



DEPARTMENT OF PUBLIC WORKS

Contractors Guide to Apply and Pay for an Encroachment Permit

CONTRACTOR'S INSTRUCTION GUIDE

“Online Contractor Accounts” offers the ability to review all your permit history and application statuses all in one place. Users can also apply and pay for encroachment permits and applications.

A contractor must have an approved account to pay or apply for a permit online.

<https://epermits.cityofsanrafael.org/etrakit3/>

HOW TO ACCESS CONTRACTOR ACCOUNT

HOW TO CREATE A CONTRACTOR ACCOUNT

To get an approved account, go to www.cityofsanrafael.org/epapply, and submit your information. You will be asked to provide the following information:

- Copies of insurance information listing the City of San Rafael as the certificate holder and additional insured
- California State Contractor's License number
- City of San Rafael Business License

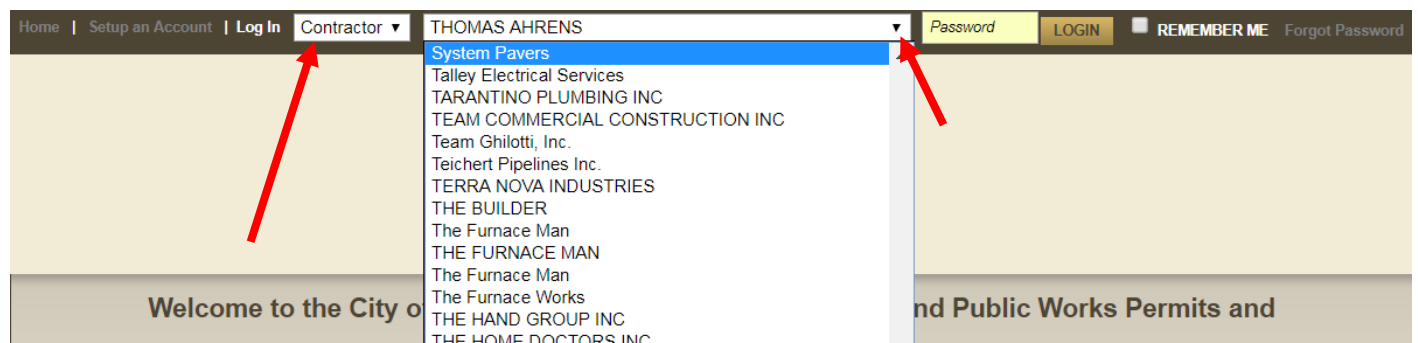
If you have questions, please contact the Department of Public Works at (415) 485-3355.

Our department will contact you with your log in information. Please note: you will be asked to choose a new password upon your first successful login. Complete all the requested information and be sure that you provide us with an email address, as that is how we would contact you if you forget your password.

HOW TO ACCESS A NEW OR EXISTING ACCOUNT

To begin the process, make sure the log in type is set to “Contractor” (see image below). From the drop-down list of companies, scroll down to your company name and select it (see image below). If you are logging in for the first time your initial password is your California State License Number (numeric digits only), unless stated otherwise by the Department of Public Works.

If you do not see your name in the drop down list, please contact us at (415) 485-3355 to verify that your company information is correctly entered into our database and updated, if necessary.



DASHBOARD

Once you're logged in, you will be taken to your 'Dashboard' which lists all permits that are associated with your license number within our system. You can then click on any Permit to check plan review, status, expiration date, and fees.

Here are a few things you will be able to do:

1. [Apply for Permit](#)
2. [Search for Permit](#)
3. [Pay Fees](#)

HOME | DASHBOARD | VIEW/EDIT PROFILE | VIEW CART | LOG OUT | LOGGED IN AS: THOMAS AHRENS

My Dashboard

- Permits
 - Apply / New Permit
 - Search Permit
 - Pay Fees
- Projects
 - Search Projects
- Contractor
 - Search Contractors
- Properties
 - Search Property
- License
 - Search Licenses
- Citation Payments
 - Search
 - Pay Fees
- Shopping Cart
 - Pay All Fees
 - Paid Items
- Contact
 - Contact us

Hello THOMAS AHRENS.
Below is a Dashboard of your current activities.

My Open Permit Applications

1 total record(s)

Applications In Progress	Permit Type	Created Date	
Continue	ENCROACHMENT ONLINE	2/12/2019	Delete

My Active Permits

5 total record(s)

PERMIT NO.	ADDRESS	TYPE	STATUS	INSPECTION	FEES DUE
B1902-058	1400 5TH A...	BUILDING ONLINE	VOID		\$0.00
B1902-061	1400 5TH A...	BUILDING ONLINE	VOID		\$0.00
EP1902-022	111 MORPHE...	ENCROACHMENT ONLINE	VOID		\$0.00
EP1902-023	111 MORPHE...	ENCROACHMENT ONLINE	VOID		\$0.00
EP1902-041	111 MORPHE...	ENCROACHMENT ONLINE	VOID		\$0.00

My Expired Permits

5 total record(s)

PERMIT NO.	ADDRESS	TYPE	STATUS	EXPIRED	FEES DUE
B1805-037	100 THORND...	BUILDING ONLINE	VOID	10/30/2018	\$0.00
E1804-058	1400 5TH A...	ELECTRIC ONLINE	VOID	10/10/2018	\$0.00
E1804-059	1400 5TH A...	ELECTRIC ONLINE	VOID	10/10/2018	\$0.00
E1804-060	1400 5TH A...	ELECTRIC ONLINE	VOID	10/10/2018	\$0.00
E1804-062	1400 5TH A...	ELECTRIC ONLINE	VOID	10/10/2018	\$0.00

APPLYING FOR AN ENCROACHMENT PERMIT

STEP ONE: HOW TO GET TO APPLICATION PAGE

To **Apply** for an encroachment permit, click on "Apply" under Permits (see image below):

From "Dashboard" Page

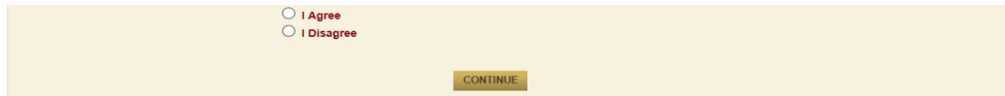
- Permits
 - Apply / New Permit
 - Search Permit
 - Pay Fees
- Projects
 - Search Projects
- Contractor
 - Search Contractors
- Properties
 - Search Property

From "Home" Page

- Permits
 - Apply / New Permit
 - Pay Fees
 - Search Permit
- Projects
 - Search
- Properties
 - Search
- License
 - Search

STEP TWO: INDEMNIFICATION AND DISCLAIMER

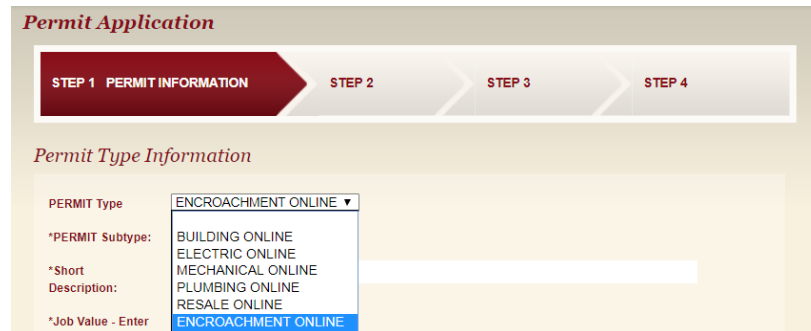
Next, read the indemnification and disclaimer. If you agree, click “I Agree” to the disclosure. If you click on “I Disagree” it will take you back to the beginning.



A screenshot of a web form with a light beige background. At the top, there are two radio buttons: the first is labeled "I Agree" and is selected (filled with a small circle); the second is labeled "I Disagree" and is not selected. Below the radio buttons is a small, rectangular, gold-colored button with the word "CONTINUE" in white capital letters.

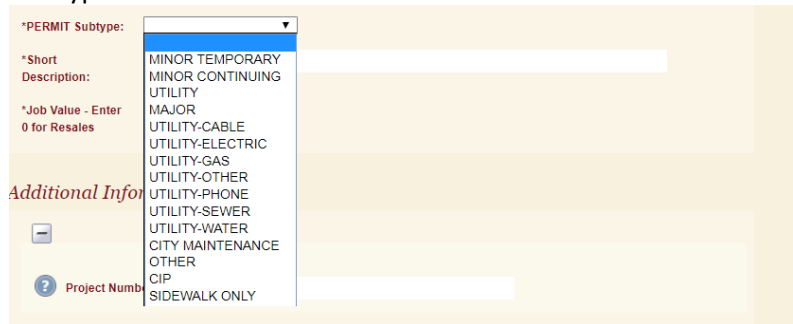
STEP THREE: PERMIT INFORMATION

Next, choose the PERMIT Type: In this case it will be an encroachment permit.



A screenshot of a web form titled "Permit Application". At the top, there is a progress bar with four steps: "STEP 1 PERMIT INFORMATION" (highlighted in a dark red arrow), "STEP 2", "STEP 3", and "STEP 4". Below the progress bar, the section is titled "Permit Type Information". It contains several fields: "PERMIT Type" with a dropdown menu showing "ENCROACHMENT ONLINE" selected; "*PERMIT Subtype:" with a dropdown menu showing "ENCROACHMENT ONLINE" selected; "*Short Description:" with an empty text input field; and "*Job Value - Enter 0 for Resales" with an empty text input field.

Next, choose the PERMIT Subtype:



A screenshot of the same web form, focusing on the "*PERMIT Subtype:" dropdown menu. The menu is open, showing a list of options: "MINOR TEMPORARY", "MINOR CONTINUING", "UTILITY", "MAJOR", "UTILITY-CABLE", "UTILITY-ELECTRIC", "UTILITY-GAS", "UTILITY-OTHER", "UTILITY-PHONE", "UTILITY-SEWER", "UTILITY-WATER", "CITY MAINTENANCE", "OTHER", "CIP", and "SIDEWALK ONLY". The "MINOR TEMPORARY" option is highlighted in blue. Other fields like "*Short Description:" and "*Job Value - Enter 0 for Resales" are visible but empty.

Contractors and residents should select from one of the following permit subtypes only:

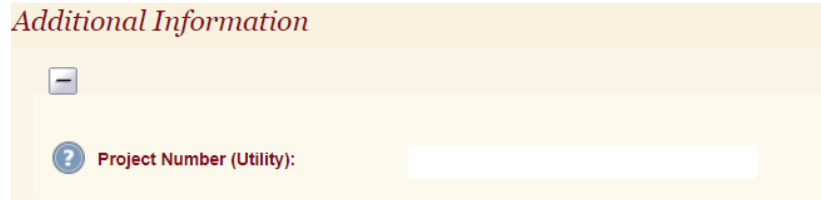
- **Minor Temporary Encroachment Permit-** A minor temporary encroachment permit is intended for work with a specified, limited period of time including debris boxes, temporary construction, scaffolding, and tree trimming.
- **Minor Continuing Encroachment Permit-** An encroachment which is intended and permitted to continue for an indefinite period of time, but which by its nature is limited in size, scale or use so that the encroachment will have little or no impact on the public health, safety or welfare like, flat or low level landscaping, bike racks, newspaper racks, and signs/architectural features extending more than four feet (4') into the public-right-of-way.
- **Major Encroachment Permit-** A major encroachment application would be needed for encroachments intended to continue for an indefinite period of time like, fences or walls higher than three feet (3') above natural grade, abutments for driveways and stairs, groundwater monitoring wells.
- **Sidewalk Only Encroachment Permit-** A permit for sidewalk, gutter, and curb work with no fee associated. All requirements of a minor temporary encroachment permit apply except the fee. See diagram below for details on work associated with a no fee encroachment permit.

Utility Companies must select a Utility subtype:

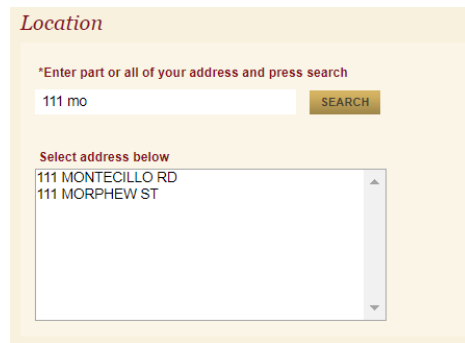
Utility Encroachment Permit- Utility encroachment applications are for encroachments by a utility or special district (water, cable, sewer, gas, etc.)

Type in a “Short Description” of the what the work is and enter the estimated “Job Valuation.”

Enter a project number. This is used for your reference only.



For “Location,” you only need to enter the first few characters of the address, and then hit the SEARCH button. Choose the correct job address in the “Select address below” box. For linear projects or projects with multiple locations, pick an address closest to the start of your work.



Note: If the address is not in the box, it could mean that the property is not in the City jurisdiction. You may need to pull the permit with another local jurisdiction.

Add all necessary attachments which include, but are not limited to, site plan, Detail plan, and traffic control plans.

Click “Next Step”

STEP FOUR: CONTACT INFORMATION

The next page shows your contact information. If necessary, please edit the fields and click “Next Step” button. **Note:** All fields are required to continue to the next step.

STEP FIVE: REVIEW, SUBMIT, AND PAY

You will now be asked to review the information that you have submitted prior to submitting. If needed, click on the “EDIT” button to fix an area, if needed. Clicking “Next Step” will take you to the Check Out Summary page, you must for the permit now by clicking the “Pay Now” button. Fill out all required information and **only click on “Pay Now” button once**. Please be patient, **clicking “Pay Now” more than once may incur multiple charges**. You must provide payment to submit the application.

Permit Application

STEP 1 STEP 2 **STEP 3 REVIEW AND SUBMIT** STEP 4

Application for a ENCROACHMENT ONLINE Permit

Permit Information EDIT	Location EDIT
Type: ENCROACHMENT ONLINE Subtype: MINOR CONTINUING Description: test Job Value: 500	111 MORPHEW ST SAN RAFAEL, CA 94901
Contacts EDIT	Fee Information
Applicant Information THOMAS AHRENS (415) 485-3357 1400 5TH AVE thomas.ahrens@cityofsanrafael.org SAN RAFAEL, CA 94901	Type: MINOR ENCROACHMENT - CONTINUING Amount: \$368.00 Total Fees \$368.00
Owner Information THOMAS AHRENS (415) 485-3357 1400 5TH AVE thomas.ahrens@cityofsanrafael.org SAN RAFAEL, CA 94901	Attachments Attachments: Alchemy Search User Guide.pdf Test document upload DELETE To upload additional attachments click Here
Contractor Information THOMAS AHRENS (415) 485-3357 1400 5TH AVE thomas.ahrens@cityofsanrafael.org SAN RAFAEL, CA 94901	

Review the information prior to submitting.

CANCEL PREVIOUS STEP NEXT STEP


Order Information

* Required Fields
Invoice Number: 20190215083717

Description:

Total: \$368.00 (USD)

Payment Information



Card Number: * (enter number without spaces or dashes)
Expiration Date: * (mmyy)

Billing Information

First Name: * Last Name: *

Company:

Address: *

City: *

State/Province: * Zip/Postal Code: *

Country:

Email: *

Phone: *

Fax:

Pay Now

STEP SIX: APPROVAL PROCESS

Please note that after purchasing the permit it does not mean the permit has been approved. Once our staff has reviewed the permit they will reach out to you via the contact information that you provided early

SEARCHING FOR PERMITS

If you do not see the permit you are looking for, you can use the “Permit Search” function to search for it. There are various search options available by using the drop-down menu (see image below). Enter in the information that you are searching for.

Permit Search

Search By: SEARCH

- Address
- Permit Number
- Address**
- Parcel Number (no dashes)
- Issue Date
- Status
- Description

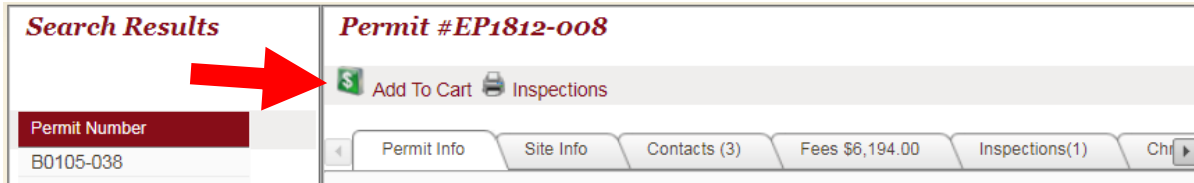
PAY A PERMIT THAT YOU ALREADY APPLIED FOR

STEP ONE: SEARCHING FOR PERMIT

Go to [Searching for Permit Section](#).

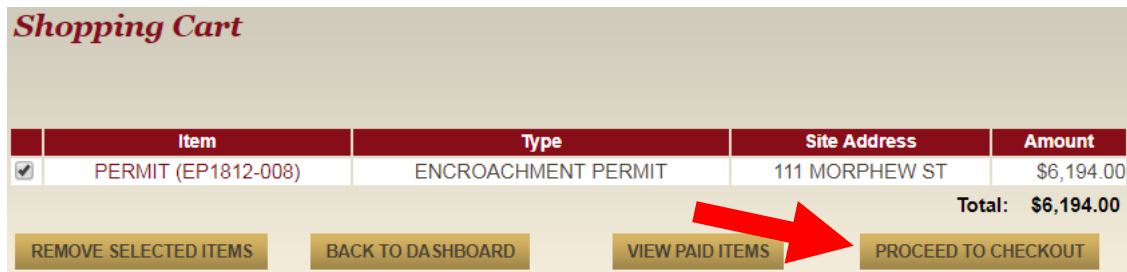
STEP TWO: ADDING TO CART

Once you have found the permit you would like to pay more, click **“Add to Cart”** (see image below). If you have multiple addresses, repeat [steps one to four](#) for each address. When you have added the necessary payments to your cart proceed to step five.



STEP THREE: CHECK OUT

Next you will be prompted to look at the information again (see image below). Please verify the “Site Address” and “Amount.” If correct, click on “Proceed to Check Out.”



STEP FOUR: CHECK OUT SUMMARY


You will get one last confirmation page (see image below) before proceeding to payment.

<i>Checkout Summary</i>	
PERMIT (EP1812-008)	111 MORPHEW ST
	SIDEWALK REPAIR PROPERTY OWNER
COST	\$6,194.00
<hr/>	
Total Fees:	\$6,194.00
<hr/>	
Total:	\$6,194.00
<hr/>	
BACK TO SHOPPING CART	PROCEED TO PAYMENT

Once all information has been verified, click "Proceed to Payment" tab.

STEP FIVE: MAKING PAYMENT

You will now have the ability to enter in payment information (see image below). Please enter all required information and click the "Pay Now" tab **once**. Please be patient, **clicking "Pay Now" more than once may incur multiple charges.**

Order Information	* Required Fields
Invoice Number: 20190215083214	
Description:	
Total: \$6194.00 (USD)	
Payment Information	
	
Card Number:	<input type="text"/> * (enter number without spaces or dashes)
Expiration Date:	<input type="text"/> * (mmyy)
Billing Information	
First Name:	<input type="text"/> *
Last Name:	<input type="text"/> *
Company:	<input type="text"/>
Address:	<input type="text"/> *
City:	<input type="text"/> *
State/Province:	<input type="text"/> *
Zip/Postal Code:	<input type="text"/> *
Country:	<input type="text"/>
Email:	<input type="text"/> *
Phone:	<input type="text"/> *
Fax:	<input type="text"/>
<input type="button" value="Pay Now"/>	

REQUESTING INSPECTION

Please contact our inspection hotline and leave a voicemail (415) 485-3355 Ext. 4.