

Online Permit Center

Training Document

Prepared for:

County of San Mateo

Prepared by:

Avoce++e
TECHNOLOGY TOGETHER

1. Abbreviations

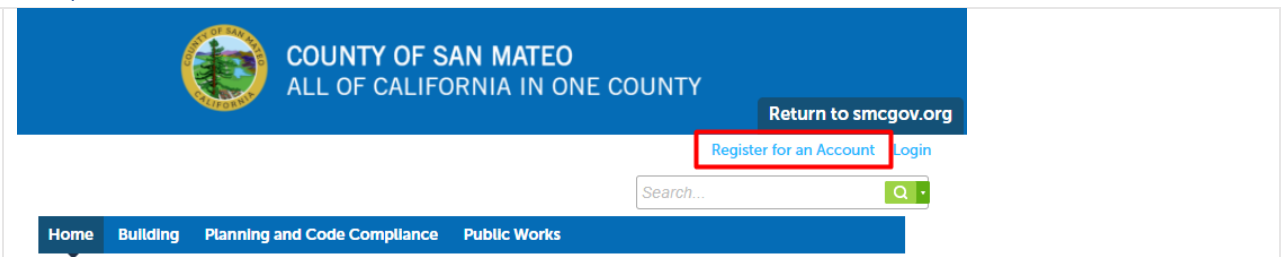
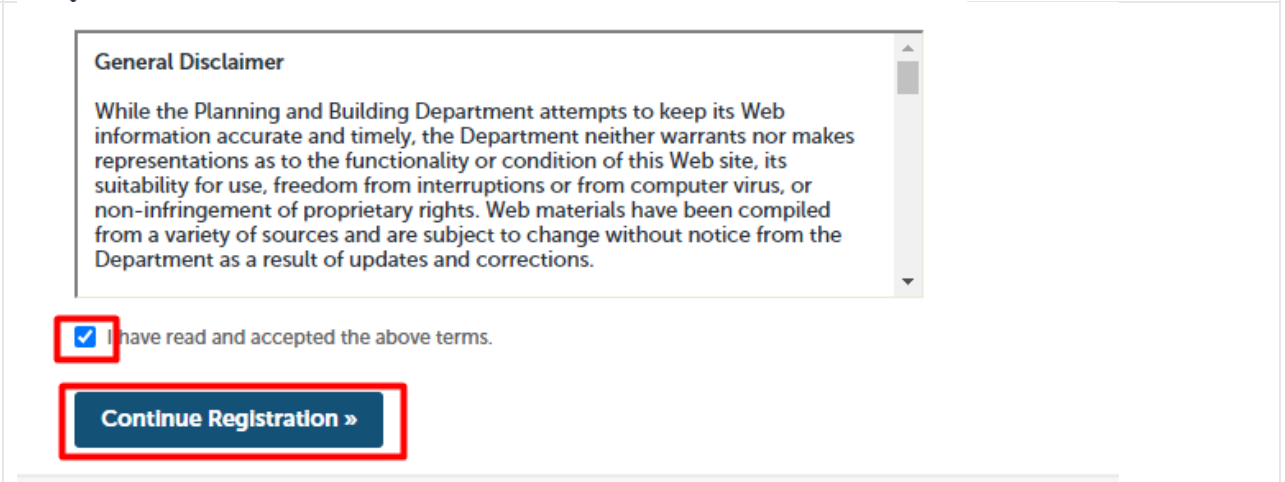
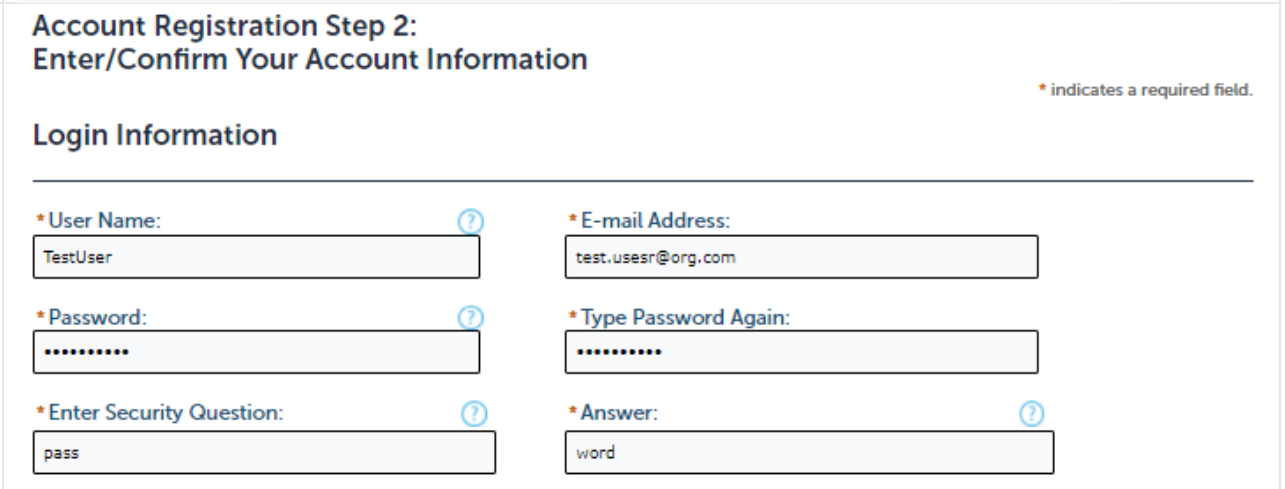
| Abbreviation | Definition |
|--------------|--|
| Portal | Online Permit Center https://aca-prod.accela.com/SMCGOV/Default.aspx |
| System | Accela Government Software |

2. ACA How to create a Registered User

2.1. Description

In order to be able to apply for a permit, you must first register on Portal. Below steps provide guidance on this process.

2.2. Steps

| | |
|---|--|
| <p>1. On Portal, click 'Register for an Account'.</p> |  |
| <p>2. Check the checkbox and click 'Continue Registration'.</p> |  |
| <p>3. Fill out the required fields under 'Login Information'.</p> |  |

4. Click 'Add New' under 'Contact Information'.

Contact Information

Add your contact information for permits and correspondence regarding your projects.

Add New

5. Select the applicable 'Type' and click 'Continue'.

Select Contact Type

* Type: Individual
--Select--
Individual
Organization

Continue

Discard Changes

6. Fill out the required fields under 'Contact Information' and click 'Continue'.

* First: Test * Last: User Name of Business:

* Address Line 1: 123 Test Street * City: Test City * State: CA * Zip: 94003

* Primary Phone: 1231231212 Home Phone: Mobile Phone:

* E-mail: test.user@org.com

Fax:

Continue

Clear

Discard Changes

7. Click 'Continue Registration' at the bottom of the page.

✔ Contact updated successfully.

Test User

test.user@org.com
Home phone:
Mobile Phone:
Work Phone: 1231231212
Fax:
[Edit](#) [Remove](#)



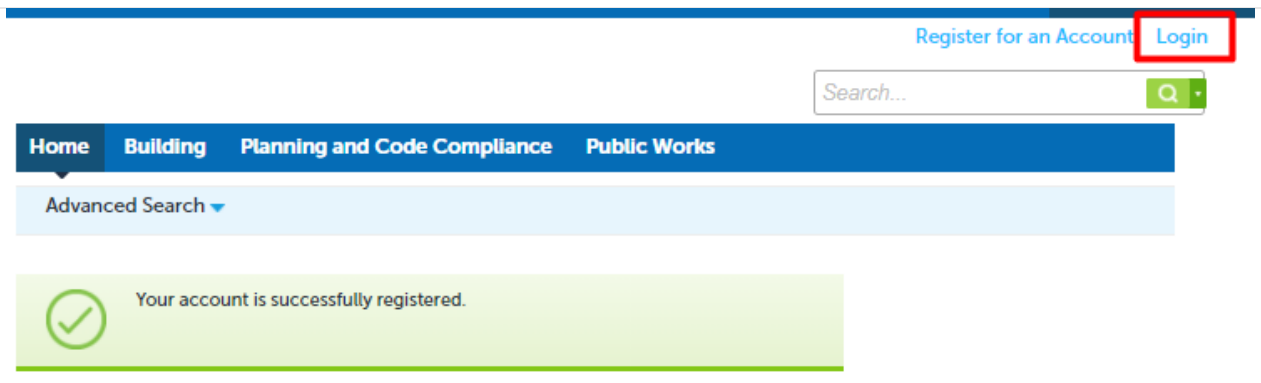
I'm not a robot



reCAPTCHA
Privacy - Terms

Continue Registration »

8. System provides a success message. You may now login via clicking 'Login' and entering your user and password.



3. ACA How to look up property information

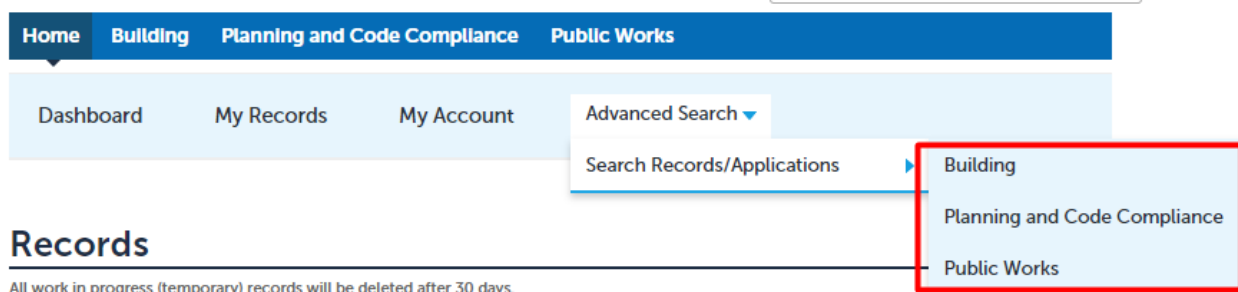
3.1. Description

Portal provides ability to look up property information via Advanced Search and Application process. Please see below steps for guidance.

3.2. Steps

1. Via Advanced Search

1. On Portal, go to Advanced Search → Search Records/Applications and select the required option.



2. Under 'General Search', fill out the search form and click 'Search'. You can search by entering either of the date, address, parcel number or permit number.

Records

All work in progress (temporary) records will be deleted after 30 days.

Permit Number:

Parcel No.:

Start Date:

End Date:

Street No.: -

Street Name:

Street Type:

City:

State License Number:

3. The list of the properties will appear below the search form.

250+ Record results matching your search results

Click any of the results below to view more details.

Showing 1-25 of 250+ | [Download results](#) | [Add to collection](#)

| <input type="checkbox"/> | Date | Record Number | Record Type | Description | Address | Status | Action |
|--------------------------|------------|---------------|----------------------|------------------------------------|---|--------|--------|
| <input type="checkbox"/> | 01/07/2021 | BLD2021-00017 | Residential Plumbing | MB Test - 07Jan21 - auto issue | 1325 CLOUD AVE, MENLO PARK CA 94025 | Issued | |
| <input type="checkbox"/> | 01/07/2021 | 21TMP-000029 | Residential Plumbing | MB Test - 07Jan21 - not auto issue | 1325 CLOUD AVE, MENLO PARK CA 94025 | | |
| <input type="checkbox"/> | 01/07/2021 | 21TMP-000031 | Residential Plumbing | Test | 3940 BROOKLINE WAY, EMERALD LAKE HILLS CA 94062 | | |

2. Via Application

1. On Portal, click 'Apply for Permit'.

Building

[Apply for a permit](#)

[Search Applications](#)

2. Check the checkbox and click 'Continue Application'.

I have read and accepted the above terms.

[Continue Application »](#)

3. Select applicable record type and click 'Continue Application'.

▼ **Residential 2020**

- Electrical Service Upgrade
- Photovoltaic Residential
- Residential HVAC, Furnace, Air Conditioning, and Heat Pump
- Residential Plumbing
- Residential Re-Roof
- Residential Siding and Stucco
- Residential Water Heater
- Residential Window or Door
- Solar Pool Heating Residential
- Solar Water Heating Residential

[Continue Application »](#)

4. Under 'Address', fill out the search form and click 'Search'. Alternately, you can search by entering parcel or owner information.

* Street No.: Direction: * Street Name: Street Type:

Unit Type: Unit No.: City:

5. System opens 'Address Search Result List' pop-up window. Click on radio button next to the required address.

Address Search Result List ×

Addresses

Showing 1-2 of 2

| Address | City | Zip |
|---|------------|-------|
| <input type="radio"/> 1325 CLOUD AVE, GIS, Area3, MENLO PARK SMC CA 94025, 1325 CLOUD AVE MENLO PARK CA 94025, 1325 CLOUD AVE MENLO PARK CA 94025 | MENLO PARK | 94025 |
| <input type="radio"/> 1325 CLOUD AVE, Planning, Area3, MENLO PARK SMC CA, 1325 CLOUD AVE MENLO PARK CA, 1325 CLOUD AVE MENLO PARK CA | MENLO PARK | |

6. System updates 'Address Search Result List', providing associated parcels and owners list.

Address Search Result List

- 94025, 1325 CLOUD AVE MENLO PARK CA 94025, 1325 CLOUD AVE MENLO PARK CA 94025 MENLO PARK 94025
- 1325 CLOUD AVE, Planning, Area3, MENLO PARK
SMC CA, 1325 CLOUD AVE MENLO PARK CA, 1325 CLOUD AVE MENLO PARK CA MENLO PARK

Associated Parcels

Showing 1-1 of 1

| Parcel Number | Lot | Block | Subdivision |
|--|-----|-------|-------------|
| <input checked="" type="radio"/> 074063280 | 280 | 063 | |

Associated Owners

Owner(s) can be added on the next screen if not listed here.

Showing 1-3 of 3

| Name | Address |
|---|--|
| <input checked="" type="radio"/> WHITE DONALD E | 1325 CLOUD AVE MENLO PARK CA 940256047 |
| <input type="radio"/> CORDER SHERRIE L | 1325 CLOUD AVE MENLO PARK CA 940256047 |
| <input type="radio"/> WHITE SONJA M | 1325 CLOUD AVE MENLO PARK CA 940256047 |

Select

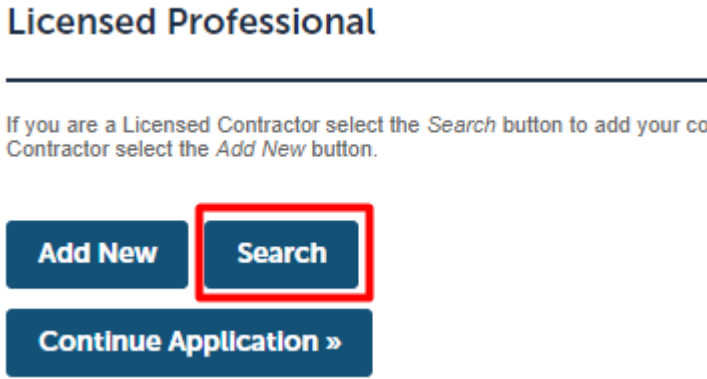
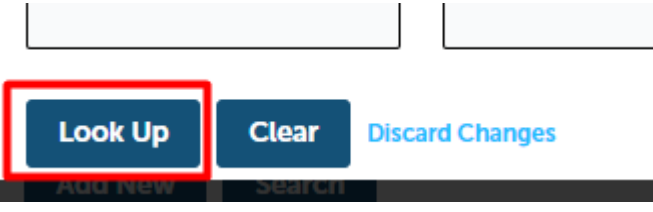
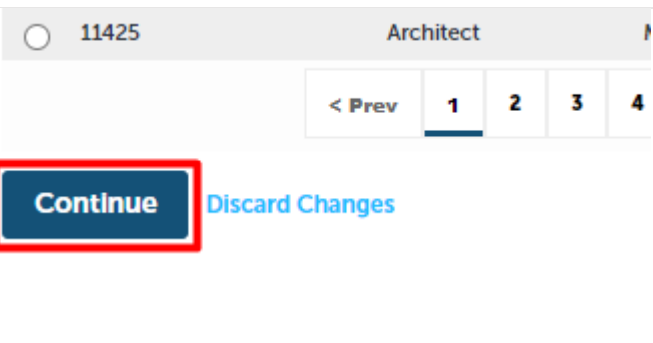
Cancel

4. ACA How to search for a licensed contractor

4.1. Description

When applying for a permit, you may be asked to add a licenced professional to your application. Below steps provide guidance on how to look up the list of professionals in the system.

4.2. Steps

| | |
|---|---|
| <p>1. On Portal – Application page, click ‘Search’ under ‘Licensed Professional’ section.</p> |  |
| <p>2. System provides ‘Look Up Licence’ pop-up window. Fill out the form by entering known information and .click ‘Look Up’.</p> |  |
| <p>3. System displays list of records that match provided search requirements. Y may browse and pick required record and click ‘Continue’ to select the record for Application.</p> |  |

5. ACA How to pay fees Description

5.1. Description

When applying for a permit, you may be asked to pay fees. Below steps provide guidance on how to pay the fees before application can be submitted.

5.2. Steps

| 1. On Portal, Application page – ‘Pay Fees’ tab, click ‘Continue Application’. | <p>Step 7: Pay Fees</p> <p>Listed below are preliminary fees based upon the information you've entered. Your payment will be processed by the County's third party vendor Elavon. Visit the Elavon website at https://www.elavon.ca/index.html.</p> <p>Application Fees</p> <table border="1"><thead><tr><th>Fees</th><th>Qty.</th><th>Amount</th></tr></thead><tbody><tr><td>CA Building Standard Fee - SB1473</td><td>1</td><td>\$1.00</td></tr><tr><td>Photovoltaic System Fee</td><td>1</td><td>\$345.00</td></tr><tr><td>Legal Counsel Surcharge</td><td>1</td><td>\$0.00</td></tr></tbody></table> <p>TOTAL FEES: \$346.00 Note:</p> <p>Continue Application ></p> | Fees | Qty. | Amount | CA Building Standard Fee - SB1473 | 1 | \$1.00 | Photovoltaic System Fee | 1 | \$345.00 | Legal Counsel Surcharge | 1 | \$0.00 |
|--|---|----------|------|--------|-----------------------------------|---|--------|-------------------------|---|----------|-------------------------|---|--------|
| Fees | Qty. | Amount | | | | | | | | | | | |
| CA Building Standard Fee - SB1473 | 1 | \$1.00 | | | | | | | | | | | |
| Photovoltaic System Fee | 1 | \$345.00 | | | | | | | | | | | |
| Legal Counsel Surcharge | 1 | \$0.00 | | | | | | | | | | | |
| 2. System opens ‘Payment Options’ page. Enter required payment information and click ‘Submit Payment’. | <p>E-mail:</p> <p><input type="text" value="test.useer@org.cpm"/></p> <p>Submit Payment ></p> | | | | | | | | | | | | |

6. ACA How to upload attachments after application submitted

6.1. Description

Portal allows to attach applications to the record before and after the application is submitted. Below steps provide guidance on how to attach documents to a record when application has already been submitted.

6.2. Steps

| | |
|--|---|
| 1. On Portal, find your Application via either the Search field or ‘My Records’ page | <p><input type="text" value="BLD2021-00022"/> Q</p> |
|--|---|

| | <p>Home Building Planning and Code Compliance Public Works</p> <p>Dashboard My Records My Account Advanced Search ▾</p> <p>▼ Building</p> <p>Showing 1-14 of 14 Download results Add to collection</p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Date</th> <th>Record Number</th> <th>Record Type</th> <th>Description</th> <th>Address</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>01/11/2021</td> <td>BLD2021-00038</td> <td>Residential Water Heater</td> <td>test</td> <td>1325 CLOUD AVE, MENLO PARK CA 94025-0000</td> <td>In Review</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>01/08/2021</td> <td>BLD2021-00034</td> <td>Electrical Service Upgrade</td> <td>test</td> <td>1325 CLOUD AVE, MENLO PARK CA 94025-0000</td> <td>Issued</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>01/07/2021</td> <td>BLD2021-00022</td> <td>Photovoltaic Residential</td> <td>test</td> <td>1325 CLOUD AVE, MENLO PARK CA 94025</td> <td>Received</td> <td></td> </tr> </tbody> </table> | <input type="checkbox"/> | Date | Record Number | Record Type | Description | Address | Status | Action | <input type="checkbox"/> | 01/11/2021 | BLD2021-00038 | Residential Water Heater | test | 1325 CLOUD AVE, MENLO PARK CA 94025-0000 | In Review | | <input type="checkbox"/> | 01/08/2021 | BLD2021-00034 | Electrical Service Upgrade | test | 1325 CLOUD AVE, MENLO PARK CA 94025-0000 | Issued | | <input type="checkbox"/> | 01/07/2021 | BLD2021-00022 | Photovoltaic Residential | test | 1325 CLOUD AVE, MENLO PARK CA 94025 | Received | |
|---|--|-------------------------------|----------------------------|---------------|--|---------------|---------|-------------------|--------|--------------------------|------------|-------------------------------|--------------------------|------|--|-----------|--|--------------------------|------------|-------------------------------|----------------------------|------|--|--------|--|--------------------------|------------|-------------------------------|--------------------------|------|-------------------------------------|----------|--|
| <input type="checkbox"/> | Date | Record Number | Record Type | Description | Address | Status | Action | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 01/11/2021 | BLD2021-00038 | Residential Water Heater | test | 1325 CLOUD AVE, MENLO PARK CA 94025-0000 | In Review | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 01/08/2021 | BLD2021-00034 | Electrical Service Upgrade | test | 1325 CLOUD AVE, MENLO PARK CA 94025-0000 | Issued | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 01/07/2021 | BLD2021-00022 | Photovoltaic Residential | test | 1325 CLOUD AVE, MENLO PARK CA 94025 | Received | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>2. When on Application page, go to Record Info → Attachments</p> | <p>Record BLD2021-00022: Photovoltaic Residential Record Status: Received</p> <p>Record Info ▾ Payments ▾</p> <p>Record Details</p> <p>Processing Status</p> <p>Related Records</p> <p>Attachments</p> <p>required, are identified below permit issuance.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>3. System opens 'Attachments' page. Click 'Add' at the bottom of the page.</p> | <table border="1"> <thead> <tr> <th>Name</th> <th>Record ID</th> <th>Type</th> <th>Size</th> <th>Latest Update</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td colspan="6">No records found.</td> </tr> </tbody> </table> <p>Add</p> | Name | Record ID | Type | Size | Latest Update | Action | No records found. | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name | Record ID | Type | Size | Latest Update | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| No records found. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>4. System opens 'File Upload' pop up window. Click 'Add' for the file selection.</p> | <p>Continue Add Remove All</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

5. System opens Windows Explorer with files on your machine. Select one or more required files and lick 'Continue'

File Upload



The maximum file size allowed is 100 MB.

ade; adp; bat; chm; cmd; com; cpl; exe; hta; htm; html; ins; isp; jar; js; jse; lib; l mhtml; msc; msp; mst; php; pif; scr; sct; shb; sys; vb; vbe; vbs; vxd; wsc; wsf; w file types to upload.

dummy.pdf

100%

Continue

Add

Remove All

Cancel

6. System displays preview of the files to be uploaded. Fill out the required 'Description' fields and click 'Save'.

File:

dummy 2.pdf

100%

*Description:

test

Save

Add

Remove All

7. System displays list of the uploaded files. You may view details or delete the uploaded file via Actions → View Details/Delete next to each row. You may also add new files via 'Add' button.

| Name | Record ID | Type | Size | Latest Update | Action |
|-------------|---------------|------|----------|---------------|------------------------|
| dummy.pdf | BLD2021-00022 | | 31.71 KB | 01/07/2021 | Actions ▾ |
| dummy 1.pdf | BLD2021-00022 | | 31.71 KB | 01/07/2021 | View Details Delete |
| dummy 2.pdf | BLD2021-00022 | | 31.71 KB | 01/07/2021 | Actions ▾ |

Add

7. ACA List of documents to upload, by permit

7.1. Description

For most permit's documents will be required to be loaded up prior to submission. The only OTC permit that does not require documents is the water heater permit. Documents will be required depending on the value of the data fields or location of the property. The list of scenarios is provided in the section below. Also, the information provided on the document page will provide this list of required documents depending on permit and scenario.

7.2. List of documents

| | |
|---|--|
| 1. Electrical Service Upgrade | If the data field Is the service upgrade less than 300 Amps = No then you will need the document Load Calculations LOAD |
| 2. Residential HVAC, Furnace, Air Conditioning, and Heat Pump | <p>If the data field Furnace - Is the appliance located in the lower level (basement or crawlspace) = Yes and the fuel type is propane then you will need the document Cross Sectional Plan (propane fueled furnaces located in basements) CROSS</p> <p>If the data field AC - Is the appliance located in the lower level (basement or crawlspace) = Yes and the fuel type is propane then you will need the document Cross Sectional Plan (propane fueled furnaces located in basements) CROSS</p> <p>If the data field AC is checked then you will need the documents Air Conditioning Unit Site Plan AC and Manufacturer Specification MSPEC</p> <p>If the data field Heat Pulp = Yes then you will need the document Heat pump floor plan HEAT</p> <p>If the data field Furnace - Is the installation or replacement located in the garage = Yes then you will need the document Floor Plan FLOOR</p> |
| 3. Residential Plumbing | <p>If the data field Sewer is checked then no documents are required</p> <p>If the data field Water is checked and the data field New, Replacement, or No Meter Change = New then you will need the document Will Serve Letter WSL</p> <p>If the data field Gas is checked and the data field Is the gas line running into a dedicated appliance = No then you will need the document Schematics SCHEM</p> |
| 4. Residential Re-Roof | If within a coastal or design review district, then you will need the document Roof Colors COLOR |
| 5. Residential Siding and Stucco | If within a coastal or design review district and the data field For partial siding/stucco replacement, does the new match existing colors and materials? = No then you will need the document Colors/Finish and Materials COLOR |

| | | |
|----|----------------------------|--|
| | | If within a coastal or design review district and the data field For partial siding/stucco replacement, does the new match existing colors and materials? = Yes then you will need the document Photos of Existing Siding or Stucco PHOTO |
| 6. | Residential Water Heater | If the replacement water heater is not in the same location and will be located in the garage then you will need the document Floor Plan FLOOR |
| 7. | Residential Window or Door | If within a coastal or design review district, then you will need the document Colors/Finish and Materials COLOR |

8. ACA How to Apply for a Permit

8.1. Description

Applying for a Permit includes submitting Application Form and providing relevant information and documentation.

Each Permit Type may require different type of information to be provided. Colors/Finish and Materials | COLOR

8.2. Steps

| | | |
|----|---|--|
| 3. | On Portal, click 'Apply for Permit'. | <p>Building</p> <p>Apply for a permit</p> <p>Search Applications</p> |
| 4. | Read and accept the General disclaimer by checking the checkbox and click 'Continue Application'. | <p><input checked="" type="checkbox"/> I have read and accepted the above terms.</p> <p>Continue Application »</p> |
| 5. | Select applicable record type and click 'Continue Application'. | <p>▼ Building</p> <ul style="list-style-type: none"> <input type="radio"/> Electrical Service Upgrade <input type="radio"/> Photovoltaic Residential <input type="radio"/> Residential HVAC, Furnace, Air Conditioning, and Heat Pump <input type="radio"/> Residential Plumbing <input type="radio"/> Residential Re-Roof <input type="radio"/> Residential Siding and Stucco <input checked="" type="radio"/> Residential Water Heater <input type="radio"/> Residential Window or Door <input type="radio"/> Solar Pool Heating Residential <input type="radio"/> Solar Water Heating Residential <p>Continue Application »</p> |

6. System opens Application Form with tabs, specific to the type selected in the previous step. Start providing information under each tab. You may click 'Save and resume later' to save provided information and continue filling out the form later.

Residential Water Heater

| | | | | | | |
|--------------------|--------------------|-----------------------|-------------|----------|---|---|
| 1 Project Location | 2 Project Contacts | 3 Project Information | 4 Documents | 5 Review | 6 | 7 |
|--------------------|--------------------|-----------------------|-------------|----------|---|---|

Save and resume later

7. Under 'Location' – 'Address', fill out the search form and click 'Search'. Alternately, you can search by entering parcel or owner information.

* Street No.: Direction: * Street Name: Street Type:

Unit Type: Unit No.: City:

Search **Clear**

8. System opens 'Address Search Result List' pop-up window. Click on radio button next to the required address.

Address Search Result List ×

Addresses

Showing 1-2 of 2

| Address | City | Zip |
|---|------------|-------|
| <input type="radio"/> 1325 CLOUD AVE, GIS, Area3, MENLO PARK SMC CA 94025, 1325 CLOUD AVE MENLO PARK CA 94025, 1325 CLOUD AVE MENLO PARK CA 94025 | MENLO PARK | 94025 |
| <input type="radio"/> 1325 CLOUD AVE, Planning, Area3, MENLO PARK SMC CA, 1325 CLOUD AVE MENLO PARK CA, 1325 CLOUD AVE MENLO PARK CA | MENLO PARK | |

Select **Cancel**

9. System updates 'Address Search Result List', providing associated parcels and owners list. Pick the applicable parcels and owners and click 'Select'.

Address Search Result List

Showing 1-1 of 1

| Address | City | Zip |
|--|------------|-------|
| <input checked="" type="radio"/> 1325 CLOUD AVE, GIS, Area3, MENLO PARK SMC CA 94025, 1325 CLOUD AVE MENLO PARK CA 94025, 1325 CLOUD AVE MENLO PARK CA 94025 | MENLO PARK | 94025 |

Associated Parcels

Showing 1-1 of 1

| Parcel Number | Lot | Block | Subdivision |
|--|-----|-------|-------------|
| <input checked="" type="radio"/> 074063280 | 280 | 063 | |

Associated Owners

Owner(s) can be added on the next screen if not listed here.

Showing 1-3 of 3

| Name | Address |
|---|--|
| <input checked="" type="radio"/> WHITE DONALD E | 1325 CLOUD AVE MENLO PARK CA 940256047 |
| <input type="radio"/> CORDER SHERRIE L | 1325 CLOUD AVE MENLO PARK CA 940256047 |
| <input type="radio"/> WHITE SONJA M | 1325 CLOUD AVE MENLO PARK CA 940256047 |

Select

Cancel

10. Once System populated the selected information under 'Location' tab, click 'Continue Application'.

Address

For best search results enter the street number and street name only. Parcel number and owner info below.

| | | | |
|-----------------------------------|---|------------------------------------|----------------------------------|
| * Street No.: | Direction: | * Street Name: | Street Type: |
| <input type="text" value="1325"/> | <input type="text" value="--Select--"/> | <input type="text" value="CLOUD"/> | <input type="text" value="AVE"/> |

| | | |
|---|----------------------|---|
| Unit Type: | Unit No.: | City: |
| <input type="text" value="--Select--"/> | <input type="text"/> | <input type="text" value="MENLO PARK"/> |

| | |
|---------------------------------------|--------------------------------------|
| <input type="button" value="Search"/> | <input type="button" value="Clear"/> |
|---------------------------------------|--------------------------------------|

Parcel

| | |
|--|--------------------------------------|
| * Parcel Number: | Parcel Area: |
| <input type="text" value="074063280"/> | <input type="text" value="7947.65"/> |

| | |
|---------------------------------------|--------------------------------------|
| <input type="button" value="Search"/> | <input type="button" value="Clear"/> |
|---------------------------------------|--------------------------------------|

Owner

| | | | |
|---|---|---|------------------------------------|
| Owner Name: ? | Address Line 1: | City: | Zip: |
| <input type="text" value="WHITE DONALD E"/> | <input type="text" value="1325 CLOUD AVE"/> | <input type="text" value="MENLO PARK"/> | <input type="text" value="94025"/> |

| | |
|---------------------------------------|--------------------------------------|
| <input type="button" value="Search"/> | <input type="button" value="Clear"/> |
|---------------------------------------|--------------------------------------|

| |
|---|
| <input type="button" value="Continue Application »"/> |
|---|

11. Under 'Project Contacts' tab add Applicant information. You can click 'As Applicant' to add existing user e.g. yourself. You can also click 'Add New' to add new person. If you prefer to 'Add New' person, go to step #14.

Applicant

To identify yourself as the main contact for this permit, select to receive all correspondence for this permit.

As Applicant **Add New**

12. Once you click 'As Applicant', System displays 'Select Contact from Account' pop-up window. Select applicable contact and click 'Continue'.

Select Contact from Account

Select a contact to attach to this application.
If the contact has multiple addresses, you can select which to use in the next step.

Showing 1-4 of 4

| Category | Type | Name |
|---|------------|------------------|
| <input checked="" type="radio"/> Associated Contact | Individual | Test User |
| <input type="radio"/> Associated Owner | | WHITE DONALD E |
| <input type="radio"/> Associated Owner | | CORDER SHERRIE L |
| <input type="radio"/> Associated Owner | | WHITE SONJA M |

Continue [Discard Changes](#)

13. System displays added Applicant. You may click 'Edit' to update user information or click 'Remove' to remove the Applicant and add different one.

Test User

test.user@org.com
Home phone:1231231212
Mobile Phone:
Work Phone: 1231231212
Fax:
[Edit](#) [Remove](#)

14. If you wish to add new person instead, under 'Project Contacts' tab click 'Add New' to add new person.

Applicant

To identify yourself as the main contact for this permit, select to receive all correspondence for this permit.

As Applicant **Add New**

15. System opens 'Contact Information' pop up. Fill out the required fields and click 'Continue'.

Contact Information

* First: Middle: * Last:

Name of Business: Country:

* Address Line 1:

* City: * State: * Zip:

Primary Phone Primary Phone Secondary Phone:

Fax: E-mail:

[Discard Changes](#)

16. System displays added Applicant. You may click 'Edit' to update user information or click 'Remove' to remove the Applicant and add different one.

✔ **Contact added successfully.**

Test User
test.user@org.com
Home phone:1231231212
Mobile Phone:
Work Phone:
Fax:
[Edit](#) [Remove](#)

17. Under 'Project Contacts' – 'Owner/Builder', click 'As Applicant' and then 'Continue Application' if you are the owner and assuming General Contractor responsibilities for this project. Otherwise, only click continue Application.

Owner/Builder

If you are the owner and assuming General Contractor responsibilities for this project, select *As Applicant*. Otherwise, select *continue Application*.

18. System opens 'Licenced Contractor and Professional List'. Click 'Add New' to add a new person. If you wish to search in the System, go to step #20.

Licensed Contractor and Professional List

If you are a Licensed Contractor select the *Search* button to add your contractor's inform Contractor select the *Add New* button.

Add New

Search

19. System opens 'Licensed Professional Information' pop up. Fill out the required fields and click 'Save and Close'.

Licensed Professional Information

* License Type:

Architect

* State License Number:

CA

* First:

Test

Middle:

* Last:

User

Name of Business:

Business License #:

* Address Line 1:

123 Test Street

* City:

Test City

* State:

CA

* Zip:

94003 000

Primary Phone:

1231231212

Secondary Phone:

Fax:

Save and Close

Clear

Discard Changes

20. If you wish to add existing person as well (or instead), click 'Search' under 'Licensed Contractor and Professional List'.

Licensed Contractor and Professional List

If you are a Licensed Contractor select the *Search* button to add your contractor's informa Contractor select the *Add New* button.

Add New

Search

21. System opens 'Look Up License' pop up window. Enter search parameters and click 'Look Up'.

Primary Phone: Secondary:

Look Up Clear Discard Changes

22. System displays search results. Select required person and click 'Continue'.

11425 Architect MICHAEL GOLDENSTEIN

< Prev 1 2 3 4 5 6 7 8

Continue Discard Changes

23. System displays list of all added Licensed Professionals. You may click 'Edit' to update the information or 'Delete' to remove person from the list. Once list is complete, click 'Continue Application'.

✔ Licensed professional added successfully.

Showing 1-2 of 2

| License Number | License Type | Contact Name | Business Name | Mobile Phone | Action |
|----------------|--------------|---------------|---------------------|--------------|-------------|
| 0 | Architect | DANIEL WARREN | DANIEL WAREN DESIGN | | Edit Delete |
| CA | Architect | Test User | | | Edit Delete |

Continue Application » Save and resume later

24. System opens 'Project Information' – 'Work Description' section. Fill out the form and click 'Continue Application'.

Step 3: Project Information > Work Description

Detailed Permit Description

Please provide a detailed description of the work being performed

* Detailed Job Description:

test

Continue Application »

25. System opens 'Project Information' section. Fill out the form and click 'Continue Application'.

Step 3: Project Information > Project Information

Project Information

WATER HEATER INFO

* System Type:

* Energy Source:

* Is this a replacement water heater in the same location?: Yes No

If new location, where located?: *

* Do you need a new electrical circuit?: Yes No

* Do you need to run new gas line?: Yes No

Zoning:

Continue Application »

8. System opens 'Attachments' tab. Click 'Add' at the bottom of the page.





| Name | Record ID | Type | Size | Latest Update | Action |
|-------------------|-----------|------|------|---------------|--------|
| No records found. | | | | | |

Add

9. System opens 'File Upload' pop up window. Click 'Add' for the file selection.

Continue **Add** **Remove All**

10. System opens Windows Explorer with files on your machine. Select one or more files.

-  Structural-Criteria-Rev_1.pdf
-  Standard-Plan-2-Rev-Microinverter_1_1.pdf
-  Central-String-Inverter.pdf
-  Checklist_4.pdf

11. System displays list of selected files. Click 'Continue'.

File Upload ✕

The maximum file size allowed is **100 MB**.
**ade; adp; bat; chm; cmd; com; cpl; exe; hta; htm; html; ins; isp; jar; js; jse; lib; mhtml; msc; msp; mst; php; pif; scr; sct; shb; sys; vb; vbe; vbs; vxd; wsc; wsf; **
file types to upload.

| | |
|-------------------------------|------|
| Structural-Criteria-Rev_1.pdf | 100% |
| Standard-Plan-2-Rev- | 100% |
| Central-String-Inverter.pdf | 100% |
| Checklist_4.pdf | 100% |
| | |

Continue **Add** **Remove All** Cancel

12. System displays preview of the files to be uploaded. Fill out the required 'Description' fields and click 'Save'.

File:
Checklist_4.pdf
100%

* Description:
test

Save **Add** **Remove All**

Continue Application »

13. System displays list of the uploaded files. You may view details or delete the uploaded file via Actions → View Details/Delete next to each row. Click ‘Continue Application’.

| Name | Type | Size | Latest Update | Action |
|---|------|-----------|---------------|------------------------|
| Structural-Criteria-Rev_1.pdf | | 735.76 KB | 01/08/2021 | Actions ▼ |
| Standard-Plan-2-Rev-Microinverter_1_1.pdf | | 774.71 KB | 01/08/2021 | View Details Delete |
| Central-String-Inverter.pdf | | 927.54 KB | 01/08/2021 | Actions ▼ |
| Checklist_4.pdf | | 492.35 KB | 01/08/2021 | Actions ▼ |

Add

Continue Application »

26. System opens ‘Review’ tab. Please review the summary of the entered information and the certification. Check the checkbox and click ‘Continue Application’.

By checking this box, I agree to the above certification.

Continue Application »

27. System opens ‘Pay Fees’ tab with list of preliminary fees to be paid. Click ‘Continue Application’.

Step 6: Pay Fees


Listed below are preliminary fees based upon the information you’ve entered. Your payment will be processed by the County’s third party vendor Elavon. Visit the Elavon website at <https://www.elavon.ca/index.html>.

Application Fees

| Fees | Qty. | Amount |
|---|------|----------|
| Application Filing Fee - Easy Review | 1 | \$50.00 |
| Electrical, Mechanical, Plumbing (Water,Gas,Sewer Line) Minimum Fee | 1 | \$165.00 |
| Document Storage Fee (2%) | 1 | \$4.30 |
| Technology Fee (4%) | 1 | \$8.60 |
| Credit Card Processing Fee (3%) | 7.16 | \$7.16 |
| Legal Counsel Surcharge (5%) | 1 | \$10.75 |

TOTAL FEES: \$245.81
Note:

Continue Application »

| | |
|---|---|
| <p>28. System opens 'Payment Options' page. Enter required payment information and click 'Submit Payment'. Once payment is processed, Application is submitted.</p> | <p>E-mail:</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">test.user@org.cpm</div> <div style="border: 2px solid red; padding: 5px; display: inline-block; background-color: #0056b3; color: white; text-decoration: none; border-radius: 3px;">Submit Payment »</div> |
| <p>29. System displays 'Record Issuance, providing your record number. You may print the receipt by clicking 'Print/View Receipt' and view the application information by clicking 'View Record Details'. You should also receive emails, notifying you about the successful payment and submitted application.</p> | <p>Step 7: Record Issuance</p> <div style="background-color: #e1f5fe; padding: 10px; border: 1px solid #cfe2f3; margin-bottom: 10px;">  Your application has been successfully submitted. </div> <p>Thank you for using our online services. Your Record Number is BLD2021-00038.</p> <p>You will need this number to check the status of your application or to schedule/check results of inspections. Please print a copy of your record and post it in the work area.</p> <div style="border: 1px solid #0056b3; padding: 2px; display: inline-block; background-color: #0056b3; color: white; text-decoration: none; border-radius: 3px; margin-bottom: 10px;">Print/View Receipt</div> <hr/> <p>Thank you for your application. Someone will be contacting you in the future with information on how to proceed with your application. Choose "View Record Details" to Schedule Inspections, check status, or make other updates.</p> <div style="border: 1px solid #0056b3; padding: 2px; display: inline-block; background-color: #0056b3; color: white; text-decoration: none; border-radius: 3px;">View Record Details »</div> |

9. ACA How to create a Collection

9.1. Description

Portal allows group records in different collections for easier navigation and more simple way of finding records you may need more frequently.

9.2. Steps

| | |
|--|---|
| <p>1. On Portal, open any record page and click 'Add Collection' on the top-right of the page.</p> | <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 80%;"> <p>Record BLD2021-00022:</p> <p>Photovoltaic Residential</p> <p>Record Status: Received</p> </div> <div style="width: 15%; text-align: right;"> <div style="border: 2px solid red; padding: 5px; display: inline-block; background-color: #00a0e3; color: white; text-decoration: none; border-radius: 3px;">Add to collection</div> </div> </div> <div style="margin-top: 10px; display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f5f5f5;">Record Info ▼</div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f5f5f5;">Payments ▼</div> </div> |
|--|---|

2. System will display 'Add to collection' pop-up window. Fill out the form and click 'Add'. You must select from Existing Collection or create New Collection by providing the name. You may also provide a description.

3. Once added, you may view your collections by clicking 'Collections' on the top of the page. This section allows to view, manage, delete the collection.

Showing 1-2 of 2

| Date Modified | Name | Description | Number of Records | |
|---------------|-------------------|-------------------|-------------------|--------|
| 01/07/2021 | Test Collection | Tests Description | 1 | Delete |
| 01/07/2021 | Test Collection 2 | | 1 | Delete |

10. ACA How to locate status updates and inspection results

10.1. Description

Status updates and inspection results can be viewed on Portal via record details page.

10.2. Steps

1. To view status updates, on Portal, go to 'My Records' and click on the record number hyperlink for the record that you wish to check the statuses for.

Dashboard **My Records** My Account Advanced Search ▼

▼ Building

Showing 1-14 of 14 | [Download results](#) | [Add to collection](#)

| <input type="checkbox"/> | Date | Record Number | Record Type | Description | Address | Status | Action |
|--------------------------|------------|----------------------|--------------------------|-------------|--|-----------|--------|
| <input type="checkbox"/> | 01/11/2021 | BLD2021-00038 | Residential Water Heater | test | 1325 CLOUD AVE, MENLO PARK CA 94025-0000 | In Review | |

2. System opens record details page. Go to 'Record Info' → 'Processing Status'.

Record BLD2021-00038:
Residential Water Heater
Record Status: In Review

Record Info ▼ Payments ▼

- Record Details
- Processing Status**
- Related Records
- Attachments
- Inspections
- Valuation Calculator

3. System opens 'Processing Status' page with progress information related to your application. You may click ▶ icon to expand the row and review additional details.

Click on the arrows to see more details like status and comments.
If you would like a print out of the case activities, please select *Reports* at the top of the page.

- * ▶ Application Submittal
- ✓ ▶ Plan Review Distribution
- ▶ Building Review**
- ⌵ Planning Review
 - Due on 01/11/2021, assigned to TBD
 - Marked as TBD on TBD by TBD
 - ⌵ Planning Review Distribution
 - Landscape Review
 - Zoning and Land use Review
 - Grading Review
 - Arborist Review
 - Planning Review Consolidation
- ▶ Additional Review
- Review Consolidation
- Ready to Issue Permit
- Inspections

4. To review inspection information, go to 'Record Info' → 'Inspections'.

- Record Info ▼
- Record Details
- Processing Status
- Related Records
- Attachments
- Inspections**
- Valuation Calculator

5. System displays all the upcoming and completed inspections related to your record. Click 'View Details' to review additional information of the specific inspection.

Record Info ▾ Payments ▾

Inspections

If you applied for a permit through the online permit center, please call (650) 295-3650, use one of the following three digit codes to schedule an inspection. Otherwise, use the codes on the inspection Card that was provided when your permit was issued.

Upcoming (5)

Schedule or Request an Inspection

Click the link above to schedule or request one.

| | |
|---|----------------------------------|
| TBD Estimated Arrival at TBD Pending Final SWN Inspector: <i>unassigned</i> | Actions ▾ View Details |
| TBD Estimated Arrival at TBD Pending Final Other Inspector: <i>unassigned</i> | |
| TBD Estimated Arrival at TBD Pending Final by Planning Inspector: <i>unassigned</i> | Actions ▾ |
| TBD Estimated Arrival at TBD Pending 921 Water Heater or Boiler Inspector: <i>unassigned</i> | Actions ▾ |
| TBD Estimated Arrival at TBD Pending 901 Building Final Inspector: <i>unassigned</i> | Actions ▾ |

Completed

There are no completed inspections on this record.

6. System opens pop up with additional information regarding the selected inspection. You may click 'Print' to print the displayed details.

Final SWN (18747407, Optional)

1325 CLOUD AVE
MENLO PARK

[Print](#)

Status

Pending

TBD

Estimated Arrival Time: TBD

Desired Date: TBD

Last updated

ATU

1/11/2021 12:15 PM

[View Status History](#)

[View Result Comments](#)

Details

Record

BLD2021-00038

Residential Water Heater

Contact

Avocette T User

Related Inspections

Showing 0-0 of 0

| ID | Inspection Name | Relationship | Status |
|-------------------|-----------------|--------------|--------|
| No records found. | | | |

11. ACA When to expect email notifications

11.1. Description

Once you submit a permit application, you will be receiving emails with information such as fee payment confirmation, submitted application number, and the issues permit. Below are the examples of such emails.

11.2. Email Examples

1. 'Order Confirmation' email, confirming the processed fee for the application.

\$3,704.29 USD

01/08/2021 04:09:12 PM

Demo

Your payment has been approved

Payment VISA 40*****6781
Transaction ID 080121ED3-9C8F920A-F1AF-4A38-8C91-29E4218D4455
Approval Code N09002
ECI
OCT Reference Number

Total **\$3,704.29 USD**

2. 'Building Permit Application Submitted' email, notifying about the accepted submitted application.

Dear Applicant,

Re: BLD2021-00034



[1325 CLOUD AVE, MENLO PARK, CA 94025-0000](#)

074063280

Electrical Service Upgrade

Thank you for your building permit application. Staff will review the application documents for completeness and reach out once the application has been accepted for processing or if more information is needed.

3. You may also receive email such as 'Building Permit Issued', providing notification about the issued permit the permit in PDF format attached to the email.

 **ACAPermit_V3_20210108_130915.pdf** 87 KB 

Dear Applicant,

Re: BLD2021-00034

[1325 CLOUD AVE, MENLO PARK, CA 94025-0000](#)

074063280

Electrical Service Upgrade

Your building permit has been issued and attached is the permit and the building inspection record that lists all the available inspection codes. You may now commence work and schedule inspections.

To schedule, reschedule, cancel, or get inspection results, please visit the online portal or call the automated inspection line (650) 295-3650. Inspections can be scheduled up to 14 days in advance (Monday-Friday) excluding holidays. If using the automated inspection line, please have your building permit number and three digit inspection code prior to scheduling an inspection.

Inspections must be scheduled by 4:00 p.m. the business day prior to the desired inspection date. You will receive a confirmation email that the inspection has been scheduled with instructions on how to get your inspection time (2-hour window).

For questions contact the Building Inspection Section at (650) 599-7311.