# Memo Procedures

1. Write Tree ID, initials and date on green memo tape and flag tree with tape.
2. On the **“Location Page”** in the **”Restrictions Note Type”** select **“Misc Tree Comments”** from the drop down menu. Select **“Memo submitted by”** from the **“Work Restriction Description”** drop down menu and enter your initials in the **“Additional Comments”** field. Set **“Active”** to yes.
3. Notify owner that pruning will occur **“same day”, “next day”**, or within 30 days or so if **“group memo”** either in person, by door hanger or voice mail. Pursue removal on good candidates (palms, very fast growers, cycle busters). See Removal Sections for more detailed info on how to properly process a removal.
4. For a **“same day” or “next day”** Memo notify your Lead. Then call the appropriate contractor based on location (UTS for Southern VMA’s 858-798-5220, Davey for Northern VMA’s 760-975-0225). **Be prepared to give: Name, Memo WO #, VMA #, Tree ID, Species, # of Units, Access Issues, Lift/Climb, and how the Customer has been Notified.**  For newly created Tree IDs, you must also give the address, pole #’s the tree is between and directions if needed. If there is no answer, leave a voicemail with all the above information and request a call back for confirmation, having left your call back phone #. If you have not received a call back in one hour, then call the contractor back until verbal confirmation is given.
5. Document Memos on the Online Memo Form. Each Memo entry can only contain trees from one VMA. Reliability and transmission memos each require their own separate entry. Write in the Comments area: Work Order # if a same day or next day is generated.
6. ***Memo trees are subject to removal and TGR treatment requirements (see TGR section)***

**NOTE: Remove old “Trim Information: Cycle” notes (e.g. Cycle 14, Cycle 13, etc.). Leave in all “Memo Submitted By” notes.**

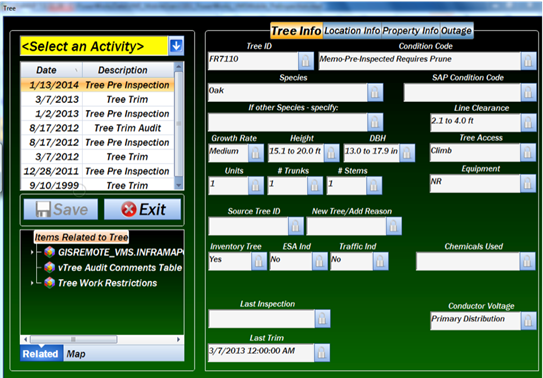
If the memo is a **Reliability,** you must create a Reliability Work Order for it and make a note in the WO comments that it is also a memo. Refer to the Reliability Checklist for reliability procedures. Check the Reliability box on the Online Memo Form.

If the memo is on **Transmission**, call to notify your lead immediately. Follow NERC procedures if appropriate, as summarized at the bottom of the Memo Sheet. Check the Reliability box on the Memo Sheet.

If the memo is a Palm be sure to follow the [Partial Prune Palm Procedure](https://docs.google.com/document/d/1iGpHTikoap-IZuDP-_FlaWTC8R3iGJCt0IPl1-__tE4/edit) and ensure the “Palm Removal Candidate” comment is added to the Location notes if removal was not obtained.

If the memo is a **Priority (Same/Next Day) fan palm**, call to notify your lead immediately. Follow the [Priority Memo Fan Palm Procedure](https://docs.google.com/document/d/12a0xurEePXFyRcb960pcTp1bwAqjppBMocNaEJAPNjw/edit)

**If you are ever unclear or uncertain on any Memo procedure, call your lead.**



The Location Info of a memo tree. Note the differences between the memo submitted by comments. The bottom row shows how old data was transferred over and the middle row is how it is currently done. NOTE if tree is a historical memo it is likely a memo again.

Select the suitable Condition Code for the type

of Memo

The Location Info page is where all memo notes will be. Old cycle notes are removed and memo submitted by notes are left in the system.

The Tree Info Page of a Memo tree.



# 

Almost all memo trees will have a removal request comment.

Initial removal request and memo submitted by notes