e-Planning

Registration and Submittal Guide

Contents

Introduction

The e-Planning submittal service is incorporated into the existing Electronic Plan Check (EPC) submittal system that has been in place for over five years by the Building Division, known as the Citizen Portal. Through the Citizen Portal (https://aca.accela.com/SACRAMENTO/Default.aspx) the public can view record details and record status of Planning and Building Division records. The e-planning submittal service makes it possible to apply for planning entitlements and submit requests for Building online permits and Electronic Plan Check (EPC) clearances from the Planning Division through the Citizen Portal.

In addition to the services detailed above, users with a registered Citizen Portal account may also utilize the following services:

➢ Online building inspection scheduling;
➢ Online Electronic Plan Check (EPC) submittal;
➢ Pay for any invoiced record fees.

Registered account plus associated contractor's license:

➢ Online minor permit applications.

This user guide will inform the public on how to navigate the e-Planning addition to the existing electronic submittal service, as follows:

Part One of this guide shows one how to register for a basic Citizen Portal account which is required to submit applications online.

Part Two outlines the steps and requirements of submitting an application and describes the three application types available.

Part I: Registration

Step one: Create a Public User Account

The web address for our Citizen Portal is http://aca.accela.com/sacramento.

Select the **New Users** link to register.

Review and accept the terms associated with using the Citizen Portal.

Fill in the login information and select the **Add New** button.

Select "Applicant" as the Contact Type from the drop-down menu and select **Continue.**

You will then be directed to the following window screenshot. Boxes with a red * asterisk are required fields.

Contact Information   ×

* First: Middle: * Last:

Name of Business:

* Address:

* City: * State: * Zip:
                       CA   ▼

* Mobile Phone: Work Phone: Home Phone:

E-mail:

Continue   **Clear**   Discard Changes

Once completed, you will see the following window and a note that your account is created. Check your e-mail inbox for the verification e-mail that includes instructions to activate your account.

✓   Your account has been created successfully but is NOT active. You will
     receive additional instructions by e-mail.

Your account has been successfully created but is NOT active.
Once your account is verified, you will be able to log into the Citizen Portal.

Account Information

User Name:	citizenqjohn
E-mail:	citizenqhohn@gmail.com
Password:	******
Security Question:	make of first car

Contact Information

john citizen	Home Phone:
big business	Work Phone:
1234 broad stree	Mobile Phone: 916-123-7891
citizenqhohn@gmail.com	

Step Two: Verification e-mail
The verification e-mail will activate your basic Citizen Portal Account. Click on the **Verification Link.**
The verification link will redirect you to the Citizen Portal login page.

noreply@accela.com <noreply@accela.com>
to me

Thank you for registering for an account with the City of Sacramento, Community Development Department Citizen Portal website.

The user name you registered with is: citizenqjohn

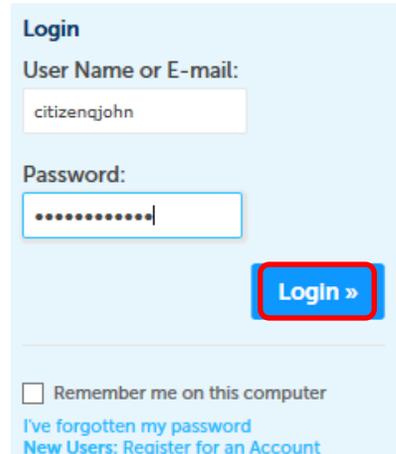Please click on the verification link to validate your registration: Verification Link

Thank you.

Community Development Department
City of Sacramento
Streamline@cityofsacramento.org

NOTE: Although not required for Planning Review submittal, it is advantageous for a contractor pursuing a minor permit to link your license to your public user account. Only accounts with an associated contractor's license can utilize the Building On-line Minor Permitting System. For more information, visit Building's On-line Permitting page.

Please Login
Thank you for registering for a CDD Citizen Portal user account. Your account has been activated. You can now log in by entering your user name and password. If you are having trouble logging in or have received this e-mail in error, please contact streamline@cityofsacramento.org as soon as possible.

Login

User Name or E-mail:
citizenqjohn

Password:
•••••••••••

Login »

☐ Remember me on this computer

I've forgotten my password
New Users: Register for an Account

Step Three: Activate Accounts
Following your successful login you will be redirected to a confirmation page. Your account is activated if your username is visible on the screen. With this basic account, you now have access to various features.

Home Building Planning General Property Info

Dashboard   My Records   My Account   Advanced Search ▾

Hello, john citizen

Action Required (0) ?   - Hide

There are no actionable items which need your attention right now.

My Collection (0)   View Collections

You do not have any collections right now.
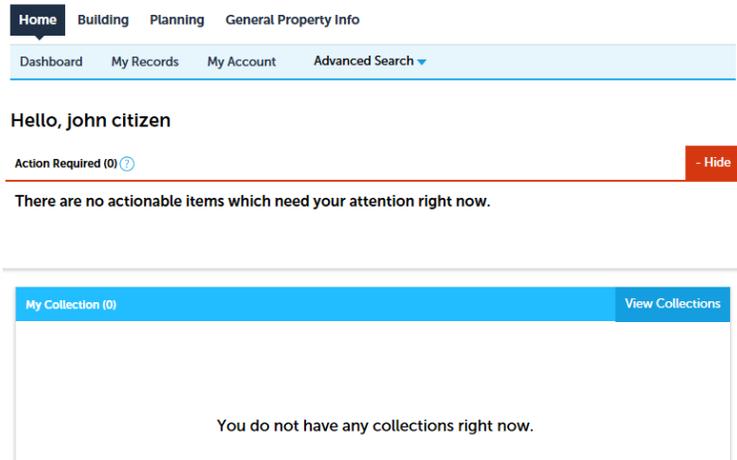
Part II: e-Planning Submittal

Creating an Application

Log in to your Citizen Portal account and select Create Planning Application Submittal via the Planning tab on the command bar as shown below.
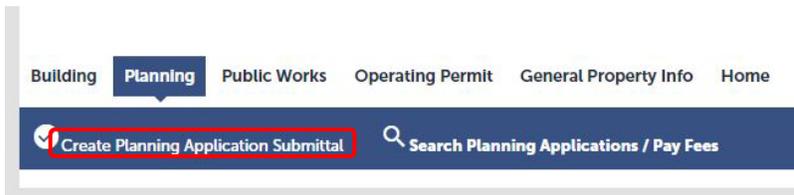
After selecting Create Planning Application Submittal you should be directed to the General Disclaimer. Read disclaimer and check "I have read and accepted the above items." Checkbox.

STEP 1: Site Information > Location

Enter address or Accessors Parcel Number (APN). Owner information should auto-populate, edit as needed.

STEP 2: People > Contacts

Click the "Select from account" button. The public user account contact information will be added. **NOTE**: If you want to use a different contact, navigate to *Account Manager* and add a new contact to your account. Don't forget to save your work by selecting the "save and resume later" button.

NOTE: At any time in the application you may save and resume application later by selecting the Save and resume button.

STEP 3: Application > Details

Select an application type:

You can only select one application type per submittal. To learn the requirements of each application type, continue to the **Application Type Explained** section.

APPLICATION TYPE

Planning Entitlement:	⑦ ☐
Building Permit Submittal Clearance:	⑦ ☐
Pre-submittal Zoning Review:	⑦ ☐

Selecting an Activity type:

The activity type is only available when the **Building Permit Submittal Clearance** application type is selected. You will only be able to select one activity type per application.

ACTIVITY TYPE

[A list of Activity Types is only displayed when "Application for Building Permit Submittal Clearance" is se Please select the most applicable Activity Type for your project.

Job Value: *	
Master Plan Review:	☐
New Commercial Building:	☐
Addition to Commercial Building:	☐
Initial Occupancy of Commercial Building:	☐
Remodel and Change of Use of Commercial Building/Space:	☐
Remodel of Commercial Building:	☐
Revision to Issued Residential Permit:	☐
New Residential Building:	☐
Addition to Residential Building:	☐
Remodel of Residential Building:	☐
Deferred/Revision to Issued Commercial Permit:	☐

SCOPE OF WORK

* Applicant Scope of Work:

Remodel of Residential Building:	☐
Deferred/Revision to Issued Commercial Permit:	☑
Relevant Planning File #: *	

Job Value:

A job value is required. It is the fair market value of the total cost of materials, labor and permanent equipment as California Licensed Contractor would charge performing the work. If needed, this value can be estimated.

Selecting *Revision to Issued Residential Permit* or *Deferred/Revision to Issued Commercial Permit* will require a relevant Planning file number to be entered.

For Example: DR12-345

Scope of work:

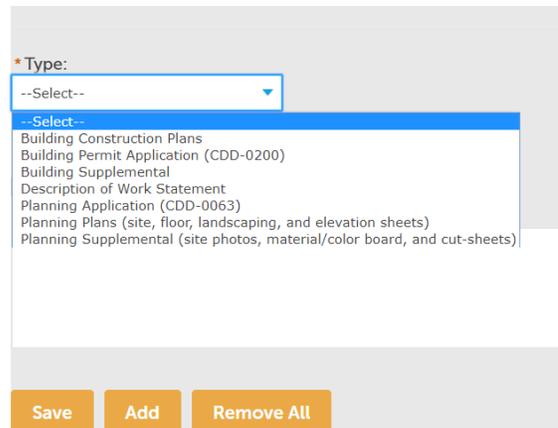Include a brief, detailed scope of work of your project is required.

STEP 4: Documents > Submittal Documents

Attach all the required documents for the pertinent application type. A minimum of two (2) documents are required.

Application Type	Submittal Requirements
Planning Entitlement	Submittal requirements in forms (CDD-0063, CDD-0009, etc.)
Building Permit Submittal Clearance	Planning's Building Permit Submittal Clearance Checklist
Pre-Submittal Zoning Review	At least two (2) items from the following: floor plan, site plan, elevations, project proposal, exhibits,

See **Application Types Explained** section to learn the required submittal documents for each Application Type.

- All submittals shall be Portable Document Format (PDF) and shall not include any embedded secured signatures.
- Please select the correct document type when uploading your documents.

STEP 5: Review

Verify all the information in the application is correct. Make any change as needed and continue application.

STEP 6: Record Issuance

This page confirms the application submittal. You will see a confirmation of your submission and your record number (see below). Check your e-mail inbox (and junk folder) for a confirmation e-mail.

This concludes your application submittal.

Please allow for a 1-2-business days for processing.

What's Next?

Planning staff will review the record information and attachments for completeness. If an application is determined to be incomplete by the Planner reviewing the record, an e-mail will be sent to applicant notifying them of the updated record status and a detailed description of the corrections requested.
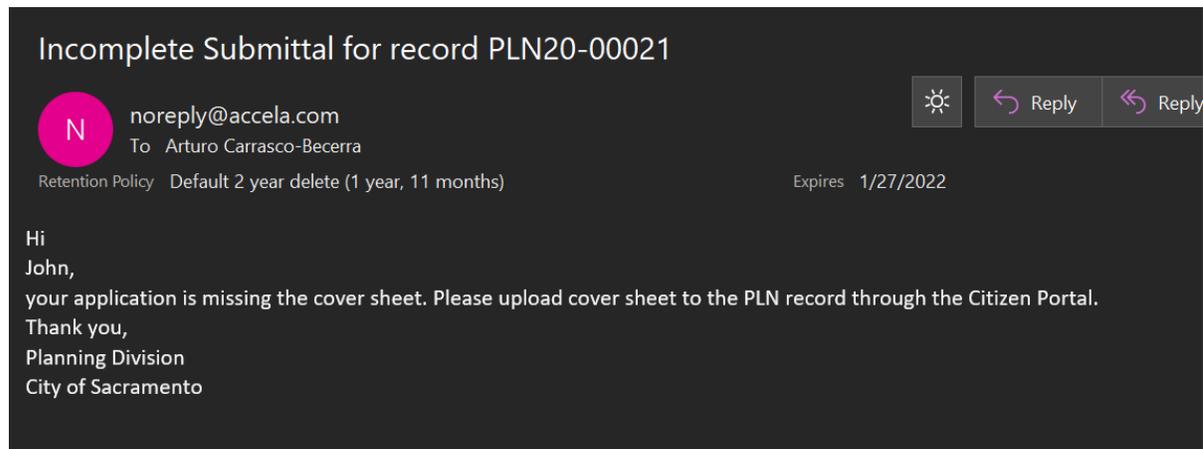
Once the Planning (PLN) record has been reviewed by our Planning staff for completeness and the appropriate determination is made for your request, the standard Planning Entitlement and Building Division Electronic Plan Check (EPC) process commences.

(1) Planning Entitlements. The planner will designate the specific entitlement record type (e.g.: DR-, Z-, P-, etc.) and invoice the appropriate fees. An e-mail notice to the applicant will be sent with instructions on how to pay the Planning fees. Log on to your Citizen Portal to view and pay the fees. Once the fees have been paid the standard review will commence.

NOTE: Once construction plans are ready to be submitted to the Building Division, a new Planning (PLN) application shall be submitted via Citizen Portal as a "Planning Clearance to Submit to Building" application type.

(2) Building Permit Submittal Clearance. A staff planner will clear the project to move forward to submit for Electronic Plan Check (EPC). Once cleared, a SUB- record will be generated, and a building plan checker will be notified of the SUB- record. From this point forward the standard Electronic Plan Check (EPC) process will resume. The contact on record will be sent an e-mail as shown in the example below.

Building Submittal record SUB-2000009 📩 Inbox ×

noreply@accela.com <noreply@accela.com>   5:02 PM (2 minutes ago)
to me ▾

Congratulations, your project has been approved by the Planning Division to progress forward. Your project and associated electronic files have been automatically uploaded to SUB-2000009. The Building Division will review these files for completeness. If additional documents are necessary, you will receive comments to this effect via email. If these files are deemed to be a complete building permit application package a building permit activity (COM-, FPP, RES- or MP-) appropriate to the projects scope of work will be initialized in our permit management system. Within this activity, submittal fees will be calculated and invoiced and then emailed to the applicant for payment. Once payment of this invoice is made the project will formally enter plan review. It is important to retain this SUB- record number. This record (the SUB-) will be used to resubmit revised files as you go through plan review and are given plan review comments.

◀ Reply   ➡ Forward

(3) Pre-submittal Zoning Review. A staff planner will review the submittal documents and scope of work and provide the applicant with a direction and zoning information pertaining to the request. Additional information may be requested.

Corrections/Revisions

Planner may request corrections and revisions or additional information through the Citizen Portal. An e-mail will be sent to the contact on record as shown in the example below. Log on to your Citizen Portal account and upload submittals to the attachments of your PLN record.

Incomplete Submittal for record PLN20-00006

noreply@accela.com
To

Retention Policy Default 2 year delete (1 year, 11 months)   Expires 1/1/2022

🌙   ↩ Reply   ↩ Reply All   → Forward   •••
Thu 1/16/2020 9:48 AM

Hi Applicant, Your application request for Building Permit Submittal Clearance cannot be completed, the request requires a planning entitlement for Site Plan and Design Review. Please upload the completed Planning Entitlement Application and Design Review Guidelines to the attachments of record PLN20-00006. Visit our planning form page at http://www.cityofsacramento.org/Community-Development/Resources/Forms/Planning-Forms to access the forms. If you have any questions please contact us at Planning@cityofsacramento.org. Thank you, Planning Division City of Sacramento

Application PLN20-00021:
Planning Online Submittal
Record Status: Submittal Incomplete

Add to collection
👍 Like 0   🐦 Tweet

Record Info ▾   Payments ▾

Application Details

Processing Status

Related Applications
or Permits

d is 1000 MB.
li;lnk;zip;mp3;mp4;avi;mpg;mov;m4v;gif;rar;doc;docx;xlsx;xls;csv;wmv;rpt;txt;xml;rtf;wav;sql;wpd are disallowed file types to upload.

Attachments

	Record ID	Record Type	Entity Type	Type	Size	Upload Date	Action
Family-Residential Principles-Checklist-Final-31014Rev-PDF.pdf	PLN20-00021	Planning Online Submittal	Record	Planning Supplemental (site photos, material/color board, and cut-sheets)	119.43 KB	02/10/2020	🔍
1610-R-ST-ARCH-PLANS1.pdf	PLN20-00021	Planning Online Submittal	Record	Building Construction Plans	3.96 MB	02/10/2020	🔍

Add

Application Types Explained

This section will describe each application type's required and required documents for submittal. There are three (3) application types available to select from:

1. Planning Entitlement
2. Building Permit Submittal Clearance
3. Pre-submittal Planning Review

1. Planning Entitlement

Use this if you know your project requires a Planning Entitlement before you can submit for Building Electronic Plan Check (EPC). Applicants using this application have already done their research and/or have visited the public counter for Planning information.   Selecting this indicates a complete project for Planning Staff to review. Planning Entitlements include: Conditional Use Permits (CUPs), Variances, Tentative Maps / Subdivisions, Site Plan and Design Review (SPDR), etc.

Submittal requirements: (Minimum 2 documents)

> ➢ Planning Entitlement Application, [download](#) the specific application for the required submittal documents.

Contact planning@cityofsacramento.org or visit us at 300 Richards Blvd, 3rd Floor for additional information or fee estimates.

2. Building Permit Submittal Clearance

This application type is for applicants who are ready to submit construction plans to the Building Division electronically through the Electronic Plan Check (EPC) program, but either have an approved Planning Entitlement or are unsure if Planning Entitlements are required and need Planning clearance. All submittal documents shall be prepared per the Building Division Electronic Plan Check (EPC) Submittal Guidelines.

NOTE: If Building Permit Submittal Clearance Application type is selected, a list of Activity Types will drop down. Only <u>one</u> type can be selected.

Submittal requirements: (Minimum 2 documents)

> ➢ The following items are required to receive Planning Division clearance:
>   o A signed concurrent review form (MOU) from your project planner if the project has a concurrent planning application in progress
>   o A detailed scope of work
>   o Plans shall only contain architectural plans. (e.g. site, floor, elevations, and/or landscape plans)
>   o Plans must be in PDF form only and must contain a licensed professional stamp.

> ➢ Visit the Building **Electronic Plan Check (EPC)** to learn about the Building EPC submittal requirements.

NOTE: If you're in pursuit of a minor permit (i.e. trade permit), this is not the correct application. Visit the Building Division page to learn how to apply for these permits online.

Examples of work scopes include:

- Residential and Commercial Water Heaters
- Residential Heating, Ventilation and Air Conditioning systems (HVAC)
- Residential and Commercial Reroofs
- Residential Electrical Minor work
- Residential Plumbing Minor work

3.Pre-Submittal Planning Review

This application type is for applicants who don't necessarily have a fully developed project and need additional zoning and land use guidance. Applicants here will have a project proposal or preliminary plans prepared.

NOTE: Do not submit an application for a quick response question(s) and/or if you don't have preliminary plans and project narrative to upload. Contact us at planning@cityofsacramento.org instead.

***Submittal requirements****: (Minimum 2 documents)*

> ➢ Architectural plans (Site Plan, floor plans, elevations)
> ➢ Scope of work statement

Paying your Planning Fees

Please visit the following link to pay associated planning entitlement application fees: https://aca.accela.com/sacramento/Default.aspx. You may also pay the fees at the cashier's desk on the 3rd Floor at 300 Richards Boulevard. No review of your Entitlement may commence until fees are paid in full.

NOTE: All fees shall be paid within 5 calendar days from notice to pay.

Once on the linked page, scroll to the bottom of the page and select the Pay Fees under the Planning title as shown below.
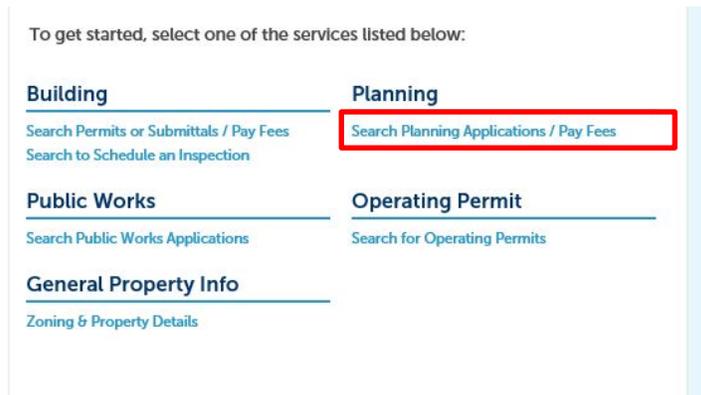
Search for the record using the record number. If you do not have the file number, search using the project address or parcel number.

Once in the planning record is identified the page, select the payment tab – pay fees. You should see a list of fees and a total at the bottom. Select Pay Fees to continue with the online payment.
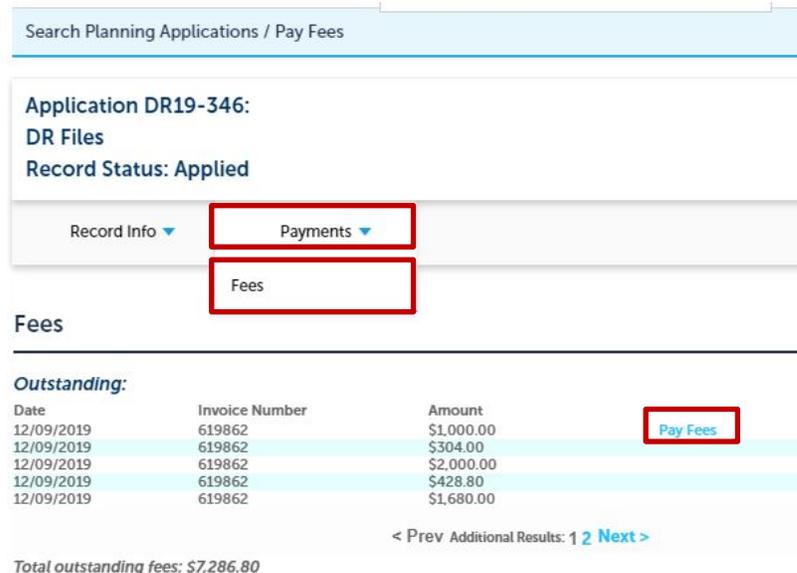
If you have any questions contact us at planning@cityofsacramento.org.