

Public Works – Incorrect Folder Policy (Internal)

Overview

When an application is started on SJPermits.org and the applicant choose the incorrect Folder Type, Sub or Work type City staff will need to take appropriate steps to correct the mistake. Below are suggested Standard Operating Procedures (SOP) that should be followed for each scenario.

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Incorrect Folder Type

If staff feels that the applicant applied for the wrong permit type, staff should first reach out to the applicant to verify the intent of the application. Once the correct folder type is identified this should be communicated to the applicant so they can begin a new application with the correct folder, sub and work type.

The following steps should be done for the folder that was started incorrectly:

1. Delete any attachments in the Attachment Tab (make sure you click on 'Yes' to both pop-ups)
2. Insert the appropriate permit cancelled or permit withdrawn process for the folder type. For the correct process for the folder refer to the [AMANDA Manual Process](#) document.
3. Complete the process to cancel the folder.
4. **Optional:** You may submit a [Help Ticket](#) requesting the deletion of the folder, so it does not appear either our records or the applicants. Select "PW – AMANDA Ecosystem" from the drop down. Be sure to include the FolderRSN (Row ID) of the folder in the ticket. This is found on the Folder tab of the permit.

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Incorrect Subtype

If the application that the applicant starts was the wrong subtype, there could be missing or extraneous folder information fields. In the case of the Utilities Section the wrong subtype would result in the need to cancel the folder as the difference between the two affects more than just info fields as it also affects the processes and overall workflow of the folder. Below are the steps DS staff and Utilities staff should take:

Development Services

1. Change the subtype to the correct subtype from the folder tab (you will also need to re-select the worktype as well).
2. Go to the Folder info tab and select all folder info fields and delete them OR select all folder info fields and then unselect the ones you feel will still apply for the new subtype.
3. Go to the Folder tab and [redefault](#) the folder info fields. Do this by:
 - Click on the “Options” at the top right of the tab
 - Click on “Redefault”
 - On the pop-up window that appears unselect / uncheck the boxes next to Property, Document, and Process. Once those have been unselected then click on “Ok.”
4. Reinitialize the folder, so the GIS Folder Info Fields are filled in from the Folder Property. The procedure differs slightly if there are fees inserted in the folder or not. To reinitialize the folder, you will need to go to the Fee Tab and do the following:
 - No Fees Inserted:
 - Click on the button at the top right (if it exists) called “Run Procedure”
 - Select “Folder Initialize” on the pop-up window and click “OK”
 - Fees Inserted:
 - Under the “Unbilled Fees” section click on the button called “Add New Fee”
 - Select “Run Procedure”
 - Select “Folder Initialize” on the pop-up window and click “OK”
5. Do one of the following:
 - Inform the Applicant they should go back to the permit on SJPermits and use the “Continue to Submit” button on the permit detail page to update / confirm the folder info fields.
 - Go through the folder info fields and fill in the mandatory fields and contact the applicant if there are any info fields that you need additional information for.

Utilities

For Utility permits the Subtype between Major and Minor is too great to keep the existing folder. The folder should be cancelled, and the applicant should submit for the appropriate folder. These steps should be taken:

1. If the Applicant in the folder is the Business Name of the Utility Company, then delete the Applicant and change the Contact to the Applicant.
2. In the Utility Major Application Completeness Check (Majors) or Utility Application Completeness Check (Minors) use the Cancelled attempt. In the attempt description add the reason the permit is being cancelled and indicate the appropriate sub and work type they should use.

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Incorrect Worktype

If the application that the applicant starts was the wrong work type, there could be missing or extraneous folder information fields. For Utilities it will depend on which work type the permit needs to be corrected to. It may be just Redefaulting the folder info or may also require the cancellation of the folder. Below are the steps DS staff and Utilities staff should take:

Development Services

1. Change the Worktype to the correct worktype from the folder tab
2. For Parcel Map or Tract Map Applications if the Worktype is being switched from Residential to Non-Residential delete all residential related Folder Info fields.
3. Go to the Folder tab and [redefault](#) the folder info fields. Do this by:
 - Click on the “Options” at the top right of the tab
 - Click on “Redefault”
 - On the pop-up window that appears unselect / uncheck the boxes next to Property, Document, and Process. Once those have been unselected then click on “Ok.”
4. Verify the folder info fields that still needs to be filled in. Do this by checking the mandatory info fields. On the Info tab click on the “options” button at the top right and then select “Show Mandatory Rows”. If there are info fields that need to be filled in still, then one of the following should be done:
 - Go through the folder info fields and fill in the mandatory fields and contact the applicant if there are any info fields that you need additional information for.
 - Inform the Applicant they should go back to the permit on SJPermits and use the “Continue to Submit” button on the permit detail page to update / confirm the folder info fields.

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Utilities

If the worktype needs to be changed to Standard, Emergency, Special or Fiber and the worktype is not Small Cell then follow the steps below. If the worktype needs to be changed to Small Cell or changed from Small Cell to one of the four other worktypes follow the steps outlined in the [Incorrect Subtype](#) section to cancel the permit application.

1. Change the Worktype to the correct worktype from the folder tab
2. Go to the Folder tab and [redefault](#) the folder info fields. Do this by:
 - Click on the “Options” at the top right of the tab
 - Click on “Redefault”
 - On the pop-up window that appears unselect / uncheck the boxes next to Property, Document, and Process. Once those have been unselected then click on “Ok.”
3. If the folder info is being changed from Fiber to one of the other Subtypes you may also delete the following info fields:
 - Archeological Sensitive area?
 - Construction Cost
4. Verify the folder info fields that still needs to be filled in. Do this by checking the mandatory info fields. On the Info tab click on the “options” button at the top right and then select “Show Mandatory Rows”. If there are info fields that need to be filled in still, then one of the following should be done:
 - Go through the folder info fields and fill in the mandatory fields and contact the applicant if there are any info fields that you need additional information for.
 - Inform the Applicant they should go back to the permit on SJPermits and use the “Continue to Submit” button on the permit detail page to update / confirm the folder info fields.

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Redefaulting the Folder Info

