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| Step | Action in Life Cycle | Master Record | Renewal Record |
| 1 | Installation Permit is Finaled | \* Master record is manually created in one of two ways:   1. Clone the Install Permit 2. Create from “New” button   **Record Status**: Active  **Workflow**: System Status/System Activated  **Expiration Date**: 12/31/next year  **Expiration Status**: Active |  |
| 2 | Renewal period begins in September. A batch script executes and enables the “Renew” button by changing the Expiration Status to “About to Expire. | **Expiration Status:** About to Expire |  |
| 3 | Renewal Letter 1 is sent to customers. | **Workflow:** System Status/Renewal Letter 1 Sent |  |
| 4 | Renewal Letter 2 is sent to customers. | **Workflow:** System Status/Renewal Letter 2 Sent |  |
| 5 | Renewal Letter Final is sent to customers. | **Workflow:** System Status/Renewal Letter Final Sent |  |
| 6 | Back Office or Online: A Renewal is started by clicking the “Renew” button. | **Record Status:** Renewal Received  **Workflow:** System Status/Renewal Received  **Expiration Date:** 12/31/next year  **Expiration Status:** Pending | \* Renewal record is automatically created and all Master record information is copied.  **Record Status:** Renewal Received  **Workflow:** Renewal/Renewal Received  **Annual Fee Assessed** (based on System Type)  **Renewal Tab:** Shows the relationship between Master and Renewal record. |
| 7 | Back Office or Online: Yearly inspection results are recorded and all system information is updated on the Renewal record and customer pays for the annual fee in full. | \* Updated information from the Renewal record is copied to the Master record (Address, Parcel, Owner, Maintenance Provider, Contacts, System Information)  **Record Status:** Active  **Workflow:** System Status/Renewal Complete  **Expiration Date:** 12/31/next year  **Expiration Status:** Active | **Record Status:** Renewal Complete  **Workflow:** Close Out/Renewal Complete  **Related Records Tab:** Shows the relationship between Master and Renewal record. Note: the relationship is no longer visible under the Renewal Tab. |

\* Steps 2 – 7 are repeated each year.