

Record Expiration Summary – Planning Module

Expiration Date and Status are listed on the ‘Description of Work/Copy Recs’ portlet:

Expiration Date

07/28/2019

Expiration Status

Active

Update to Record Expiration Date and Expiration Status takes place during these events in the record lifecycle:

- Record is created in the back office or on Citizen Access.
- Pre-Application City record type:
 - Workflow task is updated with any of the following statuses:
 - Meeting Held/Formal Submittal Rqd
 - Meeting Held/Record Complete
- Custom field named, “Expiration Date” is updated.

Application Extension:

When an application is about to expire, customer submits a form to the jurisdiction to request an application extension. Jurisdiction staff with supervisor permissions goes to the “Expiration” portlet and manually updates the Expiration Date.

Application Reinstatement:

An application could be closed due to **expiration** or because the record was **withdrawn** or **voided**. In each case, the workflow task “Close Out” has been completed with a relevant status. Jurisdiction staff with supervisor permissions uses the workflow “Supervisor” button to activate the “Close Out” task. “Close Out” task should be updated with a status of “Reinstated” which changes the record status to “Reinstated” and also updates the expiration date. This helps leave a paper trail for the reinstatement process. Jurisdiction staff with supervisor permissions should also use the workflow “Supervisor” button to activate the last active task in the workflow before the record was closed. Once active, the task should be updated with the last status to also update the record status.

Create Expiration List:

Option 1:

Automatic batch process that creates a list (set) of records about to expire on a routine schedule.

It looks for records with the following criteria:

- All Planning records
- Record status:
 - Skips records with the following status:
 - "Closed", "Complete", "Complete/Approved", "Complete/Denied", "Compliant", "Decision/Permit Issued", "Expired", "Final Approval", "Final Denial", "Issued", "LUCS Issued", "Pre-App Meeting Held", "Void", "Withdrawn"
- Record Expiration Date falls in the date range (today's date + 35 days in the future) **and** Expiration Letter Sent ASI date field value (current date is 60 days past the original expiration letter sent date)

All records that meet the criteria above will be added into this Record Set that includes a list of pending expiration records:

- `PENDING_EXPIRATION_RECORDS_APPLICATIONS_P: (date)`

An email will be sent to the agency with a summary of what the script processed.

Jurisdiction staff can run the "Expiration List by Set ID" report for each Record Set. Then staff has the opportunity to review both Record Sets to update expiration date and remove any record that should not be included.

Option 2:

No batch process will be used – Jurisdiction staff will manually search for records about to expire.

Send Letters to Customers:

Option 1:

Manually execute a script against a set of records that sends out warning letters.

Once the Record Sets are reviewed and updated, Jurisdiction staff will click Execute Script > Expiration_Letter_Planning for the Record Set and trigger the following actions from the system:

PENDING_EXPIRATION_RECORDS_APPLICATIONS_P:

If Applicant Email Exists

- Sends email to the applicant with letter attached and saves a copy under "Communications"
- Adds comment "Pending expiration notice to applicant emailed on current date"
- Adds current date to ASI field "Expiration Letter Sent"

If Owner Email Exists and it doesn't match Applicant email

- Sends email to the owner with letter attached and saves a copy under "Communications"
- Adds comment "Pending expiration notice to owner emailed on current date"

Adds current date to ASI field “Expiration Letter Sent”

If Applicant Email does not exists

Sends email to Agency with report named:

“2a-Pending Expiration Notices for Planning Permit Applications - Applicants Not Emailed”

Adds comment “Pending expiration notice to applicant mailed on current date”

Adds current date to ASI field “Expiration Letter Sent”

If Owner Email does not exists and mailing address does not match applicant address

Sends email to Agency with report named:

“Pending Expiration Notices for Planning Permit Applications - Owners Not Emailed”

Adds comment “Pending expiration notice to owner mailed on current date”

Adds current date to ASI field “Expiration Letter Sent”

An email will be sent to the agency with a summary of what the script processed.

Option 2:

No batch process will be used – Jurisdiction staff will manually generate and send warning letters for each record.

Method to Expire Records:

Option 1:

Automatic batch process that expires records on a routine schedule.

It looks for records with the following criteria:

- Expiration Date that matches the current date
- All Planning record types
- Skips Application Status:
 - Void
 - Withdrawn
 - C of O Issued
 - Closed
 - Finaled
 - Expired
 - Denied

It then updates the workflow:

- Deactivates the active task(s)
- Completes the “Close Out” tasks with a status of “Expired”
- Time tracking closes

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It also updates the record status:

- Record Status: Expired

And it also updates the Expiration Status found in the Record Details portlet:

- Expiration Status: Expired

An email will be sent to the agency with a summary of what the script processed.

Option 2:

Manually run a batch process against a list (set) of records that expires each record in the set.

It looks for records with the following criteria:

- All Planning record types in the set
- Expiration Date is <= to today's date.
- Record status is not already Expired

It then updates the workflow:

- Deactivates the active task(s)
- Completes the "Close Out" tasks with a status of "Expired"
- Time tracking closes

It also updates the record status:

- Record Status: Expired

And it also updates the Expiration Status found in the Record Details portlet:

- Expiration Status: Expired

An email will be sent to the agency with a summary of what the script processed.

Option 3:

No batch process will be used – Each record will be expired manually by jurisdiction staff.