically selected for email notification via this task status - selecting any additional people from the other available dropdowns (internal or record contacts) who need to see this request for intake payment, is an option.

7. Once this is completed, click Submit. The email that is sent to the Applicant of record is automatically saved to the Communications tab on the record. The Application Intake task status and the overall Record Status will now be updated to Intake Requirements Needed.

8. Agency will receive an emailed alert [*or will be notified there is an alert email waiting via the Alerts page, as an optional back-up*] that a payment has been made on the record – or the customer will come into the office to make payment in person.

9. Upon payment of the required intake fee(s), then continue to process Workflow as per usual. Open the Application Intake task and result it as Ready for Plan Review, select appropriate review workgroups thru parallel tasks, assign review tasks, etc.

10. Designated plan reviews take place and, if applicable, the Valuation Calculator tab is populated by the Plans Examiner of record or designee. At plan review approval by all indicated plan review workgroups - the record automatically advances to the Completeness task in Workflow. The Permit Tech then readies the record for issuance and determines the Fee Calc Factor on the Fees tab. If and when the Fee Calc Factor is changed on the record, the fees will all automatically recalculate as per the change in valuation, including the plan review fee(s) that were paid at intake. Newly recalculated plan review fees will be automatically assessed on the record.

Permit Tech will locate and invoice any of the newly recalculated plan review fees that had initially been paid at intake.

11. Go to the Payment tab – note the Not Applied balance showing on the initial (intake) payment displayed in the Transactions section – this unapplied credit must be immediately reapplied to the newly

recalculated plan review fee(s) that were just invoiced on the Fee tab [*prior step*].

12. On the Payment tab, checkbox the initial (intake) payment in the Transactions section, select Apply button – a record fee list will be displayed. Note the Amount Not Applied indicated – this is your available credit – locate the recently invoiced new plan review fee(s) that shows an Outstanding balance – enter the full amount of the unapplied credit in the Amount field, then Submit.

13. Once the available Amount Not Applied has been reapplied to the new plan review fee(s) – the Not Applied amount on the initial (intake) payment has been reapplied and is now showing as $0. The Total Balance has now been reduced by the amount of the initial (intake) payment amount – and the balance showing is the difference owed in plan review fee(s) that can now be collected along with issuance fees at issuance. Go to the Fees tab and invoice all of your other issuance fees for collection.

14. Once all the above steps have been completed – go to Workflow, open the Completeness task, result it as Ready to Issue. This result will again automatically setup for an email to the Applicant of record and will drop the Balance Due into the task comment – you will then add any issuance information including another payment comment for issuance fees this time and any instructions on how to pick-up/get their

stamped approved plans and permit. **You have now completed all steps related to taking plan review payment at intake!**