

SJPermits v2.1 - Public Works

New Application Assignment Triage Process

Overview

At [SJPermits.org](https://sjpermits.org), Applicants will create new permit applications that will need to be triaged by staff for assignment to the project or counter team. Below is an overview of general information regarding the online permit applications:

- Folders created from the Portal will contain the word “Portal” in “Reference File 4” on the main Folder tab in AMANDA.
- Application status in Portal will display to the customer as:
 - “In-Progress” when the Folder Status is “Intake.”
 - “Cancelled” when the folder status is “Cancelled.”
 - “Submitted” for all other folder statuses.
- Three YellowFin Analytics report have been created for Public Works.
 - **PW DS Portal Projects** – This report is for PW DS that shows completed online applications
 - **Utility Portal Applications for Assignment** – This report for Utilities that will show completed online applications.
 - **PW Applicant Portal Projects Started But Not Completed** – This report is for DS and Utilities where the applicant started the application but did not finish.

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Development Services

For PW DS submissions, designated staff for the week will monitor the Analytics report and will do permit history searches on the property(ies) to determine one of the following:

1. Work is related to a Planning Permit and which team it should be assigned to.
2. Any PW permit history and which team it should be assigned to.
3. Permits issued by the counter / No history / standalone submission.

Counter team permits are permits with no history and include the following permit types:

- Driveway Permits
- Joint Trench (stand-alone)
- Grading Permits
 - Exemptions
 - Hydrant Exemptions
- Sewer / Storm Lateral Permits
- Revocable Permits (storage pods)

See the table below for steps that the triage staff would need to take based on one of the three scenarios listed above.

Scenario	Team Assignment	Procedure
1	Project Team	1. Change Reference File #4 to the Team # that is assigned to the project.
2		2. Contact the team (PE, E I/II, Techs and Senior) that is responsible so they can take the next appropriate steps with the permit and applicant.
3	Counter	1. Contact the counter team for counter permits. 2. Change Reference File #4 to "Counter".
	Project Team	1. Bring project to PE Meeting for discussion and assign the permit to a Project Team. 2. Change Reference File #4 to the Project Team # that took the project.

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Utilities

1. Utility Project Engineer will run the Analytic report for Portal submitted applications. Utility Project Engineer will apply appropriate filters for permits that they will issue based on Utility Company. Filters will include Utility Company Name from Folder Info or From Applicant Organization as well as Utility Zone and Application dated.
2. Utility team member that takes the project that their team is assigned and enters the project information into the appropriate utility company excel file on SharePoint.
3. Utility Team member clears Reference File #4 to remove the project from the Analytic report and reviews, verifies and updates the folder info fields (i.e. Utility team member, located in Downtown, Capital/Development related, etc.)