DEVELOPMENT SERVICES DEPARTMENT

How to Register for an Online Permitting Account

The City of
SAN DIEGO

Introduction

The online permitting system allows customers to apply for permits online for the following permits:

- News Racks
- Residential Rooftop-Mounted Solar Photovoltaic (PV)
- Simple No-Plan Mechanical, Electrical and Plumbing Permits
- Street Trees
- Transportation
- New PTS Projects

In addition, Code Enforcement cases can be viewed online.

Getting Started

- You will need to set up an account to apply for News Racks, Residential Rooftop-Mounted Solar Photovoltaic, Simple No-plan Mechanical, Electrical or Plumbing Permits, Street Trees, Transportation permits and new PTS projects.

- No account is required to view code enforcement cases.

- Enable pop-ups and use Internet Explorer as your web browser. Other browsers may work, but not as well.

Before You Begin

- If you or your company already has an Accela account, **do not** create a new account, as you will not be able to view active permits, pay fees, or schedule inspections.

- If you already have an Accela account with another jurisdiction, then you need to use the same login information. Do not create a new user name with your existing email address. You will see the message on the right if your email is already in the Accela system. Click "here" to merge accounts.

⚠ ***Login ID:** The user name already exists. You may have an existing citizen account from another website.To use the same citizen account, click here. To create a new citizen account, use a different user name. ⑦

sandiego.gov

Creating an Account

Get Acquainted with the OpenDSD Home Screen.
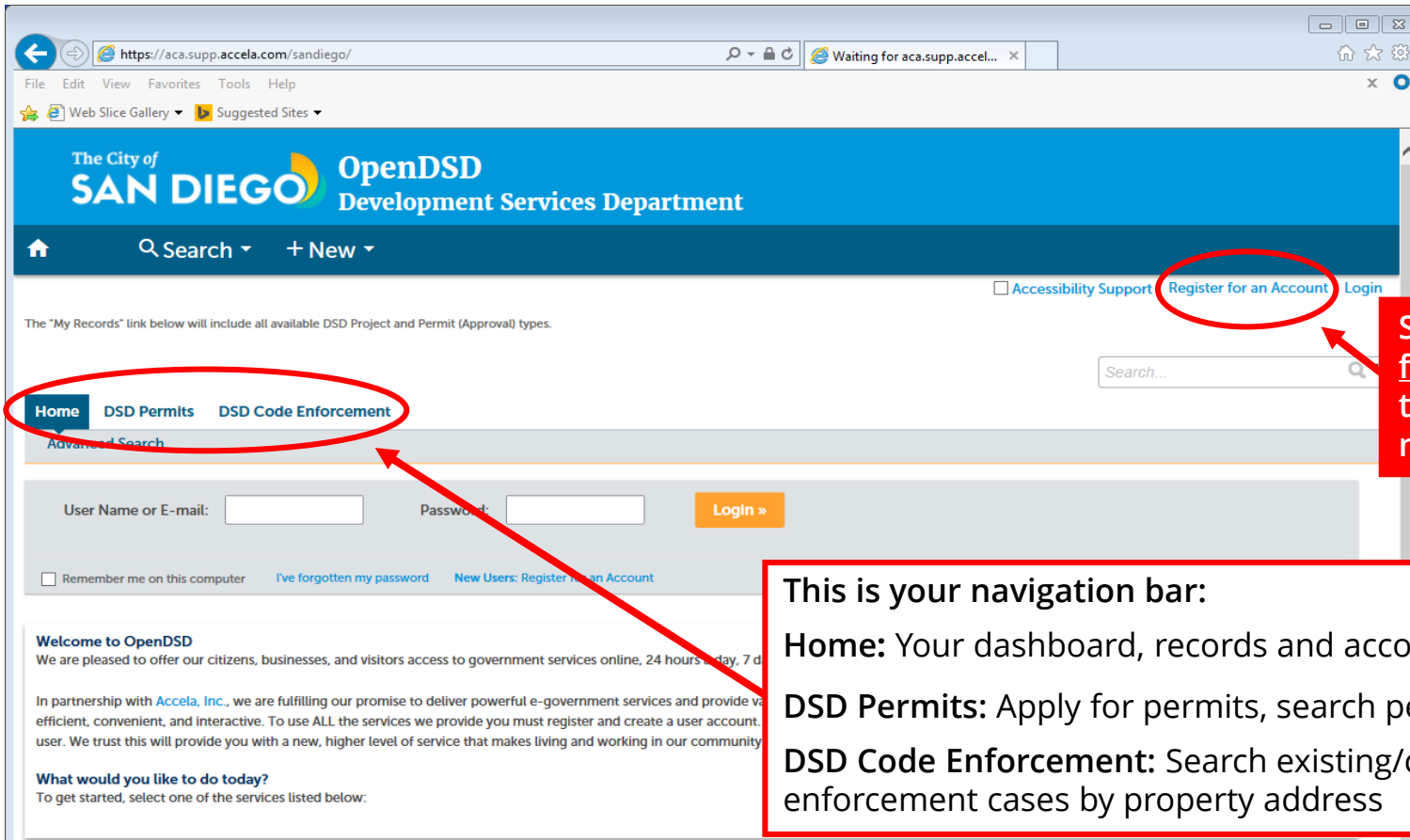
Start here to <u>register for an account</u>. Follow the instructions on the next slide.

This is your navigation bar:

Home: Your dashboard, records and account management

DSD Permits: Apply for permits, search permit records

DSD Code Enforcement: Search existing/current code enforcement cases by property address

Register for an Account

After clicking "Register for an Account":

1 Review the disclaimer and click to acknowledge. Click on "**Continue Registration**"

2 Add your Login Information. Then, click on "**Add New**" for Contact Information.

3 Select **Contact Type** – either **Individual** or **Organization**. Use Organization if there is not a specific person that is associated with this email account.* Use Individual when you are the only person accessing this account.

* Go to slide 11 for information on how to add delegates to an Organization account

Register for an Account

4 Enter contact information in the pop-up window, click "**Continue Registration**" and "**Continue**" to create the account.

5 If you do not have an account in Accela, then Click "Continue" in the pop-up window.

6 If you already have an account in Accela, then you will need to confirm the Contact Details and then Click "Confirm" in the pop-up window.

Register for an Account

7 You will see your Contact Information shown at the bottom of this screen.

Review this information before you click on the **Continue Registration** button below your newly added Contact Information.

Account Successfully Registered

Registration Complete:

On the next screen, you will see a confirmation that your account has successfully been created.

Login:

You can now login (upper right corner of this screen) by using your new username and password.

Logging In

Login Instructions:

After you click on the Login button, you will be taken to the login webpage.

Enter Username and Password:

Enter your username and password and click on the yellow **Login** box next to the username/password boxes.

Creating Linked Users (Delegates) for an Organization Account

In OpenDSD, Individual accounts can be linked to an Organization account, and access the information and documents associated with it; this linkage helps project associates collaborate on shared projects more easily within OpenDSD. To link Individual accounts with an Organization account, you need to add them as **delegates** within the Organization account profile, and define roles for each of them. *

To create an Organization account, please refer to slides 5-9, selecting "Organization" as the Contact Type during account set up, entering the relevant contact information, and confirming your registration.

Select Contact Type

Type:
Organization

Continue   Discard Changes

* You can also link two Individual accounts using these steps

Creating Linked Users (Delegates) for an Organization Account

1 To add delegates to an Organization account, login to the account and select Account Management from the Accela navigation bar at the top of the window

2 In the account details, click "Add a Delegate" on the lower right side of the screen

Creating Linked Users (Delegates) for an Organization Account

Before you can enter someone as a delegate to the account, they need to already be registered with an individual account in OpenDSD.

3a Enter the delegate's name and email*

3b Set the permissions you want them to have.

3c If you want to add a message to the delegate invitation email, click "Add Personal Note"

3d Confirm you're a person and then click "Invite a Delegate" to send the email

* Repeat steps 3a-d as many times as necessary to add desired delegates

Add a Delegate ✕

Enter the name and e-mail address of the person to whom you would like to grant delegate access to your account.

*Name

Corinne McLaughlin

*E-mail Address

CkMcLaughlin@sandiego.gov

Set Delegate Permission

Delegates can view records across all categories unless you choose to restrict them to specific categories.

View Records in all categories (Change)

For the following permissions, the available categories are limited to the ones that you have granted the delegate access to view records.

☑ Create Applications in all categories (Change)

☑ Renew Records in all categories (Change)

☑ Amend Records in all categories (Change)

☑ Manage Inspections in all categories (Change)

☑ Manage Documents in all categories (Change)

☑ Make Payments in all categories (Change)

Add Personal Note

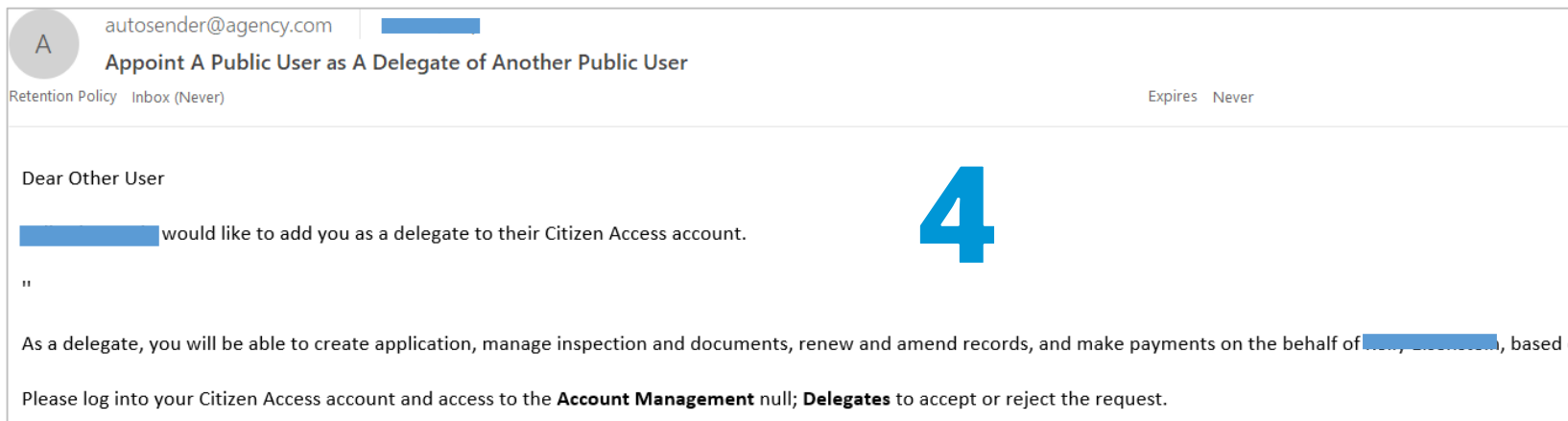✓ I'm not a robot — reCAPTCHA Privacy - Terms
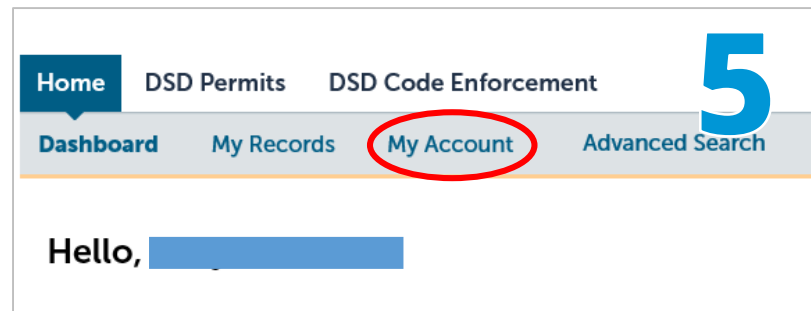
Invite a Delegate Cancel

3

Delegate Approval

4 The delegate will now receive an email from autosender@agency.com confirming the delegation and identifying the specific permissions granted.

5 The delegate will need to log into their account and click on the "My Account" link.
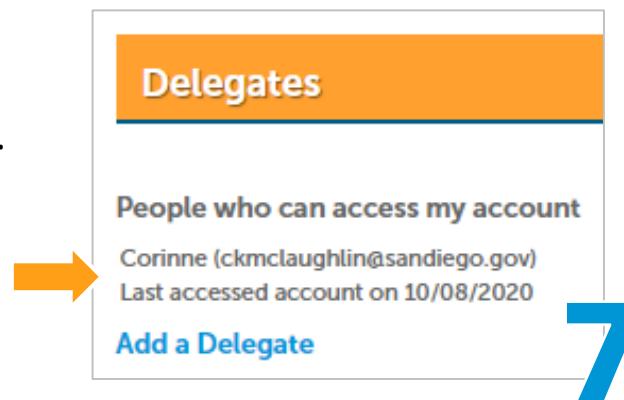
Delegate Approval

6 At the bottom left of the My Account page, in the Delegates area, the user will see the Organization account that added them as a delegate. After clicking "Accept" at the lower right, their access will be activated.

6

7 After the delegate accepts the invitation, they will be shown as a delegate in the Organization account management portal.

7

Reciprocal Access

Note that when a delegate is added to an Organization account, you can look at information in the Organization account from within the delegate's account, but not vice versa. You cannot, by default, look at information in a delegate account from within the Organization account.

In order for the Organization account to see information in a delegate account, the delegate account must add the Organization account **as its own delegate**. Then, the two accounts will have reciprocal access to information.

Using Your Dashboard

Once you register and log in, you will see your dashboard where you can quickly create, access or resume applications or view permit information. Your dashboard is accessible from the "Home" tab.

My Records:
Use "My Records" to view your permit history.

My Account:
Use "My Account" to manage your login and contact information.

Advanced Search:
To do more specific searches by property address or Record Number, choose the Advanced Search option here.

Work in Progress:
Find saved applications here. You can resume an application or pay for a permit here.