# Paperless Permitting Applicant Guide



## **The City of Salinas Permit Center**

65 West Alisal St. • Salinas, CA 93901 Monday-Friday • 9:00a.m.-4:00p.m. • 831-758-7251



# **Paperless Permits**

#### Manual for Online permit applications

The Permit Services Division safeguards public safety by ensuring that both residential and commercial building projects are built according to applicable building codes, city ordinances, and state laws. The Permit Services is comprised of permit clerks, plan check staff and building inspectors. All of whom are here to provide timely intake, review, and inspection of all private development projects to help stimulate community development and growth.

The City of Salinas Permit Services Division has partnered with Avolve to provide the residents of Salinas the ability to apply for permits at your convenience. With this new software anyone can apply for permits 24 hours a day 7 days a week.

The Division strives to provide excellent customer service at the Public Counter and to guide our customers through the permitting process in the most efficient manner.

## **Table of Contents**

**Getting Started** 

**Solar Permit Application** 

**Building Permit Portal** 

**ProjectDox: Getting Started** 

ProjectDox: Tasks

ProjectDox: Upload and Submit

**ProjectDox: Review Comments** 

ProjectDox: Respond & Resubmit

# **Getting Started**

#### Step 1:

Use an Internet Browser such as Edge, Firefox or Chrome. Be sure to turn off any popup blockers in the browser.

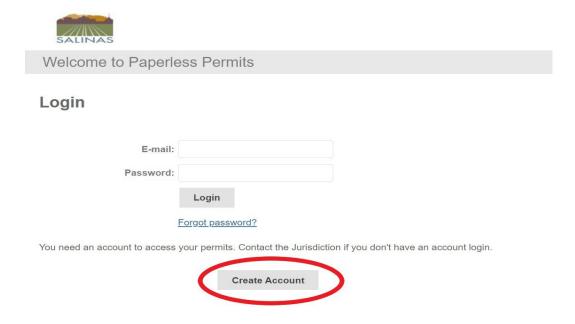
#### Step 2:

Open paperless permit site by going to:

https://salinas-ca-us.avolvecloud.com

#### Step 3:

#### Click on the box at the center of the screen titled "Create Account"



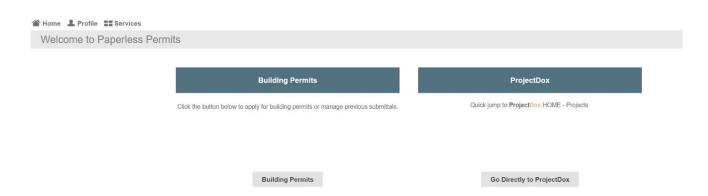
#### Step 3:

In the page "Create Your Account" fill in the required fields indicated with an asterisk.



#### Step 4:

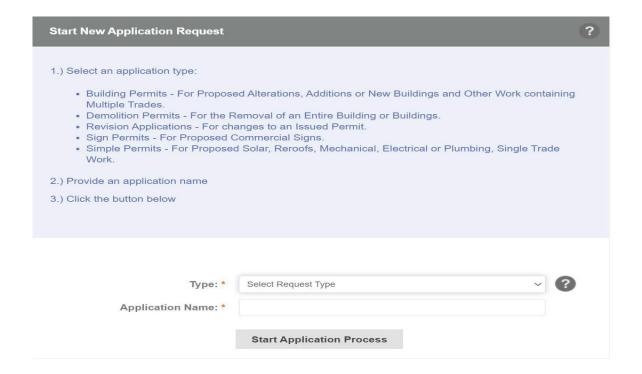
After creating your account. Log back in using your credentials. Once logged in click on the box on the left-hand side of the screen title "Building Permits".



# Below are the steps to complete a "Solar Permit Application"

#### Step 1:

After selecting the "Building Permits" options you will be directed to your Building Permits Portal. On the left-hand side of the screen there is a dialog box titled "Start New Application Request". Next, choose a Simple Permit Application type from the "Type" drop down box. The drop-down box will be located on the bottom left-hand corner of your screen.



#### Step 2:

Choose an Application Name and type it in the text box. Your application name should be limited to the type of permit you requested or property owner. Adding in your address is also helpful. For example, "PV System 123 Main St." or "Smith 123 Main St." The application name can be edited at any time.

#### Step 3:

Click on the box "Start Application Process". After clicking on "Start Application Process" a "Terms and Conditions" screen will appear. Please read the Terms and Conditions of Use. Scroll to the bottom of the page and click the check box next to "I have read, understand, and agree to the above terms and conditions." Next click on the grey box "Accept & Start My Application".

#### **MISCELLANEOUS**

User acknowledges and agrees a) that the use of the Site is not a substitute for professional judgment; b) that the use of the Site does not relieve the User from applying the appropriate standard of care and skill relevant to the use of the Site and its contents; c) that the Site is only to be used as a tool to assist the User in connection with the Project; and d) that the User is solely responsible for verifying the accuracy of all results created with the use of the Site. No approval of any type which is granted to the User with respect to the Project, which is in any way connected with the use of this Site, shall be construed to allow the violation of any City of Salinas or county ordinance, state or federal law, or administrative regulation of any governmental agency. No waiver, modification, variance, or any other type of change however described, to any City of Salinas or county ordinance, state or federal law, administrative regulation of any governmental agency can be applied for, requested, or granted through the Use of this Site.

The City of Salinas shall have the right to perform maintenance on the Site without prior notification to User.

☐ I have read, understand, and agree to the above terms and conditions

Accept & Start My Application

Back To My Home Page

#### Step 4:

Once the terms and conditions have been accepted and the "Start My Application" button has been selected, you will be directed to the "Simple Permit Application." Fill in as many fields as possible. A red asterisk means the field is required. In the top right corner of the grey text box the word "Incomplete" will automatically change to "Complete" when the sections are filed out completely.

# Simple Permit Application CITY OF SALINAS

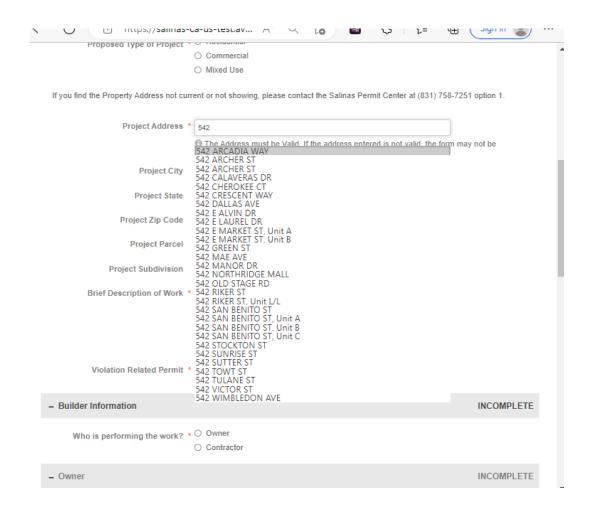
#### COMMUNITY DEVELOPMENT DEPARTMENT

65 W Alisal Street, Salinas, California 93901 TEL: (831) 758-7251 | FAX: (831) 758-7938

WWW.CityofSalinas.org/Our-City-Services/Permit-Center

#### Step 5:

In order to fill the Project Address field, type in the first 3 digits of the address. A drop down with validated addresses will appear. Select your address from the list.



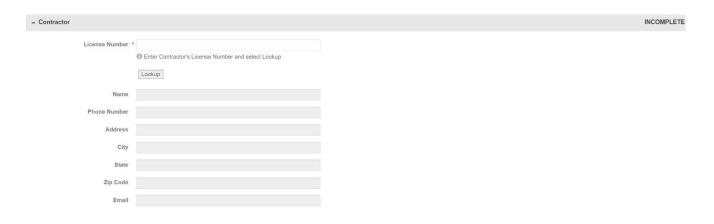
#### Step 6:

In the "Brief Description of Work" field enter the scope of work that will be done. The description must be 60 characters or less. Also please be sure to enter Yes or No in the "Violation Related Permit" field.



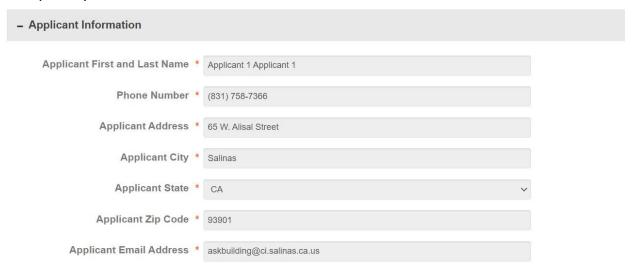
#### Step 7:

The following section is named "Contractor". Please enter the contractor's license number. The fields "Name", "Phone Number", "Address", "City", "State", "Zip Code", and "Email" will automatically populate once the license number is entered. In the top right corner of the grey text box the word "Incomplete" will automatically change to "Complete" when the section is filed out completely. In the top right corner of the grey text box the word "Incomplete" will automatically change to "Complete" when the sections are filed out completely.



#### Step 8:

The "Applicant Information" will automatically populate based on the information that you entered in Step 3. If any of the information is incorrect, please change your personal information in the Building Permits Portal. Below is an image of the "Applicant Information" section. In the top right corner of the grey text box the word "Incomplete" will automatically change to "Complete" when the section is filed out completely.



#### Step 9:

The section called "Contractor Declaration" is required to be completed by reading the information and selecting buttons based on your project specifications. Every statement following the "Acknowledge every statement by selecting each button" must be selected to complete this section. Below is an image of the "Contractor Declaration" section. In the top right corner of the grey text box the word "Incomplete" will automatically change to "Complete" when the section is filed out completely.

Contractor Declaration: Warning, failure to secure workers' compensation coverage is unlawful, and shall subject an employer to criminal penalties and civil fines up to one hundred thousand dollars (\$100,000.00), in addition to the cost of compensation, damages as provided in \$3706 of the labor code, interest and attorney's fees. I hereby affirm under penalty of perjury one of the following declarations:

Select one option

O I have and will maintain a certificate of consent to self-insure for workers' compensation, issued by the Director of Industrial Relations as provided for by \$3700 of the Labor Code, for the performance of the work for which this permit is issued.
O I certify that, in the performance of the work for which this permit is issued.
O I certify that, in the performance of the work for which this permit is issued.
Acknowledge every statement by selecting each button

Licensed Contractor's Declaration: I hereby affirm under penalty of perjury that I am licensed under provisions of \$3700 of the Labor Code, I shall forthwith comply with those provisions.

Acknowledge every statement by selecting each button

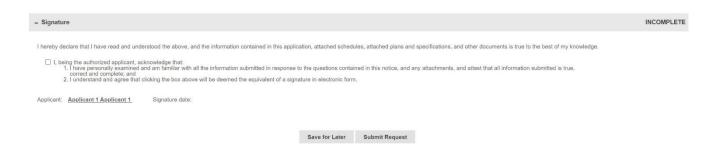
Licensed Contractor's Declaration: I hereby affirm under penalty of perjury that I am licensed under provisions of Chapter 9 (commencing with \$7000 of Division 3 of the Business and Professions Code and my license is in full force and effect.

O Workers' compensation declaration: Warning, failure to secure workers' compensation coverage is unlawful, and shall subject an employer to criminal penalties and civil fines up to one hundred thousand dollars (\$100,000.00), in addition to the cost of compensation, damages as provided in \$3706 of the labor code, interest and attorneys fees. I hereby affirm under penalty of perjury one of the following declarations.

O I certify that I have read this application and state that the above information is cornect. I agree to comply with all civy and county ordinances and state laws relating to building construction, and hereby suthorize representative of the

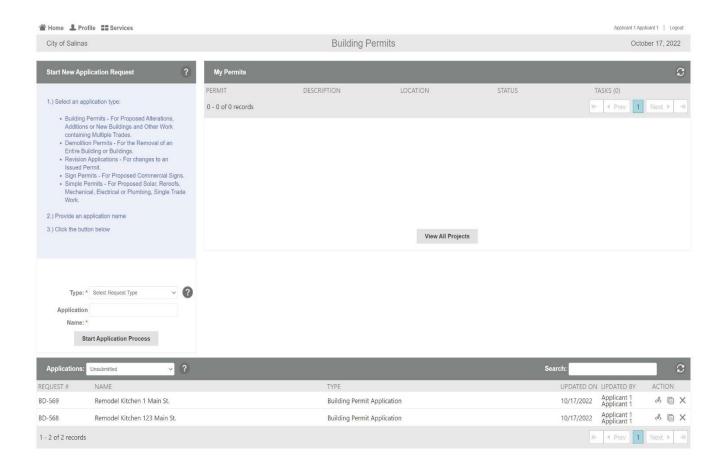
#### **Step 10:**

The final section is titled "Signature". Please carefully read the statements and check the box acknowledging the statements. Below is an image of the "Signature" section. In the top right corner of the grey text box the word "Incomplete" will automatically change to "Complete" when the section is filed out completely. When completed please click on either the "Save for Later" text box or "Submit Request" text box. In the top right corner of the grey text box the word "Incomplete" will automatically change to "Complete" when the sections are filed out completely.



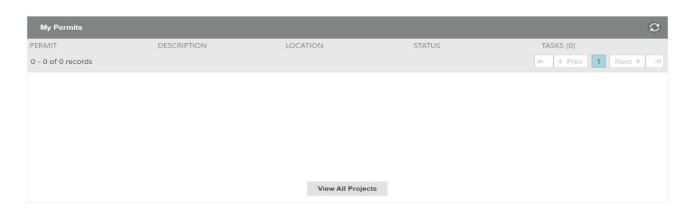
# **Building Permits Portal**

Once you have agreed to the terms and conditions you will be guided to the "Building Permit Application" page for the project you have created. If for some reason you time out of the application or get logged out your project can be accessed on the Building Permits Portal. The Building Permits Portal will look like the image below:



#### **My Permits**

On the top right-hand corner of the Building Permits Portal, there is a box called "My Permits". The "My Permits" box show projects that have been completed. By selecting a project in this section, you will be able to open the application for the project that have been completed.



#### **Applications**

On the bottom of the Building Permits Portal there is a box labeled "Applications". In the "Applications" dialogue box, you can search through both unsubmitted and submitted applications.



In the bottom right-hand corner of the "Applications" dialogue box there is a column labeled "Action". There are three actions that can be taken under the "Action" column; edit, copy and delete. The edit symbol is a pencil writing on a piece of paper, the copy symbol is two pages of lined paper and the delete symbol is a large X. You can select the action you want to take by hovering the mouse over the symbols. Below is a close-up image of the actions that can be taken:



# **Project Docx**

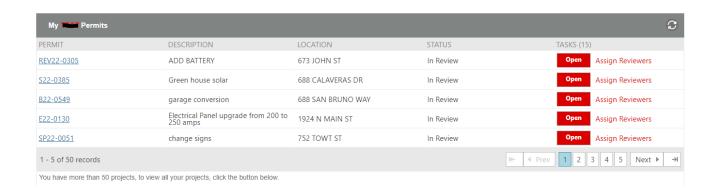
# **Getting Started**

There are two ways to log on to Project Docx.

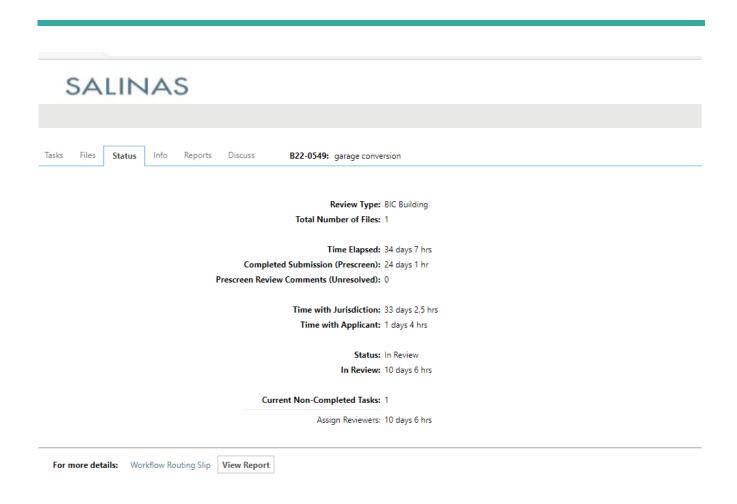
- 1. Create a paperless permit account. From there you will have access to both the paperless permits applications and Project Docx.
- 2. Be invited to view a current project by an owner/contractor or someone working on a project.
  - ➤ If you have received a link for access to a project please follow the following instructions

# Using the dashboard

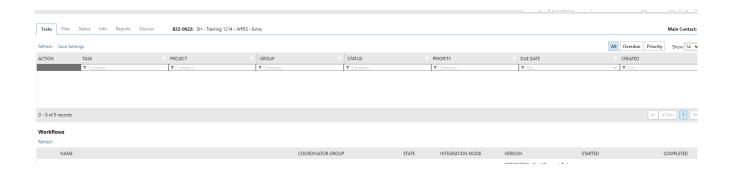
When logging in to ProjectDox to access a submitted application you can log into the Building Permits Portal or go directly to the ProjectDox portal. If you log in through the Building Permits Portal simply click on the hyperlink to the permit number under the "My Permits" section.



When logging into ProjectDox to access a submitted application you can log into the Building Permits Portal or go directly to the ProjectDox portal. If you log in through the Building Permits Portal, simply click on the hyperlink to the permit number under the "My Permits" section. When you click on the permit you would like to access you will be directed to your permits "Status" tab. Under the "Status" tab the applicant will be able to see how long the applicant has had the permit and how much time has passed since the permit application was submitted.



By clicking on the "Tasks" tab you will be able to see what tasks are pending for you to complete on your permit. If nothing is appearing under the "Task" column that means that your permit is under review, and you currently have no new tasks to complete.



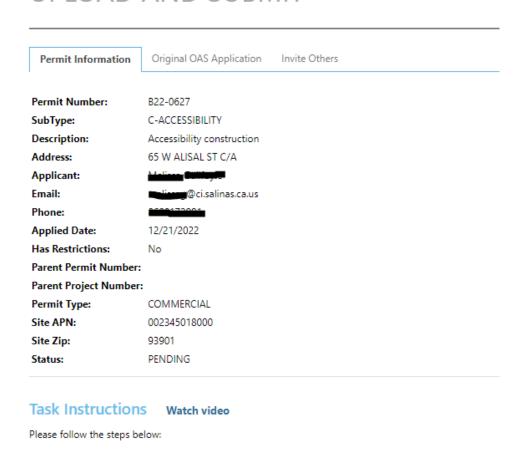
If you see instructions under the task column the instructions will tell you what steps you need to take. Under the group column you should see the word "Applicant"

meaning that it is your task to complete. In the image below in the task column it states "Upload and Submit" meaning that the applicant still needs to upload and submit documents.



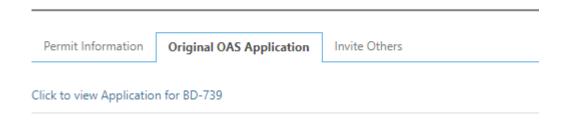
When you click on the task listed in the task column a new dialogue box will pop up. The dialogue box will have three tabs "Permit Information", "Original OAS Application", and "Invite Others." Under the "Permit Information" tab you will be able to see information regarding your permit including "Description", "Address", "Applied Date" and any restrictions on the permit.

#### UPLOAD AND SUBMIT



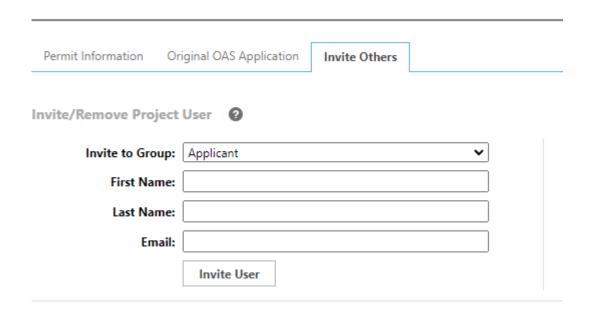
Under the "Original OAS Application" tab you will see a link to the original application. If the link is selected the browser will take you to the Building Permits Portal and allow the applicant to view the original application.

### UPLOAD AND SUBMIT



Under the "Invite" tab you will see a form to fill out to invite others to the project. Normally this is used to invite architects and/or designers to view the project. Below is an image of this tab:

### UPLOAD AND SUBMIT



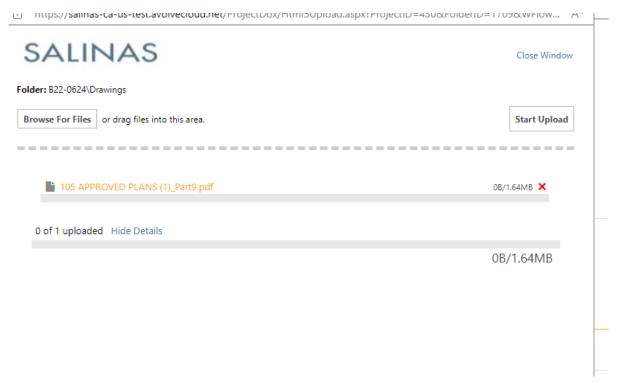
On the "Upload and Submit" page you will see three steps that need to be completed. Step 1 is to upload documents. Step 2 you must click the box to verify that all the required documents were uploaded. Step 3 you must click the "Submit" button to send the documents to city staff. If you do not have all the documents, you need ready for submittal you can click "Save for Later" and the documents will save in your profile until you are ready to submit the documents. Below are images of all three steps.

#### **UPLOAD AND SUBMIT** Permit Information Original OAS Application Invite Others B22-0624 Permit Number: SubType: R-ACCESSIBILITY Description: Wheelchair Ramp 559 POWELL ST Address: Applicant: Melissa Guilfoyle melissag@ci.salinas.ca.us Email: 8608172991 Phone: Applied Date: 12/16/2022 Has Restrictions: Parent Permit Number: Parent Project Number: RESIDENTIAL Permit Type: Site APN: 261816003000 93907 Site Zip: Status: Task Instructions Watch video Please follow the steps below: STEP 1 of 3: Select and upload your drawing and supporting document files into this project, as required File Upload for: B22-0624 ② Please click appropriately for the type of files you are uploading. Watch video Upload Documents **Upload Drawings** No files uploaded yet. Submit Save for Later STEP 2 of 3: Check all to confirm you have completed this task and are now ready to submit Confirmation @ STEP 3 of 3: Click the "Submit" button below to complete your task Submit Save for Later

If you are ready to upload documents, please click on the "Upload Drawings" box. When you click on the box a new dialogue box will appear. In order to upload files you can either click on the "Browse For Files" box or drag files into the area between the dotted lines. Once you have dragged and dropped your files or selected the files from your computer using the "Browse For Files" box click on the "Start Upload" box. The image below shows what you will see on your screen.



Once you click on the "Start Upload" box the file will appear with grey lines. Below is an image of what you will see on your screen while your file is uploading:



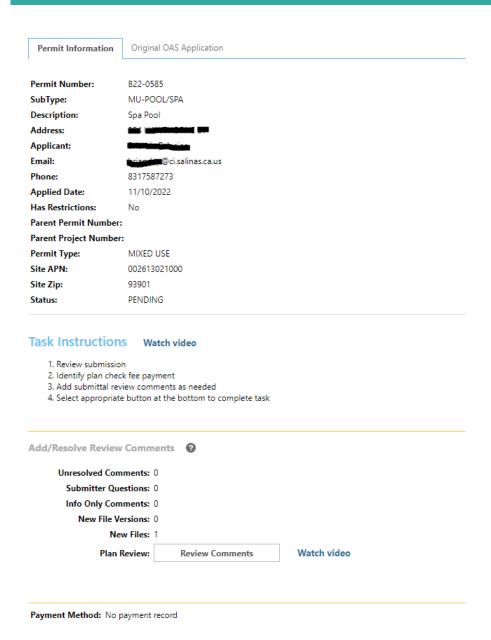
Once your file is uploaded you will receive an email stating that the file has been uploaded. Below is an image of what the email will look like:

# Hello Malicen, The following files have been received for project - B22-0624: Wheelchair Ramp Files received: 1. 105 APPROVED PLANS (1)\_Part9.pdf Please do not reply to this email.

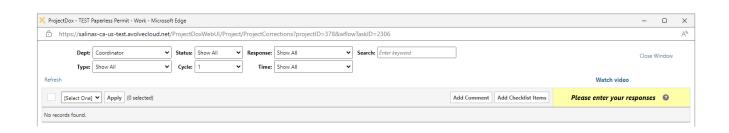
After the Coordinator receives your application, it may be sent back to you. The coordinator may send the application back to you for payment on the permit or the coordinator may want you to add additional comments. When this happens, the application will appear on your portal. Under the "task" column you will see the phrase "Prescreen Corrections". This means that there are some corrections that are needed. Under the "Group" column it will say "Applicant" meaning that you will need to make the required corrections. Below is a picture of what you will see on your portal.



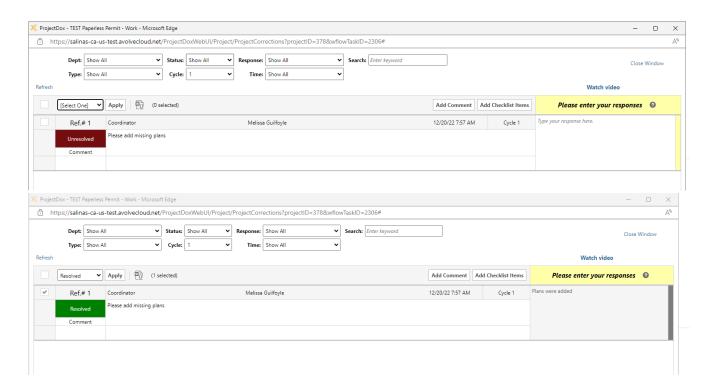
After the documents are submitted and sent to the coordinator for review you will receive the application back to fix comments or for payment. In the section titled "Add/Resolve Review Comments" you will be able to see if there are any comments that need to be added to complete the application. To view the comments, you will click on the box "Review Comments".



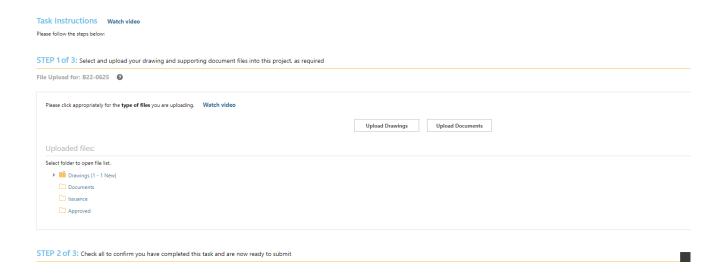
After clicking the "Review Comments" button you will see a screen that displays comments from different departments. These departments include Coordinator, Addressing, Engineering, and Planning. Using the different drop-down boxes, you will be able to filter and sort the types of comments. You can also search through the comments using a keyword search. Below is an image of the drop-down boxes that will appear on your screen.



Underneath the drop-down boxes there are rows that will display the comments that staff has left for you. You can also add comments and questions for staff in this section. All comments that need a response will have a highlighted dark red box to the right of the comment section. This dark red box will display "Unresolved". When replies are added, staff will resolve the comments and the text in the box to the right of the comments will change to green and "Resolved" will be displayed. Please enter your comments in the box that states, "Type your response here." Below are two images of both "Unresolved" and "Resolved" comment boxes.



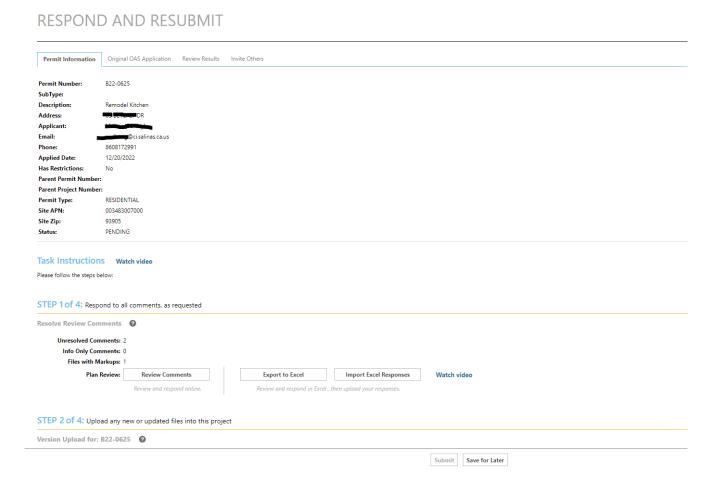
You may be required to upload additional drawings or documents during your permit application. When you would like to upload documents, you can click on the button that says, "Upload Documents". The documents will appear in the folder labeled "Documents" and the drawings will appear in the folder labeled "Drawings."



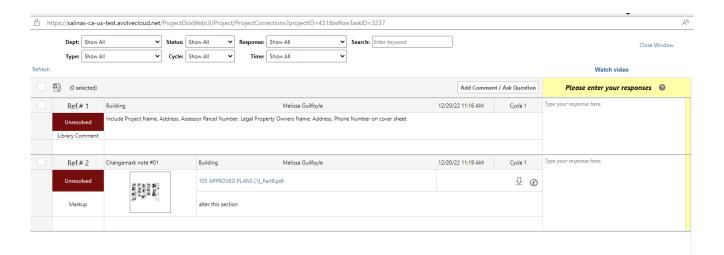
After reviewing any correction or comments to your permit you may be required to resubmit the plans. If this is the case, you will receive a task on your dashboard that is titled "Respond and Resubmit." By clicking on the task, you will open a display box titled "Respond and Resubmit."



On the "Respond and Resubmit" page you will be able to view if there are any unresolved comments or Plan Review comments. Additionally, you will be able to export plan review to Excel. If you would like to review comments made by Plan Review click the "Review Comments" box next to Plan Review.



By clicking to view unresolved comments you will also see any unresolved comments from Plan Review. You can access your marked plans by clicking on the hyperlink of the pdf that was uploaded. Any changes that are made to the plans will be denoted as "Changemark Note" followed by a number.



When the hyperlink is selected, you will be directed to view your plans that contain marks made by staff. Marks will be different shapes and sizes depending on the changes that need to be made. A list of the notes will appear in the middle column to the left of your plans. You can respond directly to the changes staff made to your plans by typing in the white box labeled "Your Response." Please make sure to click the box title "Save Response" after typing your comments to staff. In the grey box directly above the box titled "Your Response" you will be able to view your past comments as well as past comments by staff. Below is an image of a marked set of plans.

