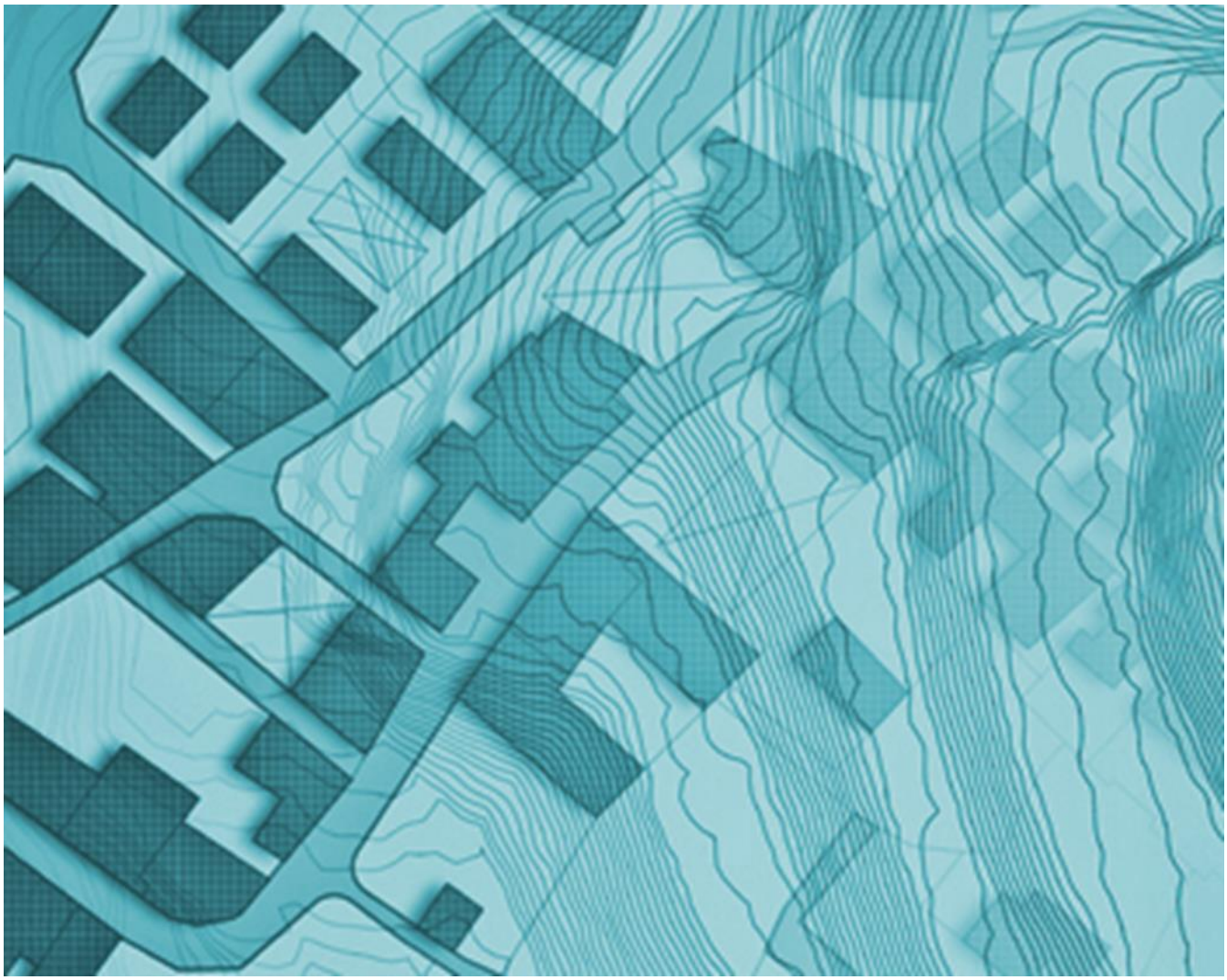

Accela Citizen Access

PUBLIC USER MANUAL

Placer County | Planning Services | June 2019

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Introduction

The Planning Services Division accepts all entitlement applications electronically. Electronic applications may be submitted online any time through the County's convenient Online Permitting Services portal, Accela Citizen Access, or to a Counter Services Technician at the Community Development Resource Agency offices in Auburn or Tahoe during front counter service hours. Application forms and filing instructions are available for download here.

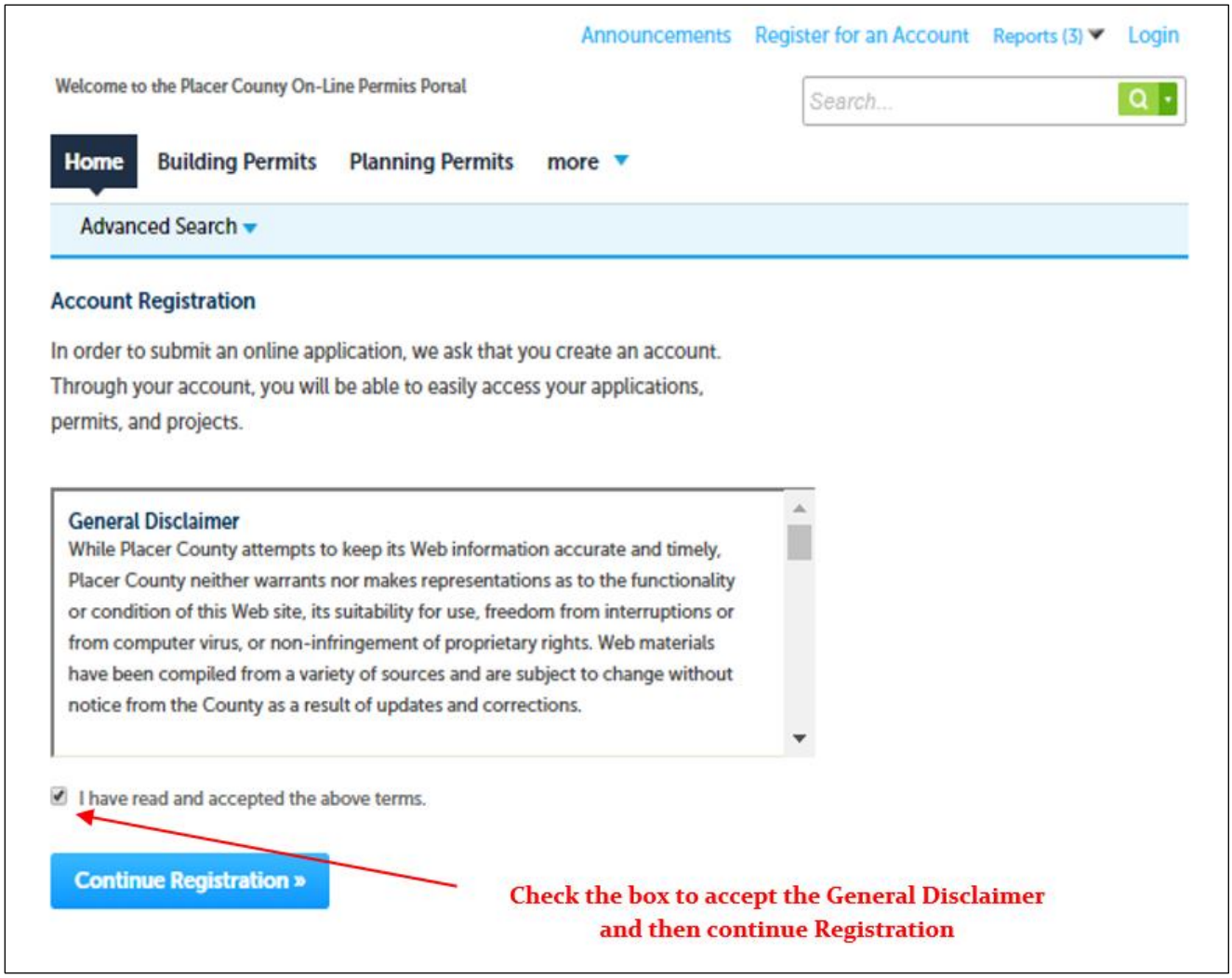
All supplemental application materials such as maps, plans and studies must be submitted in electronic format along with required supplemental application forms such as the Universal Application Form, Exemption Verification Form, Environmental Questionnaires and Minor Environmental Questionnaires. This user manual is designed for use by Public Users of the Accela Citizen Access application portal. The portal is designed as a fast, easy and user friendly tool, so don't worry – registering a user account and making applications is easy! Let's get started.

How to Register a User Account

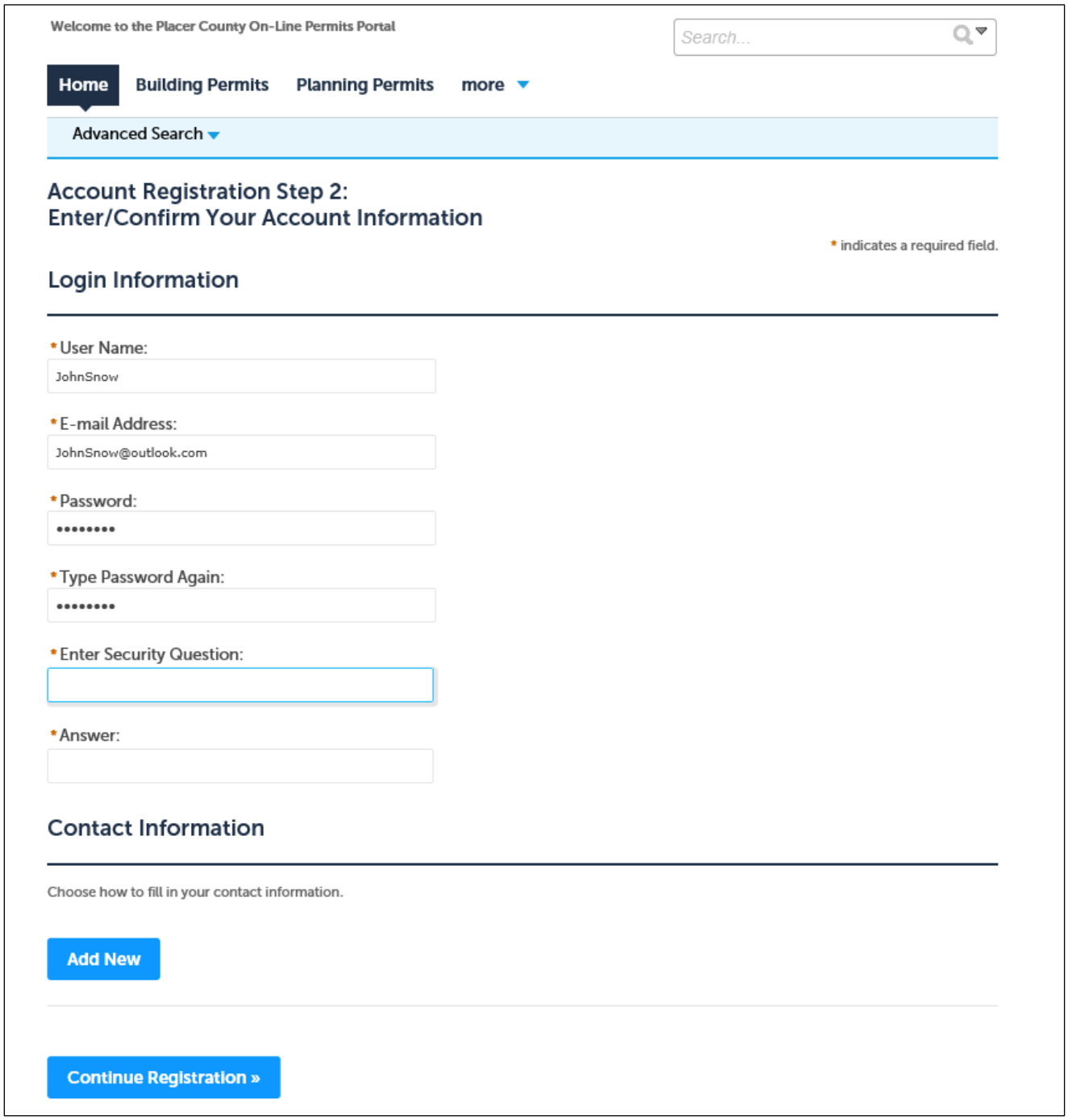
Before beginning, please make sure that your internet browser is the most current version! Problems with account registry or inability to advance an application submittal are most often caused by an out-of-date web browser!

Users who wish to submit an entitlement application online must first register for an account. Accounts include several features that enable the user to manage application submittals through their dashboard. Features include grouping related project applications under application "collections", the ability to update contact information for projects, and the ability to assign multiple users to a single shared account which enables firms to conveniently manage all application submittals to Placer County through a single account registry. Users may create an account by visiting the Placer County On-Line Permits Portal.

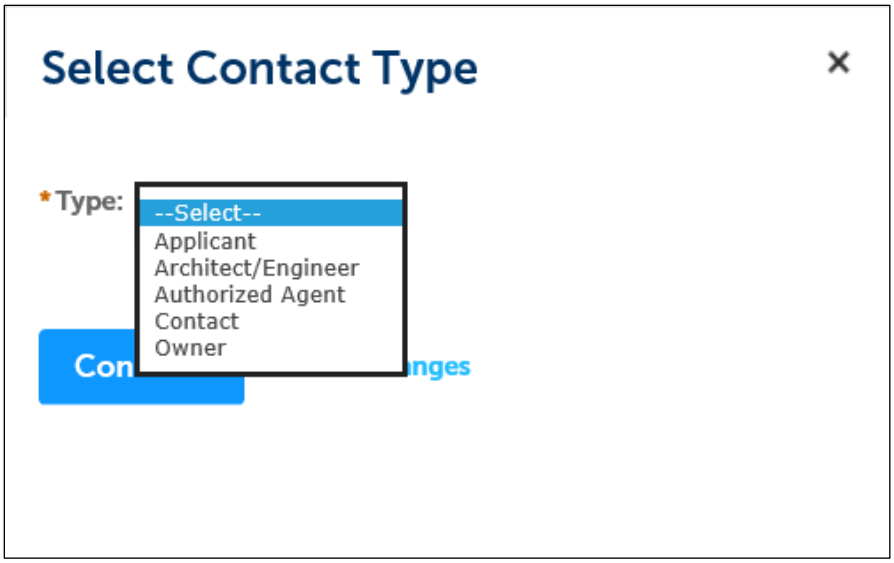
Account registration is simple and requires just a few minutes to complete. The following tutorial is a step-by-step example of the registration procedure. Let's begin!



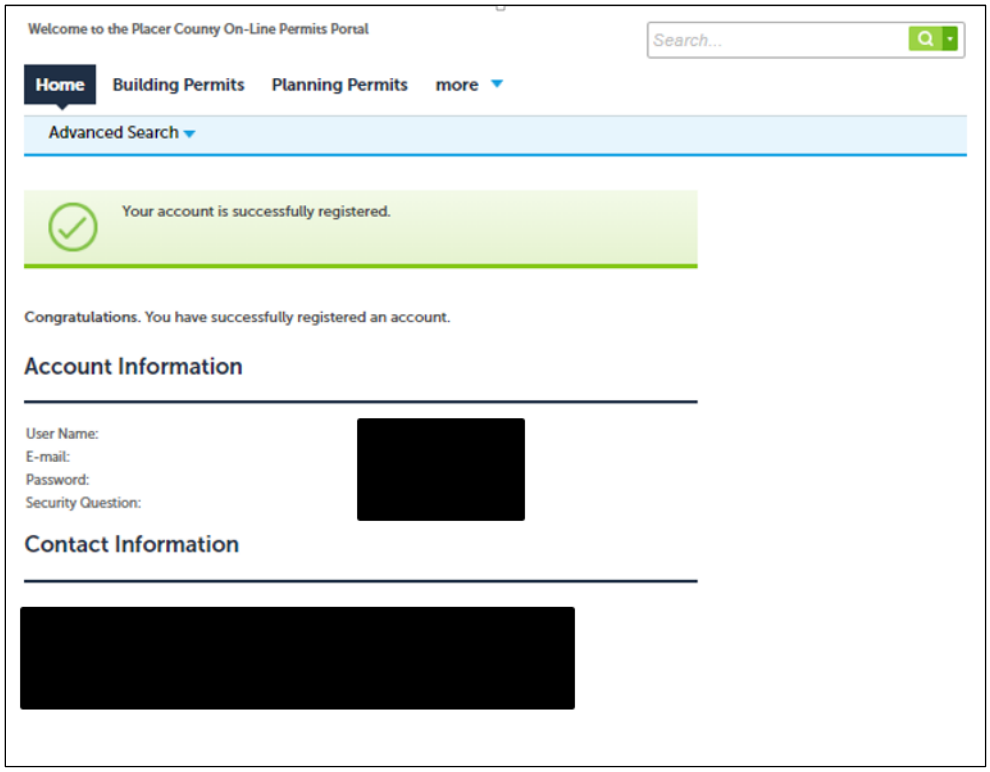
Next, the user will enter their account information creating a unique User Name, Password and Security Question. All users will need to provide their email address to enable login credentials.



Once the user has completed this information a pop-up will appear for the user to select their contact type, which includes options to register an account simply as an Applicant or Owner. For users that will manage applications on behalf of their clients, selections for Agent, Architect or Engineer are also included. The contact type is simply a user preference and will not affect how applications are reviewed or processed.



Next the user will be prompted to provide contact information including user name, address, phone number and email. Once this contact information is entered and the user selects "continue", the user contact information will be saved and the account creation process is complete. A pop-up window will appear to show that the account has been registered successfully, as shown in the screen shot below. The user will also receive an auto-generated email confirmation that the account has been created. Please save this information in a file for future reference.

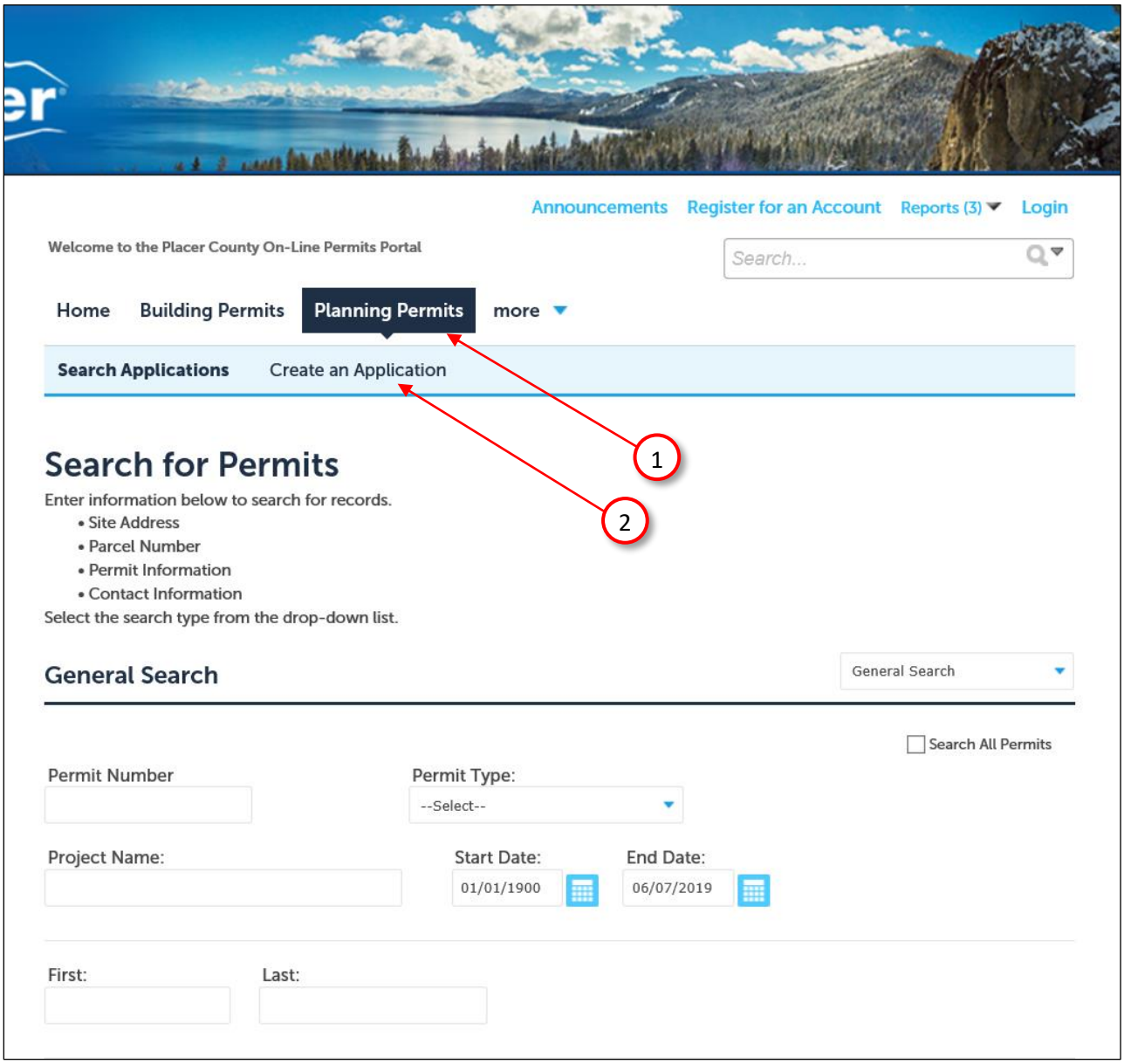


Planning Division Permits: Customer Pre-Application Submittal Process

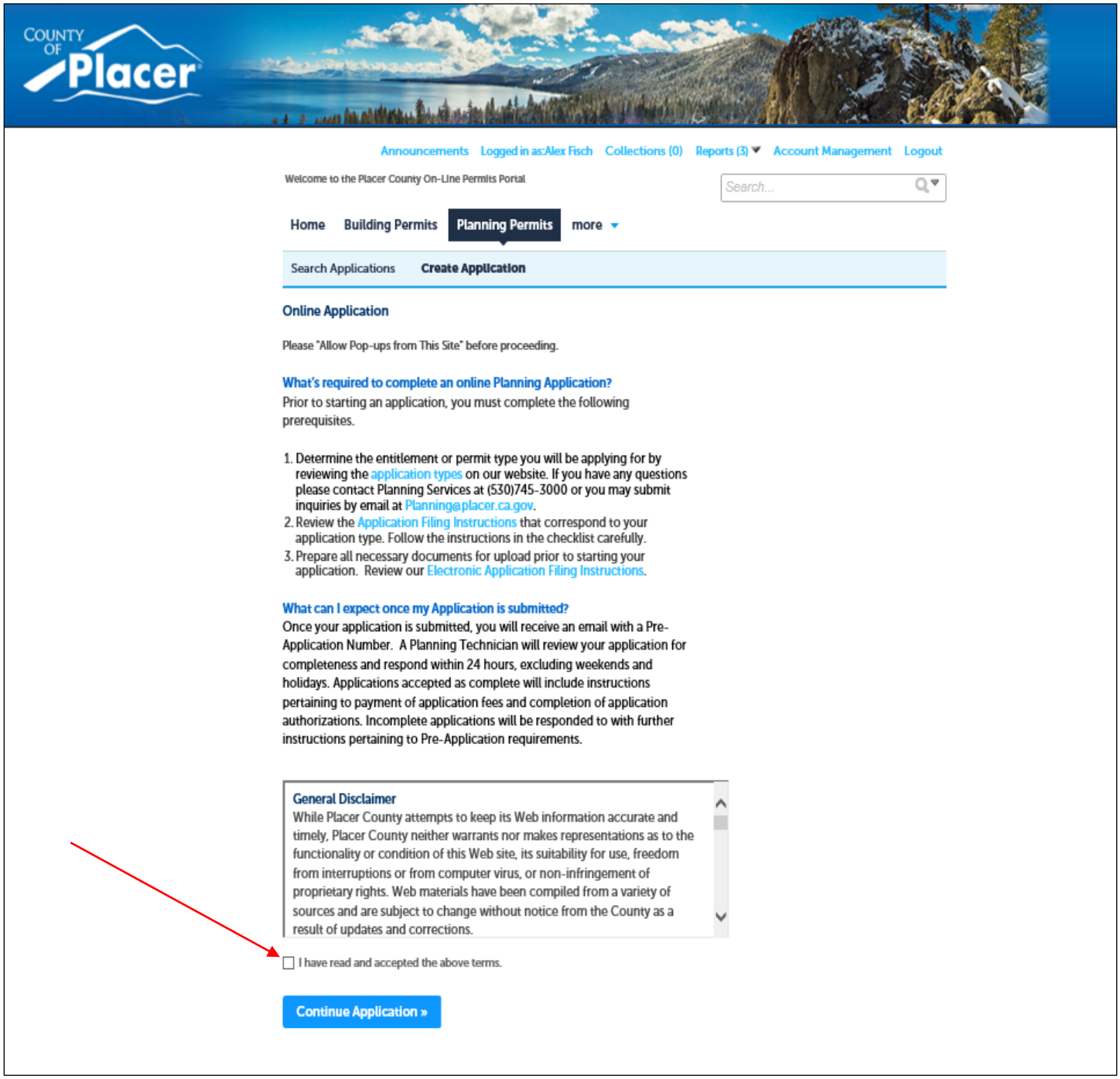
The Accela Citizen Access (ACA) online portal provides public users the opportunity to submit entitlement applications online, any time, any day. By logging into Accela Citizen Access, public users can create and manage applications, view and create collections of related applications, submit application documents and pay fees. Once an account has been created, the user will have 24/7/365 access to their online dashboard where they can manage their applications. Applications submitted by a public user are created as a "Pre-Application", which is converted to a real permit record by a Planning Technician upon validating the accuracy and completeness of the application selections.

Helper text is provided throughout the module to guide the user through the Pre-Application creation process, including live hyperlinks to the Planning Services Division application download page where applicants can review instructions for all applications, including detailed filing instructions for all entitlement application types.

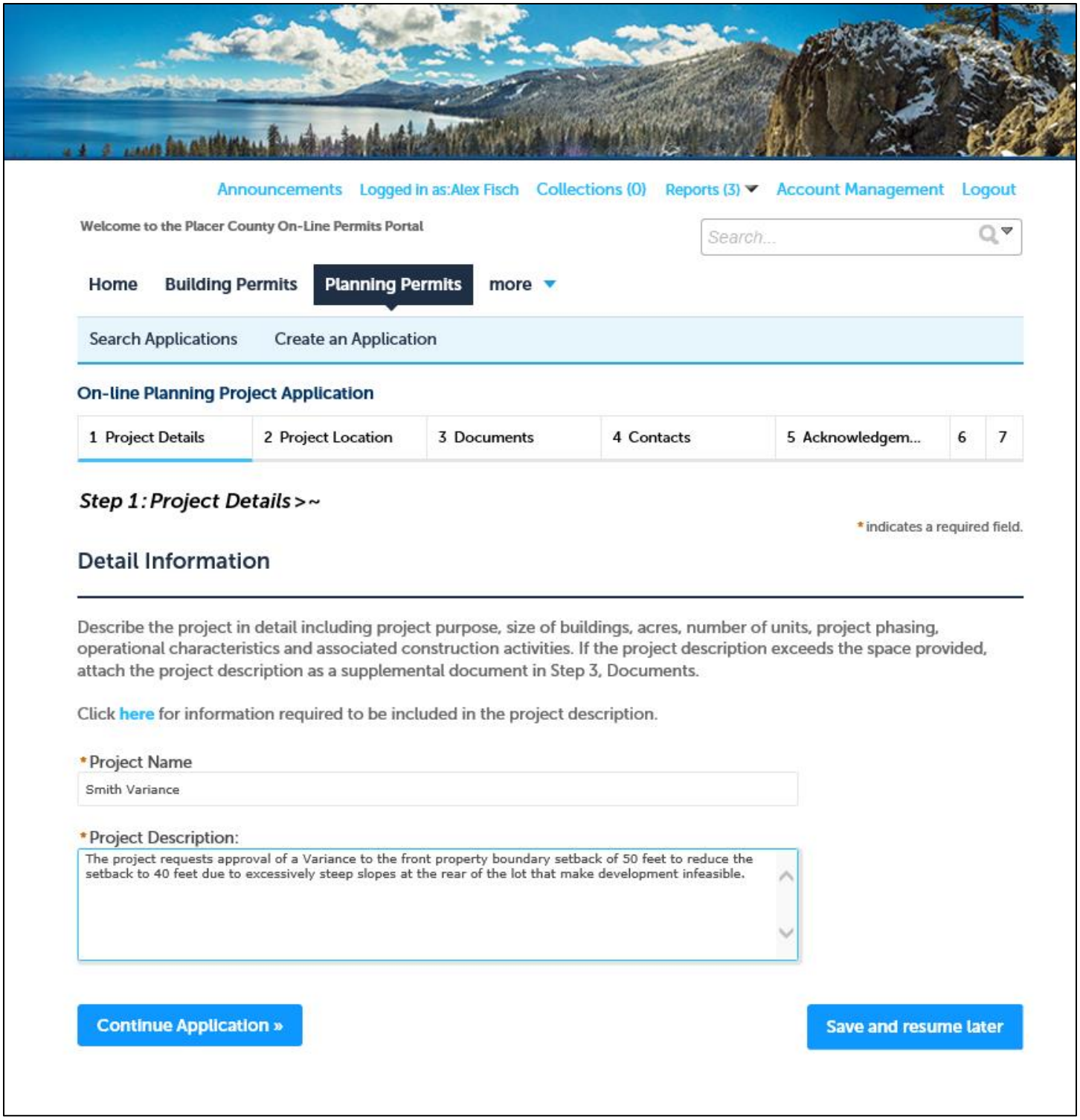
To begin an online Planning application submittal, the user will select "Planning Permits" (1) then "Create an Application" (2).



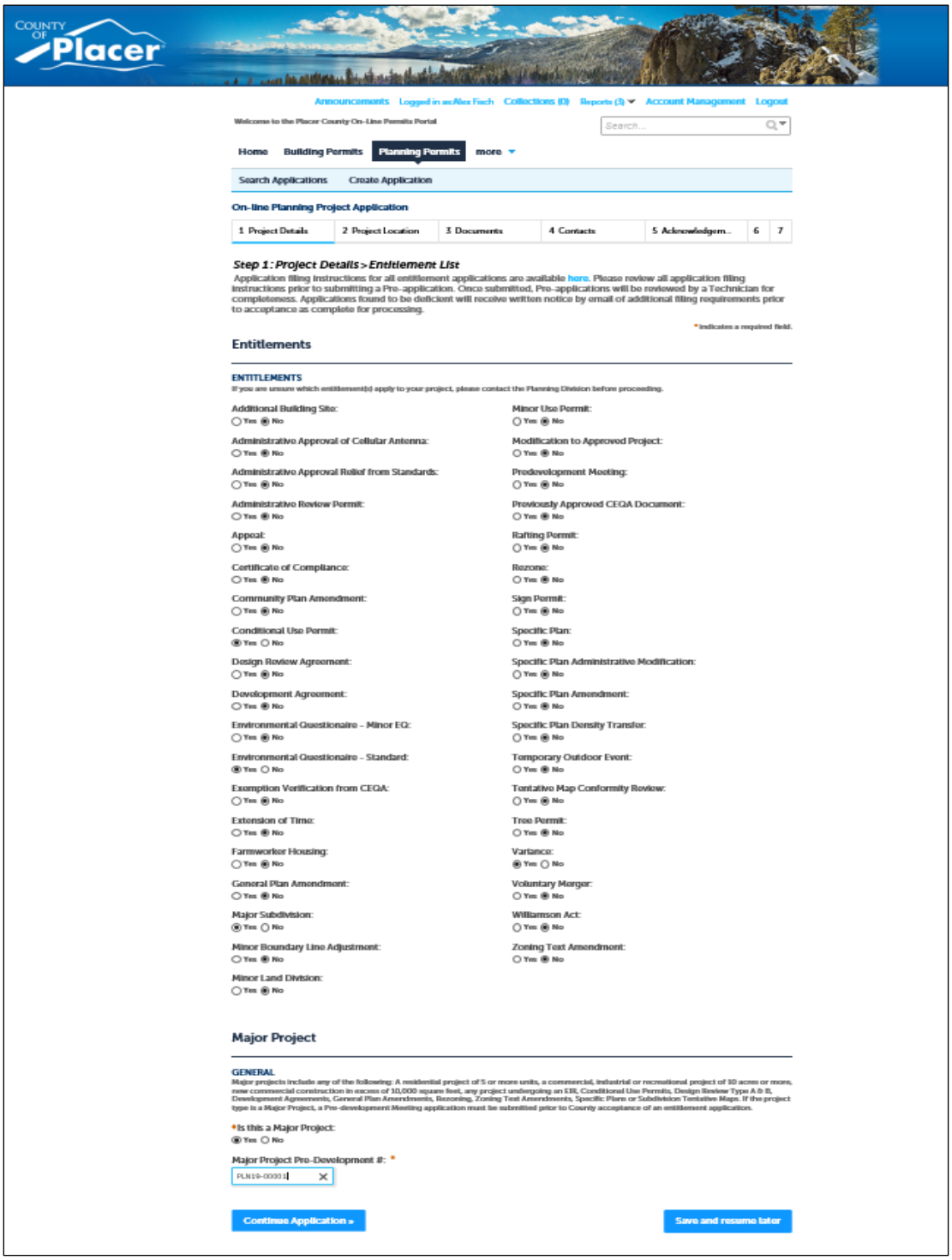
Next, the user will "Accept" the terms of use before proceeding to the module to create the Pre-Application, as shown in the screenshot below.



Once in the module the user will be prompted to provide a project name and a written project description, which will be written in the project description field provided. For complex projects requiring greater detail, a detailed written project description can be uploaded to the Pre-Application as a Word or PDF format document attachment in the "Documents" portion of the module (Step 3).



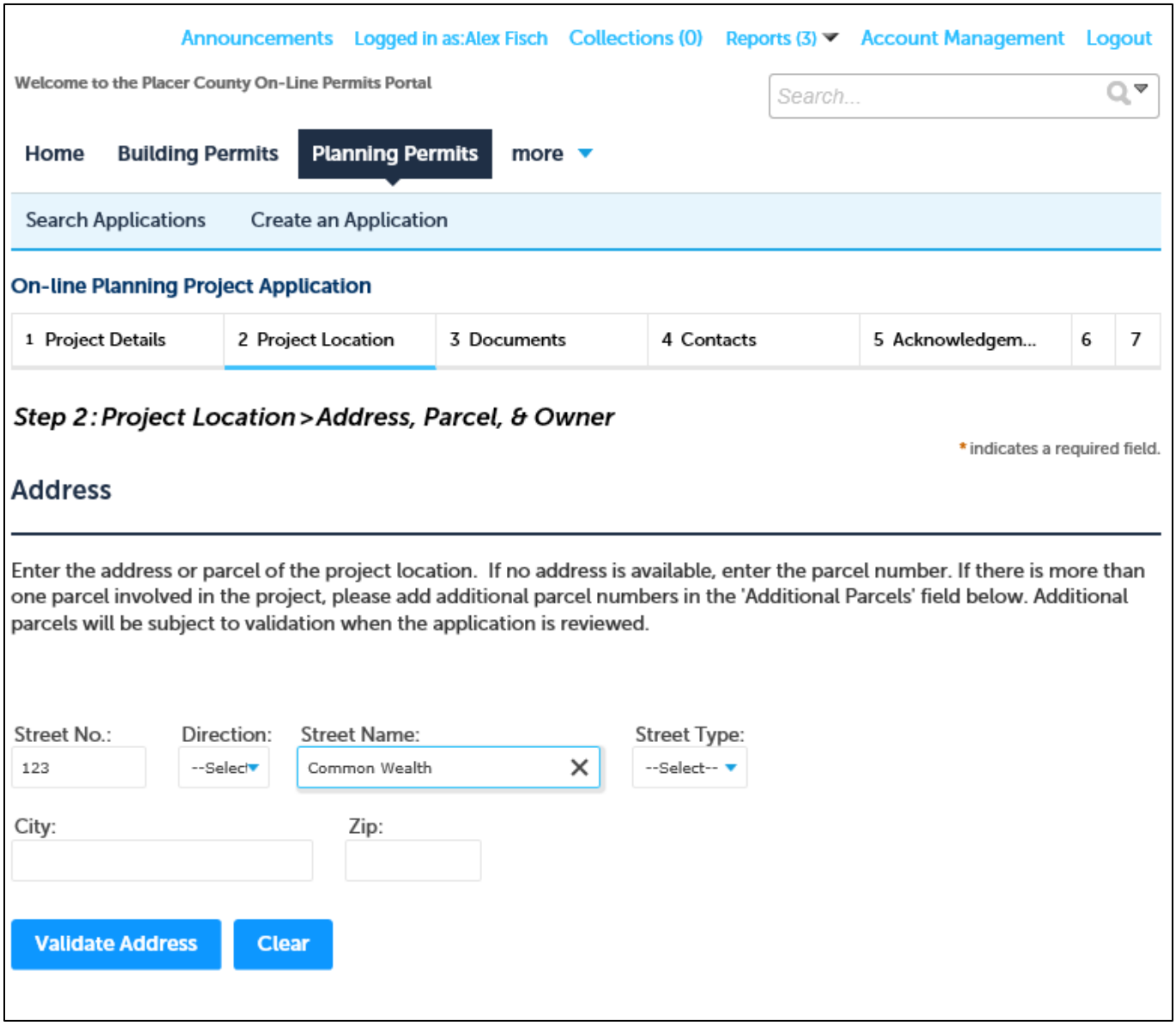
Next the user will select the project entitlements, also commonly referred to as application type. A hyperlink is included with the written instructions to redirect applicants to the Planning Services Division Application Fees & Forms download page should more research on the application selections be necessary. If the project is classified as a "Major Project", the user will be required to provide the Pre-Development Meeting application number. If a Pre-Development Meeting application has not yet been submitted, the module may be used to complete that application.



As the user continues through the module they will be will prompted to provide an address or parcel number (Step 2: Project Location) and to validate the parcel selection through the system. When a valid parcel is selected, the

owner information will automatically populate. If the user selects a parcel that is not within the County's jurisdiction an error notification will appear.

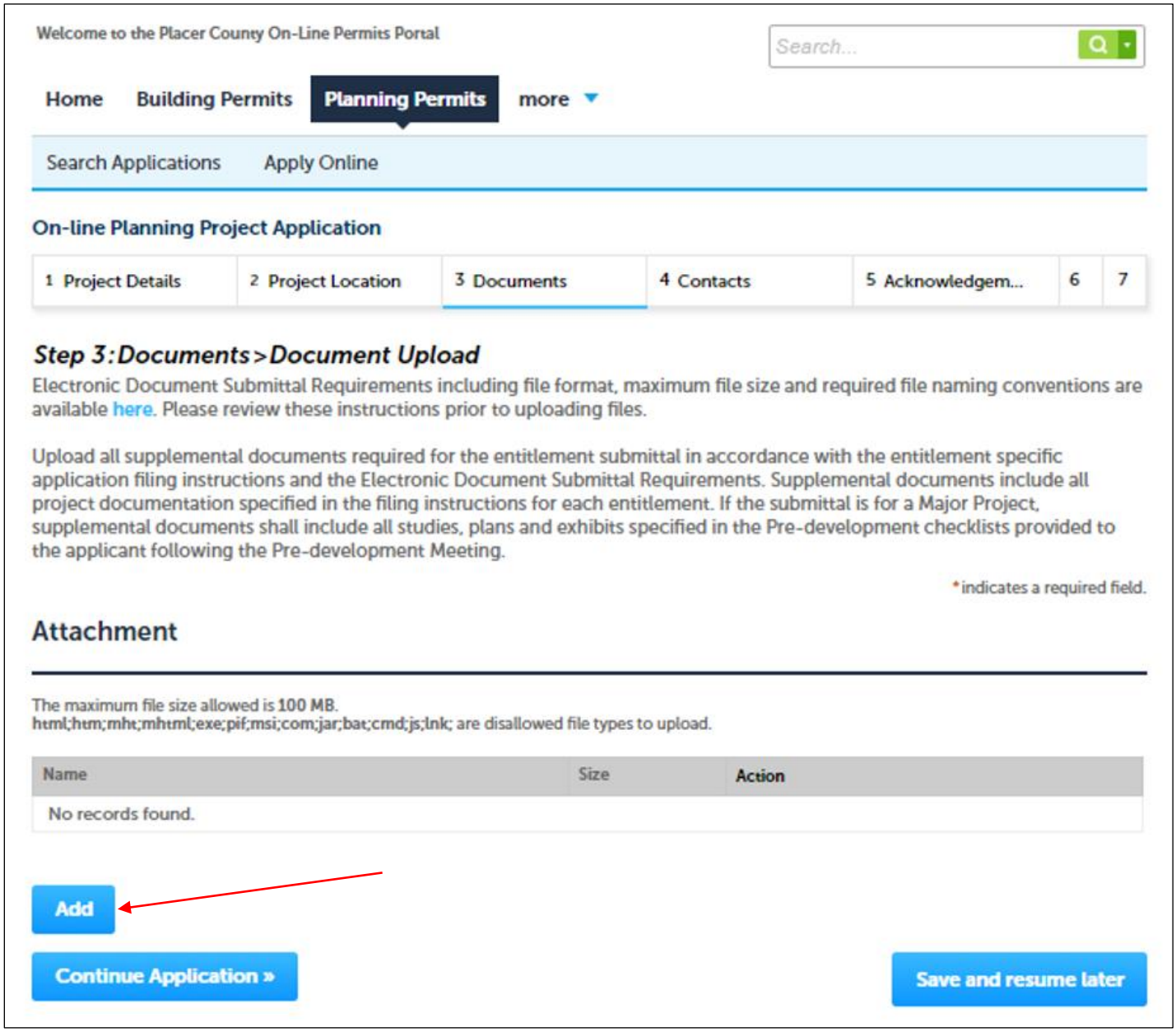
HELPFUL HINT: A valid Assessor's Parcel Number (APN) is the most certain way to validate a parcel. However, if the APN is not known a valid address can also be used to locate and validate a parcel selection. When entering street names, the spelling MUST be correct or the system will not locate the parcel. In the example screenshot below the parcel address has been entered as "123 Common Wealth" whereas the actual parcel address is 123 Commonwealth (e.g. street name is one word, not two). If a user is having difficulty locating a valid parcel utilizing the address look-up function, the most likely problem is a misspelled street name, the street name has been entered as two words instead of one, one word instead of two, or a similar grammatical error.



PLEASE NOTE THE FOLLOWING PERTAINING TO PARCEL VALIDATION: The module allows validation of only one parcel selection during Pre-Application creation. For those applications that include more than one parcel such as Minor Boundary Line Adjustments, a text field is provided for the user to enter Assessor's Parcel Numbers for additional project parcels. The Planning Technician will incorporate additional parcels into the real permit record when it is created.

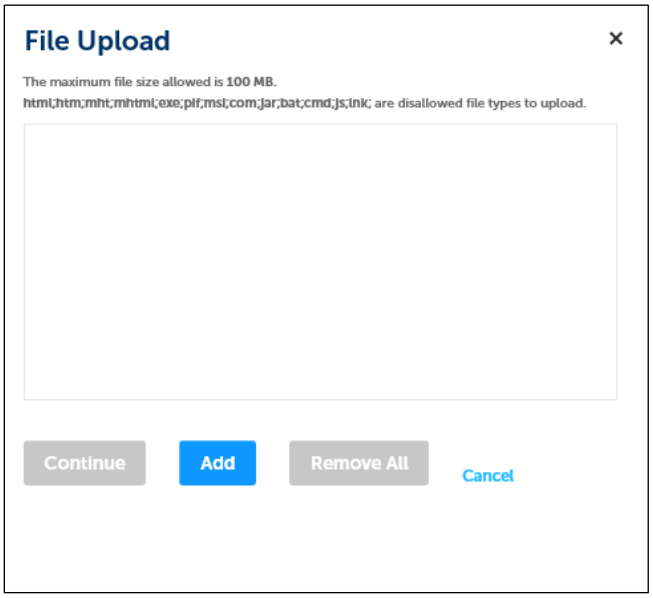
Next the module will prompt the user to validate the owner information and to provide an email address and phone number for the owner. For applications that include multiple parcels and multiple owners, such as a Minor Boundary Line Adjustments, the user will be prompted to provide information for additional owners in the contacts screen at Step 4, Contacts.

Next the user will upload application documents to the portal (Step 3, Documents). The portal has a document size limit of 100 megabytes per document, 1 gigabyte per application.

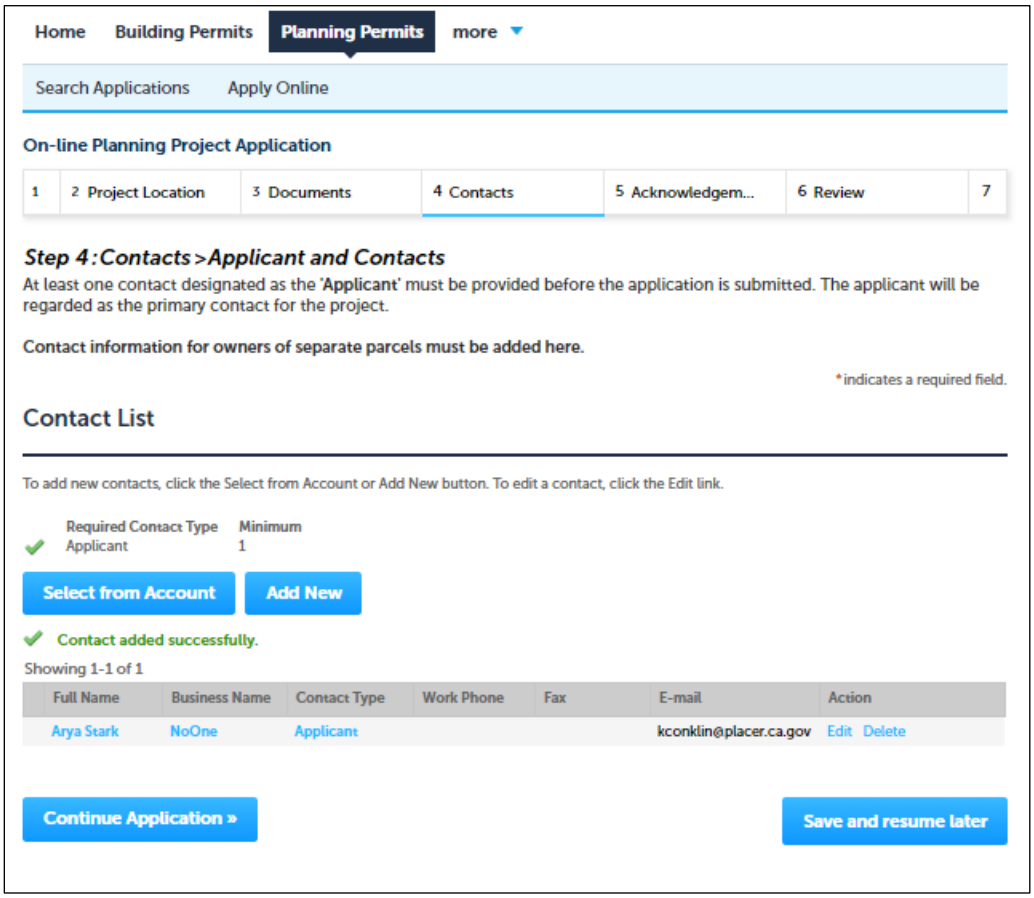


To upload documents the user will select “Add”, and a File Upload pop up browser will appear.

The browser allows the user to select files for upload from their computer or device, as shown below.



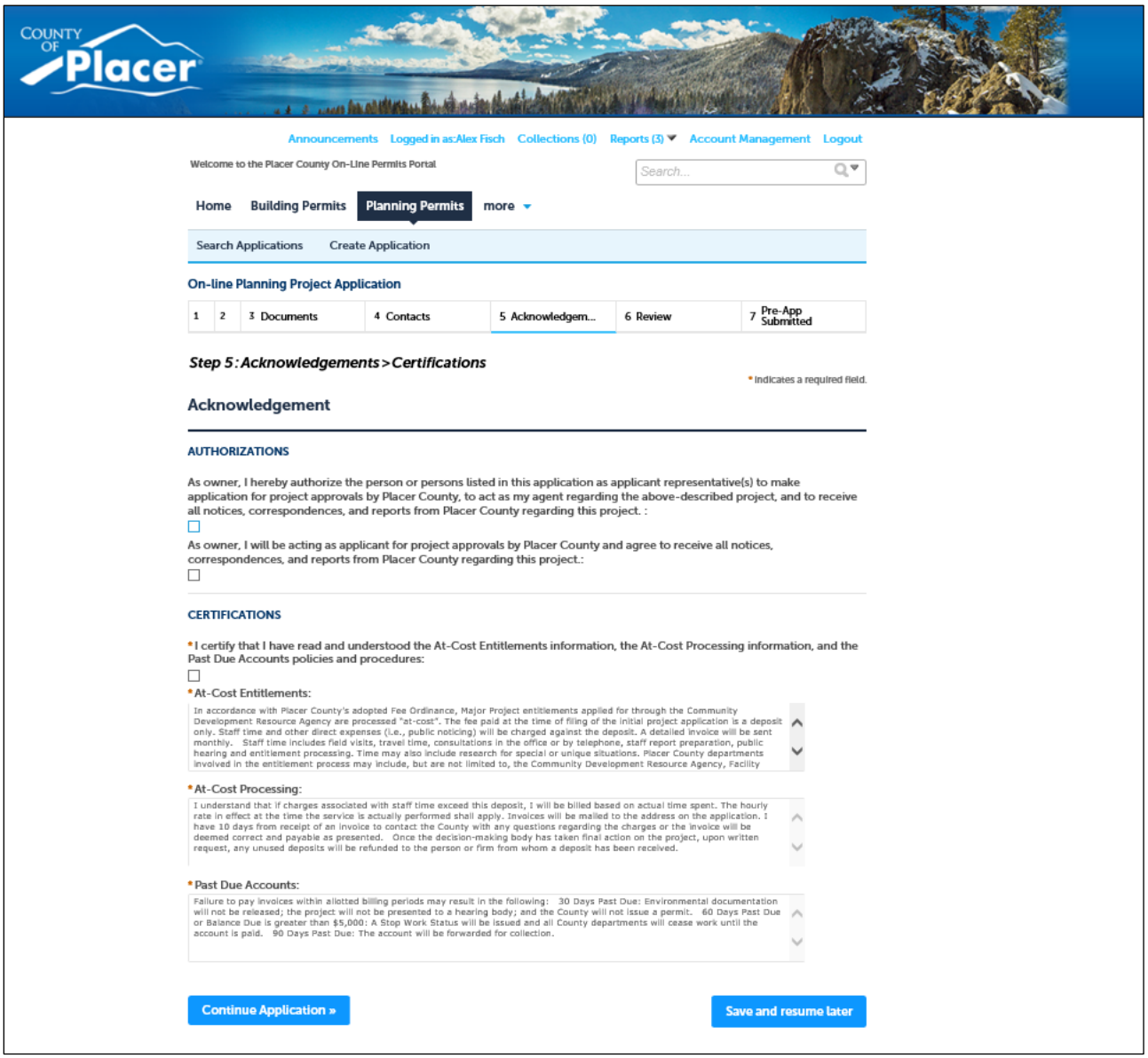
At Step 4 the user will be prompted to provide contact information. The user is required to designate at least one point of contact and may add contacts for agent, architect, engineer or additional owners associated with the application.



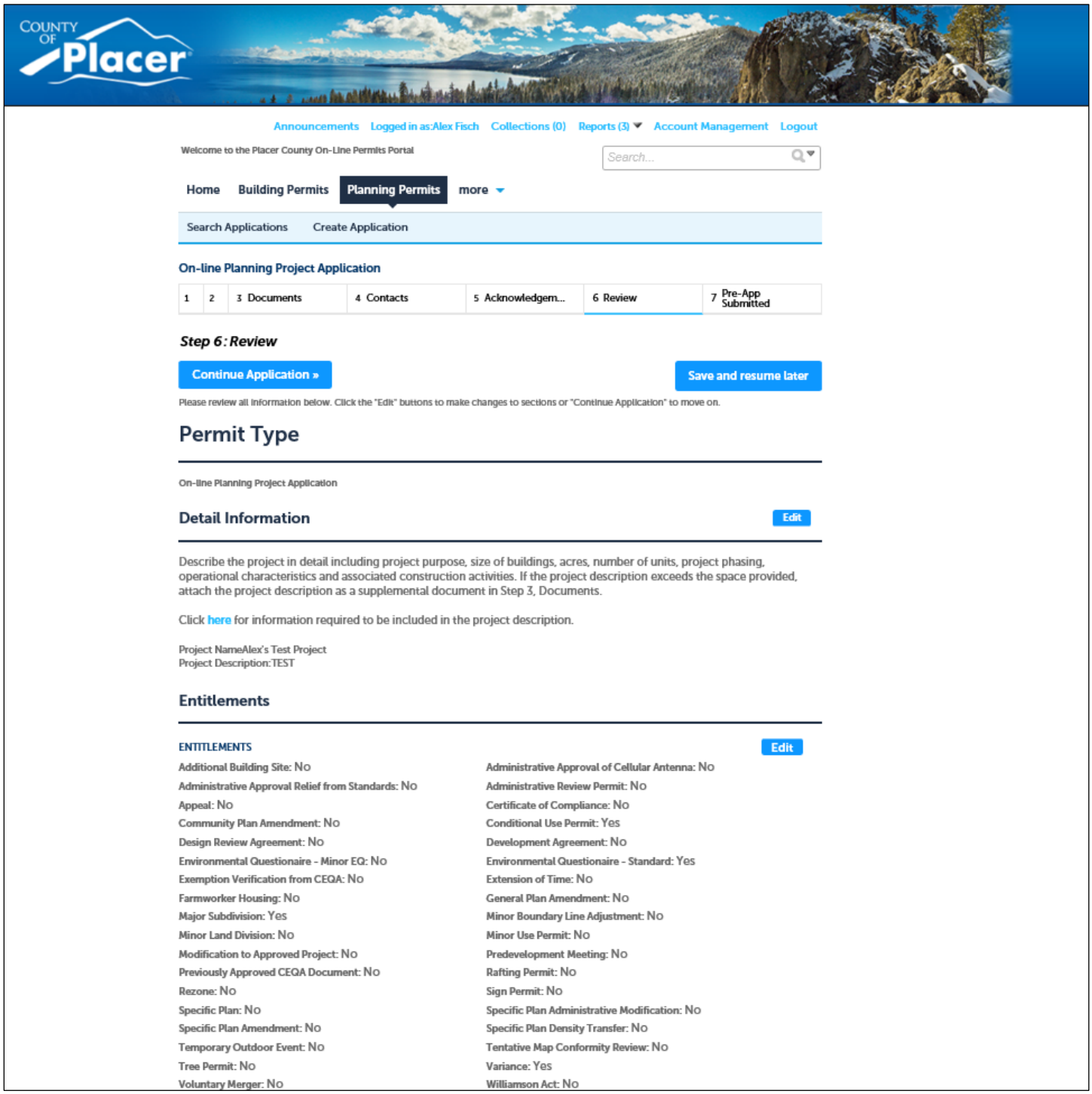
At Step 5 the user will complete selections for required application authorizations and certifications.

HELPFUL HINT: Applicants submitting applications as agent on behalf of an owner will select the first authorization checkbox below. Once the Pre-Application is accepted as complete and the real permit record is created by the Planning Technician, these selections will be incorporated into an electronic authorization document (an example of which is included on page 17 of this manual) that will be sent to the *applicant and owner* to provide final authorization of the real permit application for processing.

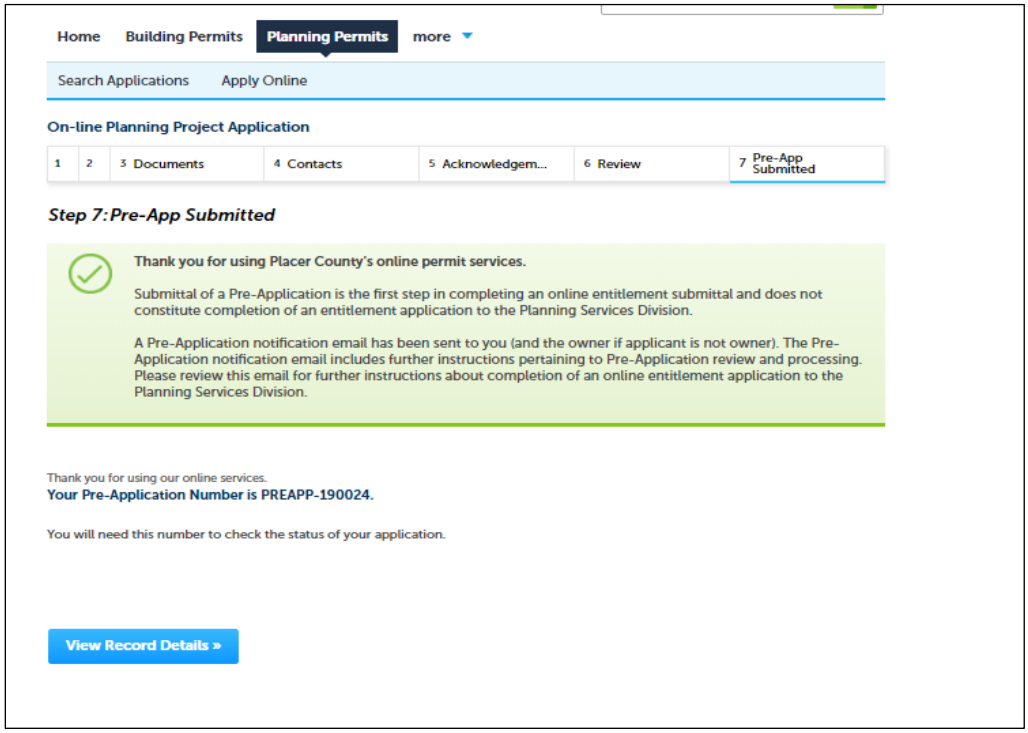
When the real permit record is created requests for payment and electronic application authorizations are sent to the applicant and all owners listed on the application. *The permit is not complete or valid for processing until payment is received and all authorizations are received from the applicant and owner(s).* Agents working on behalf of an owner are responsible for ensuring that application fees are paid and owner authorizations are provided. This step will occur after the Pre-Application is submitted and is noted here for reference. More information is included under the Electronic Signature Procedure section of this document.



Next the user will continue to Step 6, Application Review. At this step the user will review all permit selections and information and can select the “Edit” tab to correct any portion of the application before submitting.



Once the user has reviewed and verified their selections they will select “Submit” to complete the Pre-Application and the following screen appears.



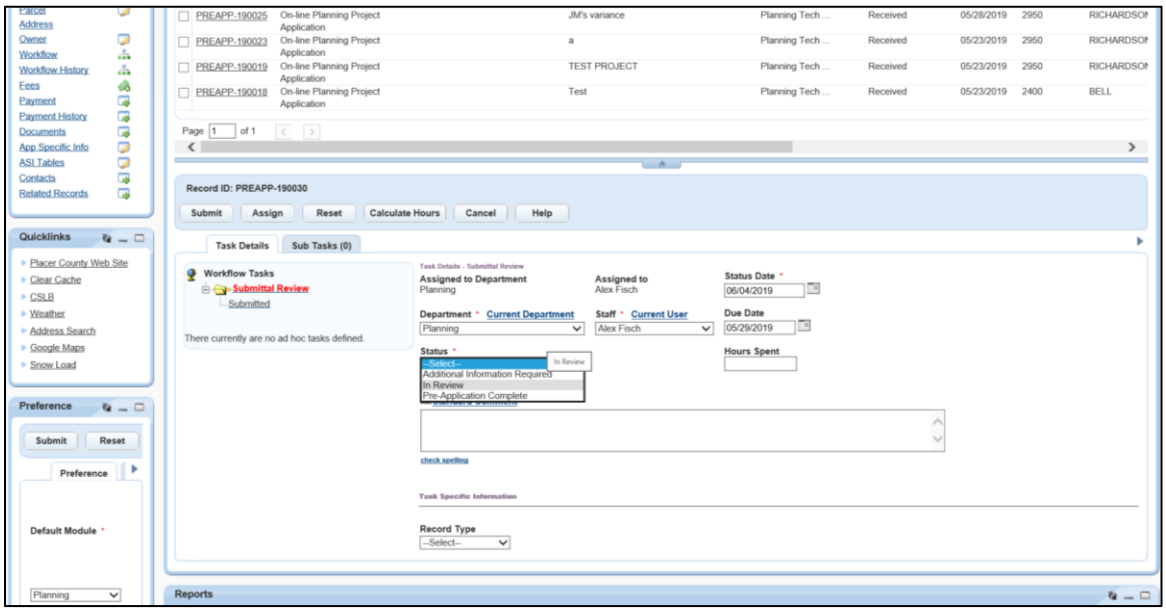
Upon Pre-Application submittal, an auto-generated email is sent to the customer and copied to the Accela Citizen Access Planning email inbox to notify the Planning Technician Staff that a new application has been received. One email account is established for the Auburn office and a separate email account is established for the Tahoe office. The auto-generated email is automatically routed to the correct office email account based on geocode information for selected parcel(s). Below is an example of the auto-generated email received by the customer.

> Your Pre-Application PREAPP-190024 has been received. A Technician will review your submittal to determine if it is complete for processing. You should receive email notification within 24 hours (excluding weekends and holidays) with information pertaining to the application completeness. Applications accepted as complete will include instructions pertaining to payment of application fees required to complete the application submittal. Incomplete applications will include further instructions pertaining to completion of Pre-Application requirements.
>
> Placer County Planning Services
>
> OnlinePLNPermits@placer.ca.gov

This concludes the steps involved in public user creation of a Pre-Application using the Accela Citizen Access permit portal. Next, this user manual details some of the steps involved in the Planning Technician review and processing of the Pre-Application to validate and/or correct the user selections and to create the real permit record, receive final electronic authorizations, and process electronic payments. This information is included in this Public User Manual as a courtesy and to provide public users with a better understanding of the procedures for converting the Pre-Application into a real permit record, as well as procedures for receiving required authorizations and application fee payments.

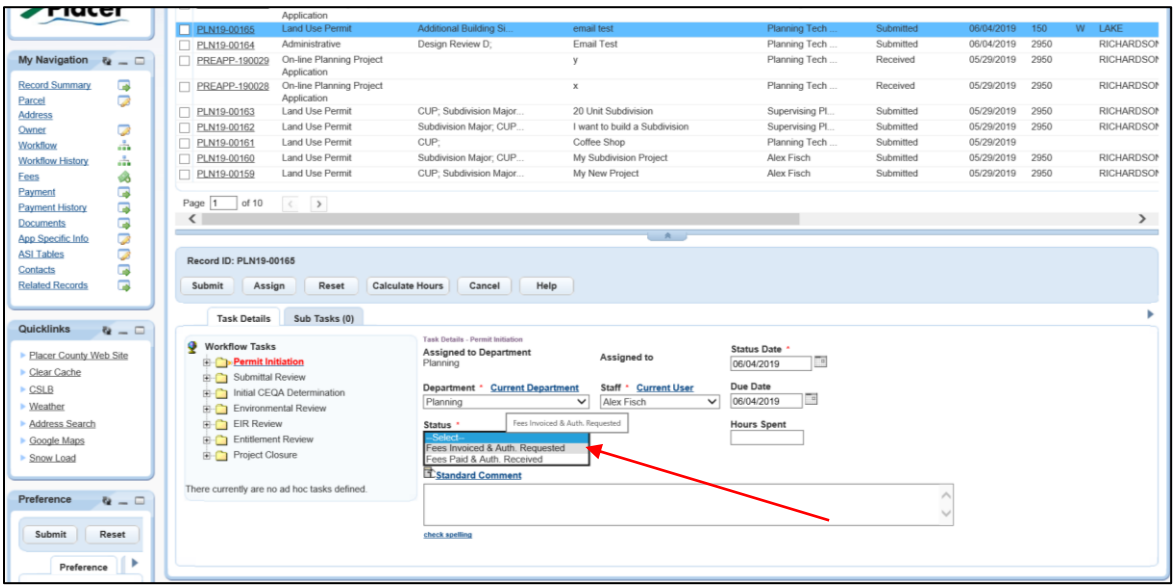
Technician Review of Pre-Application and Creation of Real Permit Record

When a Pre-Application is received the Planning Technician will review the submittal for completeness and to verify the correct entitlement selections have been made.



If the Pre-Application is complete and the correct entitlement selections were made the Technician will create the real permit record, assess application fees, and generate the application authorization document that will be sent to the applicant and owner(s).

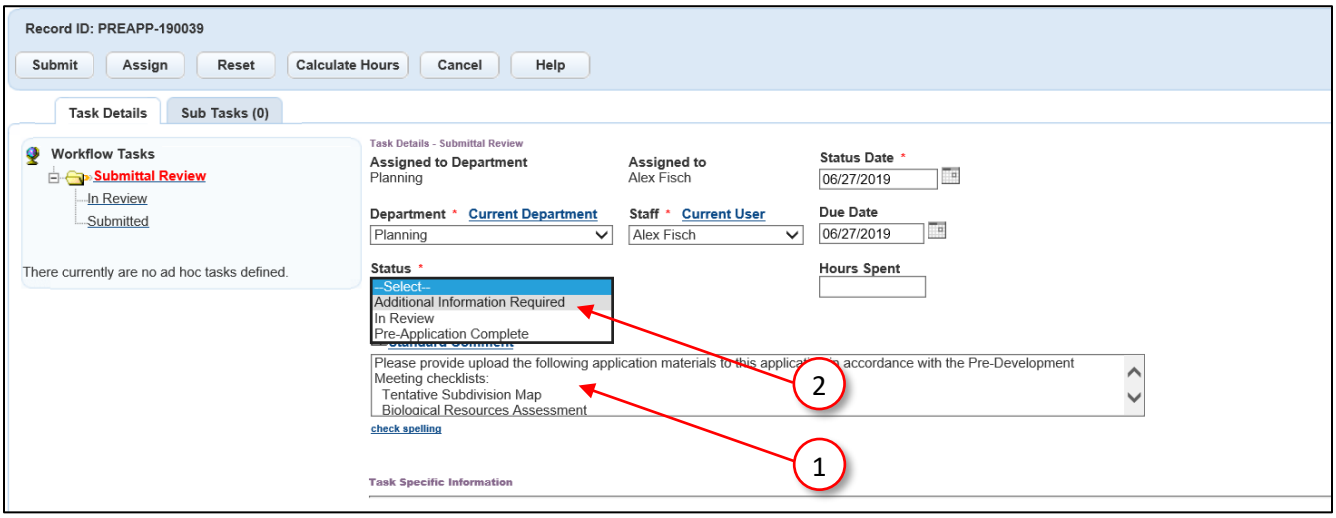
Upon completion of these steps the Technician will make a selection in the permit workflow to auto-generate the authorizations for the applicant and owner(s) in accordance with the selections made by the applicant during the Pre-Application. The applicant will receive two emails: one requesting required permit authorizations and a separate email with a direct link to a payment portal. Payment can be made by e-check/bank transfer or credit card.



Pre-Applications Deemed Incomplete

Some Pre-Applications will not be complete upon the initial submittal and may require one or more items to be clarified or corrected. In those instances where the applicant appears to have selected an incorrect application type - for instance the applicant has indicated that they wish to receive approval of a Variance but the proposal can be accomplished through approval of an Administrative Approval (or similar issue to be clarified) - the Technician may elect to contact the applicant by phone to clarify the project proposal prior to proceeding with selection of the project entitlements in the Pre-Application and creation of the real permit record.

More commonly, an applicant may fail to provide required supplemental application materials, such as required maps, technical studies, or other supplemental application materials. In those instances the Technician will write a comment in the Comment Box under the "Submittal Review" workflow folder and select "Additional Information Required" as the workflow status and "Submit" the status.



Selection of the "Additional Information Required" workflow status will auto-generate a "No Reply" email to the customer that incorporates the message placed in the comment box. The email includes an embedded permit number "deep link" that will take the customer directly to the Accela Citizen Access permit portal. If the customer is already logged in the link will direct them to their account. If they are not logged in the link will direct them to the login page. An example of the auto-generated email is shown below.

From: Placer County No Reply [mailto:noreply@placer.ca.gov]
Sent: Thursday, June 27, 2019 3:54 PM
To: Alexander Fisch <AFisch@placer.ca.gov>
Subject: Placer County Planning Services: PREAPP-190039 - Additional Information Required

Your online application Test Permit, PREAPP-190039 was reviewed on 06/27/2019. It has been determined that additional information is required in order to complete your application. Additional information is required as follows:

Please provide upload the following application materials to this application in accordance with the Pre-Development Meeting checklists: Tentative Subdivision Map, Biological Resources Assessment, Noise Study, Traffic Study, Drainage Report

If required, please use the following link to login to your application and upload any additional documents or supporting information (PREAPP-190039). If you have questions pertaining to these instructions please contact the Planning Services Division at (530) 745-3000.

Placer County Planning Services

OnlinePLNPermits@placer.ca.gov

Electronic Signature Procedure

When the real permit record is created, requests for payment of application fees and electronic application authorizations are sent to the applicant and all owners listed on the application. *The permit is not complete or valid for processing until payment is received and all authorizations are received from the applicant and owner(s).* Agents working on behalf of an owner are responsible for ensuring that application fees are paid and owner authorizations are provided. Below is an example of the Application Authorizations document that will be sent to the project applicant and owner(s).

AUBURN OFFICE (530) 745-3000 | PLACER COUNTY PLANNING SERVICES DIVISION | TAHOE OFFICE (530) 581-6280

Application Authorizations

PERMIT DETAILS

PERMIT NUMBER: PLN19-00165

ENTITLMENT(S) REQUESTED: Additional Building Site;

PROJECT NAME: email test

PROJECT DESCRIPTION: test

WORK LOCATION: 150 LAKE BLVD TAHOE CITY

ASSESSOR'S PARCEL NUMBER(S): 094-540-020-000

MAJOR PROJECT: Yes

APPLICANT: Terry Dunn

OWNER AUTHORIZATION

☐ As owner, I will be acting as applicant and will receive all notices, correspondences, and reports from Placer County regarding this project.

☑ As owner, I hereby authorize the person or persons listed in this application as applicant representative(s) to make application for project approvals by Placer County, to act as my agent regarding the above-described project, and to receive all notices, correspondences, and reports from Placer County regarding this project.

☑ The signature below authorizes any member of the Placer County Development Review Committee (DRC), and other County personnel as necessary, to enter the property/structure(s) that is (are) the subject of this application.

☑ The Planning Division is prohibited from accepting applications on tax delinquent properties pursuant to Board of Supervisors direction.

☑ Prior to the commencement of any grading and/or construction activities on the property in question, that are based upon the entitlements conferred by Placer County permit approval(s), the applicant should consult with the California Department of Fish & Wildlife (DFW) to determine whether or not a Streambed Alteration Agreement [§1603, CA Fish & Game Code] is required. The applicant should also consult with the U.S. Army Corps of Engineers to determine whether or not a permit is required for these activities pursuant to Section 404 of the Clean Water Act. Fees may be required to be paid to the Department of Fish and Game for their participation in the environmental review process as required by State law. The applicant's signature on this application form signifies an acknowledgement that this statement has been read and understood.

I certify that I have read this permit and state that the above information is correct. I agree to comply with all county ordinances and hereby authorize representatives of Placer County to enter the above listed property(ies) for field inspection purposes related to entitlement processing.

Date: _____ Signature of Owner: _____

Date: _____ Signature of Applicant: _____

Planning_Application_Authorization

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