

Permit and Development Portal 2020 Upgrade Guide

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Introduction

This document is a guide for new Permit and Development Portal features available to City of Raleigh portal users as of the April 1, 2021. This document may also be used by City of Raleigh staff that support portal users via the DS Help line or other channels.

Permit and Development Portal Changes

Application Templates (New Feature)

An applicant can create a reusable application template. This feature allows trade contractors, and similar, to create a template of their most commonly used applications. At any point within an application, the user can click the new Create Template button. This puts them into a different application stepper, in which all requirements are disabled. The user can input as many or as few fields as desired and then save or update their template. Information such as Location, Description, Contacts, and More Info (custom fields) can be stored. Attachments cannot be saved in a template at this time. Users will need to load attachments at the time of application.

Apply for Permit - Co-locate/Small Cell (Inside Right of Way) *REQUIRED

Application Steppers

Locations Type Contacts More Info Attachments Review and Submit

Attachments

Please upload all required attachments as shown in the attachment cards below. Make sure that the appropriate file is uploaded into the correct named attachment. If no specific documents are required, you may still upload any documents that you feel will aid in the review/approval of your application. **IMPORTANT:** Uploading incorrect or incomplete documents will delay or potentially cancel the permit request. Plot plan must meet all plot plan/supplemental requirements (available at www.raleighnc.gov). Construction drawings/documents must include: Equipment specs, load calculations and power supply information. If the Small Cell/Co-Locate is in NCDOT right of way, an approved NCDOT Encroachment must accompany the Construction Drawings. Failure to do so will cause the application to be denied and sent back. Please ensure the Non-Residential Permit Application is signed by the applicant and Electrical Contractor. Please select the appropriate name from the drop-down list and attach it to allow processing.

Construction drawings/documen..

Add Attachment

+

Supported: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf, .

REQUIRED

Non Residential Permit Application

Add Attachment

+

Supported: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf, .

REQUIRED

Permit Application Permit Addendum

Add Attachment

+

Supported: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf, .

REQUIRED

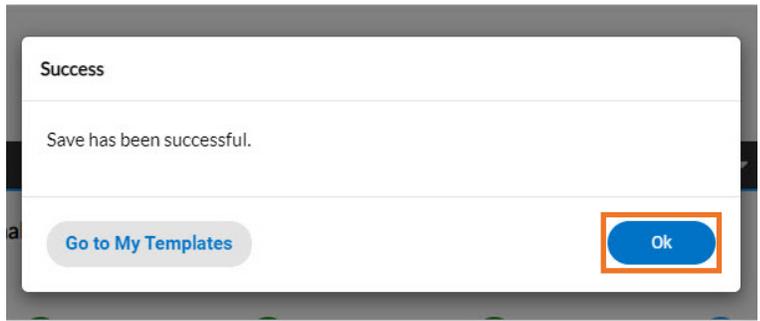
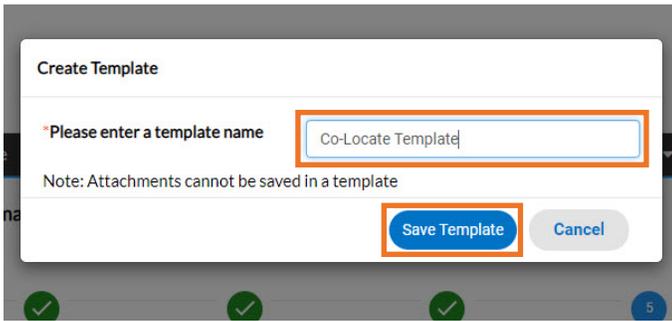
Construction drawings/ ▼

Add Attachment

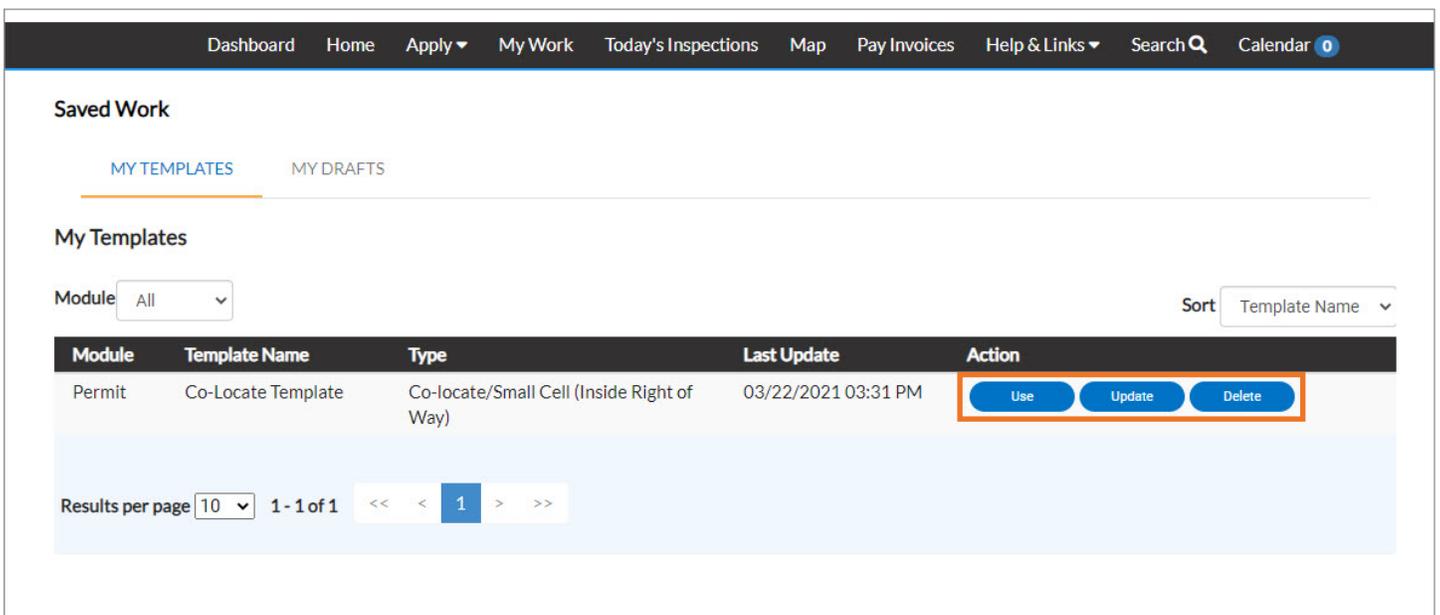
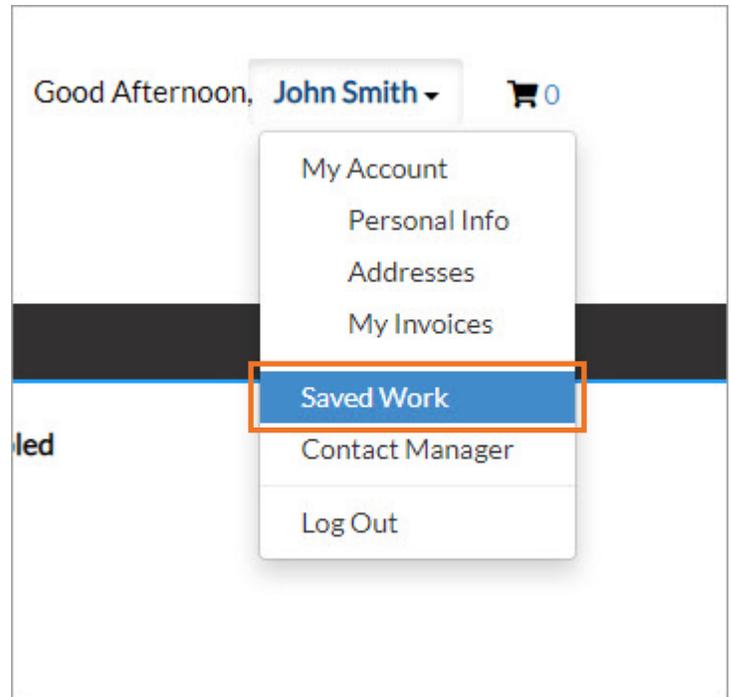
+

Supported: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf, .

BackCreate TemplateSave DraftNext

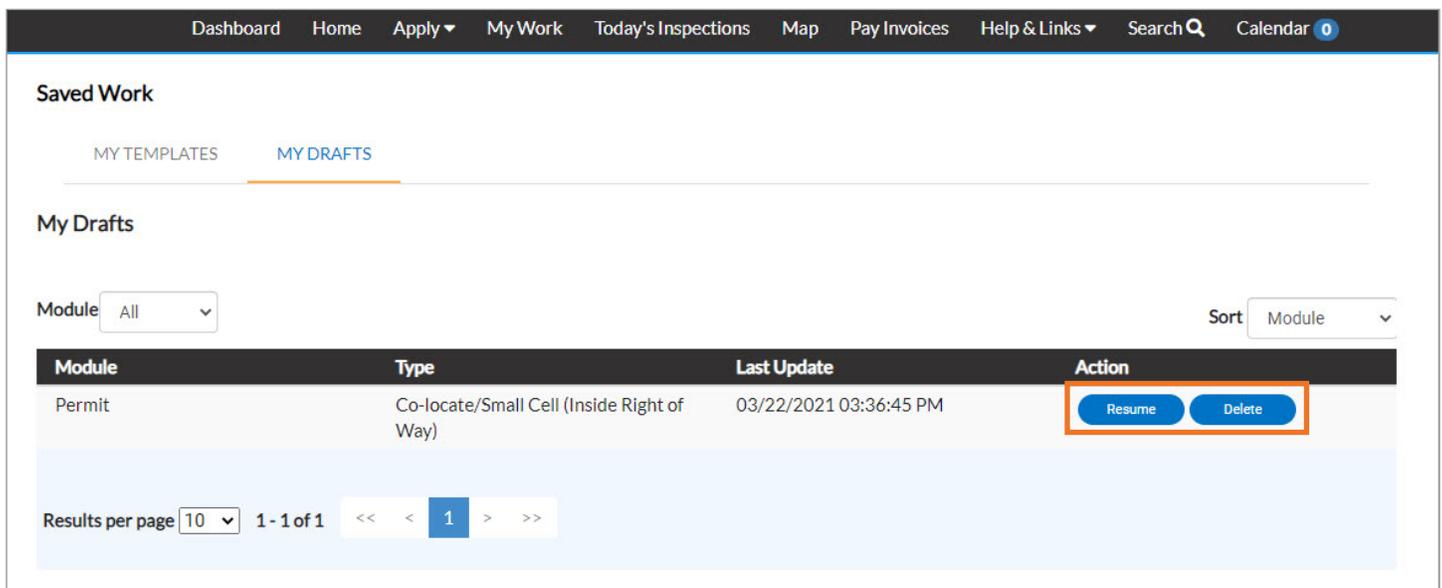
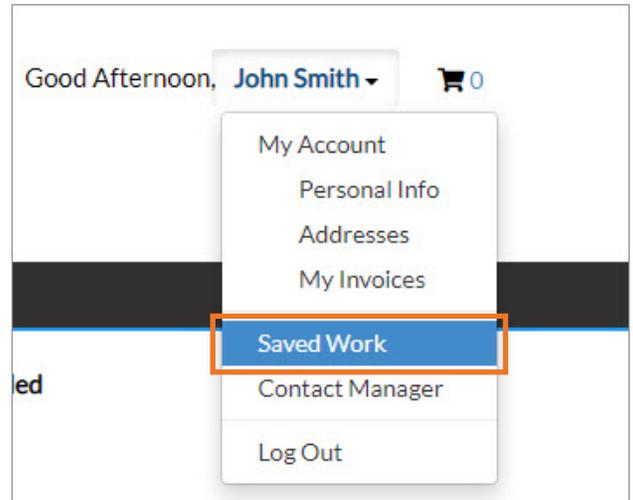


Once a template is created, the portal user can use them to create the same application repeatedly. To access a template, users can click their name in the upper-right corner of the Permit and Development Portal and select Saved Work. Templates can also be accessed from a tab within the user profile pages. When the template is used, all information from the template is pre-populated into the normal application stepper. All normal requirements must be met. After completing an application, the user can reuse the same template. Currently, attachment uploads are not available in an application template.



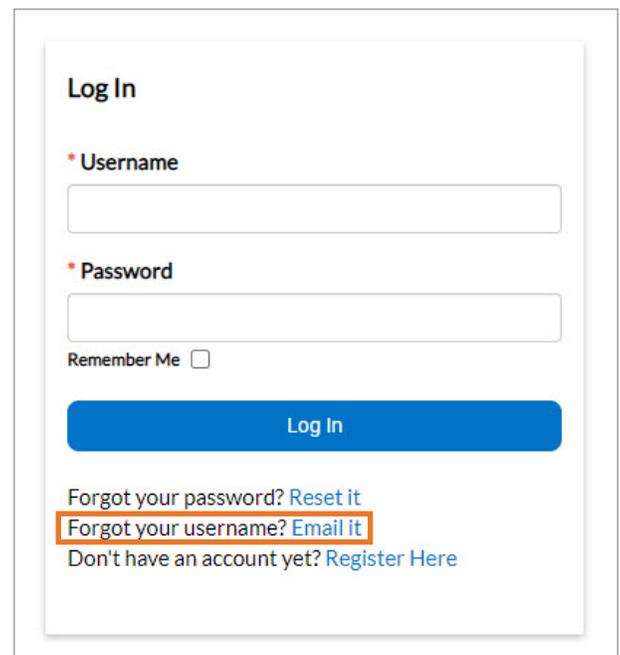
Drafts

Portal users' Drafts are now accessible within the Saved Work page of the Permit and Development Portal. It displays as a tab in this area.



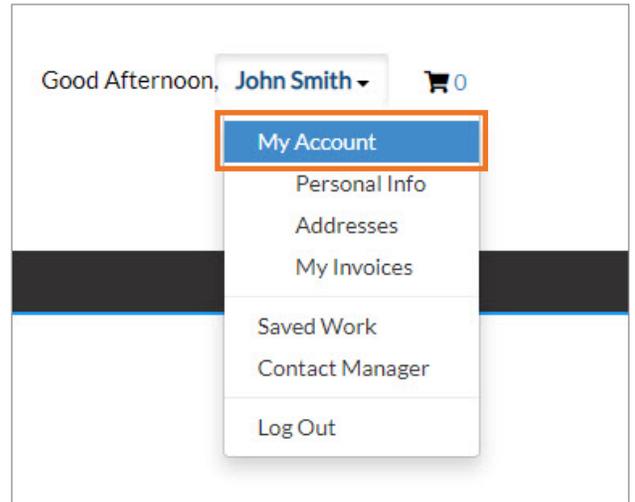
Forgot Username

A Forgot your Username feature has been added to the Permit and Development Portal login page.



My Certifications: Contractor Licenses (New Feature)

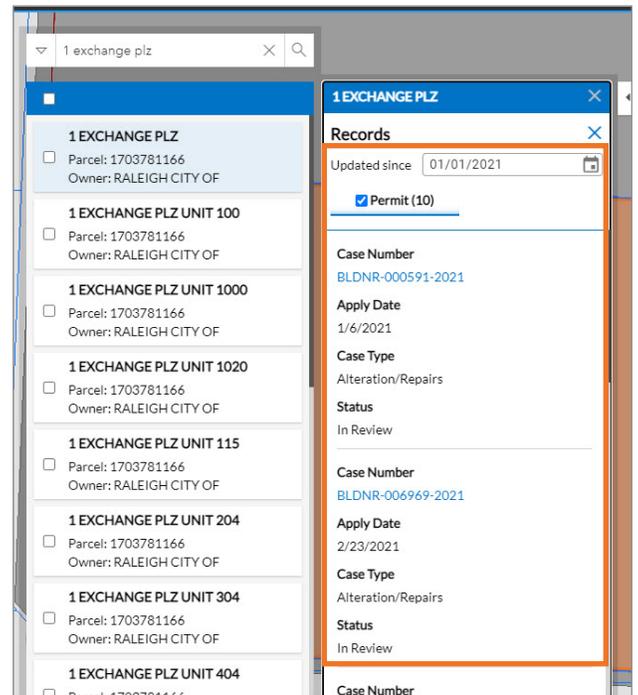
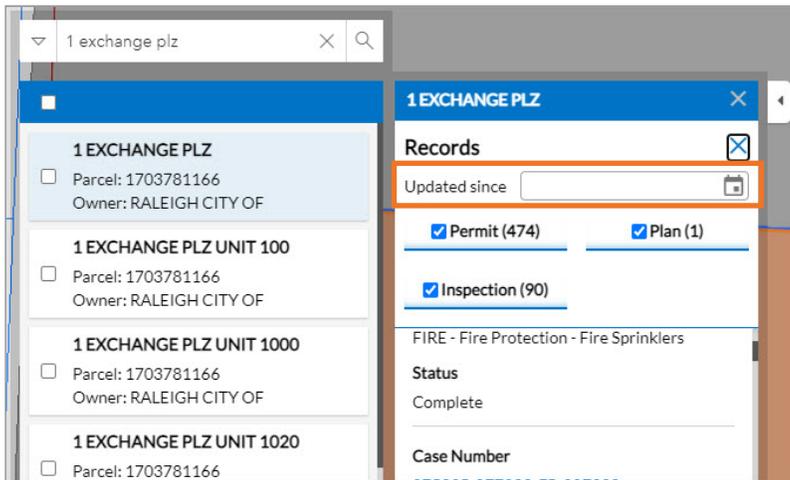
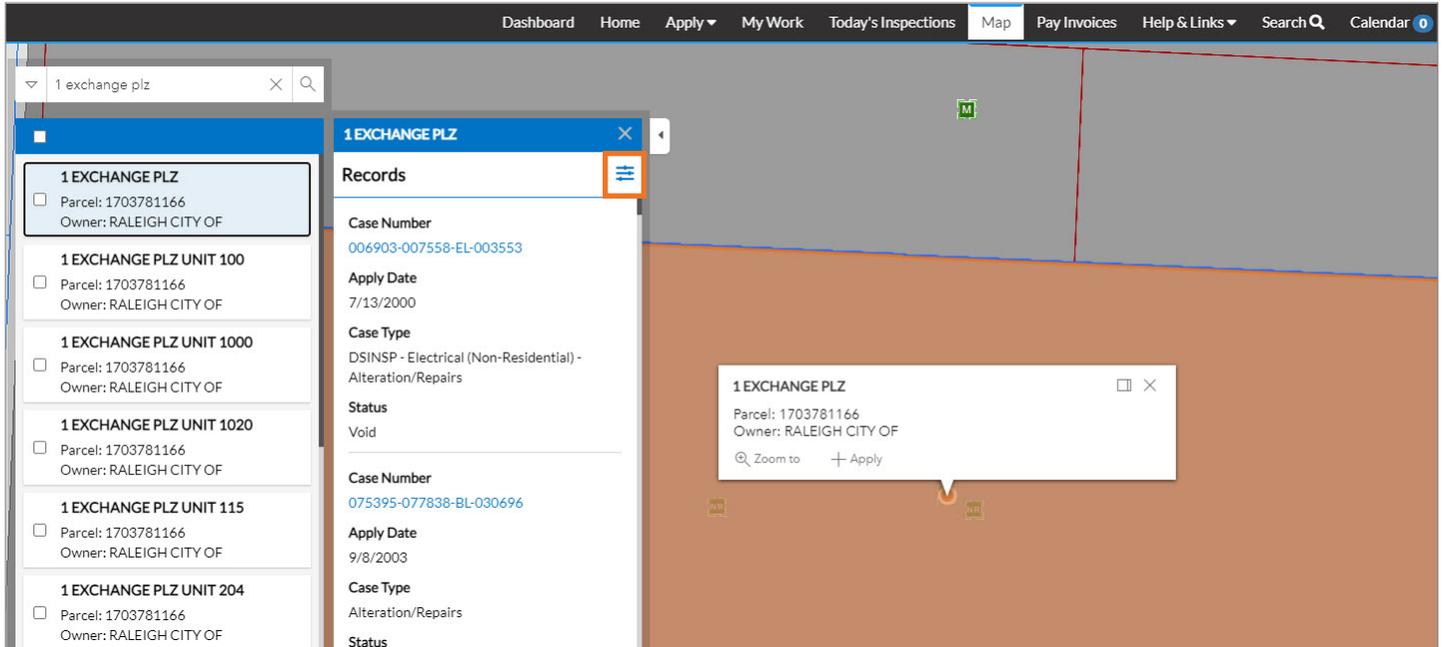
The Permit and Development Portal now shows a user the current certifications that City of Raleigh staff has assigned to their contact. A new tab is added to the My Account page showing a portal user My Certificates. This section contains stored details provided during the application process regarding contractor licenses, general liability, etc.



A screenshot of the "My Account" page. The navigation bar includes "Dashboard", "Home", "Apply", "My Work", "Today's Inspections", "Map", "Pay Invoices", "Help & Links", "Search", and "Calendar". Under "My Account", there are tabs for "PERSONAL INFO", "ADDRESSES", "MY INVOICES", "MY BUSINESSES", and "MY CERTIFICATES". The "MY CERTIFICATES" tab is selected and highlighted with an orange box. Below the tabs, the "Certificates" section is shown with a "Sort" dropdown set to "Number". A table of certifications is displayed, with the table itself highlighted by an orange border. The table has columns for "Number", "Type", "Issue Date", "Expire Date", and "Classifications". Below the table, there is a pagination control showing "Results per page 10", "1 - 3 of 3", and navigation arrows.

Map Enhancements

Clicking an address now opens a popup containing public records for the location. By default, records on the address popup displays all cases. Online users can adjust the "Updated Since" date to filter recently updated records.



Review Enhancements

The display of corrections has been updated. Now, resolved corrections will appear with a strikethrough applied to the text. In addition, the width of the comments and corrective actions has been increased.

BEFORE

Summary Locations Fees **Reviews** Inspections Attachments Contacts Sub-Records More Info Conditions

Plan Review [Administrative Site Review]

Submittal Status	Received Date	Due Date	Completed Date
*Requires Re-submit	12/21/2020	01/15/2021	01/20/2021

DS - Planning • *Requires Re-submit • ~~Completed : 01/15/2021~~ • Completed : 01/15/2021

Due Date	Completed Date
01/15/2021	01/15/2021

Corrections (40)

Correction Type	Category	Corrective Action	Comment
General	General Correction		General Please show assigned case reference #: "ASR-0050-2020" in the title block on the coversheet. Property Owners/Application Signees Please clarify the signature on the application form. Print the name of the signature shown. Zoning Conditions/Coversheet Coversheet, please provide a narrative response to each of the Zoning Conditions Z-41-19, demonstrating compliance Demolition Permits A demolition permit will be required as a condition of approval following ASR approval for this plan. Recordation Plat is a

AFTER

Plan Review [BLDNR | Addition]

Submittal Status	Received Date	Due Date	Completed Date
*Requires Re-submit	03/25/2021	04/09/2021	03/25/2021

PRCR - Urban Forestry • *Requires Re-submit • ~~Completed : 03/25/2021~~ • Completed : 03/25/2021

Due Date	Completed Date
04/09/2021	03/25/2021

Corrections (3)

Correction Type	GW Reservation Req'd: Boundary + Width	Category	PRCR - Non-Residential	Comment
				Please clearly identify and label the extent (boundary) and span (width) of the greenway easement reservation area. The width of the greenway easement area should be clearly identified.
Correction Type	GW Reservation Req'd: Labels	Category	PRCR - Non-Residential	Comment
				Please label all existing and proposed greenway easement reservation areas with: "Area Reserved for City of Raleigh Greenway Easement (UDO 8.1.6.A)"
Correction Type	GW Reservation Req'd: Voluntary Dedication of GW	Category	PRCR - Non-Residential	Comment
				Although not required, please consider voluntarily dedicating this greenway easement area as a City of Raleigh Greenway. Dedication of this easement would contribute to the protection of riparian lands, and would facilitate future greenway trail planning.

Conditions now appear on a permit or plan details page in their own tab. Only enabled conditions are shown.

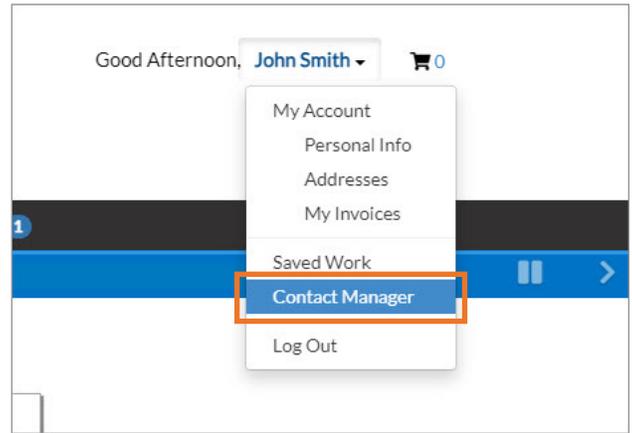
My Work Enhancements

The pages in the Permit and Development Portal that display a logged in users records, commonly labeled My Permits, My Plans, etc., have been combined into a single page. The modules are each displayed in their own tab and will only show if a user has at least one record within that module. The search, filters, and sorting that appear at the top of each of these lists has been redesigned to appear similar to the global search. This put emphasis on the search, and places other options under extended filters. The link for Today's Inspections, previously under the drop down that listed these pages, has been separated and placed directly in the menu. It should only show if previously enabled.

Permit Number	Project	Address	Permit Type	Status	Attention Reason
564332-471755-LD-112635		140 AMMONS DR 2740653	ENG - Stormwater Control Stormwater Control		
BLDNR-006998-2021		1 Exchange Plz 2766267 Raleigh, NC 27601	Commercial Addition		
BLDNR-006999-2021		1234 Duffy PI 2708784 Raleigh, NC 27603	Commercial Addition		
BLDNR-007000-2021		1234 Duffy PI 2708784 Raleigh, NC 27603	Commercial Addition		
BLDNR-007001-2021		1234 Duffy PI 2708784 Raleigh, NC 27603	Commercial Addition	Recent, Pending	

Contact Manager: Sub Contacts (New Feature)

Companies can now provide individuals (sub contacts) access to their records by using the Contact Manager tool in the Permit and Development Portal. Sub contacts can have the same permissions as their parent company contact when accessing the details of permits, plans, inspections, and professional licenses (even if the sub contact does not exist as a contact on the case).



The parent company contact can add, approve, deny, or remove sub contact access.

Contact Manager

MY FAVORITES **ASSOCIATES** MY ASSOCIATIONS

Associates

Here you are able to add associates, also known as sub contacts, to your account. Associates will mirror your access to cases, including the ability to toggle on/off visibility on the Dashboard, My Work, and your access to specific case details and actions.

Add Contact

Search: Exact Match

Existing Associates

Contact ID	First Name	Last Name	Company	Email	Action
ID-000052588					<input type="button" value="Approve"/> <input type="button" value="Deny"/>
ID-000019503					<input type="button" value="Remove"/>

Results per page 1 - 2 of 2 << < 1 > >>

A portal user can also request to become a sub contact of a parent company. They can also remove themselves from a company contact.

The screenshot displays the 'Contact Manager' interface. At the top, a navigation bar includes links for Dashboard, Home, Apply, My Work, Today's Inspections, Map, Pay Invoices, Help & Links, Search, and Calendar. Below this, the 'Contact Manager' section has three tabs: 'MY FAVORITES', 'ASSOCIATES', and 'MY ASSOCIATIONS', with the latter being the active tab. The 'My Associations' section contains a text box for adding contacts, a search button, and a pending contacts area with 'Cancel' and 'Resend' buttons. At the bottom, an 'Existing Associates' table lists one contact with a 'Remove' button in the action column. A pagination control at the bottom shows 'Results per page' set to 10 and '1 - 1 of 1' items.

Contact Manager

MY FAVORITES ASSOCIATES **MY ASSOCIATIONS**

My Associations

Here you can request access to your company(s) cases. Search for your company below. If it has been set up it will appear in the list. Click on the Request Access button to send an email to the company administrator requesting access.

Add Contact

Search: Exact Match

Pending Contacts

Sweets by CeCe

Existing Associates

Contact ID	First Name	Last Name	Company	Email	Action
ID-000019503	Robert	Brewer	Brewer Enterprises	retsam2@gmail.com	<input type="button" value="Remove"/>

Results per page 1 - 1 of 1 << < 1 > >>



Planning and Development Customer Service Center

Ds.help@raleighnc.gov

919-996-2500