Applying for a Permit Online

A guide for applicants and contractors

CITRUS HEIGHTS
Solid roots. New growth.

Engineering Division

This guide shows you how to use the City of Citrus Heights permitting portal: creating your account, submitting an application, and following it through to closeout. Each step shows the screen you will see.

For questions about the permit itself, such as which one you need, what your project must include, fees or timelines, contact the Engineering Division. This guide covers the portal.

You do not need to install anything. The portal works in any modern web browser, on a computer, tablet or phone.

> **Need help at any point?**
>
> The Help menu at the top of every page shows how to reach the Engineering Division.

1. What you can do in the portal

The portal is where you submit an application to the Engineering Division and follow it afterwards. From one account you can:

- start an application and save it as a draft until you are ready;
- attach your plans and supporting documents;
- submit the application to the City;
- see which stage it has reached, and what, if anything, is needed from you;
- read review comments, upload revised documents and resubmit;
- view and print your issued permit;
- request inspections and see their results;
- see the fees raised against the project;
- keep your company contact details for reuse on later applications.

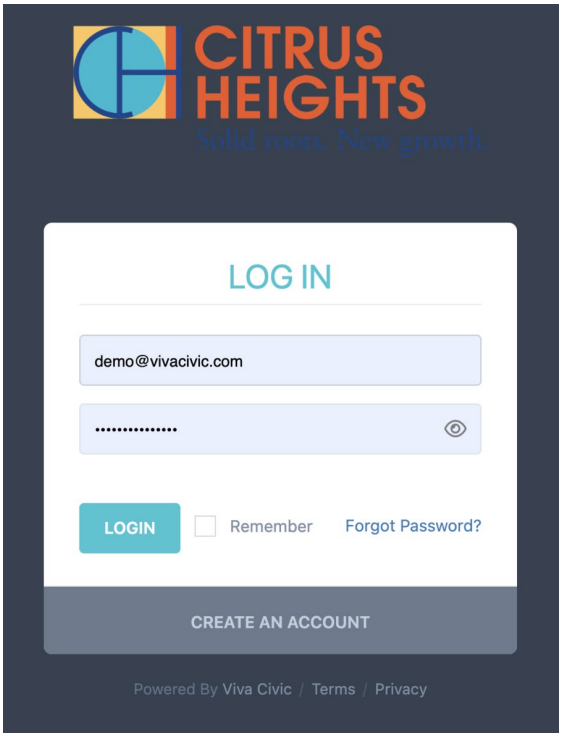
Two application types are available: Encroachment Permit and Development Permit. If you are not sure which one your work falls under, contact the Engineering Division before you start. The portal cannot move an application from one type to the other.

> **Nothing is sent until you send it**
>
> A new application is saved as a draft that only you can see. You can edit it, leave it and come back to it. The City receives it at the moment you select Submit Application, and not before.

2. Create your account

You need an account before you can apply. One account can hold all of your company's applications, so you only do this once.

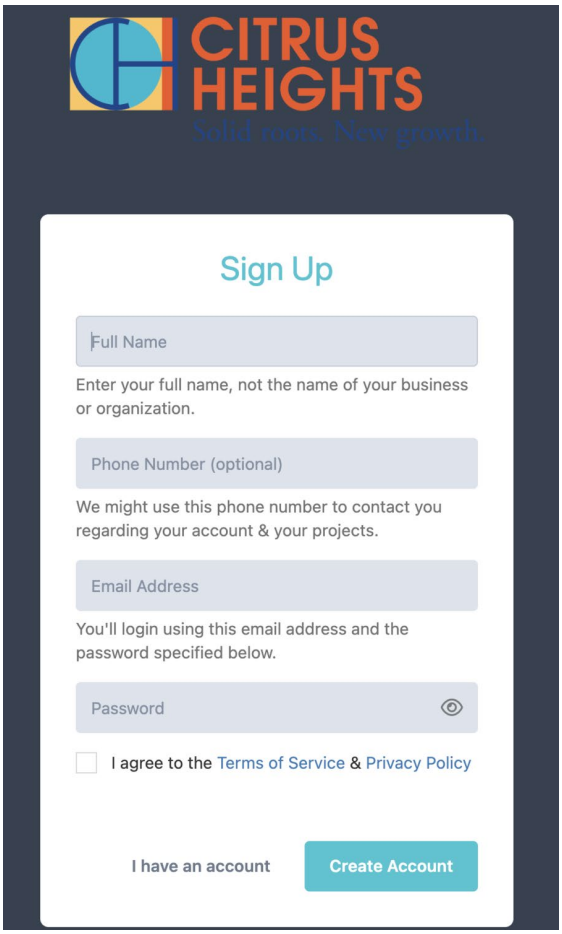
1. Open the portal and choose **Create an Account** at the bottom of the login box.



The login screen. Returning users sign in here; first-time users choose Create an Account.

2. Enter your **full name**: your own name, not your company name. There is a separate place for company details on the application itself.
3. Add a **phone number** if you would like the City to be able to reach you by phone about your projects. This is optional.
4. Enter the **email address** you want to use. This becomes your username, and every notification about your projects goes to it, so use an address you check regularly.

5. Choose a password, accept the Terms of Service and Privacy Policy, then select **Create Account**.



The sign-up form.

Confirm your email address

One more step before you can use the portal. As soon as you create the account, the City sends a message to the address you entered, asking you to confirm it.

1. Open your inbox and find the message asking you to confirm your email address.
2. Select the link in it.
3. You are returned to the portal, and your account is ready to use.

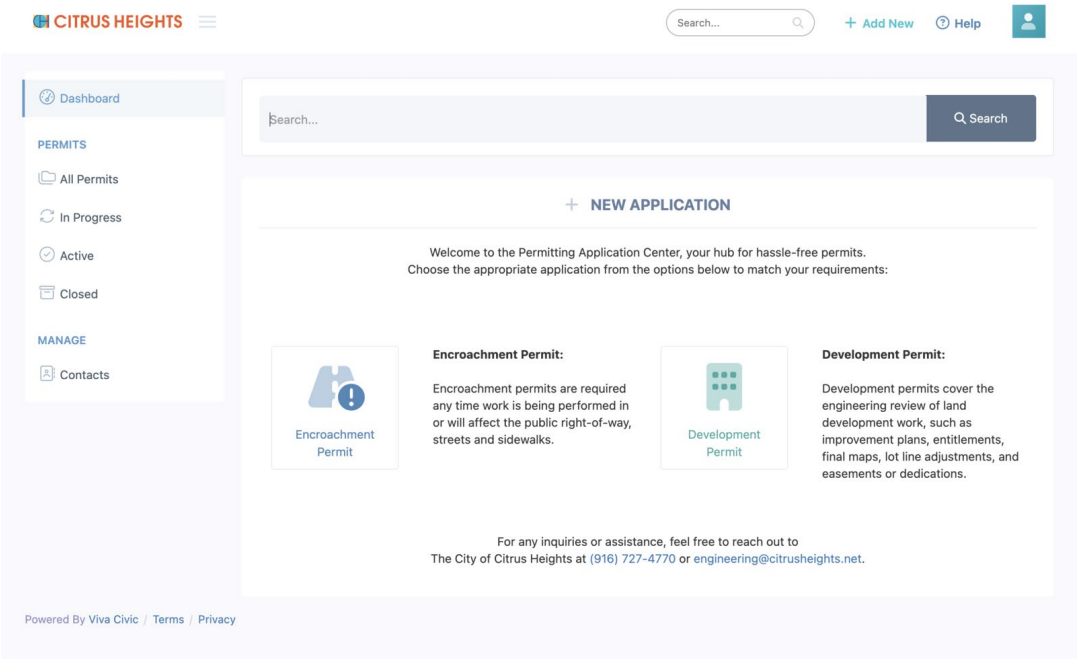
> **You cannot skip this**
>
> Until the address is confirmed the portal will not let you in, so you cannot start an application. This is also how the City knows the address works, which matters because every notification about your projects goes to it.

If the message has not arrived, check your junk or spam folder. If it is not there either, contact the Engineering Division.

From then on you sign in with that email address and password. Use Forgot Password? on the login screen if you ever need to reset it.

3. Finding your way around

After signing in you land on your dashboard. Everything you need is reachable from here.

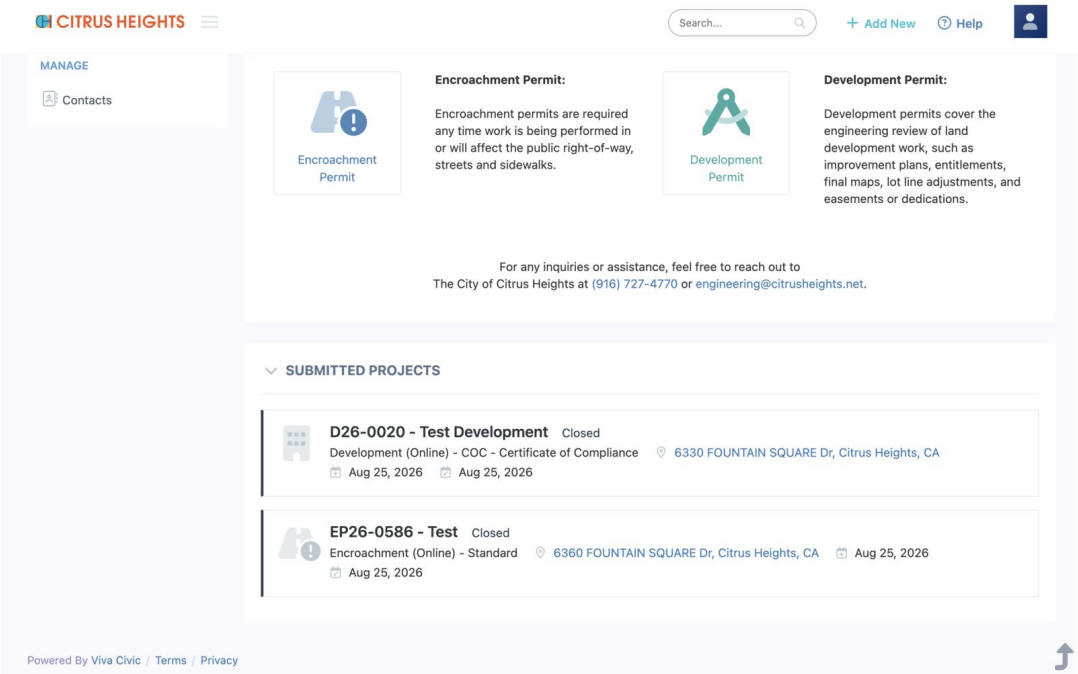


The applicant dashboard.

The menu on the left groups your work by where it has got to:

Menu item	What it shows
All Permits	Every application you have, at any stage.
Drafts	Applications you have started but not yet submitted. This appears only while you have one.
In Progress	Submitted and with the City: awaiting review, under review, or waiting for corrections from you.
Active	Approved and under way: issued, in construction, being inspected or in restoration.
Closed	Finished, closed or canceled.
Contacts	The companies and people you use on your applications, so you do not retype them each time.

Below the two permit cards, Submitted Projects lists your applications with their number, type, address and status, newest first. Select any row to open it.



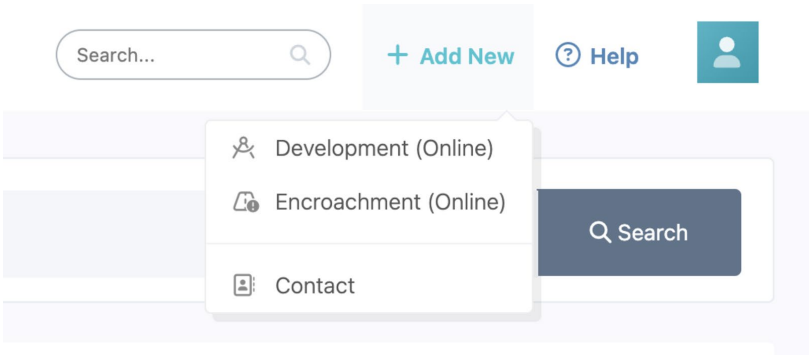
Your submitted projects, each with its current status.

4. Start an application

There are two ways in, and they lead to the same form.

From the dashboard: select the Encroachment Permit or Development Permit card under New Application.

From any page: use Add New at the top of the screen.



Add New is available from every page.

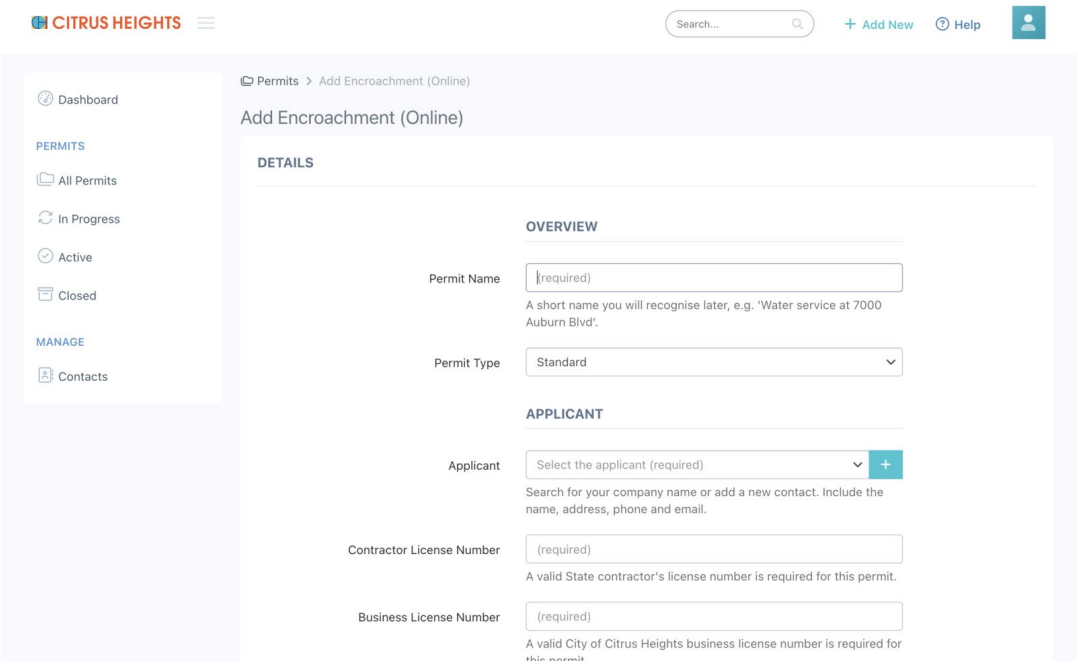
Nothing is sent yet

Creating an application saves it as a Draft. The City cannot see it, and you can edit or abandon it freely until you submit it yourself.

5. Fill in the application

The form is grouped into short sections. Fields marked (required) must be filled before you can submit; fields marked (optional) can be left empty.

Encroachment Permit



The Encroachment Permit application. The form continues below the part shown here.

The form is longer than one screen. It is grouped into these sections, and you scroll through them in order:

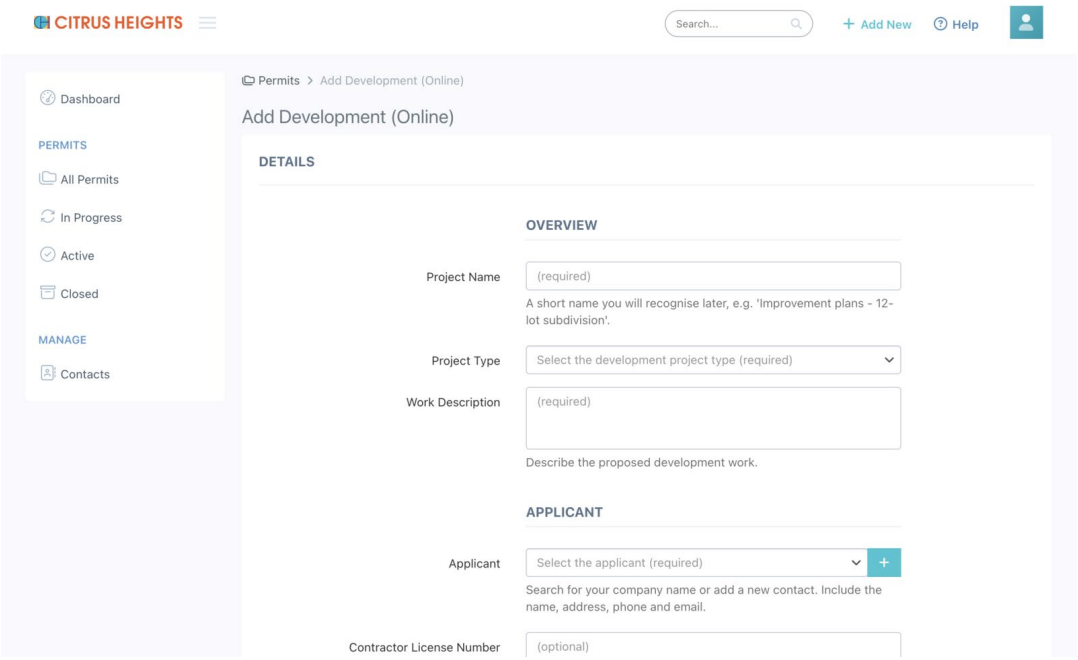
Section	What it asks for
Overview	Permit Name, and the Permit Type. The name is a short one you will recognize later, such as "Water service at 7000 Auburn Blvd". The City also assigns a permit number.
Applicant	Your company, your State contractor license number and City business license number, plus the office contact, e-mail, phone and mobile.

Section	What it asks for
Work Performed For	Whether you are working under another permit. If you are a subcontractor covered by a prime contractor permit, or by a utility or maintenance blanket permit, say so here and search for that permit.
Job	The work schedule, proposed start and end dates, who the work is performed for, a work description, your job number, and the field contact and phone.
Location	Address or APN, the location, and the affected area.
Existing Improvements	Whether a driveway or sidewalk will be removed or blocked, with details if so.
Excavation	Type of excavation, and the maximum depth, width and estimated length.
Pipes	Pipe type, diameter and product, and the voltage or PSIG.
Traffic Control	The Traffic Control Plan number.
Additional Information	Any notes you want the City to see.
Agreement	A box to acknowledge the Hold Harmless Clause and certify that what you have entered is accurate.

The subcontractor question matters

If you say the work is covered by another permit, the form asks you to find it. The portal notes that fees for work covered by a blanket permit are billed to the utility, not to the subcontractor, so answering accurately affects who is invoiced.

Development Permit



The Development Permit application. The form continues below the part shown here.

This form is shorter. Its sections are:

Section	What it asks for
Overview	Project Name, Project Type and a Work Description. The name is a short one you will recognize later, such as "Improvement plans - 12-lot subdivision".
Applicant	Your company, contractor and business license numbers, and the office contact, e-mail, phone and mobile.
Location	Address or APN, the location, and the affected area.
Additional Information	Any notes you want the City to see.
Agreement	A box to acknowledge the Hold Harmless Clause and certify that what you have entered is accurate.

Whichever form you are on, each field carries a short line of guidance underneath it, so you can see what is expected without leaving the page. Fields marked (required) must be filled before the portal will let you submit.

> **You can stop and come back**
>
> Save at any point. Your application stays in Drafts, and only you can see it. Nothing reaches the City until you submit it in step 7.

6. Attach your documents

While your application is a draft, the tracker at the top of the project asks you for exactly this:

"Please upload all required supporting documents for your application. The necessary documents may vary depending on the work you are proposing."

Select Upload Documents underneath that message. Each document the City expects is listed by name, so you can see at a glance what is still outstanding.

Every document is marked (if applicable). Upload the ones that apply to your project and leave the rest. You can also attach anything else you think helps, using the Other type.

For an Encroachment Permit

The portal lists two documents, each with the City's own guidance beneath it:

- Traffic Control Plan
- Proof of Insurance

For a Development Permit

The portal lists these:

- Improvement Plans
- Site Plan
- Grading Plan
- SWPPP
- Parcel Map
- Title Report
- Soils Report
- Drainage Study
- Traffic Study

The portal accepts PDF and images.

> **The portal does not check this for you**
>
> It lists the documents the City has configured, but it cannot tell whether what you attached is complete or correct. If you are unsure what your project needs, ask the Engineering Division before you submit.

7. Submit to the City

When the form is complete and your documents are attached, submit the application. Until you do, it stays a draft that only you can see.

1. Open the application from **Drafts** or from your dashboard.
2. Check the form and your attachments once more.
3. Select **Submit Application** in the tracker at the top of the project.

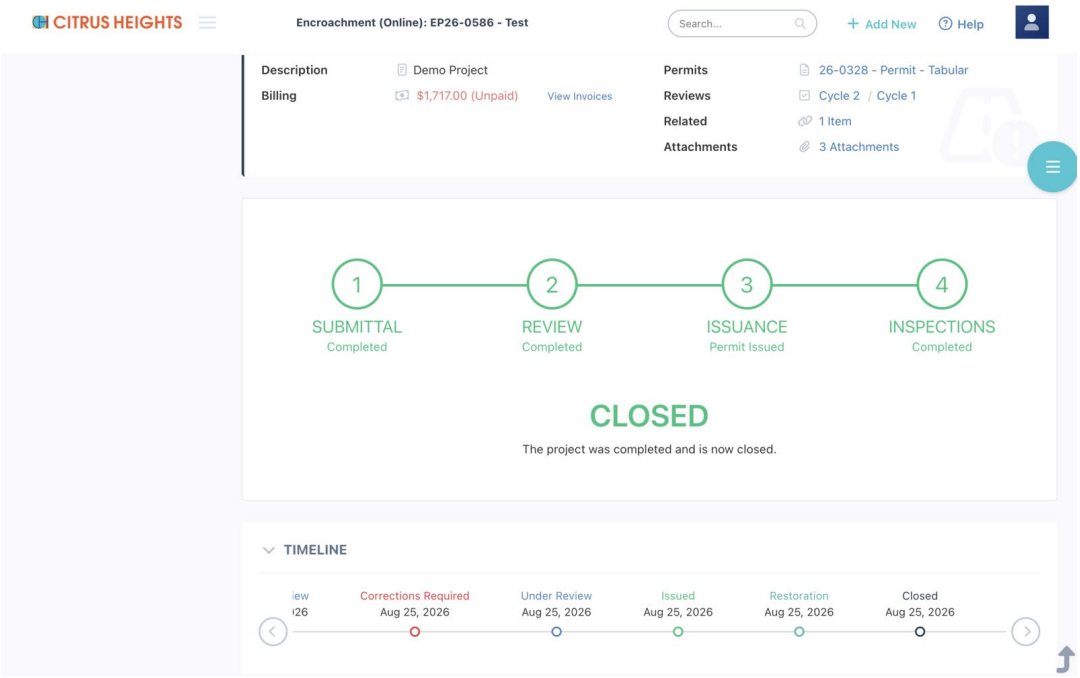
That is the hand-off. The status changes to Application Submitted and the tracker confirms it: *"We have received your application and it is waiting to be assigned for review. You will be notified when the review starts or if anything further is needed."*

After submitting you can still open the application and follow its progress, but you can no longer change the form. That is what keeps the version the City is reviewing and the version you see the same. If something needs to change, add a note on the project or call the Engineering Division.

8. Track your project

Open any application to see where it has got to. The tracker across the top shows the stages of your permit, with the current one highlighted, and a short line underneath explains what is happening and what, if anything, is needed from you.

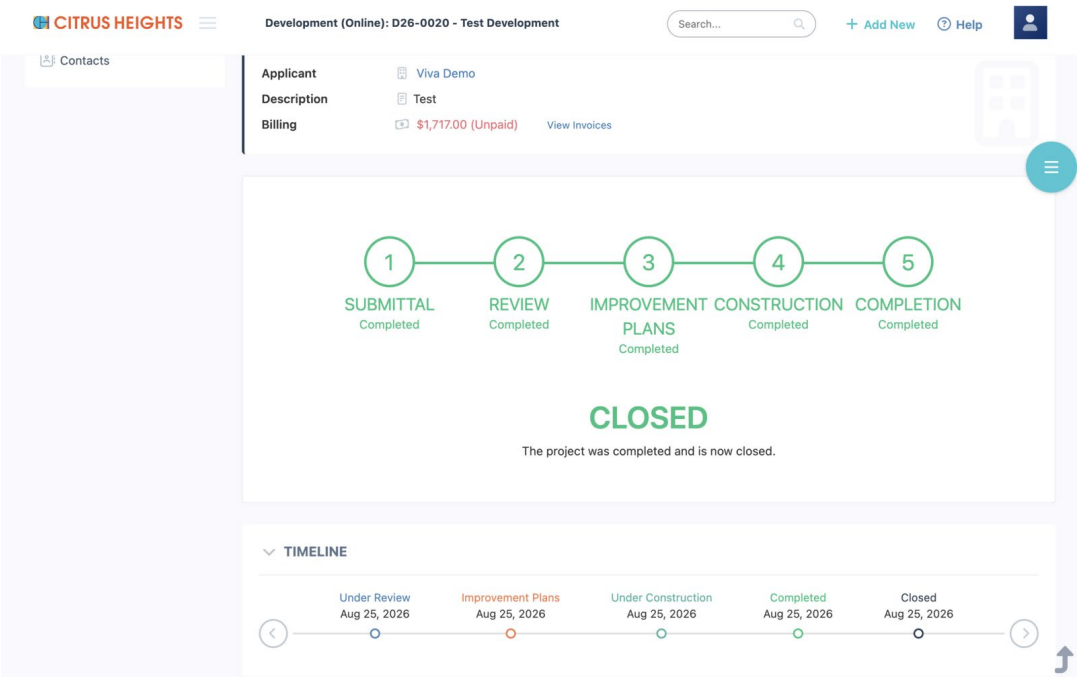
An Encroachment Permit



An encroachment permit that has been through review, issued, inspected and closed.

Stage	What is happening
Submittal	Your application has been received.
Review	Engineering is reviewing your application and plans. If corrections are needed, this stage turns red.
Issuance	Your permit has been issued. Print it, along with the approved TCP, and keep both on site.
Inspections	Work is under way and being inspected. You can request inspections from here.

A Development Permit



A development project through improvement plans, construction and completion.

Stage	What is happening
Submittal	Your application has been received.
Review	Engineering is reviewing your submittal.
Improvement Plans	Improvement plans are being prepared and reviewed. This stage appears only on projects that reach it.
Construction	Approved work is being built and inspected.
Completion	The work is complete and the project is being closed out.

Below the tracker, Timeline shows every status your project has been through and when, so you can see how long each stage took. Billing, Permits, Reviews and Attachments are listed alongside it.

What the portal tells you, and what to do

At every stage the tracker spells out where your project stands and puts the buttons you need right underneath it. You are never left guessing whose turn it is.

What you see	What to do
Upload Documents *"Please upload all required supporting documents for your application. The necessary documents may vary depending on the work you are proposing."*	Your application is still a draft. Attach your documents, then select Submit Application.
Application Submitted *"We have received your application and it is waiting to be assigned for review. You will be notified when the review starts or if anything further is needed."*	Nothing. The City has it. Watch for the email when review starts.
Under Review *"Your application is under review. Processing time varies by project complexity and application volume. If more information is needed, we'll notify you with a timeline for submission."*	Nothing yet. Engineering will come back to you.
Corrections Required *"Additional information is needed to complete the review. Please address the corrections below and resubmit your application for further review."*	Your turn. View Corrections, Upload Attachments, then Resubmit.
Improvement Plans *"Your improvement plans are being prepared and reviewed. We'll let you know when the next round of comments is ready."*	Nothing yet. Development projects only.
Issued	Use View Permit, print it, and keep it on site with the approved TCP. Schedule Inspection when you are ready.
Under Construction · Inspections · Restoration	Work is under way. Request inspections as the work requires; View Inspections shows the results.
Completed *"The work is complete and the project is being closed out."*	Nothing. The City is finishing the paperwork.
Closed *"The project was completed and is now closed."*	Nothing. The job is done.
On Hold *"Your application is on hold."*	See the notes or contact the Engineering Division if you are not sure why.

9. If corrections are needed

If the review finds something that needs changing, your project moves to Corrections Required and you receive an email. The tracker shows the Review stage in red and tells you plainly:

"Additional information is needed to complete the review. Please address the corrections below and resubmit your application for further review."

Three buttons appear underneath. Work through them in order:

1. **View Corrections**: read exactly what is being asked for.
2. **Upload Attachments**: add the revised documents. Add the new version rather than deleting the old one, so the history of the submittal stays intact.
3. **Resubmit**: you will be asked to confirm that you have reviewed all the corrections and attached everything required.

Your project returns to Under Review and a new review cycle begins. You can see previous cycles on the project, so nothing from earlier rounds is lost.

> **Read the confirmation before you accept it**
>
> The portal asks you to confirm that you have reviewed all the corrections and attached everything required, and warns that incomplete submittals lead to delays. Once you resubmit, the form is locked again.

10. Your permit and inspections

Once the permit is issued, open the project and select View Permit. From there you can view, download and print it.

When you are ready for an inspection, open the project and use Schedule Inspection. Choose the date you want. The inspection then appears on your project, and you will see its result there once the inspector has recorded it.

You can request another inspection from the same place whenever the work needs one.

11. Fees

Your project shows the amount due at the top, and View Invoices lists the invoices raised against it. This is where you check what is outstanding.

> **Payment is not taken in the portal**
>
> The portal shows you what is owed but does not collect payment. Arrange payment with the City directly, and contact the Engineering Division with any question about an amount.

12. Email notifications

You do not need to keep checking the portal. An email goes to the address on your account whenever:

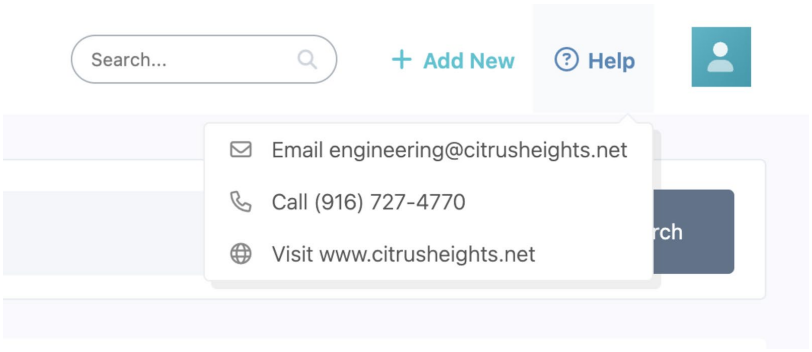
- your application moves to a new stage, for example when review starts, when corrections are required, or when your permit is issued;
- City staff add a note to your project that is meant for you.

Every notification names the project and its new status, and links straight to it.

> **Not receiving emails?**
> Check the junk or spam folder first, and that the address on your account is the one you actually read. Ask your IT team to allow mail from the City if your company filters external senders.

13. Getting help

The Help menu at the top of every page shows how to reach the Engineering Division.



The Help menu, available on every page.

- **Email** engineering@citrusheights.net
- **Call** (916) 727-4770
- **Visit** www.citrusheights.net

If something in the portal does not behave as this guide describes, tell the Engineering Division. It helps us put it right for everyone.