

## Submitting a Pre-Application:

**EFFECTIVE:** AUGUST 3<sup>RD</sup>, 2020

**SCOPE:** RESIDENTIAL AND COMMERCIAL

*The information provided in this document is general and intended as a guide only. Each project is unique and additional requirements may be enforced as deemed appropriate.*

### INTRODUCTION

The online pre-application process allows prospective permit applicants to submit their pre-applications and upload digital plans and documents. Staff will review the application materials to ensure all necessary documents have been provided. The applicant will be notified once the online submittal package is considered complete and ready for the online building permit application intake phase.

### ONLINE REGISTRATION

Pre-applications can be filed online through Palo Alto’s Accela Citizen Access (ACA) portal link. You may also paste this link into your internet browser to access the pre-application page: <https://aca.accela.com/PALOALTO>.

To submit for a pre-application, you must register for an ACA account or have an existing account. To register select, Register for an Account, on the Citizen Portal main screen.

Follow the instructions on your email confirmation letter to start a pre-application. Below is an example email confirmation letter that you will receive.

Welcome to the City of Palo Alto's Citizen Portal!  
 Detail information of the Account  
 User name :  
 Email Account:

**Your account has been activated:**

**If you are a licensed contractor** you may add your contractor's license information to your account under account management. As a licensed contractor, you may apply, pay and print a limited number of simple permits online under the 'Building' section.

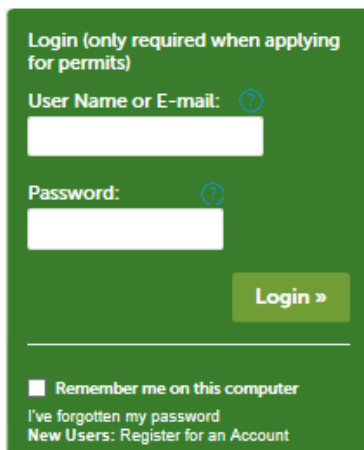
**To submit plans and documents for pre-application**, click on the link below, login with your username and password and select "Create an Application" under the Pre-Application section. Pre-Application allows the Planning & Development Services Department to ensure that when we open to the public, your project can more quickly and efficiently move forward for review.

We thank you for your patience as we endeavor to expand our scope of services to better serve you. Permit pre-application can now be submitted online. Please log in and select Pre-Application to begin this process.

[City of Palo Alto Citizen Access Portal](#)

Link to Citizen Portal

## CREATING A PRE-APPLICATION



Login (only required when applying for permits)

User Name or E-mail:

Password:

Remember me on this computer



[I've forgotten my password](#)

[New Users: Register for an Account](#)

Login to your account to start the Pre-Application process.



Once you have logged into the Citizen Portal select "Pre-Application" and open the online application by clicking the "Pre-Application" menu button.

 Search Pre-Applications  Create Pre-Application

### Online Application

## Online Application

## Welcome to Palo Alto's Online Project Submittal

You are now able to start any permit application here. The new process looks like this.

- Complete the short application here.
- Upload required plans and documents
- Staff will contact you by email or phone to complete the intake process.
- When your application is accepted, pay fees as required.
- Permit will advance through the plan review process.
- Upon project approval, staff will contact you for applicable permit issuance steps.

**General Disclaimer**  
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I have read and accepted the above terms.

**Continue Application »**

Accept the Citizen Portal terms by checking the box and select "Continue Application".

### Step 1: Project Location > Location

#### Address

Enter street number and street name (only), then select "Search" and we will look this up for you. Then press "Continue Application" button to go to next page.

* Street No.:	* Street Name:	Street Type:	Direction:	Unit Type:	Unit No.:
<input type="text"/>	<input type="text"/>	--Select--	--Select--	--Select--	<input type="text"/>

**Search** **Clear**

Enter the project's street number and street name then select "Search", then confirm and select the applicable address, parcel and owner's information.

**Parcel**

\* Parcel Number:  Zoning:  Year Built:

The Parcel and Owner's information will be filled in automatically if a valid Palo Alto address has been entered in the previous step.

**Owner**

Owner Name:  ? Secondary Owner:

Address Line 1:

Address Line 2:  City:  State:  Zip:

When the Address, Parcel and Owner's information is complete, select "Continue Application".

**Note: If the Parcel or Owner's information does not automatically populate after searching for an address number and street name, enter the corresponding information into the fields above.**

### ENTER PROJECT INFORMATION

Select application type and whether the project is Residential or Commercial, then enter a detailed description of the project. When complete, click “Continue Application”.

**Step 2: Project Details > Permit Details**

**Custom Fields**

**GENERAL**

\* Application Type: --Select--

Residential or Commercial: --Select--

\* Do you have a contractor?:  Yes  No

**Detail Information**

\* Detailed Description:  
*Please enter a short description of your project*

**Continue Application >**

Select one:  
Public Works  
Building Permit  
Planning Entitlement  
Fire Permit

Select one:  
Residential  
Commercial

Enter a detailed project description, see example below, then click “Continue Application”.

Example description for a Building Permit: New 2-story single-family dwelling, 2500 s.f., with attached garage, 400 s.f., basement, 1200 s.f. and covered porches, 250 s.f.

Example description for a Planning Entitlement: Individual Review application for deconstruction of an Existing one-story Home and Construction of a two-Story 3,450 square foot home. Zoning District: R-1 (Single Family Residential).

### CONTACT INFORMATION

Enter the Applicant information for the main contact for this project, e.g., architect, contractor, project manager, etc. Please note: All email correspondence for this application will be sent to this person.

**Step 3: Contact > Primary Point of Contact**

**Applicant**

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Select Primary Point of Contact for this Project

**Select from Account**      **Continue Application »**

Select Applicant from Account, then select "Continue Application".

**Step 4: Contractor > Contractor**

**Licensed Professional**

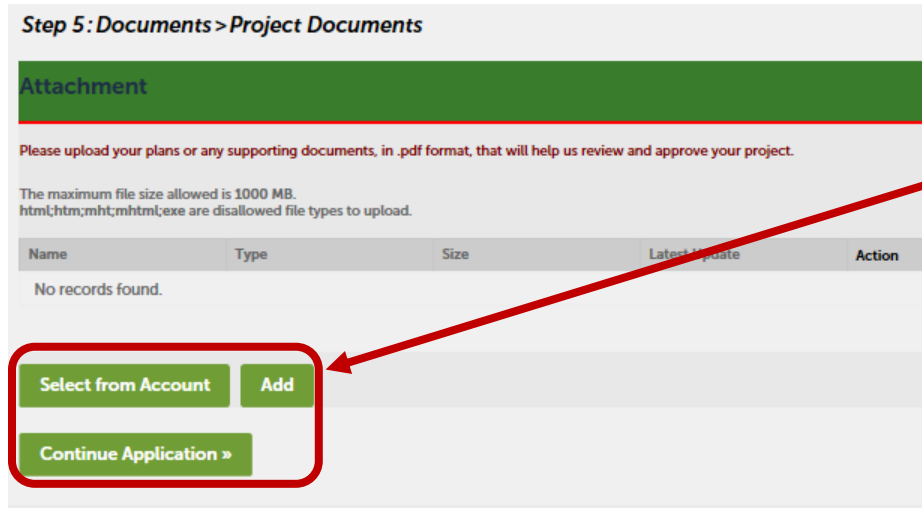
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If you have not selected a contractor yet, please ignore this step.

**Add New**   **Look Up**      **Continue Application »**

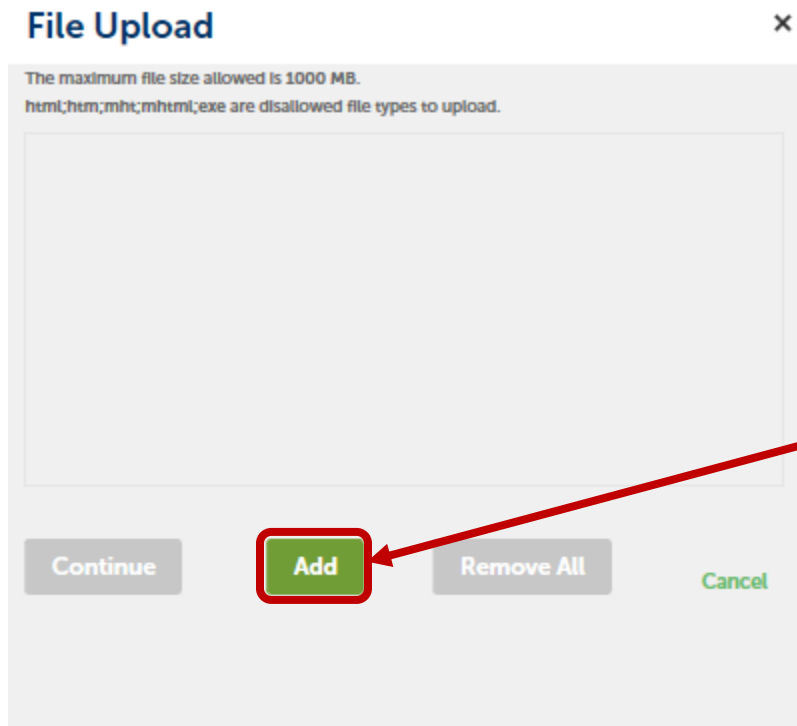
Enter contractor's information if one has been selected. If not, select "Continue Application".

## UPLOAD PDF PLANS AND SUPPORTING DOCUMENTS



Select "Add" to upload pdf files for plans and other documents, i.e., structural calculations, arborist report, geotechnical report, energy report, etc. When complete, select "Continue Application".

A pop-up screen will appear to allow you to upload files from your account or from your computer.



PDF files from your computer can be uploaded into the Citizen's Portal. Select the "Add" button to start. For more information regarding the file formats requirements for electronic plans, please review the Electronic Plan Review Submittal Guidelines.

Please note that any plan set files that exceed 400 MB (megabytes) should be broken up into separate files with the following naming convention: C1\_250HAM\_PLANS01 or C1\_250HAM\_PLANS\_01

Indicate the types of files that are being added with a brief description.

The screenshot shows a form for uploading a file. It includes a dropdown menu for file type, a file name field, a progress indicator, a description text area, and several action buttons. Red callout boxes provide instructions for each field.

**\*Type:** --Select--

**File:**

Plans - 1 25 19 (1).pdf  
100%

**\*Description:**

Buttons: Save, Select from Account, Add, Remove All, Continue Application »

**Callouts:**

- Select one: Plans Supporting Documents
- Enter a description of the PDF file, e.g., Initial plans, structural calculations, soils report, arborist report, fire sprinkler plans etc. Then click "Continue Application".

The screenshot shows a table of attachments with columns for Name, Type, Size, Latest Update, and Action. A callout box explains that uploaded PDF files appear as attachments. Another callout points to the 'Add' button, stating that additional PDF files can be added at this time. A final callout points to the 'Continue Application' button, stating that it should be selected after all attachments are completed.

Name	Type	Size	Latest Update	Action
C1_250HAM_PLAN.pdf	Plans	529.53 KB	08/03/2020	Actions

Buttons: Add, Continue Application »

**Callouts:**

- When the PDF files have been uploaded it will appear as an "Attachment".
- Additional PDF files can be added here at this time.
- When you have completed uploading all the attachments, select "Continue Application".



### PRE-APPLICATION SUMMARY AND REVIEW

Accela Citizen Portal will now display a summary of the information that you have entered. Please review this information to confirm that it is correct. The pre-application information can still be changed before the final submission.

[Continue Application »](#)  
Please review all information below. Click the "Edit" buttons to make changes to sections or "Continue Application" to move on.

#### Record Type

Pre-Application

#### Address

250 HAMILTON AV

#### Parcel

Parcel Number: 120-27-011  
Zoning: PF

#### Owner

CITY OF PALO ALTO  
250 HAMILTON AVE  
PALO ALTO CA 94301

#### Custom Fields

##### GENERAL

Application Type: Building Permit  
Residential or Commercial: Commercial  
Do you have a contractor?: No

#### Detail Information

Detailed Description:

#### Applicant

Applicant Name  
Business Name  
Address  
City, State, Zip Code  
Home Phone Number  
Work Phone Number  
Mobile Work Number  
Email Address

#### Attachment

Please upload your plans or any supporting documents, in .pdf format, that will help us review and approve your project.

Note: If your Pre-Application had been approved, document upload will be closed for the Pre-Application. Any further actions will not be available.

The maximum file size allowed is 400 MB.

ade;adp;bat;chm;cmd;com;cpl;exe;hta;htm;html;ins;isp;jar;js;jse;lib;lnk;mde;mht;mhtml;msc;mst;php;pif;scr;sct;shb;sys;vb;vbe;vbs;vxd;wsc;ws

Name	Type	Size	Latest Update	Action
C1_250HAM_PLAN.pdf	Plans	529.53 KB	08/03/2020	<a href="#">Actions</a> ▼

**PRE-APPLICATION SUMMARY AND REVIEW CONT.**

If the information in the Pre-Application is correct and complete, review the application conditions and check the box for agreement. Select the "Continue Application" to complete your Pre-Application.

I certify that I have read and understand the instructions that accompany this application and that the statements made as part of this application are true, complete, and correct and that no material information has been omitted. By checking the box below, I understand and agree that I am electronically signing and filing this application.


By checking this box, I agree to the above certification. Date: 04/08/2020

[Continue Application »](#) [Save and resume later](#)

**PRE-APPLICATION SUBMITTAL SUCCESSFUL**

You will receive an email notification that your Pre-Application submittal was successful. In addition, you will receive a pre-application record number: 20APP-XXXXX for future reference.

**Step 7: Pre-Application Submittal**

 Your application has been successfully submitted.

Thank you for using our online services.  
**Your Application Number is 20APP-000**

Please check your email for confirmation of your Pre-Application submittal and information on the next steps of the review process.

Thank You

[View Record Details »](#) (You must post the record in the work area.)

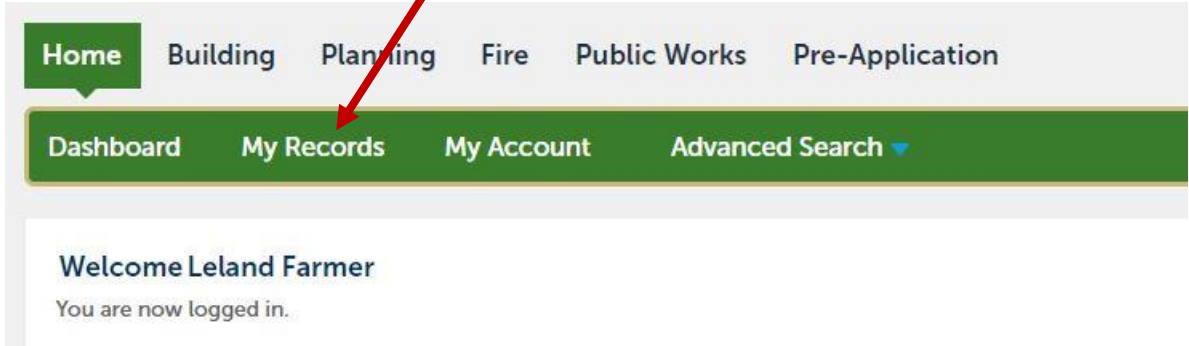
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**PRE-APPLICATION REVIEW PROCESS**

Your submitted documents and plans will be reviewed for completeness within 5 days. If necessary, you will be advised by email to submit additional documentation via the Citizen Access portal. Once it is determined that all required documentation has been submitted, a permit application will be created, and you will be advised of your Building, Planning, Fire or Public Works Permit record number. At this point your application will begin the normal review process and your project coordinator or Planning Technician will continue to inform you as needed. **Please note that your Pre-Application record will automatically become inactive once it is accepted and you will no longer be able to 'add' documents to your Pre-Application record. Please refer to your formal Permit/Record number after your 'Pre-Application is accepted.**

In the event that you need to attach additional supporting documents, follow the following steps:

Log in to the Palo Alto ACA website and click on "My Records".



After clicking on "My Records", click on the correct Building Permit or Planning Entitlement record number that you wish to upload additional documents to.

Note: This process is not for resubmittals, please reach out to your Project Coordinator for additional details regarding resubmittals.

▼ Pre-Application

Showing 1-4 of 4 | Download results | Add to collection

<input type="checkbox"/>	Date	Record Number	Record Type	Description	Project Name	Expiration Date	Status
<input type="checkbox"/>	07/29/2020	20APP-0	Pre-Application	Additional Stucco Repairs			Additional Info Required
<input type="checkbox"/>	07/26/2020	20APP-0	Pre-Application	Build a new 2 story 10,000 sq ft commercial building			Received
<input type="checkbox"/>	06/26/2020	20APP-0	Pre-Application	TEST PLS IGNORE TEST			Additional Info Required

In this case, we will submit additional documents for the last pre-application shown on the image above.

Click on "Attachments"

Record 20APP-00 :  
Pre-Application  
Record Status: Additional Info Required

Record Info ▾ Payments ▾

Record Details

Processing Status

Related Records

Attachments

Inspections

Click "Add"

### Attachments

Please upload your plans or any supporting documents, in .pdf format, that will help us review and approve your application.

Note: If your Pre-Application had been approved, document upload will be closed for the Pre-Application. Any future uploads will be rejected.

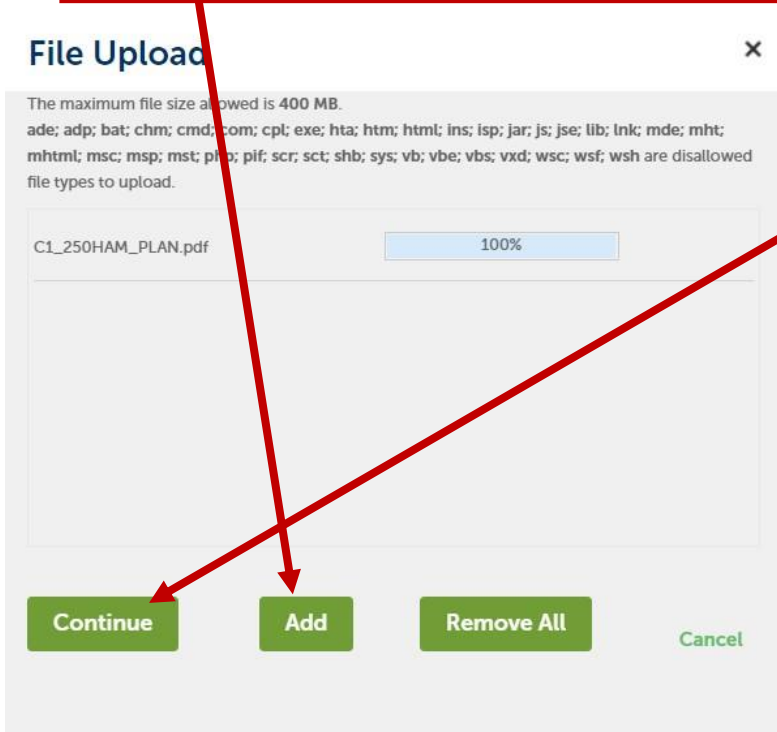
The maximum file size allowed is 400 MB.

Supported file types: .ade;.adp;.bat;.chm;.cmd;.com;.cpl;.exe;.hta;.htm;.html;.ins;.iso;.jar;.js;.jse;.lib;.lnk;.mde;.mht;.mhtml;.msc;.msp;.mst;.php;.pif;.scr;.sct;.shb;.sys;.vb;.vbe;.vb

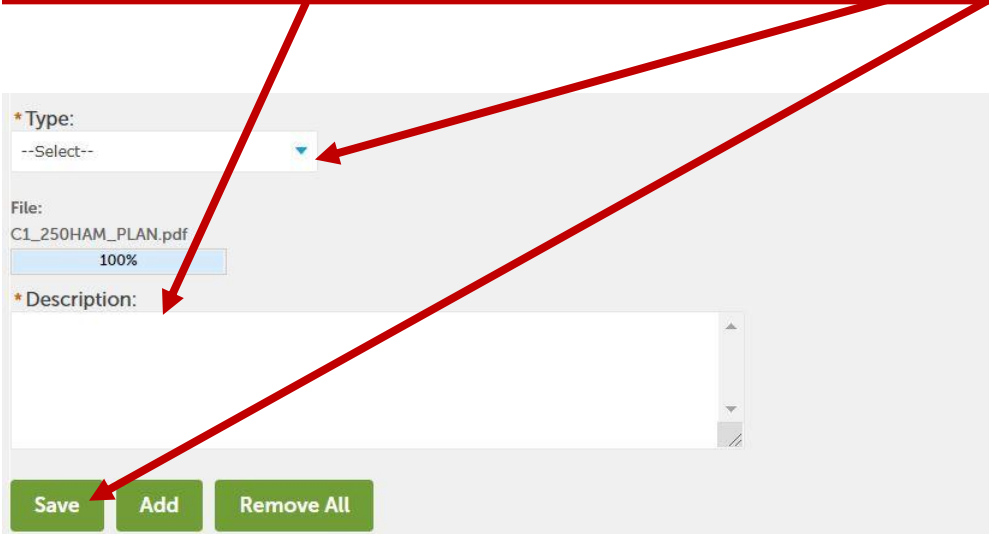
Name	Record ID	Record Type	Entity Type	Type
<a href="#">C1_250HAM_DOCS.pdf</a>	20APP-00	Pre-Application	Record	Supporting Documents
<a href="#">C1_250HAM_APPLY.pdf</a>	20APP-00	Pre-Application	Record	Supporting Documents

**Add**

Click “Add” again and select the file(s) you wish to upload to this Building Permit or Planning Entitlement. Wait until the document reaches 100% uploaded status, then click “Continue”.



Classify the document by selecting one of the options on the dropdown menu and include a short description of the file you are uploading. Then click “Save”.



That’s all, please remember that a resubmittal is a different process than submitting additional documents. Contact you’re Project Coordinator for details on resubmittals. **Please note that your Pre-Application record will automatically become inactive once it is accepted and you will no longer be able to 'add' documents to your Pre-Application record. Please refer to your formal Permit/Record number after your 'Pre-Application is accepted.**