



e-Planning

Registration and Submittal Guide

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Introduction

Users with a registered Citizen Portal account may utilize the following services:

- Online building inspection scheduling;
- Online [Electronic Plan Check \(EPC\)](#) submittal;
- Payment of any invoiced fees.

For registered accounts with an associated contractor's license:

- [Online Minor Permit Applications](#)

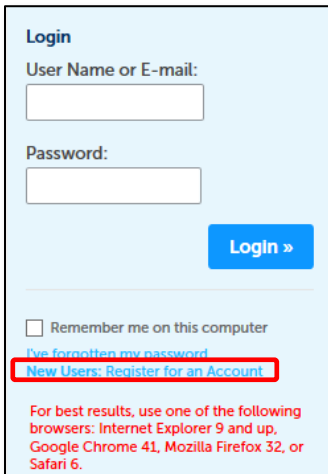
This user guide will inform the public on how to navigate the e-Planning addition to the existing electronic submittal service, as follows:

This guide shows one how to register for a basic Citizen Portal account which is required to submit applications online.

Part I: Registration

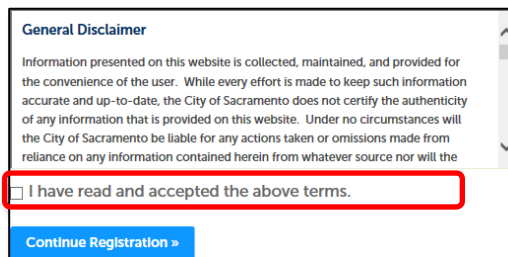
Step one: Create a Public User Account

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**.

Account Registration Step 2:
Enter/Confirm Your Account Information

Login Information

* User Name:

* E-mail Address:

* Password:

* Type Password Again:

* Select a Security Question:

* Answer:

Contact Information

Choose how to fill in your contact information.

Add Now

Enter the words below

4218

Continue Registration >

Select Contact Type

* Type:

Applicant

Continue

Assigned Engineer
Assigned Planner
Association
Billing Contact
CIP Manager
Complainant
Confidential Applicant
Consultant
Designer
Developer
Environmental Planner
Environmental SR Planner
External Agency
Foreman
General Contact
Hearing Body Member
Individual
Job Contact
Operator
Organization
Other City Contact
Owner Representative
Primary Contact
Project Manager
Requestor
Surety Company
Tenant

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:

* 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 yet. 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

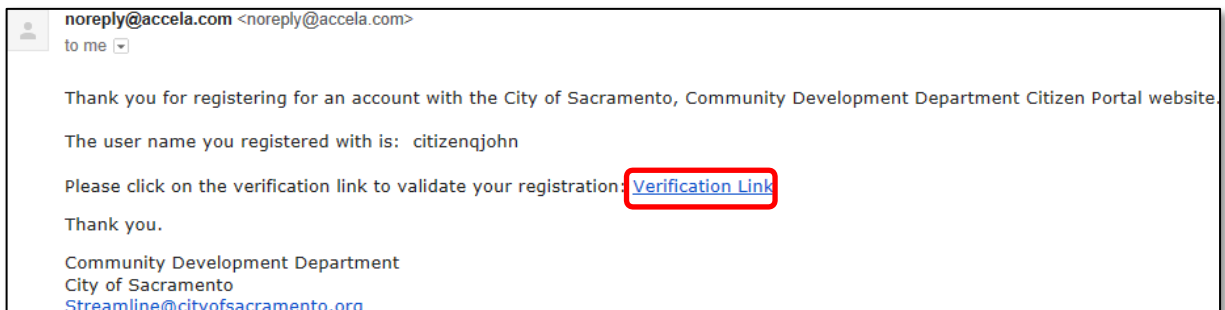
User Name:	citizenqjohn
E-mail:	citizenqhohn@gmail.com
Password:	*****
Security Question:	make of first car

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.

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 Division On-line Minor Permitting System. For more information, [visit the Online Minor Permits webpage.](#)

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:

Password:

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" via the Planning tab on the command bar as shown below.



After selecting Create Planning Application, you will be directed to the General Disclaimer. Read the disclaimer and select "I have read and accepted the above items."

STEP 1: Site Information > Location

Enter an address or Accessors Parcel Number (APN). The owner information should auto-populate, but you may edit as needed. See examples below.

Address example: 1234 N Place St

The image shows a form titled "Address" with a blue header. Below the header is a red instruction: "If property does not currently have a street address only populate the parcel field." The form contains the following fields: "* Street No.:" (text input with "1234"), "Direction:" (dropdown menu with "N"), "* Street Name:" (text input with "Place"), "Street Type:" (dropdown menu with "ST"), "Unit Type:" (dropdown menu with "--Select--"), and "Unit No.:" (text input). Below the fields are two orange buttons: "Search" and "Clear".

Address example: 1234 Place St, Suite 200

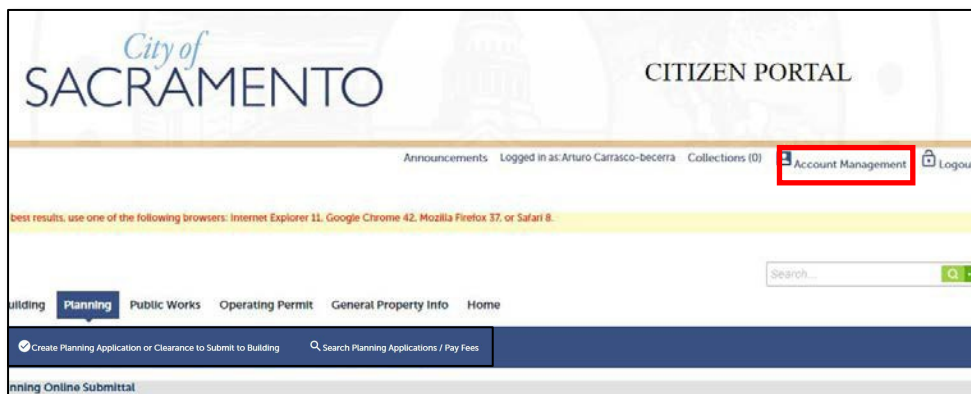
The image shows the same "Address" form as above. The fields are populated with: "* Street No.:" (text input with "1234"), "Direction:" (dropdown menu with "--Select--"), "* Street Name:" (text input with "Place"), "Street Type:" (dropdown menu with "AVE"), "Unit Type:" (dropdown menu with "SUITE"), and "Unit No.:" (text input with "200"). The "Search" and "Clear" buttons are still present.

If you only have an APN for your lot, provide it in the box under “Parcel Number” The information should auto populate after clicking search.

The screenshot shows a web form titled "Parcel". The "Parcel Number" field is highlighted with a red box and contains the text "09101200230000". Other fields include "Legal Description:", "200 Year Flood Findings:", "Building Inspection Assignment:", "CVFPP Levee Toe:", "FIRM Flood Zone:", "General Plan 2035:", "Housing Impact Fee:", "Natomas Basin:", "Old Sacramento Historic District:", "Park Impact Fee (2017):", "Park Planning Area:", "Parking Districts:", "TDIF Incentive Zone:", "Design Review Area:", "Building Inspection Area:", "Historic District:", "Historic Landmark:", "Zoning:", "PUD:", "SPD:", "School District:", "Contributing Resource:", and "Deferred Area:". At the bottom, there are "Search" and "Clear" buttons.

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.

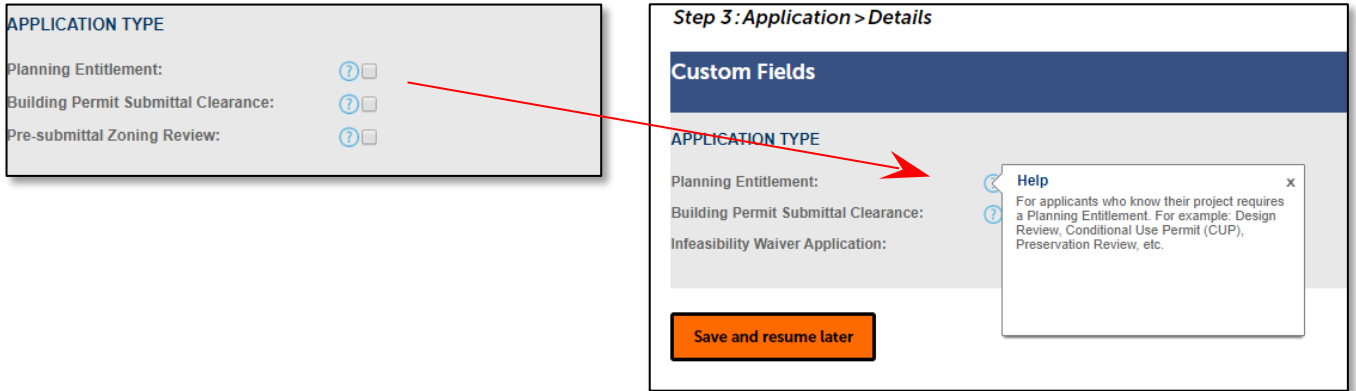


NOTE: At any time in the application, you may save and resume the application later by selecting the Save and resume button.



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. If you are submitting for an Accessory Dwelling Unit (ADU), please click Building Permit Submittal Clearance.



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.

The screenshot shows the 'Step 3: Application > Details Continue' page. It features a 'Custom Fields' header. Below the header are four sections: 'JOB VALUE' with a required field containing '0'; 'ACTIVITY TYPE' with a note: '[A list of Activity Types is only displayed when "Application for Building Permit Submittal Clearance" is selected.] Please select the most applicable Activity Type for your project.'; 'INFEASIBILITY WAIVER QUESTIONS'; and 'SCOPE OF WORK' with a required field containing a text area. A red box highlights the 'JOB VALUE' and 'SCOPE OF WORK' sections.

Job value:
Include approximate or exact job value.

Scope of work:
Include a brief, detailed scope of work of your project.

STEP 4: Documents > Submittal Documents

See the submittal matrix on page 2 of the [Planning Entitlement Application \(CDD-0063\)](#) for specific submittal requirements.

Attachment

Three Categories describe Planning applicants: **Planning Entitlement**, **Building Permit Submittal Clearance** and **Pre-submittal Zoning review**. These categories have distinct submittal requirements. Listed below, under the Application Type names, is a list of the required documents for each category.

Planning Entitlement: *For applicants who know their project requires a Planning entitlement.*
Planning Plans (Site, Floor, Landscaping and Elevation plan sheets)
Planning Application
Planning Supplemental (see submittal Matrix on page 2 of the Planning Entitlement Application)
Upload your files using the [Initial Submittal naming convention](#).

Building Permit Submittal Clearance: *For applicants who have prepared all building permit application materials and need Planning to review them in order to submit to the Building Division. All projects require planning approval to submit to the building division.*
Building Construction Plans
Building Permit Application (Examples: CDD-0200, CDD-0269, or CDD-0431 depending on the submittal type)
Building Supplemental

The maximum file size allowed is 1000 MB.
ade;adp;avi;bat;chm;cmd;com;cpl;csv;doc;docx;exe;gif;hta;htm;html;ins;isp;jar;js;jse;lib;lnk;m4v;mde;mht;mhtml;midi;mov;mp3;mp4;mpg;msc;msp;mst;php;pif;rar;rpt;rtf;scr;scs;shb;sql; are disallowed file types to upload.

Name	Type	Size	Uploaded	Action
No records found.				

Add

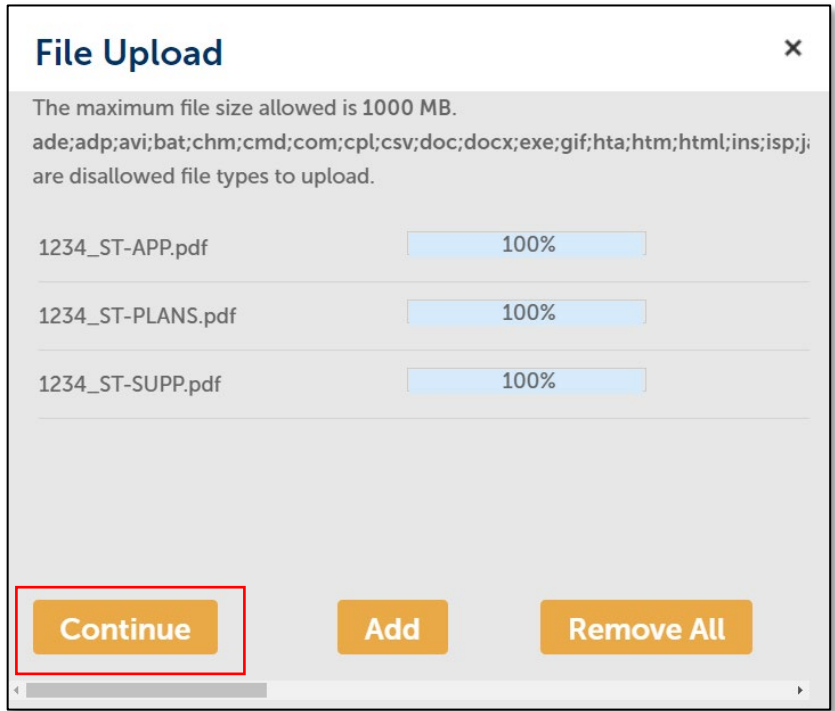
File Upload

The maximum file size allowed is 1000 MB.
ade;adp;avi;bat;chm;cmd;com;cpl;csv;doc;docx;exe;gif;hta;htm;html;ins;isp; are disallowed file types to upload.

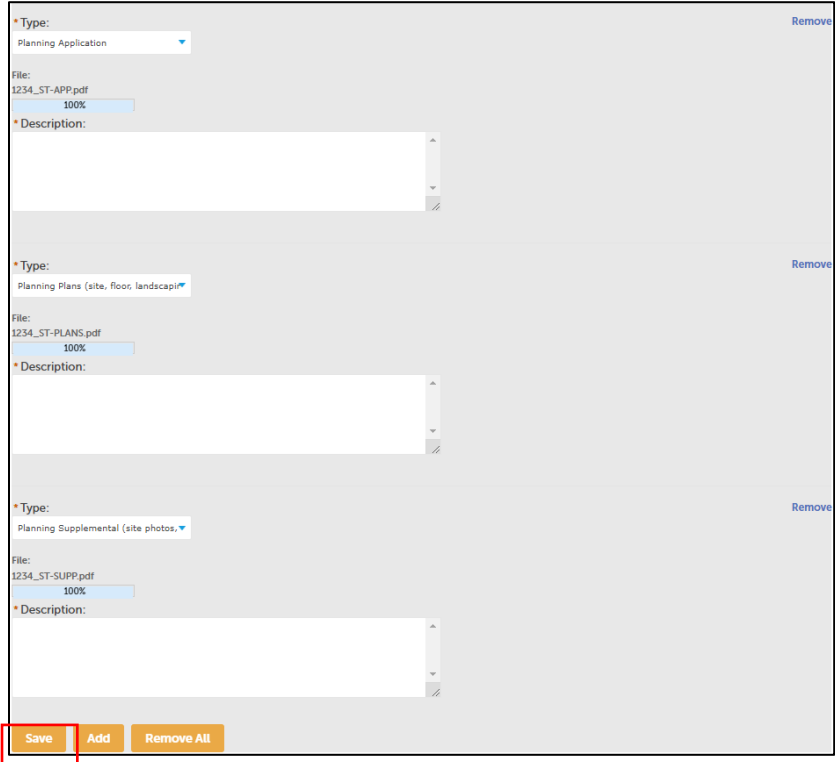
Continue **Add** **Remove All**

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

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



- Attach all the required documents for the pertinent application type. Click “Continue” when all the documents have been uploaded.



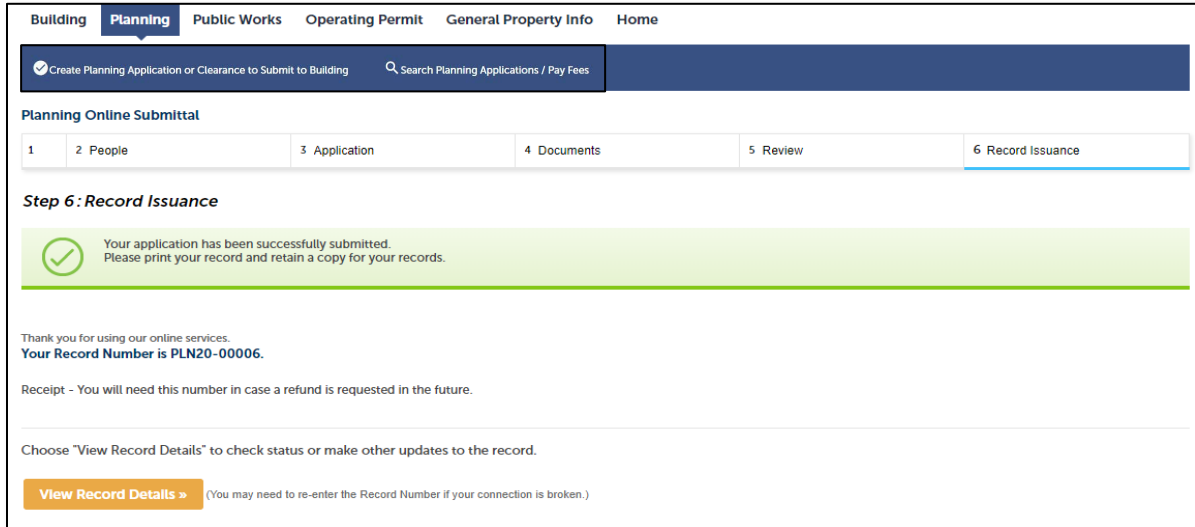
- Select the correct document type when uploading your documents.
- Provide a description of the document uploaded or any information you think the Planner should know about in the box below. The red asterisk (*) means this information is required.
- Verify all the information is correct and click “SAVE” when done.

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 confirmation of your submission and your record number (see below). Check your e-mail inbox (and junk folder) for a confirmation e- mail.

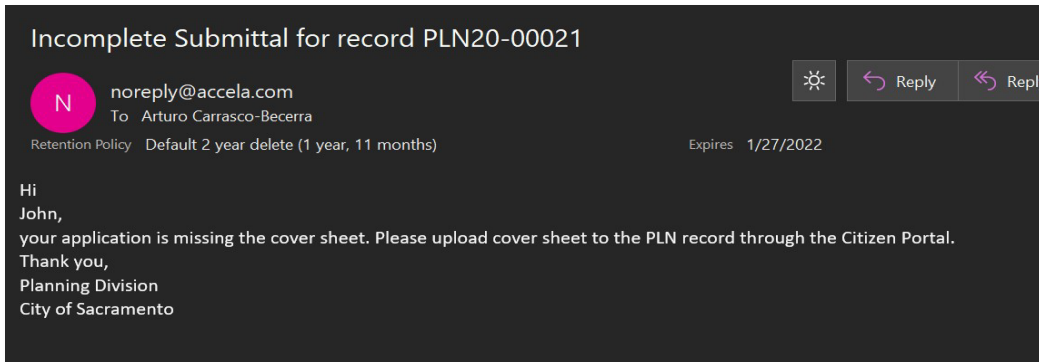


The screenshot shows a web application interface for 'Planning Online Submittal'. At the top, there is a navigation bar with links for 'Building', 'Planning', 'Public Works', 'Operating Permit', 'General Property Info', and 'Home'. Below the navigation bar is a dark blue header with a search bar and a link to 'Search Planning Applications / Pay Fees'. The main content area features a progress bar with six steps: 1, 2 People, 3 Application, 4 Documents, 5 Review, and 6 Record Issuance. Step 6 is highlighted in blue. Below the progress bar, the heading 'Step 6: Record Issuance' is followed by a green confirmation message: 'Your application has been successfully submitted. Please print your record and retain a copy for your records.' Below this message, there is a thank you note and the record number: 'Your Record Number is PLN20-00006.' A receipt note states: 'Receipt - You will need this number in case a refund is requested in the future.' At the bottom, there is a button labeled 'View Record Details »' with a note: '(You may need to re-enter the Record Number if your connection is broken.)'

This concludes your application submittal.
Please allow 2-3 business days for processing.

What's Next?

Planning staff will review the submittal completeness. If an application is deemed incomplete, an e-mail will be sent to the applicant notifying them of the updated record status, including 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.

(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.



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: [Redacted]
Retention Policy: Default 2 year delete (1 year, 11 months) Expires: 1/1/2022 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

Attachments	Record ID	Record Type	Entity Type	Type	Size	Upload Date	Action
Family-Resident 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

TIPS

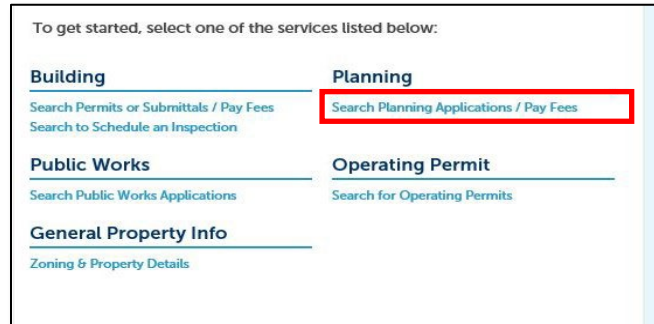
- Do not submit an application for questions and/or if you don't have preliminary plans and project narrative to upload. Contact us at planning@cityofsacramento.org instead.
- After a planning entitlement has been approved, and once construction plans are ready to be submitted to the Building Division, a new Planning (PLN) application shall be submitted via Citizen Portal as a "Planning Clearance to Submit to Building" application type.
- Your PLN submittal will show as closed on your account should it be accepted by the Planner reviewing it. A closed PLN means it has been cleared to proceed to the Building division under the Electronic Plan Check Process (EPC).

Paying your Planning Fees

Please use the [Citizen Permit Portal](#) to pay associated planning entitlement application fees. 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.

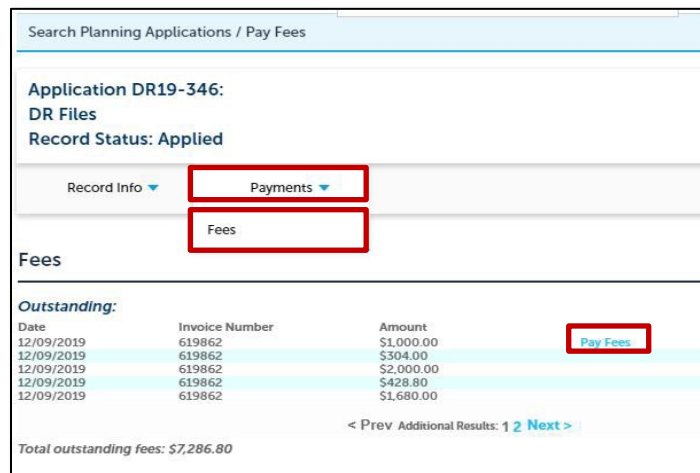
NOTE: All fees shall be paid within 5 calendar days from notice to pay.

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 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.