



USER GUIDE

Town of Marana
Development Services

Effective Date:

10/25/2016

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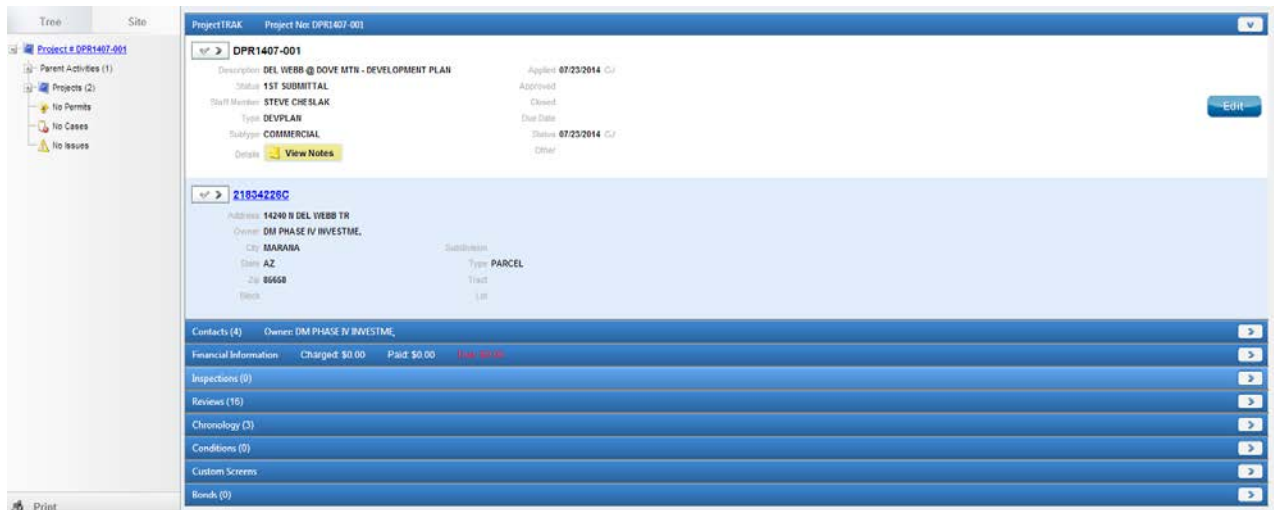
Revised 06/16/2022

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TRAKiT9 Main Status Window

This section provides general information about a project or permit and its status at a high level as part of the overall approval process. This area will be completed, maintained and verified by the project coordinators, building permit technicians and water billing specialists. **Make sure the project or permit is properly linked to the parent project, permit, address and parcel record.**



Description -

Project Module: The project name which should include the following if applicable: Block #, Phase # or Lots x-xxx, with limited use of abbreviations. The formal plat name should be listed first if it differs from a new sales name. If you are creating a sub project, the description should match the parent project.

Permit Module: Refer to department SOP for specific naming conventions. Generally if pertaining to a parent project, the permit name should include the project name.

Status - Update the status as needed throughout the approval process according to the following definitions.

- *Active* -
 - Project Module/Permit Module:** The project or permit is in the review and/or approval process.
- *Approved* -
 - Project Module:** The plans are approved by all reviewing agencies (internal & external). The plans are ready for an approval stamp or signatures.
 - Permit Module:** The plans are approved by all reviewing agencies (internal & external) and administrative items have been received. Permit fees may still remain preventing issuance.

- *Issued* –
Project Module: Not used.
Permit Module: All fees have been paid and the permit has been sent to the applicant.
 - For Occupancy Compliance applications, the final certificate of occupancy is ready for delivery.
 - For Water Meter applications, work order has been scheduled and issued.

- *Finalized* –
Project Module: Not used.
Permit Module: The permit has passed all necessary inspections.
 - For Water Meter Applications, the meter is installed.

- *Recorded* –
Project Module: If applicable, the approved plan has been recorded.
Permit Module: Not used.

- *Denied* –
Project Module/Permit Module: The project or permit is unable to be approved because it does not meet Codes/Standards or is not an allowable use.

- *Expired* –
Project Module/Permit Module: The application, plan approval, or permit has expired. A new application will be required to move forward. Refer to code or department policies for eligibility of permit extension and/or permit re-activation.

- *Inactive* –
Project Module/Permit Module: The applicant has requested to cancel their application and does not wish to continue with the approval process.

- *Void* –
Project Module/Permit Module: Only used for records created in error. All fees, reviews, inspections, etc. shall be removed from the record.

- *System Not Accepted* –
Project Module: Not used.
Permit Module: Water Meter Permits Only. Public water system has not been accepted and the water meter install request cannot be completed.

- *Permit Not Required* –
Project Module: Not used.
Permit Module: Industrial Waterwater Discharge Permits Only. Application review is complete and it was determined that a IWWD permit is not required.

- *Closed 1yr Warranty* –
Project Module: Not used.
Permit Module: RW, MW, MS and FB Permits Only

- *Closed 2yr Warranty* –
Project Module: Not used.
Permit Module: RW Permits Only

- *Closed LT Warranty* –
Project Module: Not used.
Permit Module: RW Permits Only

- *Closed No Warranty* –
Project Module: Not used.
Permit Module: RW Permits Only

Planner – **Project Module Only:** Planner’s name

Applicant – **Permit Module Only:** Auto populated field based on what is entered in the contact window as the applicant. (See Contacts Window).

Type/Subtype – **Project Module/Permit Module:** Select the appropriate option.

Details – **Project Module/Permit Module:** Brief description of the project/permit. Identify each revision and deferred submittal as shown in the example below. Note the applied date when the submittal comes in and change to the approved date when applicable.

9/14/2016 8:24:01 AM (HOPE RODRIQUEZ) SINGLE FAMILY RESIDENCE M1609-003 (M-4003) FOR BLUE AGAVE SUBDIVISION *MODEL EXPIRES 09/09/2019	✓
10/10/2016 5:09:22 PM (PAUL FROEHLKE) D-1 DEFERRED SUBMITTAL FOR TRUSS CALCS, APPROVED 10/10/2016.	✓
10/11/2016 7:27:49 AM (PAUL FROEHLKE) R-1 REVISION FOR STRUCTURAL CHANGES DUE TO TRUSS CHANGES, APPROVED 10/11/2016	✓

Applied Date – **Project Module/Permit Module:** The date is automatically populated when the record is created.

Approved Date – **Project Module/Permit Module:** The date the application is approved by all reviews (internal & external). Plans are ready for approval stamp/signature. This will update automatically on some records however, this should be verified for all.

Closed Date - Project Module Only: The date the project file is cleaned up, scanned and closed out by the planner.

Issued Date - Permit Module Only: The date the permit was issued to the applicant.

Final Date - Permit Module Only: The date of last inspection representing the completion of all proposed work and/or final sign off of the permit. No additional work or inspections can occur on this permit once finalized.

Expired Date - Project Module/Permit Module: Represents the date the project or permit expires and cannot continue without a new application.

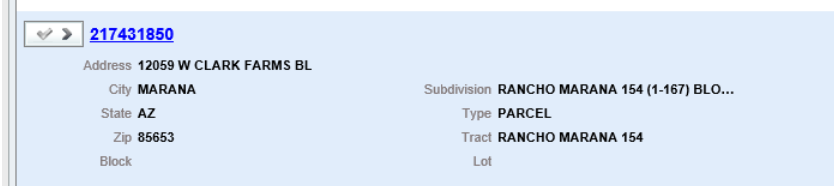
Status Date - Project Module Only: This reflects the date of status change, for example, the date of inactivity or the date of withdraw.

Canceled Date - Project Module/Permit Module: The date the permit is canceled by the applicant.

Wrnty Exp Date (in lieu of Canceled Date) - RW, MW, MS and FB permits only. The date the warranty expires. (Maintained and entered by the ROW Inspector and or the Engineering Specialist)

GEO Record - Project Module/Permit Module: Verify using GIS that the address, parcel, application and location map/site plan provided by the applicant all match. If there is a discrepancy between TRAKiT9 and the GIS information, please contact addressing for verification.

Link all projects and permits to the correct GEO record and verify the GEO record information is correctly displayed.



Note: Avoid creating duplicate GEO records. Please contact a program administrator if updates are needed to a geo record or if duplicate records are found.

For project applications, use the assigned administrative address for the associated project.

For records that pertain to locations other than parcels of land such as ROW Permits, a brief description may be used for an address. (Example: NE Intersection of Twin Peaks and Tangerine Rd.)

Entry of building number or suite numbers - Link to the main parcel number and address. Click edit on the permit/project record, and add the unit or building number as shown in the examples below. This will save the unit number to the individual record to assist with searches, without creating a duplicate GEO record.

Enter commercial suite numbers as shown below:

PermitTRAK Permit No: B1801-009

B1801-009

Description: Applied: [grid] [T]

Status: Approved: [grid] [T]

Applicant: **Marana Sign Services LLC** Issued: [grid] [T]

Type: **SIGN** Finaled: [grid] [T]

SubType: **OTHER** Expired: [grid] [T]

Details: [View Notes](#) Canceled: [grid] [T]

10105026W

Address: ←

City: Subdivision:

State: Type: **PARCEL**

Zip: Tract:

Block: Lot:

Enter building numbers as shown below:

21736004B

Address: ←

City: Subdivision:

State: Type: **PARCEL**

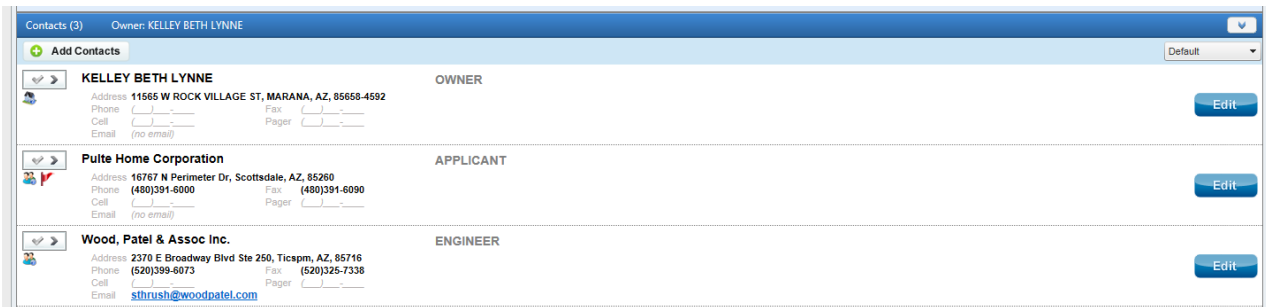
Zip: Tract:

Block: Lot:


TRAKiT9 Contacts Window

This area will be completed, maintained and verified by the project coordinators, building permit technicians and water billing specialists. Link contact(s) to an existing AEC record whenever possible.

Inspection notifications are sent to the email address entered in the “inspections” contact. An email must be added on all permits that require inspections. Contact the applicant for this information if it’s not provided on the permit application.



Edit Contact - Link contacts based on the application and according to the following definitions.

 *House Symbol* - Identifies the contact is linked to a GEO record. Used for the “Owner” contact only and will auto populate from the GEO record when the project or permit is linked to the correct parcel.

 *People Symbol* - Identifies the contact is linked to an AEC record.

Search - Use the search field to find an existing AEC record. If you find any duplicates, please notify a program administrator for cleanup.

(Search for an existing record)

Update the email and other info (contact name) as needed and click save.

Note: If any edits are made to the information a warning message will be displayed - “Would you like to update the AECTrak contact information?” **Click NO** to save changes to the permit/project only.

TRAKiT9 Financial Window

This section provides financial information on a project or permit. The project coordinators, building permit technicians and water billing specialists will add the appropriate fee(s) based on the current fee schedule. The cashier is responsible for receipting and entering the payment into TRAKiT9. The TRAKiT9 report “Account Activity Summary” and “Refunds by Date” will be used for daily balancing of the drawer.

The screenshot displays the TRAKiT9 Financial Information window. At the top, it shows 'Financial Information' with summary statistics: Charged: \$13,480.00, Paid: \$13,480.00, and Due: \$0.00. Below this is a navigation bar with icons for Add, Pay, Refund, Receipts, History, Deposits, and Un-Pay. The main area contains a table with the following data:

Description	Qty	Amount	Comments	Paid
SPECIFIC PLAN		\$13,200.00		03/19/15 CHECK
OVER 20.01 RES/DIACRE & COMMERCIAL 10023000 4424	155	\$13,200.00		
TITLE REPORT 10023000 4336		\$280.00		03/19/15 CHECK

At the bottom of the window, there is a summary bar showing: Charged: \$13,480.00, Paid: \$13,480.00, Deposit Bal: \$0.00, and Due: \$0.00.

All money transactions should be accounted for including over payments, deposits and refunds. The following are the only exceptions and are receipted directly through munis:

- Addressing for individual lot owners who do not need to apply for a project or permit. All other addressing fees should be accounted for in the appropriate project or permit whenever possible.
- Planning Department pre-application meeting
- Zoning letter
- Firework permit
- Liquor license not associated with a special event
- Business license

Note: Each fee needs to have a munis account number which should populate automatically when the fee is added. If you find a missing or incorrect account number, please notify a program administrator.

TRAKiT9 Payment Entry

The cashier is responsible for receipting and entering the payment into TRAKiT9. One payment for multiple fees should have one receipt number. This is done by adding additional projects and/or permits. Enter the project/permit number you wish to add in the search bar.

Cashiering

Search Record: Record # Contains

b1605 x Search

Load eTRAKIT Cart

Record #	Address	Unpaid Total
CRW-PROJECT	9215 N HARTMAN LN	\$300.00
Description	Amount	
SUBSTITUTE ASSURANCE 10024000 4418	\$300.00	\$300.00

Total Due: \$300.00
 Fees Selected: \$300.00
 Credits Selected: \$0.00
 Total Payment: \$300.00

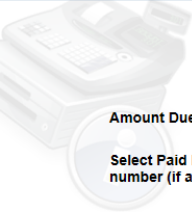
Cancel Next

When the exact project/permit number is entered the search bar, all fees due for that project/permit will be added to the list for payment.

Items can be removed by clicking on the red x.

Continue adding items through the search bar until all fees are accounted for and reflect the payment being made.

Cashiering



Amount Due: \$2,677.50

Select Paid By and Pay Method. Enter a credit card confirmation number or check number (if applicable) and click Pay to complete the transaction.

Paid By:

Pay Method: CREDIT/DEBIT CARD

Reference #:

Date: 5/17/2016 Today

Receipt #:

Paid By - If the payee is listed as a contact, pick the name from the drop down menu. If not, type in the correct name.

Paid Method - Select the correct payment method and enter additional information as described below.

- *Cash*
- *Check*
Check #: Check number
- *Credit/Debit Card*
Reference #: Credit card authorization number
- *Deposit*
- *Dept Transfer* - The project coordinators, building permit technicians and water billing specialists will complete an Internal Permit Issuance Form and submit the approved form to the cashier, along with the department name that is responsible for payment. Cashier will include the form with the end of day transactions to the Finance Department.
Reference #: Enter the department from which funds are being transferred. (Example: Marana Water) *Note: This field has a 20 character limit.*

- *Development Agmt* - The project coordinators, building permit technicians and water billing specialists will provide the cashier the applicable resolution or ordinance number with payment request.
Reference #: Enter the Resolution or Ordinance Number of the approved agreement. (Example: Resolution 2010-007 or Ordinance 2009-023). *Note: This field has a 20 character limit.*
- *IGA* - The project coordinators, building permit technicians and water billing specialists will provide the cashier with the applicable resolution or ordinance number with payment request.
Reference #: Enter the Resolution number of the approved IGA (Example: Resolution 2011-007) *Note: This field has a 20 character limit.*
- *Trust Account*
Trust Acct #: Auto fills with the trust account number based on the Payee entered. The project or permit must be linked to the correct trust account (AEC record).

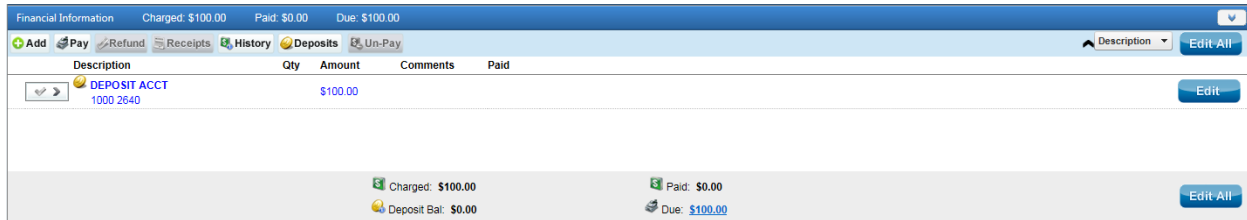
Date - This field will automatically populate with the current date.

Receipt # - This field will display "Auto" and will automatically populate a receipt number based on a sequential order.

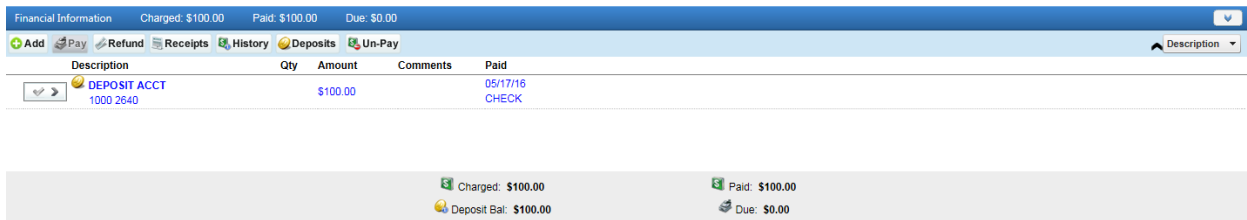
Note: Fees waived because of Town use, IGA or Development Agreements should be noted in chronology with the resolution or ordinance number. Attach the resolution or ordinance in TRAKiT9 as a record of fees being waived.

TRAKiT9 Deposits and Overpayments

Deposits can be added to a project or permit for overpayments and/or advanced payments. Utilizing this feature eliminates the need to modify fees later. Deposits should be added at the time payment is received. Upon project approval or permit issuance, any remaining funds will be refunded back to the customer. The project coordinators or permit technicians are responsible for managing this and completing the refund request if needed.

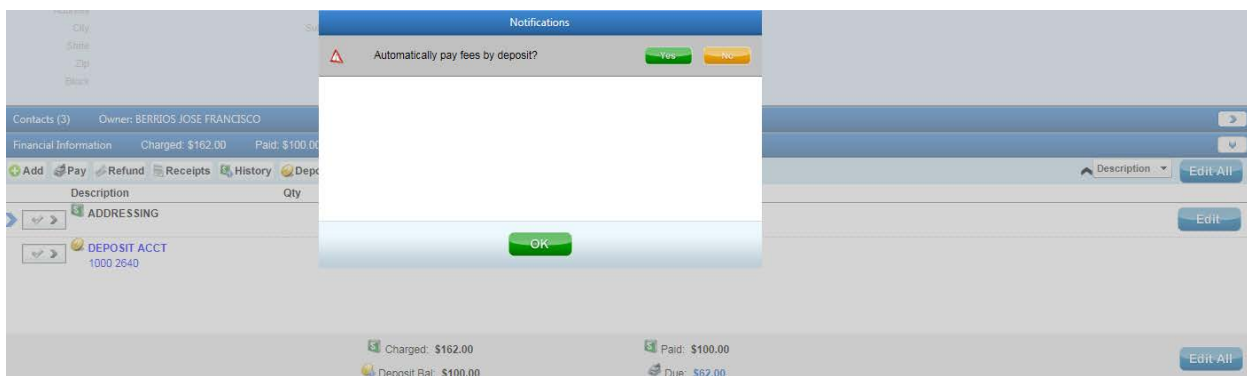


Add the Deposit - The project coordinators, building permit technicians and water billing specialists will select and add the deposit just like any other fee. Enter the amount of the deposit. It is shown as blue in the financial window.



Pay the Deposit - The cashier is responsible for receipting and entering the payment information for a deposit just like any other fee.

Using a Deposit - The project coordinators, building permit technicians and water billing specialists will add fees to the project or permit as typically done. Upon saving the fee, the following prompt will appear. Click "Yes" to use the deposit as the form of payment. The deposit is applied to fees based on the order they are listed.



(Continued on next page)

If no is selected you can do either of the following:

- Click on any unpaid fee, click edit, and click save (no actual edits need to occur). This will cause the prompt to re-appear so that yes can be selected. The deposit is applied to fees based on the order they are displayed financial window.
- Select pay for any unpaid fee, choose “Deposit” as the pay method. You can also use this if you would like to apply the deposit to a specific fee.

Description	Qty	Amount	Comments	Paid
ADDRESSING		\$62.00		05/17/16 DEPOSIT
DEPOSIT ACCT 1000 2640		\$100.00		05/17/16 CHECK

Charged: \$100.00 Paid: \$100.00 Due: \$0.00

Deposit Bal: \$38.00 Due: \$0.00

Deposit Balance – The deposit balance will update automatically as it is applied to fees. The “Paid” information will show *Deposit* to indicate the deposit balance was used for that fee item. When all deposit funds are used, the deposit balance will show \$0.00. If there is any unused deposit money remaining at the approval of the project or issuance of permit, a refund needs to be requested as soon as possible following refund procedures.

Deposits into Trust Accounts – Add a fee in the financial information window labeled as “Trust Account Deposit”. This will be paid the same as any other fee. This will generate the receipt information that links to munis.

Description	Qty	Amount	Comments	Paid
TRUST ACCOUNT DEPOSIT 1000 2640	50000	\$50,000.00		05/12/17 CHECK

Charged: \$50,000.00 Paid: \$50,000.00

Deposit Bal: \$0.00 Due: \$0.00

Chronology (0)

License Information Registration #: 249191 Expiration: 9/30/2018

Insurance (0)

Trust Account (198) Account #: CTA2480098T Balance: \$50,903.18

Add Items

\$30,000.00 Initial Trust Account Deposit

Paid by: Mattamy Tucson LLC Date: 4/16/2015 (R51) Receipt #: 32474 (Check)

(\$301.00) B1502-130 32519

Paid by: Date: Receipt #:

In the trust account window, click add items. Use the receipt information from above to enter the deposit. This will add the money to the trust account balance in TRAKiT9.

TRAKiT9 Refunds

This window is used to enter refunds. All refunds need to be accounted for and entered on the correct project or permit record after the department manager has approved the refund. The project coordinators or permit technicians are responsible for completing the paperwork, obtaining approval and entry in TRAKiT9. For trust account payments, use the trust account refund request form and for all other payment types, use the check request form.

The approved refund request form is provided to the cashier the same day as entry into TRAKiT9. The cashier will be forwarded to paperwork to finance with their end of day transactions for issuance of a check.

Do not use “apply credit” for refunds or any other financial transactions.

Refund Amount - Verify the munis account number(s) that require the refund prior to adding the refund in TRAKiT. Ensure the correct refund amount is being applied to the correct munis account number(s) when entering the refund.

B1601-012
Total Paid \$13,922.27

Account#	Amount	Refund Amount
10022000 4303	\$5,551.27	3500.00
31600000 4345	\$2,461.00	2461.00
36643000 4339	\$5,599.00	5599.00
10021000 4481	\$12.00	
10023000 4336	\$40.00	
1000 2018	\$259.00	

Refund to: Maracay Homes Arizona LLC
 Refund Method: CHECK
 Check #:
 Date: 5/16/2016
 Reason: Refund - Permit Canceled
 Receipt #: 35668
 Total Refund: 11560.00

Buttons: Refund, Cancel

Note: The fee must be associated to an account number in order to be refunded.

Refund to - Company or person receiving the refund.

Refund Method - Select Check or Trust.

Check # - Leave blank.

Date - The date of entry which should also represent the date the request is approved and submitted to finance.

Reason - A brief description explaining what the refund is for. Always start with “Refund”. Example: Refund - Overpayment or Refund - Permit Canceled

Receipt # - This field will display “Auto” and will automatically populate a receipt number based on a sequential order.

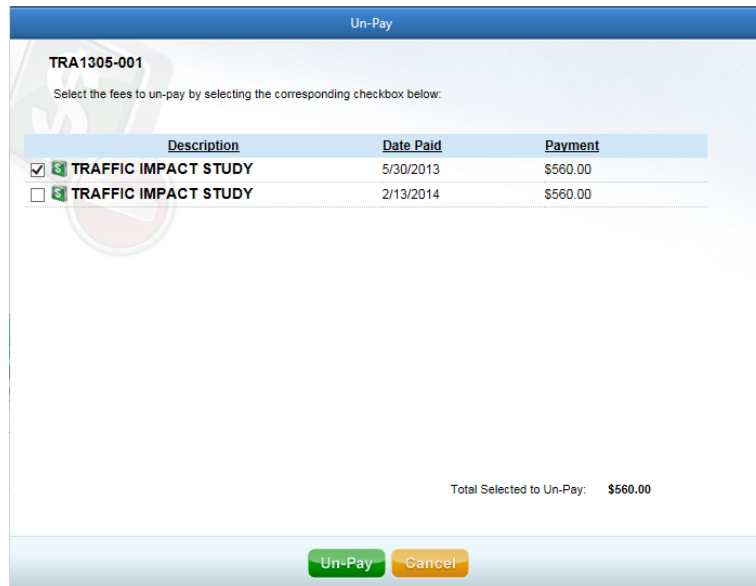
When the refund entry is complete in TRAKiT9, attach the following as a pdf and give to finance for final processing:

- Original receipt noting which fees are being returned
- Approved check request/trust account refund form
When refunding **deposits**, use distribution account 1000 2640
When refunding **trust account payments**, use distribution account 1000 2640
When refunding **cash or check payments**, use distribution account 1000 2020
- Any additional back-up documentation such as a cancelation request, etc.

TRAKiT9 Un-pay

This feature is used to reverse or void a transaction. This will erase all payment information, including the receipt number. Be sure to print a receipt prior to selecting un-pay if documentation is needed.

Note: Select only the items you wish to un-pay. This feature should only be used for same day transactions unless directed otherwise by the Finance Department.



Un-Pay

TRA1305-001

Select the fees to un-pay by selecting the corresponding checkbox below:

	Description	Date Paid	Payment
<input checked="" type="checkbox"/>	TRAFFIC IMPACT STUDY	5/30/2013	\$560.00
<input type="checkbox"/>	TRAFFIC IMPACT STUDY	2/13/2014	\$560.00

Total Selected to Un-Pay: \$560.00

Un-Pay Cancel

If an un-pay is completed the same day:

- No further action is required

If an un-pay is completed on a previous day's transaction:

- Print original receipt prior to completing the un-pay
- Complete un-pay in TRAKiT9
- Process corrected payment
- If corrected payment is going into a different munis account, complete a journal entry. Include the original receipt and the new receipt with the journal entry request.

TRAKiT9 Returned Checks

The Finance Department will notify the project coordinator or permit clerk if a check has been returned unpaid or canceled. The project coordinators, building permit technicians and water billing specialists are responsible for the following:

Follow-up with the applicant if needed, and determine the best course of action based on the circumstances surrounding the returned check.

- *Option 1-* Un-pay the fee and leave as an open balance to be collected. Also, add the return check fee of \$25.00. The original receipt and returned check should be attached to the permit/project as a way to document what has happened and for future reference. A chronology note can also be added to document what has happened.
- *Option 2 -* Un-pay and delete the fee because the customer has canceled the project or permit and does not wish to continue with the application process. Still try to collect the return check fee of \$25.00.

Note: Please be careful to only un-pay or delete the appropriate item and not everything. This feature should only be used for same day transactions unless directed otherwise by the Finance Department.

The screenshot shows a web interface titled "Un-Pay" for project "TRA1305-001". It prompts the user to "Select the fees to un-pay by selecting the corresponding checkbox below:". A table lists two "TRAFFIC IMPACT STUDY" fees. The first, dated 5/30/2013 for \$560.00, is selected with a checked checkbox. The second, dated 2/13/2014 for \$560.00, is not selected. A "Total Selected to Un-Pay: \$560.00" is displayed at the bottom right. At the bottom of the interface are two buttons: "Un-Pay" (green) and "Cancel" (orange).

	Description	Date Paid	Payment
<input checked="" type="checkbox"/>	TRAFFIC IMPACT STUDY	5/30/2013	\$560.00
<input type="checkbox"/>	TRAFFIC IMPACT STUDY	2/13/2014	\$560.00

Total Selected to Un-Pay: \$560.00

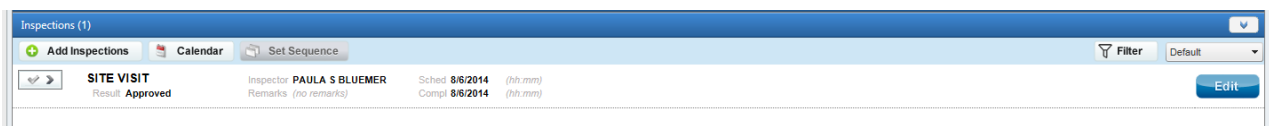
Notify the cashier as to which action should be taken. Attach the original receipt and returned check to the correct project or permit. Add a chronology note to document what has happened.

TRAKiT9 Inspection Window

Required inspections and the results are tracked in this section. Inspections can be scheduled online through eTRAKiT, by a permit technician or an inspector. Each inspector will be responsible for completion and entry of their inspection results.

Inspection results are emailed automatically as soon as the inspection is resulted to the email address entered in the “inspections” contact.

Note: All inspection information is available to the public. Be aware of notes added. They should be brief and relevant to the task being completed. Use professional and customer appropriate language.



Inspection Type - Select the appropriate option.

Inspector - The default is set at permit creation based on region by the permit technicians. Inspectors will re-assign based on route assignment and/or upon completion of the inspection.

Schedule Date - Date inspection is scheduled.

Schedule Time - Time of inspectors arrival, to the nearest half hour.

Duration - Total time it took to complete the inspection, to the nearest quarter hour.

Result - Update result status according to the following definitions.

- *Approved*- The inspection is approved with no additional changes required.
 - Meter releases are only sent for approved results to the utility companies.
 - A request to print and process a TCO or CO are only sent for approved results to the permit technician.
- *Approved as Noted* - The inspection is approved with minor comments that do not warrant any further inspection. The inspector **trusts** that the contractor will address the comments without verifying they are complete.
- *Partial Approval*- The work is being completed in phases. Approval of work to a certain point is noted allowing the contractor to move forward. Additional inspection(s) are required as the work continues until a full approval is issued.

- *Not Approved* - The inspection is not approved and additional information or changes are required.
- *Canceled* - The inspection was canceled after being scheduled.
- *Site Visit Completed* - Used for investigative/verification type site visits that are not related to code compliance.

Remarks - Enter any special requests from the applicant such as time of day for inspection. A note can be added if more space is necessary.

Completion Date - Date the inspection was completed. Automatically updates when results are entered, however the inspectors should verify this.

Completed Time - Time of inspectors departure, to the nearest half hour.

TRAKiT9 Review Window

This section is used to provide information about the review status. Initial setup of this area will be done by the project coordinators, building permit technicians and water billing specialists. Each reviewer is responsible for completion of their individual review and should attach their comment letter when complete. Outside agency reviews are managed by the project coordinators, building permit technicians and water billing specialists. All reviews are done concurrently.

Note: All review information entered is available to the public. Be aware of notes added. They should be brief and relevant to the task being completed. Use professional and customer appropriate language. If a more detailed note is required, an attachment should be created (See Attachment Guidelines).

Group	Reviewer	Remarks	Sent	Due	Returned	Action
Marana Dev. Eng Group: DIST LIST 3-8-11 Status: Approved	GUS MYERS	Sub 1	9/1/2014	9/22/2014	9/22/2014	Edit
Marana Planning Group: DIST LIST 3-8-11 Status: Not Approved	SHANNON SHULA	Sub1	9/1/2014	9/22/2014	9/22/2014	Edit
Marana Planning Group: MARANA Status: Approved	SHANNON SHULA	Sub 2	11/17/2014	12/2/2014	12/2/2014	Edit

Sent Date - Represents the date the review was routed to each department for assignment and review.

Due Date - Represents the date comments or approval are due. All reviews should be completed and attached by this date. Day 1 of the review is the day after the sent date. Example: Sent date is Monday 11/11, day one of the review is Tuesday 11/12.

Returned Date - Represents the date comments or approval are completed and attached. Each reviewer is responsible for updating their returned date and attaching their comment/approval letter.

Reviewer - Select the appropriate reviewer name (if known) when submittal is assigned. See below for third party reviewers.

Remarks - Enter the project/permit submittal number, based on the following, when submittal is assigned.

- *Sub 1 = Submittal 1*
- *Rev 1-Sub 1 = Revision 1 Submittal 1 (used for revisions to an approved plan only)*

Group Name - This will default based on the list selected. Example: Building Permit, ROW Permit or Deferred Subs.

Status - Updated when the review is complete according to the following definitions:

- *Reviewed for Compliance* - **Project Module/Permit Module**: The review is approved with no additional changes required.
- *Corrections Required* - **Project Module/Permit Module**: The review is not approved and additional information or changes are required.
- *No Response* - **Project Module/Permit Module**: A response was requested but was not received. The project coordinator or permit clerk will make this selection if needed.
- *Canceled* - **Project Module/Permit Module**: The review is being canceled prior to completion of the review. The project Coordinator or permit clerk will make this selection if needed at the request of an applicant or manager.

Documenting a Revised Comment Letter: When comments are revised, leave the initial return date and add a note to the review window “Comments revised [Date]” (Example: Comments revised 8/25/2016). The date on the revised comment letter should match the date of revision. Attached the revised comment letter and name it accordingly (Sub 1 Review Planning Revised).

Third Party Reviewers: Used anytime a review is sent out to a third party reviewer by the Town, to complete a review on the Town’s behalf. The review type will remain as the appropriate Town of Marana review, i.e. Marana Building. Select “Third Party” as the reviewer’s name and add where the review was sent in the remarks field, i.e. Stantec. See the highlighted example below.

Reviews (4)					
Add Reviews					
<input type="checkbox"/>	ADMINISTRATIVE	Reviewer (no reviewer)	Sent	3/14/2018	
<input checked="" type="checkbox"/>	Group AUTO	Remarks (no remarks)	Due	(mm/dd/yyyy)	
	Status (no status)		Returned	(mm/dd/yyyy)	
<input type="checkbox"/>	MARANA BUILDING	Reviewer THIRD PARTY	Sent	3/14/2018	
	Group AUTO	Remarks Sub 1-Stantec	Due	3/28/2018	
	Status (no status)		Returned	(mm/dd/yyyy)	
<input type="checkbox"/>	MARANA DEV ENG	Reviewer GUS MYERS	Sent	3/14/2018	
	Group AUTO	Remarks Sub 1	Due	3/28/2018	
	Status (no status)		Returned	(mm/dd/yyyy)	

Administrative Reviews: The **checklist** feature is utilized to track administrative items required prior to approval and permit issuance. It is the reviewer’s responsibility to keep the checklist up to date and verify all items are addressed prior to permit issuance.

Use the green checkmark to update the list and review status. "Edit" is used to select the reviewers name only on reviews that contain a checklist.

Select the appropriate status of each item in the checklist (Pass, Fail or N/A). Click "Apply" to save changes. Then "ok" to close. This will automatically update the review status and completion date.

Item	Status	Last Updated	Notes	Details
Address	Pass	CHRISTEN BILOW 5/31/2022		
Sewer Receipt	Pass	CHRISTEN BILOW 5/31/2022	P19WX00324	
Contractor Town Business License	Pass	CHRISTEN BILOW 5/31/2022		
Bond Exception Certificate	Fail	CHRISTEN BILOW 5/31/2022		
MUSD Receipt	NA	CHRISTEN BILOW 5/31/2022		
Contractor State License	Pass	CHRISTEN BILOW 5/31/2022		
Impact Fees	Fail	CHRISTEN BILOW 5/31/2022		
Approved Master Plan Review	Pass	CHRISTEN BILOW 5/31/2022		

TRAKiT9 Chronology Window

This section is used to provide a more detailed look at a project or permit as it relates to the overall approval process. The information will tell the story of steps taken throughout the project or permit process. This area will be completed and maintained by all TRAKiT9 users as applicable.

Note: The following chronology window will be accessible to the applicant online in the near future. Be aware of notes added. They should be brief and relevant to the task being completed. Use professional and customer appropriate language. This cannot be stressed enough. If a more detailed note is required, an attachment should be created.

Chronology (4)			
Add Actions		Schedule Event	
	Staff	Action	Completed Date
Sub 1 In/Routed	CHRISTEN BILOW	1/5/2015 Compl: 1/6/2015	Edit
Sub 1 Complete	CHRISTEN BILOW	2/2/2015 Compl: 1/27/2015	Edit
Correspondence to/from	CHRISTEN BILOW	1/29/2015 Compl: 3/11/2015	Edit
Mylar/Final Submittal	CHRISTEN BILOW	3/13/2015 Compl: 3/11/2015	Edit

Action Date - Represents the date the action took place or is scheduled to take place. Refer to the specific action item below for more details.

Completion Date - Represents the date the action is completed. Update the notes section for progress updates or pertinent information regarding the task Refer to the specific action item below for more details.

Staff - The person responsible for completing the action.

Action Item - Select the appropriate item based on the following definitions.

- *Sub (#) In/Routed* -
Project Module/Permit Module: Represents the submittal being received, processed, entered into TRAKiT9 and routed for review.
Action: The date the submittal was received.
Compl: The date the submittal was routed for review.
Note: Anything special or unusual about the routing, pending items, requests for additional information or anything pertaining to a delay.
- *Sub (#) Complete* -
Project Module/Permit Module: The submittal has been reviewed and comment or approval letter has been sent to the applicant.
Action: The date the reviews are due (Based on review timeframes).
Compl: The date the review was completed and customer was notified.
Note: Anything pertaining to a delay, such as missing comments, or a reminder request for lagging responses.

- *Rev (#) Sub (#) In/Routed –*
Project Module/Permit Module: Represents a submittal for a revision to an accepted plan being received, processed, entered into TRAKiT9 and routed for review.
Action: The date the submittal was received.
Compl: The date the submittal was routed for review.
Note: Anything special or unusual about the routing, pending items, requests for additional information or anything pertaining to a delay.

- *Rev (#) Sub (#) Complete –*
Project Module/Permit Module: The revision to an accepted plan has been reviewed and comment or approval letter has been sent to the applicant.
Action: The date the reviews are due (Based on review timeframes).
Compl: The date the review was completed and customer was notified.
Note: Anything pertaining to a delay, such as missing comments, or a reminder request for lagging responses.

- *Over the Counter –*
Permit Module: Represents a submittal being received, processed and reviewed at the counter.
Action: Date of entry
Compl: Date completed (same as entry)
Note: Anything special or unusual about the project or permit

- *Approved Distribution –*
Project Module/Permit Module: The approved project plan or permit is processed, signed, scanned, and distributed to the applicant.
Action: Date approval stamp or signature is requested
Compl: Date completed.
Note: When document is sent to customer and any information pertaining to a delay in processing.

- *Inactive/Canceled –*
Project Module/Permit Module: Represents a withdrawn or canceled application.
Action: The date the cancellation request was received by the applicant
Compl: The date the cancellation request was received
Note: The reason for the cancellation and who made the requested.

- *Extension Request –*
Project Module/Permit Module: Represents a request to extend a permit being received, reviewed, processed and updates sent to the customer.
Action: Date request was received.
Compl: Date completed and results sent to the customer.
Note: Result of review and/or anything special or unusual about the request.

- *Notes –*
Project Module/Permit Module: Any important information pertaining to the project or can be used as a reminder to document a need to follow-up. If it relates directly to any of the other defined action items, than add it to the notes for that action item in-lieu of adding a notes action.
Action: The date current date
Compl: The date current date or this can remain open for the duration of the review process – just be sure it is closed out when the project/permit is approved.
Note: Multiple entries should be completed under the same action item by adding a new note. Each note will be date/time stamped with the user’s ID.

- *Correspondence to/from –*
Project Module/Permit Module: Any important correspondence that occurs. If it relates directly to any of the defined action items above, add it to the notes for that action item in-lieu of adding a correspondence action.
Action: The date original correspondence took place
Compl: The date correspondence regarding the topic was concluded. This could be the same day. This can remain open for the duration of the review process and should be closed out when the project/permit is approved.
Note: The type of correspondence, person(s) involved, a description and any action required. Multiple entries should be completed under the same action item by adding a new note. Each note will be date/time stamped with the user’s ID.

- *Temp Certificate of Occupancy –*
Permit Module: Represents a request being received (by inspection result notification), reviewed, processed and issued to the customer.
Action: Date request was received.
Compl: Date certificate is processed, singed, printed, filed and distributed.
Note: When document is sent to customer and any information pertaining to a delay in processing.

- *Certificate of Occupancy –*
Permit Module: Represents a request being received (by inspection result notification), reviewed, processed and issued to the customer.
Action: Date request was received.
Compl: Date certificate is processed, singed, printed, filed and distributed.
Note: When document is sent to customer and any information pertaining to a delay in processing.

- *Expired* –
Project Module/Permit Module: Represents a record that has expired.
Action: The date of status change.
Compl: The date of status change.
Note: Document any attempted correspondence with the applicant regarding the status change. Also document action taken on fees and records.

- *RFI* –
Project Module/Permit Module: Represents a request for information being received, reviewed, processed and sent to the customer.
Action: Date request was received.
Compl: Date completed and information sent to the customer.
Note: Anything special or unusual about the request.

- *Deferred (Type of Submittal) Sub In/Routed* –
Permit Module: Represents a deferred submittal being received, processed, entered into TRAKiT9 and routed for review.
Action: The date the submittal was received
Compl: The date the submittal was routed for review
Note: Note which document is being submitted (i.e. Fire Sprinkler). As additional deferred submittals are received, add a note with the document type in lieu of adding a new action. Also, include anything special or unusual about the routing, pending items, requests for additional information or anything pertaining to a delay.

- *Deferred (Type of Submittal) Sub Complete* –
Permit Module: The deferred submittal has been reviewed and comment or approval letter has been sent to the applicant.
Action: The date the reviews are due (Based on review timeframes).
Compl: The date the review was completed and customer was notified.
Note: Note which document (i.e. Fire Sprinkler) and anything pertaining to a delay, such as missing comments, or a reminder request for lagging responses or any additional items needed to issue a permit such as sewer card. Add a note for each new deferred submittal in lieu of adding a new action.

- *Monitoring Report* –
Permit Module: For Industrial Wastewater Discharge permits, send applicant the form if they have not submitted it on their own.
Action: Set to 1 month prior then due date. Reports are due 7/28 & 1/28
Compl: Date the letter & form was received from the applicant
Note: The date reminder notification was sent to the applicant, date report was received and status.

- *Mylar/Final Submittal –*
Project Module: Represents a project Mylar or report being approved, processed, entered into TRAKiT9 and signed. This will also be used for receipt of final approved documents, like a specific plan.
Action: Due date (4 days after Mylar was received or after approval of required Commission/Council Action)
Compl: Date completed
Note: When Mylar/document is received, routed for signature, signed and any information pertaining to a delay

- *Records Center –*
Project Module: The plan and/or report is sent to Records Department for scanning and to request any required copies. This is used only if the request is made separately and not included in the normal electronic distribution.
Action: Date request is sent
Compl: Date request is completed
Note: Anything special or unusual about the routing or anything pertaining to a delay

- *Recordation –*
Project Module: If applicable represents recordation of a document.
Action: Target date (Friday following council meeting)
Compl: Date recorded
Note: When document is sent to the Clerk’s Office for recording, the date and sequence number when recorded, and when the document is returned from the Clerk’s office

- *As-Built Submittal –*
Project Module: Represents an as-built plan being processed, entered into TRAKiT9 and scanned.
Action: The date the as-built plan is received
Compl: Date the plan is processed – scanned, copied and distributed
Note: When routed for scan, and distribution of plans. If a Mylar, note when ready for customer pickup

- *Public Hearing Notification –*
Project Module: If public hearing notification is required.
Action: 15 days prior to the scheduled public meeting date
Compl: Date of actual notification
Note: Type and place of publication

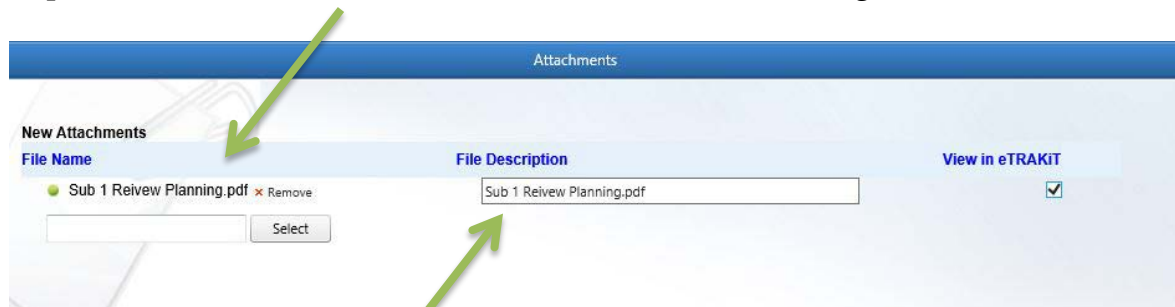
- *Board of Adjustment* –
Project Module: If BOA action is required.
Action: Scheduled meeting date
Compl: Date of actual meeting
Note: The meeting outcome
- *Planning Commission* –
Project Module: If Commission action is required.
Action: Scheduled meeting date
Compl: Date of actual meeting
Note: The meeting outcome
- *Town Council* –
Project Module: If Council action is required.
Action: Scheduled meeting date
Compl: Date of actual meeting
Note: The meeting outcome, note any ordinance or resolution number
- *Annual Report Notification* –
Project Module: For specific plans, send applicant the form if they have not submitted it on their own.
Action: Set to 11 months from the approval date for the Specific Plan
Compl: Date the letter & form was received from the applicant
Note: The date, notification was sent to the applicant and to whom
- *Cultural Documents (Class I Survey, Class III Survey, Mitigation Plan, Mitigation Plan Results, Monitoring Plan, Monitoring Plan Results, Data Recovery Plan, Data Recovery Plan Results, Testing Plan, Testing Plan Results)* –
Project Module: Represents the document being received, reviewed & processed.
Action: Date document was received.
Compl: The submittal has been reviewed and comment or approval letter has been sent to the applicant.
Note: When document is sent to customer and any information pertaining to a delay in processing.
- *Cultural Certificates (Certificate of No Effect, Certificate of Appropriateness, Certificate of Approval)* –
Project Module: The certificate is processed, scanned, distributed as needed.
Action: Date request was received/started.
Compl: Date certificate is processed, signed, printed, filed and distributed.
Note: When document is sent to customer and any information pertaining to a delay in processing.

TRAKiT9 Attachment Guidelines

Attach only PDF's or images for photos.

Note: Attachments are accessible to the public online. Use professional and customer appropriate language in all attachments.

File Name - Visibility is affected when the file name contains special characters. Commonly used characters are # : + , & () and should be avoided. If a file name contains a special character, the file must be renamed before attaching to the record.



File Description - Change the description to follow the naming conventions listed below. Avoid using acronyms and abbreviations.

- *[Document Name]*
- *Sub [#] [Document Name]*
- *Sub [#] Review [Department Name]*
- *Sub [#] Review [Report Name]*

Examples

Application
 Approved Distribution
 Fees Paid
 Rev1 Sub 1 Comments to Applicant
 Rev1 Sub 1 Distribution
 Rev1 Sub 1 Review Traffic
 Sub 1 Distribution
 Sub 1 Comments to Applicant
 Sub 1 Plans
 Sub 1 Review Building
 Sub 1 Review Building Revised
 Sub 1 Review Dev. Engineering
 Sub 1 Review Geotech
 Sub 2 Distribution
 Sub 2 Review TEP

Documents Viewable Online in eTRAKiT - Reviewers will make their comment letters viewable to the public in the online portal. This is done while the document is being attached to the record. Check the box under “**view in eTRAKiT**” and then click save.

The screenshot displays the 'Attachments' interface. The top section, 'New Attachments', contains a table with columns for 'File Name', 'File Description', and 'View in eTRAKiT'. A single entry is shown: 'Sub 1 Reivew Planning.pdf' with a checked checkbox. Below this is a 'Manage Attachments' section with a table listing existing attachments. Each row includes a PDF icon, a quantity of 1, a title, a description, a date, a user name, and an 'eMarkup' button. A 'Save' button and a 'Cancel' button are located at the bottom of the interface.

File Name	File Description	View in eTRAKiT
Sub 1 Reivew Planning.pdf	Sub 1 Reivew Planning.pdf	<input checked="" type="checkbox"/>

Icon	Quantity	Title	Description	Date	User	Action
	1	Application	Application CUP1710-001.pdf	11/1/2017	DAWN JACOB	eMarkup
	1	Fees Paid	Mobilite Receipt CUP001.pdf	10/31/2017	MELANIE STOUGH	eMarkup
	1	Sub 1 Distribution.pdf	Sub 1 Distribution 001.pdf	11/1/2017	DAWN JACOB	eMarkup
	1	Sub 1 Review Addressing.pdf	CUP1710-001 Wireless Small Cell fo...	11/1/2017	CHRISTEN BILOW	eMarkup

This icon will show next to any attachment that is viewable to the public online.



TRAKi9 Modification Request Form

Name:	Date:
Department:	Project/Permit Number(s):
Request Type: <input type="checkbox"/> Add <input type="checkbox"/> Remove <input type="checkbox"/> Change/Correction	
Description:	
Department Benefits:	
DSC Benefits:	
Director's Approval: _____	Date: _____
FOR OFFICIAL USE ONLY	Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No
Reviewed By: _____	Date Implemented: _____
Comments: _____	Date Tested: _____

Refund Example - Check Request



Town of Marana

Finance Department

Check Request

CR Number:	
Date:	m/dd/yyyy
Requesting Dept:	Department
Dept. Contact:	Name
Phone/Ext.:	1234
Vendor No.	

Vendor:
WLB

Send Checks To:
The WLB Group
Linda Thompson
4444 E Broadway Blvd
Tucson, AZ 85711

Description	Invoice No.	Amount
Deposit of Overpayment	43834	\$500.00
Landscape Review Fees for Riverside Plaza	43834	\$300.00
Total Amount:		\$300.00

DISTRIBUTION		Special Handling Instructions
ORG CODE OBJECT PROJECT	Amount	
1000 2020 - for a deposit refund	\$500.00	Check to be picked up by: _____
1000 2020 - for a fee refund	\$300.00	Attachments to be sent _____ Yes
		Wire Transfer <input type="checkbox"/>
		Cashier's Check <input type="checkbox"/>
		Financial Services Use Only:
		Dated/Entered: _____
	Total: \$800.00	

Department Approval By: _____	Financial Services Approval By: _____

Refund Example -
Trust Account



TOWN OF MARANA

INTERNAL CHARGE FORM

TRUST ACCOUNT REFUND REQUEST

Date of Request: _____ m/dd/yyyy

Requested by: _____ Clerk Name

Project Number: _____ B1611-022

Project Description: _____ Inground Pool

Finance Use Only:

Journal Entry No.

Trust Acct Number | CTA032554 - Patio Pools & Spa

Permit Payment Information:

MUNIS ACCOUNT CODE:	REVENUE DESCRIPTION:	RECEIPT CODE:	AMOUNT:
10022000 4336	Miscellaneous	43834	\$ 50.00
Total:			

MUNIS ACCOUNT CODE:	EXPENSE DESCRIPTION:	AMOUNT:
1000 2640		\$ 50.00
		-
		-
Total:		\$ 50.00

Department Approval: _____

Finance Approval: _____