Customer Portal

Using your Customer Portal

Home Page:

Initiate applications for Permits, Planning Approvals or Licenses by selecting the appropriate blue link. A new page will open to allow you to select the specific application type to meet your needs.

Applications are structured as a series of pages with questions, including a section where documents can be uploaded to support your application. At the end of the application, you can pay and submit your application immediately or choose to pay and submit later.

Once submitted, use the tabs on the Home Page to track and manage your application.

My Activities is the heart of the Customer Portal - track your applications and check often for updates.
My Inspections is where you can request and manage permit-related inspections.
My Businesses is where you add and create Business Profiles for your License Applications.
My Projects is where you can organize your permit and planning applications into projects.

Quick Tip: Open pages in new tabs to minimize loading time.

Hold the CTRL key why selecting the link.

My Activities Tab:

This tab shows all **applications in progress**.

This tab is structured as a Table.

Each header in the table allows for sorting (A-Z and Z-A) by clicking that column header.

The sorting is not retained if you leave your customer portal or refresh your page so the table will revert to default settings with the most recently actioned application at the top of the list.

At the top of My Activities tab you'll find a **Show More…** link.

When the customer portal first opens, a limited number of applications will load.

By selecting **Show More…**, the system will load additional applications.

For customers with large amounts of applications in progress this step may need to be repeated several times to see all applications.

When there are no more applications to load, the link will change to **Show Less…**.

The **Show More**… function will also group applications by application type into separate tables. Permit applications will appear in the first table, followed by planning applications and then business license applications. These tables will be empty if you do not have any applications of that type.

Applications Requiring Attention:

When an application requires your attention, the text in the Status column will be red.

For **Incomplete Applications**, select anywhere in the row to open the file and see a description of why the application was returned to you.

For **Revisions Required**, select the blue link in the revisions required column to open to the revisions page. Here, you'll see notes from reviewers about the changes required, and you can view or download any documents with mark-ups, upload revised documents, and resubmit your updated application.

When permit applications are issued, a blue link labeled **Request Inspections** will appear in the Next Action column. Use this link to open a pop-up window where you can select the Inspection Type required and provide special inspections related to your inspection request.

Inspections requests initiated in error can be canceled using the Cancel Inspection Request button.

NOTE: When a permit is COMPLETED, it will no longer appear on the My Activities Tab.

If you are the applicant on a permit, use the search function from the main menu to retrieve completed permits and obtain your Certificate of Occupancy or Certificate of Completion.

My Inspections Tab:

This tab is used to manage and monitor Inspections.

Inspections can be cancelled from here.

The information in this tab is structured in a table. Just like the My Activities Tab, the My Inspections Tab column headers will allow sorting (A-Z and Z-A) of information in this table.

When an Inspection is Completed, the related inspection report will be available here as a downloadable document. Click the blue link titled Inspection Report.

Note: Any inspection that is not completed as PASSED will require another inspection to be requested until the inspection passes.

When a permit is Completed, the inspections for that permit will no longer appear on the My Inspections Tab.

My Projects Tab:

The My Projects Tab allows customers to create and organize permit and planning applications into projects folders that support how you organize your work.

To create a project, select [+Project], give the project folder a name, and then add individual permits to the project as desired.

Files can only be associated with one project at a time.

Permits and planning applications can be linked to a project at any time.

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My Businesses Tab:

This tab is used to manage issued business licenses associated with your account.

During the application stage, the My Activities tab will track a license application and will show if the application is returned. Once issued, the licenses can be managed from here

Like other tabs, the information in this tab is structured as a table and is sortable (A-Z or Z-A)

Main Menu > Search:

This menu options allows customers to search for applications where they are the applicant.

Open the appropriate search type and enter as much information as you can to locate a specific file.

Main Menu > Pay:

This page lists all outstanding fees for your applications.

If you choose to “Submit and Pay Later” you can manage payment of outstanding fees from this menu option.

Select the applications you would like to pay in one transaction and select [Pay Selected] to open a payment screen.

Note: Applications are not submitted until application fees are paid in full.

Main Menu > My Payments:

This page lists all payments made on applications from your customer portal account and provides a printable / downloadable receipt for each transaction.

Main Menu > Profile:

The My Profile Page allows customers to manage their customer portal account information such as Email Address and Contact Phone Number. It is also where customers can set their email notification preferences.

If you work for a contracting company, this is were you can manage your Contractor Profile for the purposes of co-managing applications with other members of your company.