Generating Reports – Certificate and Permits on Records in Accela

Because a converted record was not created in Accela, certain key data elements may be missing - yet certain standard Accela reports are looking for this Accela-specific data. As a result, there are some necessary checks or steps you need to take on <u>any</u> record in Accela in order to successfully generate certain reports, particularly the Certificate of Occupancy, Certificate of Satisfactory Completion, and the Permit. Because Certificates are required to include certain elements, the following is a list of necessary checks or steps to take prior to generating these important documents.

Go to **record Navigation**:

☐ **Custom Fields/Application Specific Information(ASI):** complete the custom fields on the record for all required fields indicated by a red asterisk, particularly Category of Construction and Type of Work, any others that might be indicated as required. When records are cloned/copied the required ASI is missing as a result of bypassing the intake process and needs to be filled in.

☐ **Description of Work:** review the Description of Work to confirm that this is the statement of work that you want to appear on the printed permit and/or certificate as your legal documents – remove any extraneous comments/information as appropriate.

☐ **Inspections:** assure that a "final inspection" is indicated and positively resulted, and that any other outstanding pending and/or scheduled and/or incomplete inspections have been deleted or resulted as appropriate.

☐ **Invoice Fees:** resolve any unpaid invoiced fees, and confirm that any new fees are invoiced and paid or deleted as appropriate. Exceptional payment types such as Credit Memo, Fee Waiver, etc. may be appropriate for resolving any outstanding unpaid balance(s).

☐ **Payment:** confirm that there are no unapplied payment(s) indicated.

☐ **Property Owner:** assure that a property owner is associated to the record – most all standard reports look for a Primary Owner to be indicated if more than one is associated to a given record.

☐ **Valuation Calculator:** for Certificates, even if you are not using the Valuation Calculator to assess fees/determine valuation, you must add a row(s) and input the Occupancy Group and Construction Type to be included on Certificates as required.

☐ **Workflow**:
For the Permit, assure that the Permit Issuance task shows a status of "permit issued" and the record status should mirror this and also show as "permit issued."

For the Certificates, additionally assure that the Inspection Process task shows as "inspection process complete", which will advance the record to the Certificate of Occupancy task for processing. Assuming all other steps in this training document have been completed, you would add a new status of "C of O Issued" to the Certificate of Occupancy task which will then generate your C of O report – you can then email this to any of the people associated to the record where email has been provided and/or print it – this report is auto-saved to Documents on the record. Once the C of O report has been successfully issued, the workflow advances to the Close Out task – you will add a new status of "finaled" which will complete the record and update the record status to "finaled" as well.

☐ **Related Records –** Check for related records and confirm that they are in a closed/finaled status and that all of the above numbered items have been verified and checked.

☐ **Standard Conditions/Conditions of Approval –** Verify that all standard conditions/conditions of approval have been resolved (result as 'Not Applied').