CMR or AEVR
Internal Design Guide

City of San Antonio

Last Modified Date: 2/2/23

JIRA: BSAR2-54684

Revision History

Version No	Date	Prepared by / Modified by	Significant Changes
0.0.1	01/30/2023	Caryn Moore	Initial Draft
1.0.0	02/06/2023	Caryn Moore	Final Draft

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Document Purpose

The purpose of the document is to provide staff with an understanding of the design, functionality and constraints with the CMR/AEVR Request from the Accela Online Portal (used by the external customers) and Accela Civic Platform (AKA: Back-office) functionality (used by Intake and Plan Reviewers).

This document does not provide step by step instructions for submitting or processing this application or its permits.

The intent is to provide enough resources and knowledge to help Staff in problem solving and reporting issues and/or incorporating functional low impact workarounds to help improve their support to our customer and their business process.

HELPFUL HINT: Throughout this document will be links to other sections or external documents that allows you easy navigation to that section or that document. Simply hold the CTRL key down and using your mouse, click on the name. These can be visually identified by the field being in a Blue and Underline format and once clicked will turn Red and Underline format.

Overview of the CMR/AEVR Record

The CMR/AEVR Request is a record for the customer to request administrative reprieve from sections of the code that are routinely modified or to appeal administrative decisions by submitting Variances to Planning Commission (IB124).

Property Information Requirements

Address or Parcel is required: The property information is required for a Commercial Project Application. If the User fails to enter either an address or parcel, they will be prevented from submitting the Application and receive the following message:

You must provide an Address or a Parcel for this application.

Property must be within City Limits or with SA ETJ: When the user enters the Address or Parcel, the system queries the city GIS information (i.e. One-Stop Map). If the address is found outside City Limits or not with the SA ETJ, the User will receive the following message:

A permit is not required from the City of San Antonio since the property is located outside our jurisdiction."

When the address/parcel is accepted (and after submission), the property attributes (i.e. Overlays, Jurisdiction etc) are copied and viewable in Custom Lists of the Application.

How to lookup Address or Parcel Info:

- Refer to BuildSA - Address Best Practices document for Search Best Practices instructions
- Refer to TBD for Processing Steps for looking up an address or Parcel in the ACA Online Portal
- Refer to TBD for Processing Steps for looking up an address or Parcel in the AA Backoffice

Contact Information Requirements

When submitting the CM/AEVR request, the only contact required is the name and email address of the Applicant submitting the request.

Other Contacts are available to add prior to submission of the Application or after by use of the Add/Remove Contact amendment.

Refer to BuildSA – Contact Searching Best Practices document for Search Best Practices instructions

Refer to Delegate Management Guide document for Delegates of other ACA Accounts and their authorization.

Custom Field Design

For the CM/AEVR request the fields displayed and required for the customer to complete are defined by the request type.

When the customer selects the Request Type of Administrative Exception Variance Request (AEVR), they will be prompted to provide the type of variance they are requesting.

- Barbwire Fencing
- Bike Lane
- Drainage *Coming Soon!*
- Driveway
- Floodplain *Coming Soon!*
- Irrigation
- Landscape
- Sidewalk
- Streets
- Traffic
- Tree
- Other

Depending on the type requested, will drive who will be assigned to the Technical Review for AEVR (Refer to 'Technical Review – AEVR' section for additional details)

When the customer selects the Request Type of Code Modification Request (CMR), they will be prompted to provide the type of modification they are requesting.

- Building
- Electrical
- Fire
- Mechanical
- Plumbing
- Other

These types are all informational and are not used by the system.

Once the user has indicated their request type and variance/modification type, both will be prompted to provide the following information:

- Land Use:
- Occupancy Group:
- Code Issue:
- Code Section:
- Ordinance Year:
- Project Acreage:
- Is this request related to an in-process application, permit or plat?

All these field above are informational and are not used by the system.

If the user indicates their request is related to an existing application, plat or permit in Accela, the system will prompt the user to provide the Record ID.

There are no system checks to determine if it is a valid number. However, if it is valid, the system will link this record to the CMR/AEVR request as a Child to the request. This can be seen in the 'Related Records' Tab of the CMR/AEVR request after submission.

Internal Use only Custom Fields

The below are fields available for staff to enter information based on their review of the request. These fields are also information only and not used by the system.

- Planning Commission or Administrative:
- Is there Hardship?
- Hardship Description:
- Variance %:
- Impact
    - ESA
    - Flood Plain
    - Heritage
    - Large Significant
    - Small Significant
- Dollars Into Fund:
- Staff Comments:
- Preservation Method:
- Mitigated above Code:

Document Requirements

When the user is entering their request, they will be provided the opportunity to upload documents before they submit their request. Below is a list of document types they can upload.

- AEVR/CMR Supporting Documents
- Hardship Letter
- Original Application

- Site Plan Exhibit
- Other Document

If their request is for AEVR type variance, they will be required to upload both the Hardship Letter and the Site Plan Exhibit before they are allowed to submit.

If their request is for CMR, then the user is not required to upload any documents.

Fee Requirements

There is only one application fee required to be paid before the Review for the request will be started. The fee is a flat $350.00 and is systematically invoiced based on the type of request

- Administrative Exception Variance Request Fee – GL/IO: 4202955-229000000000
- Administrative Exception Code Modification Request Fee – GL/IO: 4202969-229000000017

Both fees qualify for refund and is determined only by the COSA Staff

Application Workflow Design

The application workflow is broken up by Completeness, Technical Review and Committee Review tasks for each of the request types (CMR or AEVR). Intake is auto-closed upon submission and Fees Due is auto-closed if submitted from ACA but activated when submitted from AA. The rest of the workflow is only activated after the custom pays the required application fee.

- Intake
- Fees Due
- Completeness Review - CMR
- Completeness Review - AEVR
- Technical Review - AEVR
- Technical Review – CMR
- *Technical Review – Flood – Coming Soon!*
- Committee Review - AEVR
- Committee Review - CMR
- Closure

Application Intake

The **Application Intake** task is used to capture which environment the request was submitted from (Accela Online Portal (used by the external customers) or Accela Civic Platform (AKA: Back-office). The task is systematically created and automatically closed upon the receipt of the record.

- If the task is closed with the status of 'Received' than the application was entered by COSA from Back-office.
- If the task is closed with the status of 'Received Online' than the application was entered by an external customer from Accela Online Portal.

Fees Due

The Fees Due task is intended to capture when fees are unpaid on the Application.

The fees are required to be paid from ACA before the customer is allowed to submit. Therefore, this task is auto-closed as Paid when the application is received from ACA.

If the request is entered in Backoffice, then after submitting the Fees Due will be activated. Staff can print the invoice and provide to the Customer. The customer can take the invoice to the cashier and pay the fees, or they can pay their fee through ACA.

Once the fees are paid, the system will auto close the task as Paid.

Once the Fees Due task has closed, the system will proceed to the Completeness Review tasks.

Completeness Reviews

The **Completeness Review** is designed with two (2) tasks (Completeness Review - CMR and Completeness Review – AEVR).

If the request type is **Code Modification Request (CMR),** then the system will systematically activate the **Completeness Review – CMR** and auto assign to a staff in the CMR-Plan Review Admin workgroup. The task has a performance measure of three (3) business days (consecutive) to complete. This is tracked in the In Possession Time (hrs) field of each task.

Once the **Completeness Review – CMR** is closed, the system will proceed to the Committee Review – CMR task.

If the request type is **Completeness Review-AEVR**, then the task is systematically closed, and the system will proceed to the Technical Review – AEVR task.

Both tasks have the following available statuses the user can select.

- Under Review
  - This is the status the task is set to when the system activates it for the first time.
  - This will start the tracking of performance In Possession Time (hrs) of the task.
  - If the staff update the task to this status, it will change the status of the Record to 'Under Review'
- Additional Information Required
  - This status is intended to provide the staff the method to notify the customer of additional documentation or fees required to proceed.
  - The system requires at least one Deficiency (i.e. Task Specific Information) to be checked on the task.
  - The system will automatically generate the Additional Information Required email when this status is used (Refer to Email Requirements section)
  - This system will automatically update the status of the Record to 'Additional Info Required
  - This will stop the tracking of performance In Possession Time (hrs) of the task.
- Additional Information Received

- This status is systematically set to notify staff that information they previously requested has been received.
- All deficiencies checked must be received before the task will be systematically updated.
- This will re-start the tracking of performance In Possession Time (hrs) of the task.
- This status will update the Record status to 'Under Review'

- Completed
  - Closes task and triggers the system to proceed to the next workflow step.
- Withdrawn
  - Closes task and closes the Application.
  - When you select the status of withdrawn, the system will display two (2) checkbox items.
    - Confirm
    - Email Notice of Withdraw

IMPORTANT: The Withdrawn status should only be used if the request was erroneously submitted. It should NOT be used to close a singular task.

- The 'Confirm' is required to be checked before the system will allow you to close the task with this status. Its purpose is to ensure the action requested was what you expected and not an mis selection of task status.
- The 'Email Notice of Withdraw' checkbox is optional and if checked will generate the withdraw email (Refer to Email Requirements section for more information on this email). Checking this option will require you also to enter in Standard Comments as to why your withdrawing the record. This will be included in the email to the customer.

Technical Review - AEVR

There is only 1 Technical Review and only activated when the Request Type is Administrative Exception Variance Request (AEVR). Once activated, the system will auto-assign the task based on the variance type.

Variance Type:	Workgroup Assignment	
Drainage	*TCI Storm Water Manager*	*Coming Soon!*
Floodplain	*TCI Storm Water Manager*	*Coming Soon!*
Bike Lane	Engineering Traffic Manager	
Driveway	Engineering Traffic Manager	
Sidewalk	Engineering Traffic Manager	
Streets	Engineering Traffic Manager	
Traffic	Engineering Traffic Manager	
Irrigation	Tree Plan Reviewer	
Landscape	Tree Plan Reviewer	
Tree	Tree Plan Reviewer	
Barbwire Fencing	Zoning Manager	

Other	Zoning Manager

The task has a performance measure of three (10) business days (consecutive) to complete. This is tracked in the In Possession Time (hrs) field of each task.

Once the **Technical Review – AEVR** is closed, the system will proceed to the Committee Review – AEVR task.

This task has the following available statuses the user can select.

- Under Review
  - This is the status the task is set to when the system activates it for the first time.
  - This will start the tracking of performance In Possession Time (hrs) of the task.
  - If the staff update the task to this status, it will change the status of the Record to 'Under Review'
- Additional Information Required
  - This status is intended to provide the staff the method to notify the customer of additional documentation or fees required to proceed.
  - The system requires at least one Deficiency (i.e. Task Specific Information) to be checked on the task.
  - The system will automatically generate the Additional Information Required email when this status is used (Refer to Email Requirements section)
  - This system will automatically update the status of the Record to 'Additional Info Required
  - This will stop the tracking of performance In Possession Time (hrs) of the task.
- Additional Information Received
  - This status is systematically set to notify staff that information they previously requested has been received.
  - All deficiencies checked must be received before the task will be systematically updated.
  - This will re-start the tracking of performance In Possession Time (hrs) of the task.
  - This status will update the Record status to 'Under Review'
- Completed
  - Closes task and triggers the system to proceed to the next workflow step.
- Withdrawn
  - When you select the status of withdrawn, the system will display two (2) checkbox items.
    - Confirm
    - Email Notice of Withdraw

IMPORTANT: The Withdrawn status should only be used if the request was erroneously submitted. It should NOT be used to close a singular task.

  - The 'Confirm' is required to be checked before the system will allow you to close the task with this status. Its purpose is to ensure the action requested was what you expected and not an mis selection of task status.

- The 'Email Notice of Withdraw' checkbox is optional and if checked will generate the withdraw email (Refer to Email Requirements section for more information on this email). Checking this option will require you also to enter in Standard Comments as to why your withdrawing the record. This will be included in the email to the customer.

Committee Reviews

The **Committee Review** is designed with two (2) tasks (Committee Review - CMR and Committee Review – AEVR).

The Tasks will be assigned based on who completed the prior task.

- Committee Review - CMR – will be auto-assigned to the same person who closed the Completeness Review – CMR Task.
- Committee Review - AEVR – will be auto-assigned to the same person who closed the Technical Review – AEVR Task.

There are no performance measures for this task. Both tasks have the same statuses available for the user can select:

- Under Review
  - This is the status the task is set to when the system activates it for the first time.
  - This will start the tracking of performance In Possession Time (hrs) of the task.
  - If the staff update the task to this status, it will change the status of the Record to 'Under Review'

- Additional Information Required
  - This status is intended to provide the staff the method to notify the customer of additional documentation or fees required to proceed.
  - The system requires an Open Issue in the Plan Room for the Task that is using it. (Refer to Plan Room Section for additional information)
  - The system will automatically generate the DPR Discipline Review Rejected email when this status is used (Refer to Email Requirements section)
  - This system will automatically update the status of the Record to 'Additional Info Required
  - This will stop the tracking of performance In Possession Time (hrs) of the task.

- Additional Information Received
  - This status is systematically set to notify staff that information they previously requested has been received.
  - This will re-start the tracking of performance In Possession Time (hrs) of the task.
  - This status will update the Record status to 'Under Review'

- Approved
  - This status will close the task and the stop the tracking of performance In Possession Time (hrs) of the task.

    - The system will automatically generate the Review Status email (Refer to Email Requirements for additional information) to inform them of the outcome of the outcome of the review.
- Approved with Conditions
    - If Approved: The system will prevent this task from closing if there is any Open Issues in the plan room.
    - This status will close the task and the stop the tracking of performance In Possession Time (hrs) of the task.
    - The system will automatically generate the Review Status email (Refer to Email Requirements for additional information) to inform then of the outcome of the disciplines review.
- Denied
    - This task will remain active to allow the customer to appeal. The system will automatically stop the tracking of performance In Possession Time (hrs) of the task.
    - System will require the user to enter Standard Comments from the Standard Comments List. This is included in the email when generated and is intended to notify the customer as to why their request is being denied.
    - This status will leave the task in active status and generate the Review Status email (Refer to Email Requirements section for additional information on this email).
- Withdrawn
    - Will close the task and the application
    - When you select the status of withdrawn, the system will display two (2) checkbox items.
        - Confirm
        - Email Notice of Withdraw **(New! As of Dec 12, 2022)**

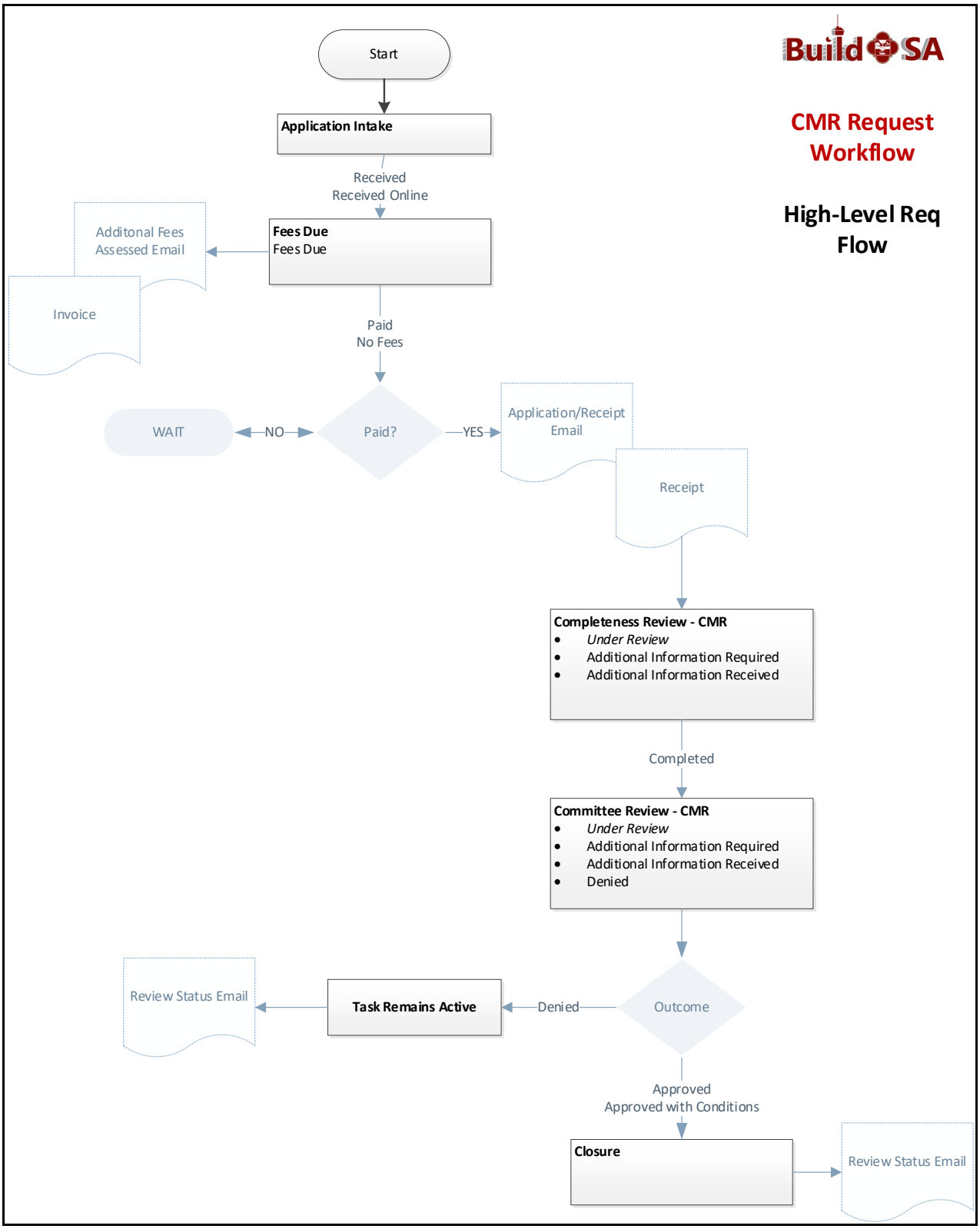
    IMPORTANT: The Withdrawn status should only be used if the request was erroneously submitted. It should NOT be used to close a singular task.

    - The 'Confirm' is required to be checked before the system will allow you to close the task with this status. Its purpose is to ensure the action requested was what you expected and not an mis selection of task status.
    - The 'Email Notice of Withdraw' checkbox is optional and if checked will generate the withdraw email (Refer to Email Requirements section for more information on this email). Checking this option will require you also to enter in Standard Comments as to why your withdrawing the record. This will be included in the email to the customer.

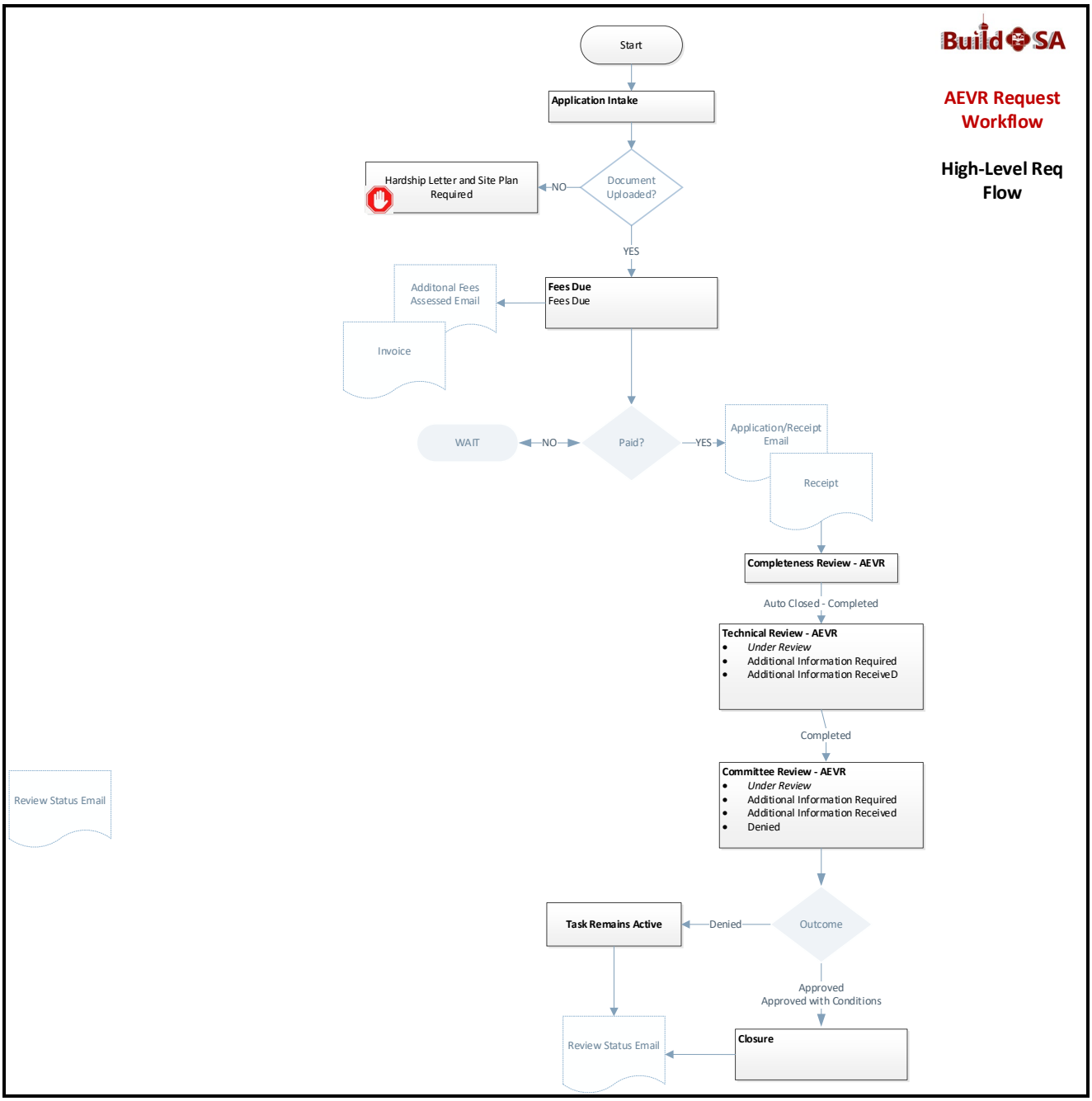
Closure

Once the Committee Review tasks are closed, the Request will systematically closed

CMR Workflow Diagram



AEVR Workflow Diagram



Email Requirements

All emails have variables that are systematically populated based on the type of request being submitted. They can be represented in brackets <> and red font. Any font that is Blue Underline are hyperlinks to those sites.

Application Receipt

The Application Receipt email is generated after the request has been submitted and after fees are paid.

The email will have the following **Subject Line**:

Application Receipt & Payment Confirmation for CMR or AEVR Request <REQ-CMRORAEVR-YY-444NNNN> - <Request Type>

The **email body** will be as follows:

Greetings

This email confirms that the City of San Antonio received your application and/or payment for CMR or AEVR Request - <Request Type> - <REQ-CMRORAEVR-YY-444NNNN>. Attached please find a copy of your application and/or payment receipt.

For your convenience, you may track the progress of your application online at Customer Portal and upload documentation, request inspections or pay fees.

Thank you for your business.

Sincerely,

The City of San Antonio

Partnering with our community to build and maintain a safer San Antonio.

Please take a moment and tell us how we are doing by taking our survey.

Attachments:

- Application Summary Report – This is a report that contains the information of the request submitted.
- Payment Receipt: If fees have been paid, then the receipt for those fees paid will be also attached.

Additional Information Required

This email is generated only when the user places their task in status of 'Additional Information Required'.

The email will have the following **Subject Line**:

The City has Requested Additional Information for CMR or AEVR Request <REQ-CMRORAEVR-YY-444NNNN>

The **email body** will be as follows:

Greetings

The City reviewed CMR or AEVR Request - <REQ-CMRORAEVR-YY-444NNNN> on <MM/DD/YYYY>. In order to continue processing your request, we will need the following item(s):

Requested Documents, Updated Document List

<Document Type>

<Comments>

For your convenience you may submit these items online Customer Portal.

Thank you for your business.

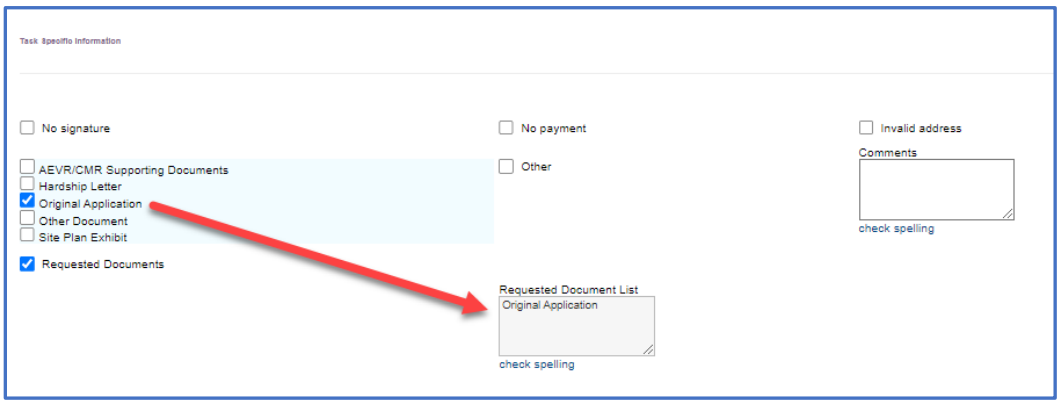
Sincerely,

The City of San Antonio

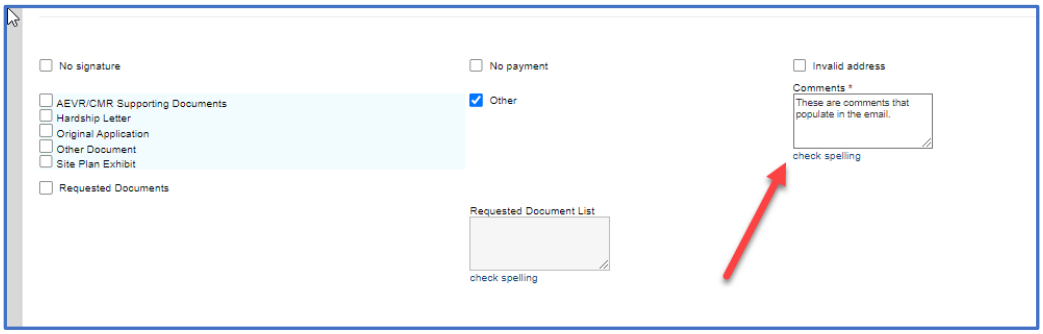
Partnering with our community to build and maintain a safer San Antonio.

Please take a moment and tell us how we are doing by taking our survey.

The Document Type is populated based on what document was checked in the Document List of the Task:



The Comments are populated based on what was entered in the Comments Box of the Task. This is used when other or additional information is needed.



There are no attachments for this emai.

Additional Fees Assessed

The Additional Fees Assessed email is systematically generated when fees are invoiced, and the Fees Due Task is activated. This would always occur when entering the request from Backoffice.

The email will have the following **Subject Line**:

Fee(s) Invoiced for CMR or AEVR Request <REQ-CMRORAEVR-YY-444NNNN> - <Request Type>

The **email body** will be as follows:

Greetings

Development Services Dept. reviewed CMR or AEVR Request - <Request Type> - <REQ-CMRORAEVR-YY-444NNNN> on <MM/DD/YYYY>. As part of the review process for this application, fees have been assessed and the invoice is attached.

For your convenience, you may pay the fees online, as well as track the progress of your application, upload documentation or request inspections Customer Portal.

Thank you for your business.

Sincerely,

The City of San Antonio

Partnering with our community to build and maintain a safer San Antonio.

Please take a moment and tell us how we are doing by taking our survey.

Attachments:

- Invoice: The invoice with the fees itemized that are required to be paid will be populated on the report and attached to the email.

Review Status

The Review Status email is generated when the Committee Review Task is closed.

The email will have the following **Subject Line**:

Review Status for CMR or AEVR Request<REQ-CMRORAEVR-YY-444NNNN>

The **email body** will be as follows:

Greetings

The Committee Review - CMR for CMR or AEVR Request - <REQ-CMRORAEVR-YY-444NNNN> - <Request Type> and has <Results> your request.

<Standard Comments>

Thank you for your business.

Sincerely,

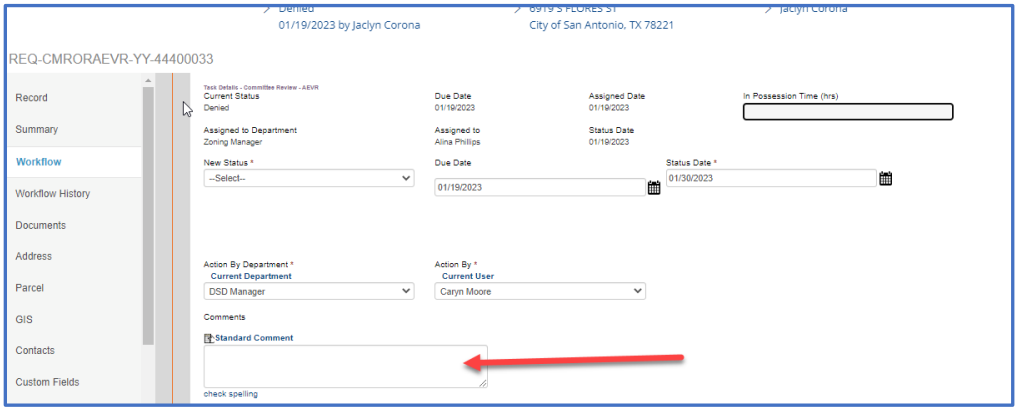
The City of San Antonio

Partnering with our community to build and maintain a safer San Antonio.

Please take a moment and tell us how we are doing by taking our survey.

The ‘Results’ is based on the status the Committee Review Task was last updated (i.e. Approved, Approved with Conditions or Denied).

The Standard Comments is populated based on whatever the user entered in Standard Comments before they updated the task.



Links to other related Guides

IB’s

INFORMATION BULLETIN 124 Administrative Exception Variance Request Procedures for Building Permits, Environmental, and Platting (AEVR)

INFORMATION BULLETIN 114 Code Modification Request Procedures