

# Temporary Certificate of Occupancy (TCO)

## FAST FACTS

This document pulls together all information on the granting of Temporary Certificates of Occupancy (TCO) in the system – options on how to initiate TCO, how to process the TCO request, and other important information on managing TCOs.

**Temporary Certificate of Occupancy (TCO)** → *generated thru Workflow, separate related record; only documents the approval process for TCO, is not a permit*

- **Definition:** formal required documentation that only temporary occupancy has been granted for a specified amount of time and only for a specified area/portion of the structure - with the indication that an additional TCO will be requested and required if more time is needed to complete the project - and that the new structure/construction will be completed to code and granted a full Certificate of Occupancy through final inspection approval.
- Is generated from the parent record Workflow – specifically from the Inspection Process task by adding a result of “Temp C of O Requested” – it is invoked in the Inspection Process because the request for TCO is generally requested during inspection on most projects. **See optional way to initiate a TCO below.**
- Creation of a TCO child record will automatically post a Notice Condition on the parent record that a TCO is in place – the Notice is unapplied when the parent record finals.
- The TCO child record has its own approval-only Workflow – Workflow on these is not intended to be repeat of plan review but only approval of the request to temporarily occupy based on work done and inspections completed. Who is required to approve is determined thru Parallel Tasks and by the agency.
- TCO Acceptance Workflow task – “Request Accepted” kicks off the approval process and opens Parallel Tasks for determination of who must sign off approval of the request to temporarily occupy. This is up to the agency.
- TCO Issuance Workflow task – “Temp C of O Issued” result indicates summary approval of temporary occupancy and is required along with completion of several Task Specific Info fields (TSI) that populate the TCO document:
  - Number # of days – will take the date the TCO is generated plus the # of days indicated – will then print this date for expiration of the TCO period on the TCO document showing how long the temporary occupancy has been granted for. The TCO report is then auto-generated and attached to the Documents tab on the TCO record.
  - The parent record will be automatically updated via scripting – on the parent, the Inspection Process task will be automatically resulted as “TCO Issued” (was formerly set to “TCO Requested”) once the TCO is issued on the TCO child, doing this keeps the parent record status aligned with the TCO child record status.
- The TCO child record will close automatically when parent closes/finals

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### Optional way to initiate a TCO:

Scheduling the 1950 TCO Requested inspection type will also create a TCO (child) record directly (*as optional to resulting the Inspection Process task via Workflow*).

This inspection must be scheduled by staff users (public users do not have access to add the inspection). The inspection can be scheduled via the back office or the inspector app. Once the inspection has been **scheduled**, it will kick off scripting that will:

- 1) Add the inspection to the record
- 2) Create a child TCO record with a status of App Submitted
- 3) Update the Workflow task status for Inspection Process on the parent record to Temp C of O Requested with the comments noting it was updated via Inspection
- 4) Update the overall parent record status to TCO Requested/Under Insp
- 5) Add a condition to the parent record
- 6) Automatically result the 1950 TCO Requested inspection as Information Only using the current date. As soon as you schedule this inspection, the scripting is kicked off (even if you schedule the inspection for a future date).

### **Important criteria for making this work:**

- 1) This feature is only available to Commercial Structural, Commercial Phased Project, Residential Structural, Residential Phased Project and Residential 1 & 2 Family Dwelling record types.
- 2) The Inspection Process task must be the active task on the Structural record
- 3) You must add the 1950 TCO Requested inspection as **Scheduled**. The scripting only works when you "Schedule" the inspection (*not pending or resulted*).

***Once the Child TCO record has been created it will need to be processed - this method only offers another option for creating the TCO record and was specifically created to make it easier for inspectors in the field.***

To aid you in monitoring, and follow-up on the processing of these TCO requests, there are some TCO Filters available from the Record List:

- **TCO – Awaiting Review:** TCO records where the TCO record status is Awaiting Review or App Submitted
- **TCO – Open (not issued):** TCO records where the TCO record status is not TCO Issued, TCO Complete or TCO Withdrawn
- **TCO Created in Past 7 days:** TCO records that have an opened date within the past 7 days