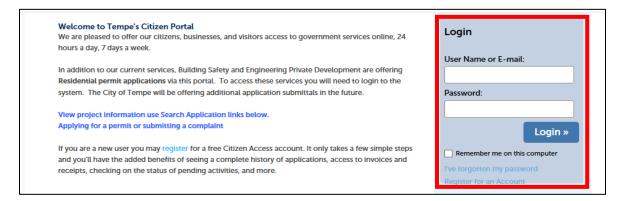


THIS STEP-BY-STEP GUIDE WILL ASSIST YOU WITH THE PLANNING PROJECT ONLINE SUBMITTAL PROCESS.

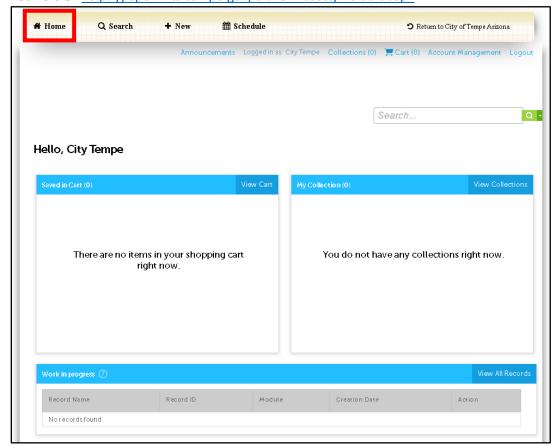
#### LOGIN

- If you have not already done so, please create an account with the Tempe Citizen Access (TCA) Portal.
- Once an account is created, proceed by logging in with your new credentials.



#### **DASHBOARD**

- The dashboard is where you can view items in your cart and applications in progress.
- Click the home button to start a brand-new application or navigate to the following URL if the home button is not visible: <a href="https://epermits.tempe.gov/CitizenAccess/Default.aspx">https://epermits.tempe.gov/CitizenAccess/Default.aspx</a>





### **CREATE AN APPLICATION**

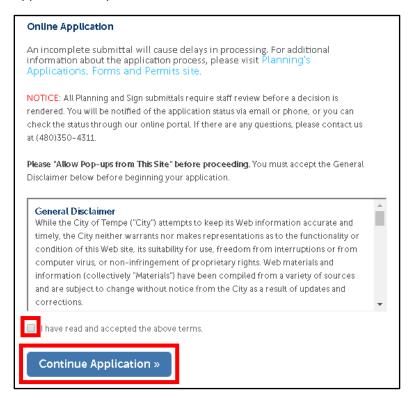
• Under the "Planning & Signs" header, select "Create an Application".

What would you like to do today? To get started, select one of the services listed below:	
General Information	Building Safety
Lookup Property Information	Create an Application
Search for a Licensee	Search Applications
	Schedule an Inspection
Assessment	Enforcement
Search Applications	Search Applications
Private Development Engineering	
Private Development Engineering Create an Application Search Applications	Planning and Signs  Create an Application  Search Applications
Create an Application	Create an Application
Create an Application Search Applications	Create an Application Search Applications
Create an Application Search Applications Schedule an Inspection	Create an Application Search Applications Schedule an Inspection
Create an Application Search Applications Schedule an Inspection Engineering Dry Utilities	Create an Application Search Applications Schedule an Inspection  Traffic Complaints
Create an Application Search Applications Schedule an Inspection  Engineering Dry Utilities  Create an Application	Create an Application Search Applications Schedule an Inspection  Traffic Complaints
Create an Application Search Applications Schedule an Inspection  Engineering Dry Utilities  Create an Application Search Applications Request an Inspection	Create an Application Search Applications Schedule an Inspection  Traffic Complaints
Create an Application Search Applications Schedule an Inspection  Engineering Dry Utilities  Create an Application Search Applications	Create an Application Search Applications Schedule an Inspection  Traffic Complaints



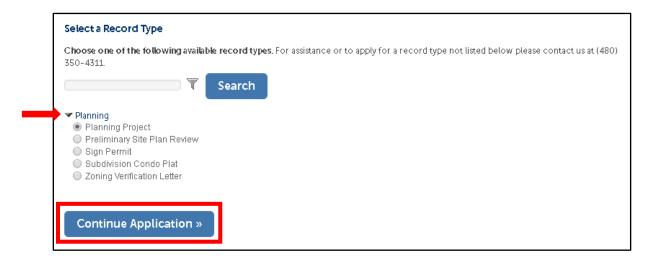
#### **REVIEW THE TERMS**

- Please read and review the terms within the window.
- If you agree to the terms, check the box "I have read and accepted the above terms" and click "Continue Application" to proceed.



#### **SELECTING A PLANNING RECORD TYPE**

- Click the "Planning" drop-down header and select the "Planning Project" button.
- Click "Continue Application" to proceed.

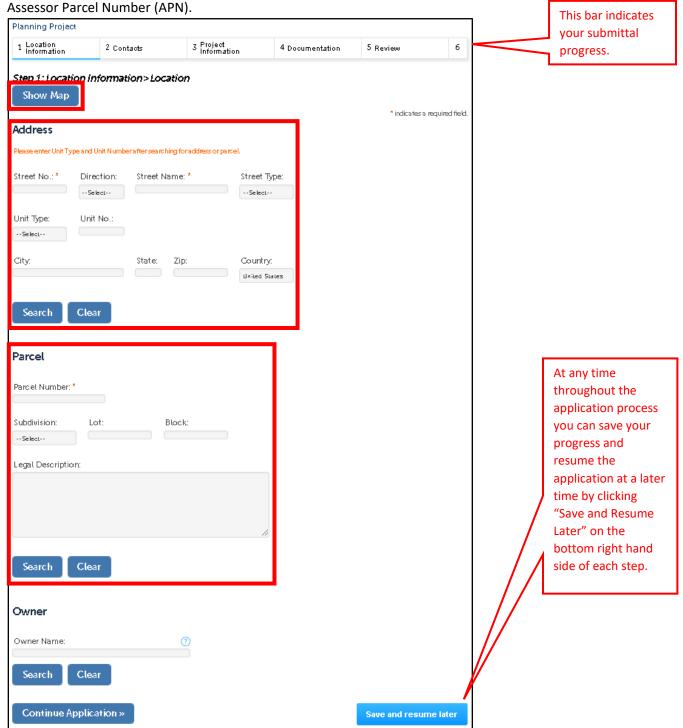




#### STEP 1 - Location Information>Location

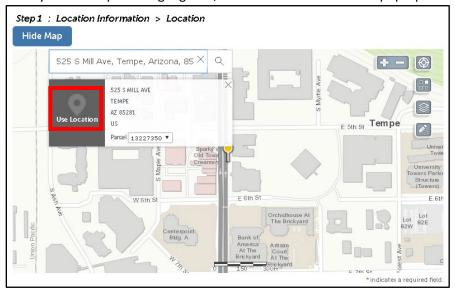
You can confirm the location of the request by using the interactive map, typing in the address, or typing in the

Assessor Parcel Number (APN)

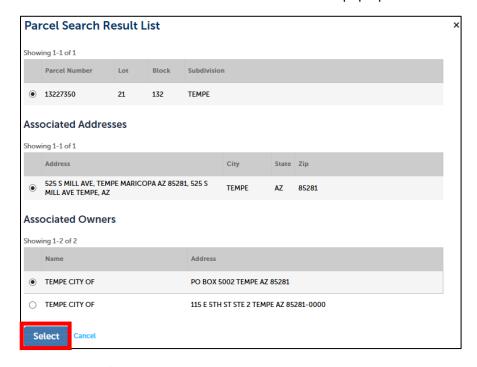




- Use one of the following search methods to confirm the location of the request:
  - o Map Option
    - To use the map, click "Show Map" and type in the address into the search bar or manually select a parcel within the map.
    - Once you have a parcel highlighted, click "Use Location" in the pop-up window.



Confirm that the location information is correct in the pop-up window and click "Select".



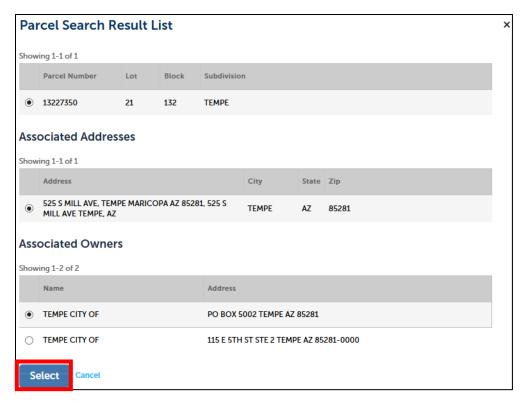
The location information will now automatically populate.



- Address Option
  - Provide the address for your subject property under the "Address" header and click "Search".
  - If you find that the *Search by Address* result list comes up with no results, try leaving the "City", "State", and "Zip" fields empty or try the *Search by Parcel* option.



Confirm that the location information is correct in the pop-up window and click "Select".

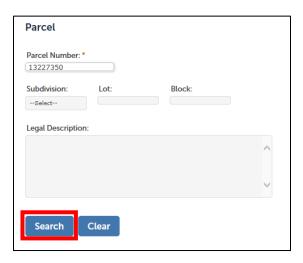


The location information will now automatically populate.

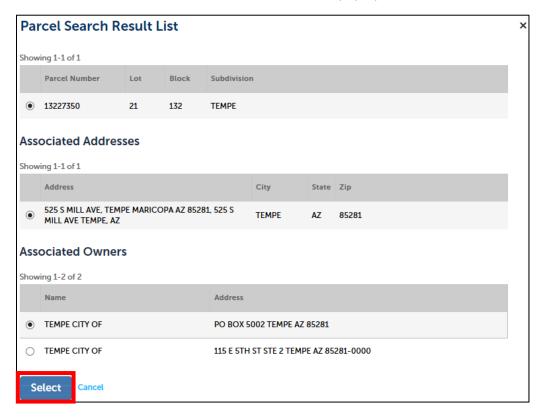


### o Parcel Option

Provide the parcel number for your subject property under the "Parcel" header and click "Search".



Confirm that the location information is correct in the pop-up window and click "Select".



• The location information will now automatically populate.

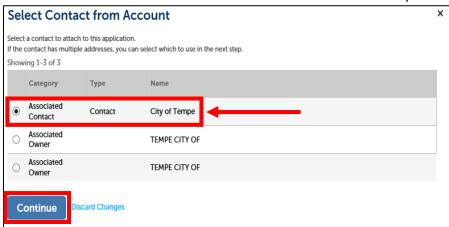


#### STEP 2 - Contacts>People

• If you want to select the contact associated with your TCA account, under the Contact header, click "Select from Account"



• Select the "Associated Contact" button to auto-fill the contact with your information.

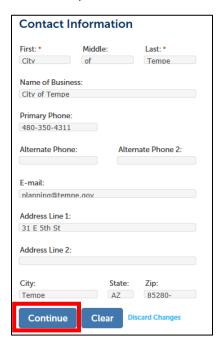


• If you want to add a contact that is not associated with your TCA account, under the Contact header, click "Add New".

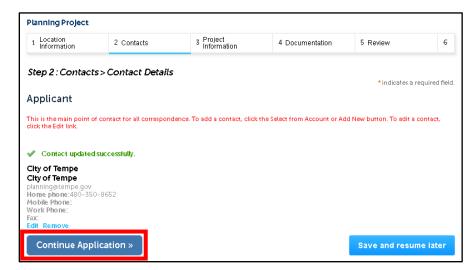




• Fill in all required information in the pop-up window and click "Continue".



• Verify that the information is correct and click "Continue Application" to proceed.





Revised: 10/29/2024

### STEP 3 – Project Information>Application Information

#### • Detail Information:

- Enter the name of the project in the "Project Name" field. Typically, projects are named after the
  property owner, business operator, addresses, or general location (i.e. Ringer Enterprises Properties, The
  Hallman Residence, Ringer LLC, or 1 South Mill Avenue, Mill and 1st).
- Provide detail information pertinent to the requested planning entitlement(s) and type of project in the "Project Description" field.

### Project Information:

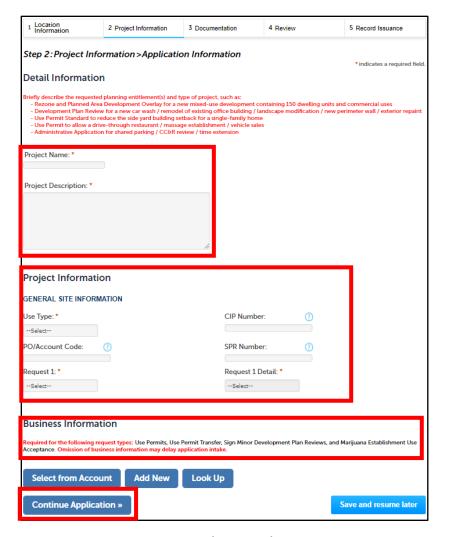
### O General Site Information:

- Select "Use Type" from the dropdown menu.
  - If requested entitlement is for a Capital Improvement Project, enter a CIP Tracking
     Number
  - If requested entitlement is for a public school, enter a Purchase Order Account Code.
  - Select "Request 1" type and "Request 1 Detail" from the dropdown menus. Another "Request" dropdown menu will appear below the first request in the event your Planning Project requires more than one entitlement.

#### Business Information:

- Business information is required when filing applications for a Use Permit, Use Permit Transfer, Sign Minor Development Plan Review, and Marijuana Establishment Use Acceptance.
- Click "Continue Application" to proceed.





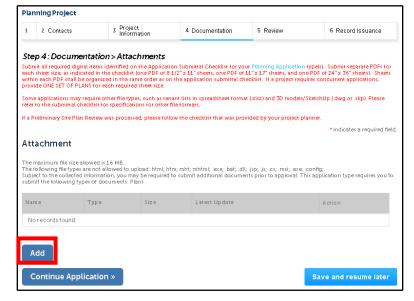
#### STEP 4 – Documentation>Attachments (Required)

- Attach all required digital items identified on the Application Submittal Checklist for your <u>Planning Application</u> type(s) in the following manner:
  - Submit separate sets of attachments for required document, as indicated in the applicable application checklist form(s). For example:
    - Attachment 1 shall consist of a PDF containing all required 8-1/2"x11" sheet size documents;
    - Attachment 2 shall consist of a PDF containing all required 24"x36" sheet size plans; and
    - Attachment 3 shall consist of a PDF containing all required 8.5"x11" sheet size plans.
  - Some applications may require other file types, such as tenant lists in spreadsheet format (.xlsx) and 3D models/SketchUp (.dae). Please refer to the submittal checklist for specifications for other file formats.
  - Sheets within each PDF shall be organized in the same order as on the application submittal checklist. If a project requires concurrent applications, provide <u>ONE SET OF PLANS</u> for each required sheet size.
  - o If a Preliminary Site Plan Review was processed prior to submittal of this formal application, please follow the checklist that was provided by your project planner.
  - Label each attachment using attachment number followed by the Project Name (i.e.
     1\_ProjectName\_Documents.pdf, 2\_ProjectName\_Plans\_24x36.pdf, 3\_ProjectName\_Plans\_8.5x11.pdf.).

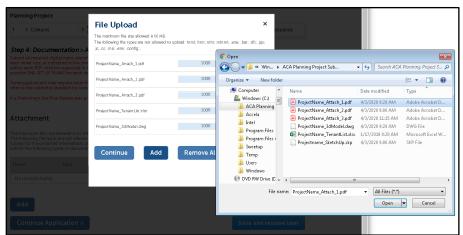


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- Other file types shall be labeled as above with the applicable file type extension then the file type (i.e. 4a ProjectName 3D.dae).
- Click the Attachment "Add" button to begin attaching required documentation.

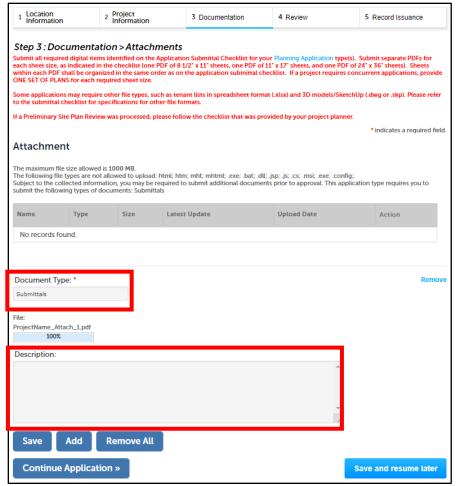


 Multiple files can be uploaded at one time.
 Simply click the File Upload "Add" button to add more files.



- Once all files have been uploaded, click the File Upload "Continue" button to complete the file upload process. To start over, click the File Upload "Remove All" button.
- Next, identify the document type for each attachment using the "Document Type" dropdown menu.
   Description notes may be provided using the "Description" text box. Identify all attachments as "Submittals" which is the required documentation type for this type of submittal.



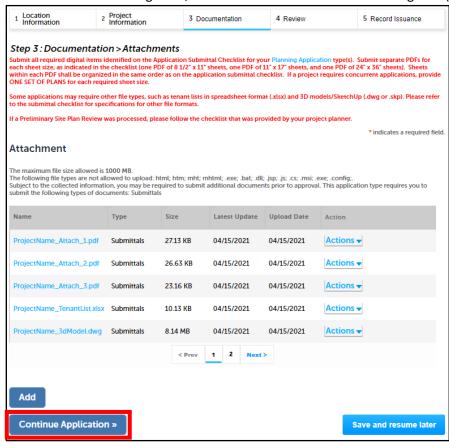


Once all attachments have been uploaded and characterized, click "Save" and then "Continue Application". At this point, there is also one last opportunity to add more files if any were forgot from the previous step; simply click the "Add" button to add more files. To start over, click the "Remove All" button to remove all files and start all over.





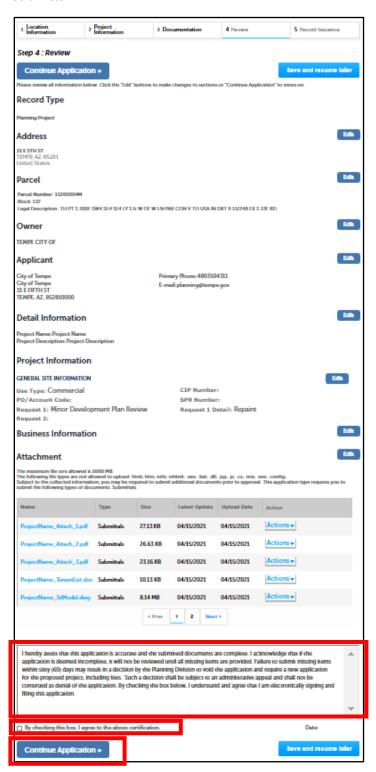
- Next, a confirmation banner will appear if all attachments were uploaded successfully. If there were any
  issues, the banner will explain what went wrong with the upload. If everything looks okay, click the
  "Continue Application" button to continue.
- If attachments were forgotten, click the "Add" button to add missing files (final opportunity to do so).





#### STEP 5 – Review

- Review your application and verify that all information is correct.
- Once you have confirmed that the information is correct, click "Continue Application" to complete the submittal.





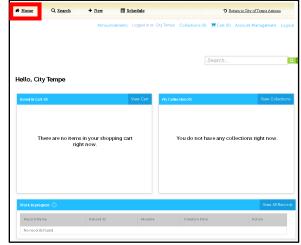
#### STEP 6 - Payment

 Once the planning project has been submitted, the following screen will display the project address and the assigned tracking number at the bottom.

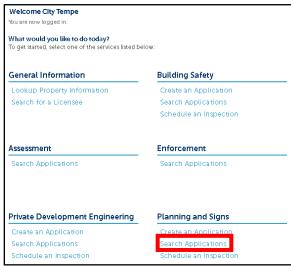


- The Permit Center will then invoice all applicable fees for the submitted Planning Project.
- The contact of record for the project submittal will be notified by email when the fee(s) are ready for payment.
- When ready for payment, proceed by signing in with your credentials on the <u>Tempe Citizen Access Portal</u>.
- Click the home button to or navigate to the following URL if the home button is not visible:

https://epermits.tempe.gov/CitizenAccess/Default.aspx

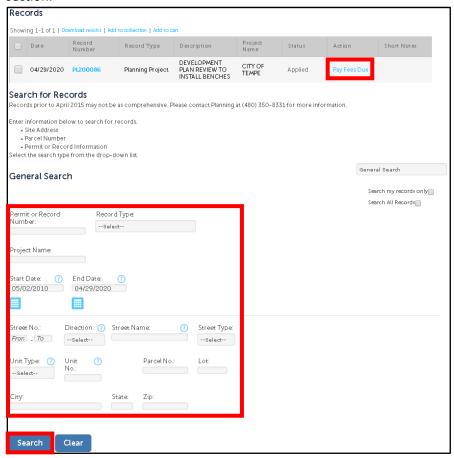


 Next, click "Search Applications" under the "Planning and Signs" header in the right-hand column.

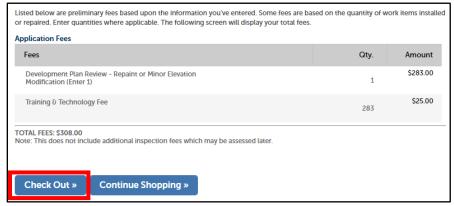




All project submittals processed under the Tempe Citizen Access account will be listed under records. Click the
"Pay Fees Due" link under the "Action" column on the right-hand side. If your record is not listed, you may
search for it by <u>Permit or Record Number</u>, <u>Project Name</u>, <u>Date Range</u>, or <u>Address</u> in the "General Search"
section.



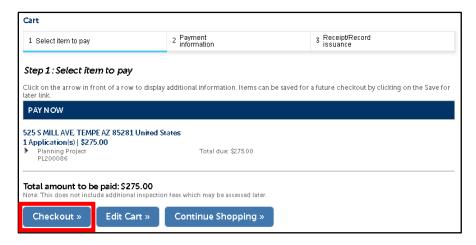
• The next page will be the check out page. Verify all listed application fees and quantities then click "Check Out" at the bottom. Contact the permit center if there are any discrepancies with the invoiced fees.





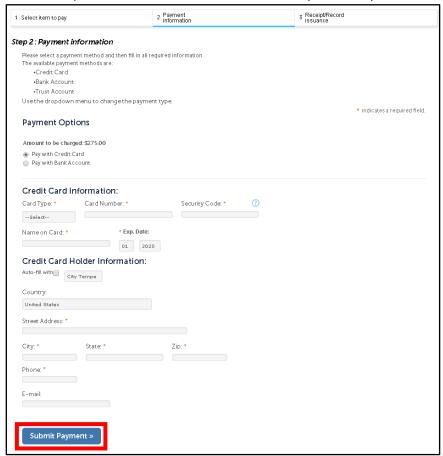
### CART - STEP 1: Select Item(s) to Pay

• Confirm that the items in your cart are correct and click "Checkout" to proceed or click "Edit Cart" to edit the quantity and remove items from the cart or click "Continue Shopping" to add additional applications to the cart.



#### **CART – STEP 2: Payment Information**

- Payment may be applied with a credit card or bank account (electronic check).
- The system will prompt you to fill out different information based on which payment method you choose.
- Fill in all required information and click "Submit Payment" to proceed.





### CART - STEP 3: Receipt/Record Issuance

- Your application has been successfully submitted.
- A confirmation email will be sent to the email address on record for the TCA account.
- You can click the link of your newly created PL tracking number to review your application, view the receipt, and check the status of your request.



• Click on the "View Details" link to open the receipt.



- It is recommended that you save/print a copy of the receipt for your records.
- Administrative completeness reviews are processed within 2 business days of payment.

If you have issues or questions at any point throughout the Planning Project submittal process, please contact the Planning Division at (480) 350-4311 or planning@tempe.gov. Thank you for doing business in Tempe!