

File Closeout Procedures 2019

1. Make sure application fees have been paid! If not, collect them! If they are any fees assessed on the record that are not due, delete.
2. Copy the property owner on all correspondence, including the approval and final action letters.
3. Copy the job address file on the approval letter.
4. Organize file using dividers provided, separating out any attorney-client protected information (these should be kept in a separate file in your workstation). Organization includes preparing the file for eventual scanning. Please do the following:
 - a. Remove duplicates of documents.
 - b. Make sure that all documents are hole punched and properly secure. If it is a very large file, please consider making another folder. This will ensure all documents are secure to the file.
 - c. Please do not leave any post-it notes on the documents. They may be removed and thrown away. If it is vital information, please type it on a regular sheet of paper (8 ½ x11) and then add to the file.
 - d. Please make sure that plans are folded properly. Use the "Fresno Fold". It will fit better in the file folder and cabinets.
5. Close out the file in Accela (verify the workflow is accurate). Please note that the Accela record is the official record. The file is for any hard copy documents being reviewed (Traffic exhibits) and the internal staff memo with findings.
6. When you close out a file, make sure that the entitlement numbers were written on the indicated parcels in the APN books. Then color a red circle on your file.
7. Take your file to the Records Division and place it in order on the shelves.