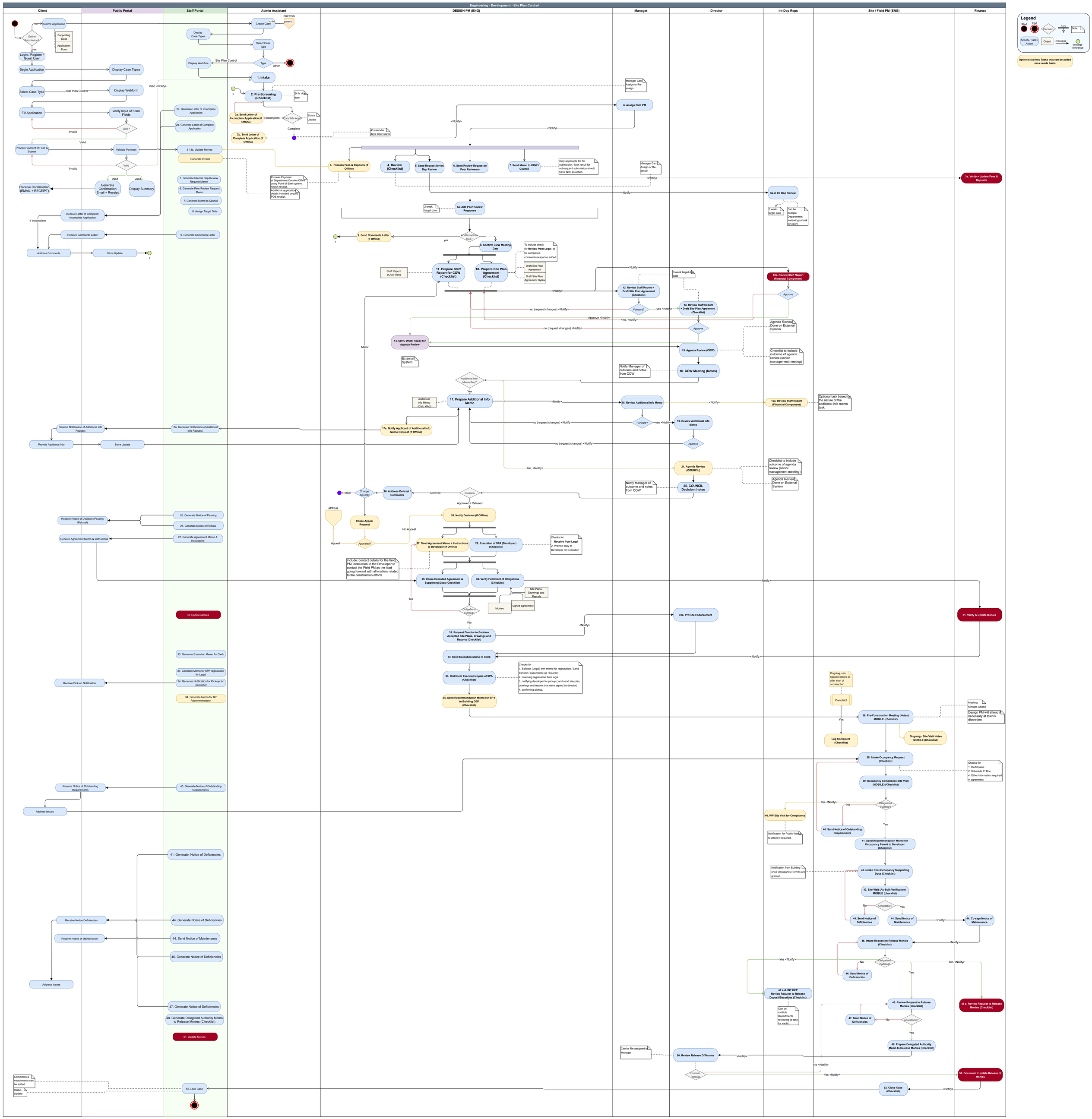
Engineering - Development - Site Plan Control
Client
Public Portal
Staff Portal
Admin Assistant
DESIGN PM (ENG)
Manager
Director
Int Dep Reps
Site / Field PM (ENG)
Finance
Legend
Start
End
Decision
Fork
Note
Activity / Task / Action
Object
message
on-page reference
Optional /Ad-hoc Tasks that can be added on a needs basis
Submit Application
Online Submission?
Supporting Docs
Application Form
Login / Register / Guest User
Begin Application
Display Case Types
Select Case Type
Site Plan Control
Display Webform
Fill Application
Verify Input of Form Fields
Valid?
Invalid
Valid
Provide Payment of Fees & Submit
Validate Payment
Receive Confirmation (EMAIL + RECEIPT)
Generate Confirmation Email + Receipt
Display Summary
Receive Letter of Complete/ Incomplete Application
if incomplete
Receive Comments Letter
Address Comments
Store Update
Create Case
PRECON parent
child
Display Case Types
Select Case Type
Display Workflow
Type
other
1. Intake
2. Pre-Screening (Checklist)
24 hr due date
2a. Send Letter of Incomplete Application (If Offline)
Incomplete
Complete App?
Status Update
Complete
2b. Send Letter of Complete Application (If Offline)
2a. Generate Letter of Incomplete Application
2b. Generate Letter of Complete Application
3 / 3a. Update Monies
Generate Invoice
5. Generate Internal Dep Review Request Memo
6. Generate Peer Review Request Memo
7. Generate Memo to Council
8. Assign Target Date
9. Generate Comments Letter
Manager Can Assign or Re-assign
6. Assign ENG PM
<Notify>
43 calendar days timer starts
3. Process Fees & Deposits (If Offline)
4. Review (Checklist)
5. Send Request for Int Dep Review
6. Send Review Request to Peer Reviewers
7. Send Memo to COW / Council
Only applicable for 1st submission. Task result for subsequent submission should have 'N/A' as option.
Process Payment at Department Counter/Office using Point of Sale system. Attach receipt. Additional application details included beyond POS receipt.
3a. Verify + Update Fees & Deposits
5a-d. Int Dep Review
2 week target date
Can be multiple Departments reviewing (a task for each)
6a. Add Peer Review Response
9. Send Comments Letter (If Offline)
Additional Info Req?
yes
8. Confirm COW Meeting Date
To include check for Review from Legal to be completed, comments/response added.
Staff Report (Civic Web)
11. Prepare Staff Report for COW (Checklist)
10. Prepare Site Plan Agreement (Checklist)
Draft Site Plan Agreement
Draft Site Plan Agreement Bylaw
12a. Review Staff Report (Financial Component)
3 week target date
12. Review Staff Report + Draft Site Plan Agreement (Checklist)
Approve
Forward?
yes <Notify>
13. Review Staff Report + Draft Site Plan Agreement (Checklist)
no (request changes) <Notify>
Approve <Notify>
<no, <notify>
Agenda Review Done on External System
14. CIVIC WEB: Ready for Agenda Review
Minor
15. Agenda Review (COW)
Checklist to include outcome of agenda review (senior management meeting)
External System
Notify Manager of outcome and notes from COW
16. COW Meeting (Notes)
Additional Info Memo Req?
Yes
17. Prepare Additional Info Memo
Additional Info Memo (Civic Web)
18. Review Additional Info Memo
12a. Review Staff Report (Financial Component)
Optional task based on the nature of the additional info memo task.
17a. Notify Applicant of Additional Info Memo Request (If Offline)
19. Review Additional Info Memo
Receive Notification of Additional Info Request
17a. Generate Notification of Additional Info Request
Provide Additional Info
Store Update
No, <Notify>
21. Agenda Review (COUNCIL)
25. COUNCIL Decision (notes
Decision
Deferred
16. Address Deferral / Comments
Change Severity
<- Major
Approved / Refused
26. Notify Decision (If Offline)
APPEAL
Intake Appeal Request
Appealed?
Appeal
No Appeal
Receive Notice of Decision (Passing /Refusal)
26. Generate Notice of Passing
26. Generate Notice of Refusal
Receive Agreement Memo & Instructions
27. Generate Agreement Memo & Instructions
27. Send Agreement Memo + Instructions to Developer (If Offline)
28. Execution of SPA (Developer) (Checklist)
Checks for 1. Receive from Legal 2. Provide copy to Developer for Execution
include: contact details for the field PM, instruction to the Developer to contact the Field PM as the lead going forward with all matters related to the construction efforts
29. Intake Executed Agreement & Supporting Docs (Checklist)
30. Verify Fulfilment of Obligations (Checklist)
Site Plans, Drawings and Reports
Monies
signed agreement
No
Obligations Fulfilled?
Yes
31. Request Director to Endorse Accepted Site Plans, Drawings and Reports (Checklist)
31a. Provide Endorsement
31. Verify & Update Monies
33. Update Monies
33. Generate Execution Memo for Clerk
33. Send Execution Memo to Clerk
34. Generate Memo for SPA registration for Legal
34. Generate Notification for Pick-up for Developer
Receive Pick-up Notification
34. Distribute Executed copies of SPA (Checklist)
Checks for 1. Solicitor (Legal) with memo for registration / Land transfer / easements (as required) 2. receiving registration from legal 3. notifying developer for pickup (and send site plan, drawings and reports that were signed by director) 4. confirming pickup.
34. Generate Memo for BP Recommendation
35. Send Recommendation Memo for BP's to Building DEP (Checklist)
Ongoing , can happen before or after start of construction.
Complaint
Meeting Minutes Added
36. Pre-Construction Meeting (Notes) MOBILE (checklist)
Design PM will attend if necessary at town's discretion.
Yes
Log Complaint (Checklist)
Ongoing - Site Visit Notes MOBILE (Checklist)
38. Intake Occupancy Request (Checklist)
Checks for 1. Certificates 2. Schedule 9" Doc 4. Other information required in agreement
Receive Notice of Outstanding Requirements
40. Generate Notice of Outstanding Requirements
39. Occupancy Compliance Site Visit (MOBILE) (Checklist)
Address Issues
Yes <Notify>
No
Obligations Fulfilled?
40. PW Site Visit for Compliance
40. Send Notice of Outstanding Requirements
Yes
Notification for Public Works to attend if required.
41. Send Recommendation Memo for Occupancy Permit to Developer (Checklist)
41. Generate Notice of Deficiencies
Notification from Building once Occupancy Permits are granted.
42. Intake Post-Occupancy Supporting Docs (Checklist)
43. Site Visit (As-Built Verification) MOBILE (checklist)
Acceptable?
No
Yes
Receive Notice Deficiencies
44. Generate Notice of Deficiencies
44. Send Notice of Deficiencies
44. Send Notice of Maintenance
<notify>
44. Co-sign Notice of Maintenance
Receive Notice of Maintenance
44. Send Notice of Maintenance
45. Intake Request to Release Monies (Checklist)
46. Generate Notice of Deficiencies
Yes <Notify>
46. Send Notice of Deficiencies
46 a-d. INT DEP Review Request to Release Deposit/Securities (Checklist)
Can be multiple Departments reviewing (a task for each)
46. Review Request to Release Monies (Checklist)
46 e. Review Request to Release Monies (Checklist)
47. Send Notice of Deficiencies
47. Generate Notice of Deficiencies
48. Generate Delegated Authority Memo to Release Monies (Checklist)
48. Prepare Delegated Authority Memo to Release Monies (Checklist)
51. Update Monies
Can be Re-assigned to Manager
50. Review Release Of Monies
No <Notify>
Execute Release
51. Document / Update Release of Monies
Comments & Attachments can be added
Status Update
52. Lock Case
52. Close Case (Checklist)