

SETTING UP A USER ACCOUNT AND SUBMITTING A PLANNING APPLICATION ONLINE

Part I - Setting up New User Account or Logging in

1. To apply for a planning project online, enter this address into your browser:

<https://epermits.cityofsanrafael.org/ETRAKIT3/login.aspx?It=either&rd=~/ProjectApplication/step1.aspx>

The page should look like the page below. If this is your first time applying, select “* New users Click Here to Register.” Please note: The username and password will only contain letters and numbers, is case sensitive and will not use special characters or email addresses. If you have already registered, enter your log on credentials and continue to Step 4.

The screenshot shows the 'Public Login' page of the ePermits system. The page has a navigation bar at the top with links for Home, Setup an Account, Log In, Contractor (selected), J.M. O'NEILL, INC. (selected), Password, LOGIN, REMEMBER ME, and Forgot Password. A left sidebar contains a menu with categories: Permits (Apply / New Permit, Search Permit, Pay Fees), Planning Apps (Apply for New Project, Search Projects, Pay Fees), Contractor (Search Contractors), Properties (Search Property), License (Search Licenses), Pay Citations (Search, Pay Fees), Shopping Cart (Pay All Fees, Paid Items), and Contact (Contact us). The main content area is divided into two sections. The top section, titled 'Public Login', contains a 'User Name' field with 'micheleg' and a 'Password' field with masked characters. Below these fields is a 'LOGIN' button. A red banner below the fields reads 'FIRST TIME USERS GO HERE' followed by '* New users [Click here](#) to Register.' and a link for 'Forgot your password?'. The bottom section, titled 'Contractor Login', features a dropdown menu above a 'Password' field and a 'LOGIN' button. A 'Forgot your password?' link is also present at the bottom of this section.

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3. If you are registering for the first time, the screen below will appear. Please provide all required information. All lines marked with an asterisk (*) must be filled out before selecting "Create Account". Use letters and/or numbers when creating a log-in name. Passwords must be 6-15 characters in length using only numbers/letters.

The screenshot shows a registration form titled "Create New Public User Account" with a sub-header "* Required fields". The form is divided into two sections: "Profile" and "Username and Password".

Profile Section:

- * First Name: [Text Input]
- * Last Name: [Text Input]
- * Address: [Text Input]
- * City: [Text Input]
- * State: [Dropdown Menu]
- * Zip: [Text Input]
- * Email: [Text Input]
- * Phone: [Text Input]
- Ext: [Text Input]

Username and Password Section:

- * Log-In Name: [Text Input] (letters/numbers only)
- * Password: [Text Input] (6 to 15 letters/numbers only)

4. Once you have created your account, you will be redirected to the main services page. Select "Apply" under **Planning Apps** to get started.

The screenshot shows the main services page of the City of San Rafael website. At the top, there is a navigation bar with links: HOME | DASHBOARD | VIEW/EDIT PROFILE | VIEW CART | LOG OUT. The user is logged in as MICHELE GINN.

The main header features the City of San Rafael logo and the tagline "THE CITY WITH A MISSION".

The main content area is titled "Welcome to the City of San Rafael Building, Fire Prevention and Public Works Permits and Records Site". A note below the title reads: "NOTE: To view attachments, right click and choose 'Save link / target as ...' to save it to your computer."

The dashboard displays several service tiles:

- Permits:** Apply / New Permit, Pay Fees, Search Permit
- Planning Apps:** Apply, Pay Fees, Search
- Contractor:** Search Contractors
- Properties:** (partially visible)
- License:** (partially visible)
- Pay Citations:** (partially visible)

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Part II - Submitting a Planning/Zoning Application

1. Enter Project Information. Fill in all the fields completely and attach your plans and the [General Planning Application form](#) (signed by the property owner).

The location field will want you to search for the correct address and accept the address.

Note: If the property is a vacant lot or you have trouble finding by address, you will need to enter the assessors parcel number (APN) rather than the assumed street address. Once you have filled in all the fields and attached your documents, select “next step”.

The screenshot shows a web application interface for submitting a project application. At the top, a navigation bar includes links for HOME, DASHBOARD, VIEW/EDIT PROFILE, VIEW CART, and LOG OUT, along with the user's name: MICHELE GINN. A sidebar on the left titled 'My Dashboard' lists various menu items such as Permits, Planning Apps, Contractor, Properties, License, Pay Citations, Shopping Cart, and Contact. The main content area is titled 'Project Application' and features a progress indicator with four steps: STEP 1 (ENTER PROJECT INFORMATION), STEP 2, STEP 3, and STEP 4. Below the progress bar, the 'Project Type Information' section contains a dropdown menu for 'PROJECT Type' and a text input field for 'Short Description'. The 'Location' section includes a search prompt and a search box with a dropdown for 'Search By' (set to 'Address') and a 'SEARCH' button. The 'Your Relation to this Project' section has a checkbox for 'Property Owner' with the instruction 'Check this box if you are the Property Owner'. The 'Attachments' section includes a 'Filename' field with a 'Select' button and a 'Description' field. At the bottom, there is an 'UPLOAD' button and 'CANCEL' and 'NEXT STEP' buttons.

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2. Enter Contact Information. Fill in all of the information you have. Email addresses are vital for all parties entered.

HOME | DASHBOARD | VIEW/EDIT PROFILE | VIEW CART | LOG OUT LOGGED IN AS: PLANNING APPLICANT

Project Application

STEP 1 **STEP 2 ENTER CONTACT INFORMATION** STEP 3 STEP 4

Application for a PLANNING APPLICATION ONLINE Project

Applicant Information

Name	<input type="text" value="Planning Applicant"/>	Phone	<input type="text" value="(415) 555-1212"/>
Address	<input type="text" value="1 Main St"/>	Email Address	<input type="text" value="test@user.com"/>
City	<input type="text" value="San Rafael"/>		
State	<input type="text" value="CA"/>	Zip	<input type="text" value="94901"/> - <input type="text"/>

Owner Information

Name	<input type="text" value="Planning Applicant"/>	Phone	<input type="text" value="(415) 555-1212"/>
Address	<input type="text" value="1 Main St"/>	Email Address	<input type="text" value="test@user.com"/>
City	<input type="text" value="San Rafael"/>		
State	<input type="text" value="CA"/>	Zip	<input type="text" value="94901"/> - <input type="text"/>

Architect Information

Name	<input type="text"/>	Phone	<input type="text" value="() - -"/>
Address	<input type="text"/>	Email	<input type="text"/>
City	<input type="text"/>		
State	<input type="text"/>	Zip	<input type="text"/> - <input type="text"/>

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3. Review and submit. Review the information you entered and make any corrections if necessary. To make corrections, click the edit button in the section that needs correction. Once everything looks correct, select “next step”

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

Application for a *PLANNING APPLICATION ONLINE* Project

Review the information below prior to submitting the application

Project Information

[EDIT](#)

Type	PLANNING APPLICATION ONLINE
Subtype	
Description	planning application description

Location

[EDIT](#)

1400 5TH AVE
SAN RAFAEL, CA 94901

Contacts

[EDIT](#)

Applicant Information

Planning Applicant (415) 555-1212
1 Main St test@user.com
San Rafael, CA 94901

Owner Information

Planning Applicant (415) 555-1212
1 Main St test@user.com
San Rafael, CA 94901

Architect Information

Fee Information

Total Fees	\$0.00
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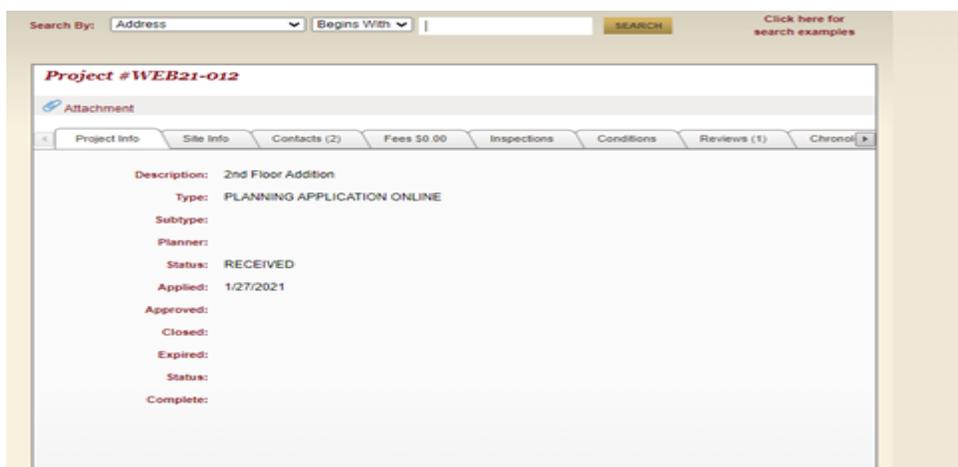
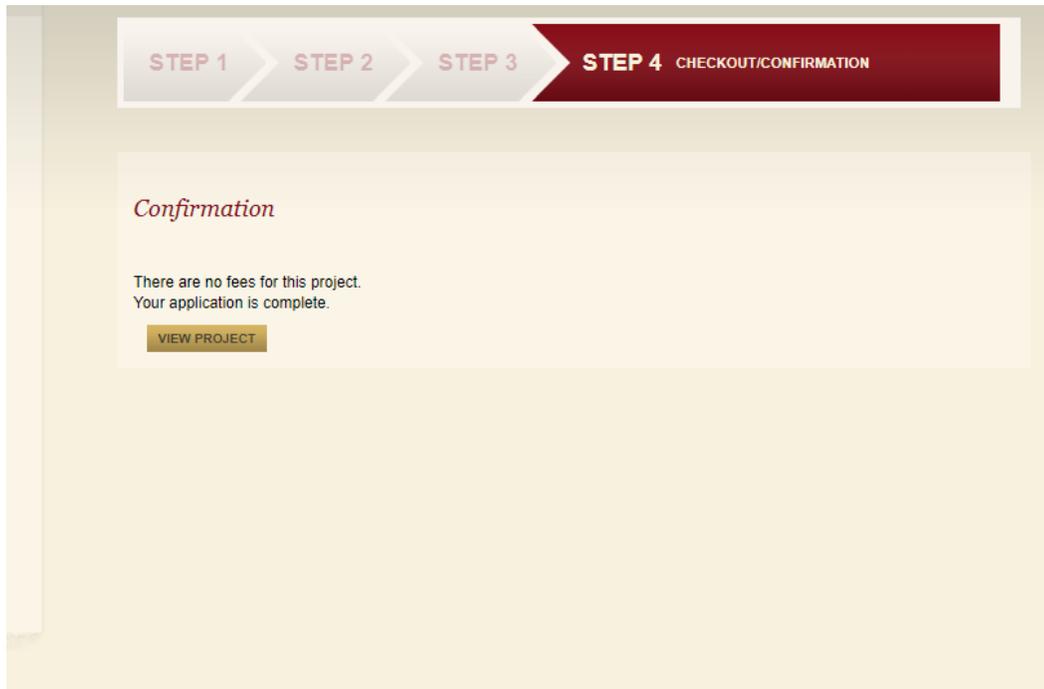
Attachments

To upload additional attachments click [Here](#)

[CANCEL](#) [PREVIOUS STEP](#) [NEXT STEP](#)

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4. Checkout/Confirmation. At this time no fees will be due. A planner will review your submittal and contact you via email within 2 business days to let you know what fees are due based on the documents you have submitted. After you submit, you may see this confirmation page below or it may take you straight to your project page, example below Confirmation screenshot.



Within 24 hours you will receive the following email to confirm the project was received and to inform you of the process.

Planning Application Received

 San Rafael Planning Dept <planning@cityofsanrafael.org>
Tue 1/26/2021 12:47 PM
To: Michele Ginn; planning

Thank you for your Planning application. Staff will contact you within one business day to let you know the application fee amount that is due and if any additional information is needed before your application can be assigned.

Your application is not considered Submitted and will not be assigned to a planner until the application fee has been paid. If have not yet attach the General Planning Application signed by the property owner, please log back in and attach it as soon as possible. It is required for ALL planning applications.

If you have any questions, feel free to email us at planning@cityofsanrafael.org or call (415) 485- 3085.

Planning Staff
City of San Rafael

[Reply](#) | [Reply all](#) | [Forward](#)

Please note, completion of this on line submittal is only the first step in submitting a planning/zoning application and does not complete the required process. Once you complete the last step, a planner will contact you within 2 business days to set up a time to review the project and determine what planning/zoning entailments are required.

Based on that review, the planner will create any required planning/zoning applications and you will then receive instructions on how to pay and complete the application.