

Creating a Permit from Authorization or Site Evaluation – Onsite Module

This document will outline the steps required to track an Authorization that becomes a Permit/Repair/Alteration. The purpose of this process is to properly reflect all Onsite activity as it relates to DEQ Surcharge reporting.

- 1) Create an Authorization record upon customer request. Process this application as you normally would per your internal business process.
- 2) If the Authorization now requires a corresponding Permit, fill out the 'Authorization Resulted in' field with the appropriate value, and click Save:

Record ID: 246-16-000012-AUTH

Save Reset Help

Type of Application * Residential Authorization Authorization Notice for * Addition of One or More Bedrooms

Category of Construction Single Family Dwelling Authorization Resulted in Repair - Minor

Septic Tank Last Pumped Average or Lot Size City/County/UGB Zo

Include Unit of Measure --Select--

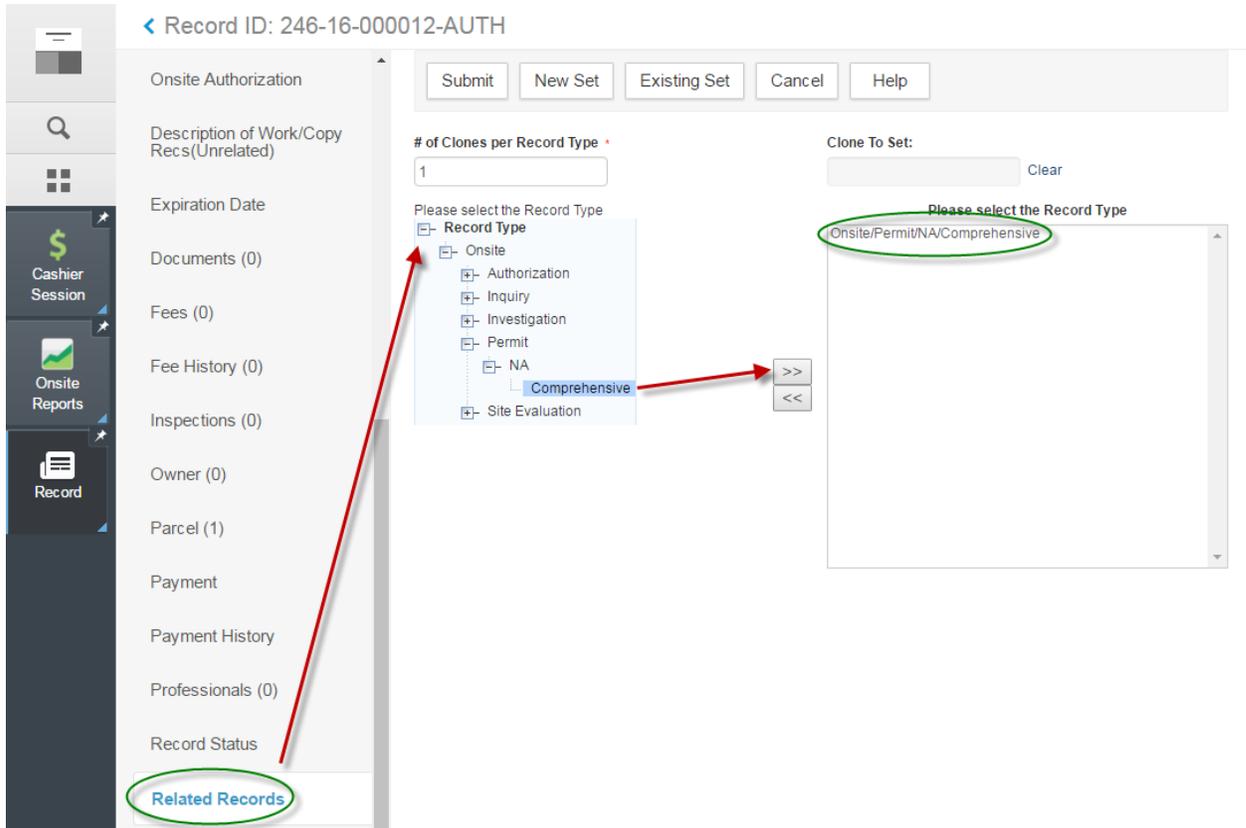
Existing Use of Structure Proposed Use of Structure

check spelling check spelling

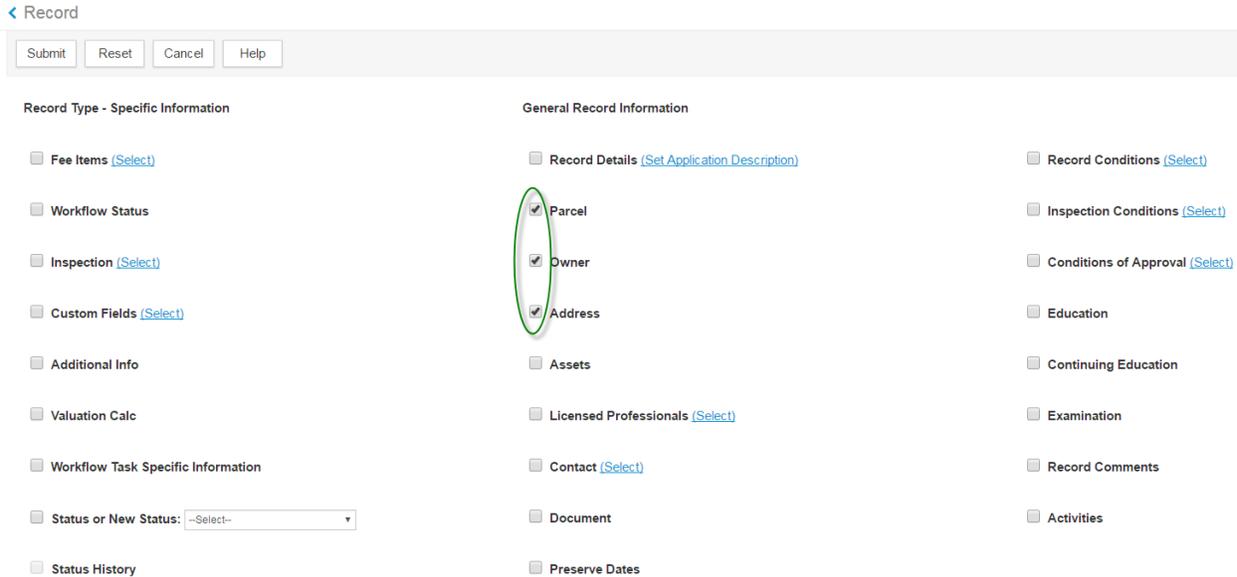
Directions to Property Comments

By filling out this field, the DEQ surcharge report will now accurately count the number of Authorizations that turn into Permits.

- 3) You can then finish and close out the Authorization record through workflow and close the record.
- 4) To generate the corresponding Permit in a time-effective manner (and also to keep the same record number for easier record keeping), click on the Related Records page > Clone Mult. Choose the Permit record type and click Submit:



5) You can then copy over certain information from the Authorization to the Permit. **We recommend cloning the Address, Parcel, and Owner** assuming the site location is the same.



6) The Permit has now been created, and it's automatically related to the original Authorization record with the same parent ID number since we created this via Clone:

Menu ▾ List View Clone Mult Update Related Records Search Look Up Create a Set Delete Help

1 record(s) added successfully.

- DEQ_COOS 246-16-000012-AUTH [Onsite,Authorization,NA,Comprehensive] 07/11/2016 00:00:00
- DEQ_COOS 246-16-000012-PRMT-01 [Onsite,Permit,NA,Comprehensive] 07/20/2016 14:42:40

- 7) Update the Description of Work, Custom Fields, and any other data for the Permit as per your business process.
- 8) If you are not charging any additional fees for the permit, then you don't need to add/invoice anything on the record.
 - a. **If the permit fees exceed the authorization fees**, you can assess the difference using the "Authorization Upgrade". This fee would be assessed on the newly created permit:

Fee Calc. Factor: Job Value(Contractor)\$0.00 ▾ Fee Total \$200.00
Showing 1 of 1

<input type="checkbox"/> Fee Item	Qty	Unit	Fees	Status	Balance Due
<input type="checkbox"/> Authorization upgrade	200	Amount	\$200.00	NEW	\$200.00

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- 9) Your DEQ Surcharge report should now reflect that 1) an Authorization Notice has been created, and 2) a Permit resulted from the Authorization Notice:

AUTHORIZATION NOTICES		
With field visit	7	\$700.00
No field visit	0	\$0.00
DEQ Only Activities	0	\$0.00
Total Activities and Calculated Surcharge	28	\$2,800.00
COLLECTED SURCHARGE FEES	28	\$2,800.00

Record	Date Indicated
555-17-000011-AUTH Authorization Resulted in Alteration - Major permit Authorizations resulting in permits 1	5/22/17