CITIZEN ACCESS USER GUIDE PLANNING DEPARTMENT

Your guide to navigating the Citizen Access System

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CREATE AND MANAGE YOUR ONLINE ACCOUNT

Navigate to the City of Merced *Civic Access* portal from the City's webpage at <u>www.cityofmerced.org</u>.

First time users must create an account to be able to use the system. If you have already created an account, please proceed to the <u>Login Instructions</u> below.

CREATING A NEW ACCOUNT

PLEASE NOTE: The username (email) and password you create will be used for all processes you apply for. This includes Planning Department Applications, Business Licenses, Building and Encroachment Permits, paying fees, requesting inspections and reviewing information related to your application/permit.

Once you reach the City of Merced Civic Access portal, follow these steps to register and create your account.

1. Click on the Login or Register tile from the Civic Access Home page.



After clicking on the **Login or Register Tab**, the following screen will appear (see next page).

Sign in to communit	ty access ser	vices.	
Email address			
Keep me signed in			
Ne	xt		
OF	2		
Sign in with		Ø	
Unlock account?		Help 🗗	
Create an	account		

- 2. Click on "Create an account."
- 3. The following screen will appear (see next page). Please complete the requested information and create a password. Please note the password requirements. Your password must meet **all** the criteria to be accepted by the system. After all information is entered, click the "Sign Up" button.



Enter your information on this screen and choose a password. Then click on the "Sign up" button.

4. The following message will appear. Check your email and enter the verification code. Click the "Verify" button. Note: If you don't receive the email, refer to <u>Confirmation Email Not Received</u> section below.



Note: The email will be sent from <u>noreply@.org</u> and the subject of the email is Citizen Self Service New User Account Confirmation.

5. The following screen will appear (see next page). You can choose to set up other security measures by following the prompts for the method you choose. This step is NOT required but provides an extra layer of protection for your account. To proceed, click on the "Continue" button.

	ද jul3165@yahoo.com
	Set up security methods
	methods help protect your Tyler Citizen account by ensuring only you cess.
Set up (optional
Goo	gle Authenticator
	a temporary code generated from the
	le Authenticator app.
Used	for access
Set	up →
	Okta Verify
V	Okta Verify is an authenticator app,
	installed on your phone or computer, used to prove your identity
	Used for access
	Set up →
Pho	ne
	y with a code sent to your phone
Verify	for access
Used	up →
Used	up →
Used	up → Continue

This step is OPTIONAL; however, it is recommended to provide better security for your account.

6. The following page will appear. Please read the acknowledgement and click the "Continue" button.

Registration		
Step 1 of 3: Acknowledgement		
When registering. Please be sure to use your mailin	g address for this profile.	

7. Enter your contact information and click the "Next" button. Use the "Back" button to navigate to the previous screen if you need to change/correct information.

legistration		
Step 2 of 3: Personal Info		
		*REQUIRED
First Name	Julie	
Middle Name		
Last Name	Nelson	
Company		
Contact Preference	Select Contact Preference	
* Email Address	jul3165@yahoo.com	
Additional Contact Information		
* Business Phone		
* Home Phone		
* Mobile Phone		
	Back Next	

8. Enter your mailing address and click the "Submit" button (see screenshot on the next page).

tep 3 of 3: Address		
		REQUI
* Address	Street address, P.O. box. (required)	
	Apartment, suite, unit, floor, (optional)	
City		
State	~	
Postal Code		

9. The following screen will appear, and your registration is complete. You are now ready to apply for an application.

City of Merced						Julie Nelson -	m 0
		Home Dashboard		ay's Inspections Map Searc			
	Cree My Permits	dit or debit card transactions a	re subject to a 3.5% service fi	ee or \$2.00 minimum, whichev	er is greater.		
	Attention O	Pending	Active O	Recent	Draft O		
	My Plans						
	Attention O	Pending	Active O	Recent	Draft O		
	View My Plans						

LOGIN INSTRUCTIONS

Click on the Login or Register tile from the Civic Access Home page.



1. The following screen will appear. Enter your email address and click the "Next" button.



You can click the button next to "Keep me signed in" if you want to remain signed into the system.

2. Enter your password and click the "Verify" button.

A MercedPlanningCSS@proton.me			
Verify with your password			
Password			
	0		
Vertfy		¢	
Forgot password?			
Verify with something else			
Back to sign in			

3. The following screen will appear. You are now signed in and ready to apply for your application, pay an invoice, request an inspection, review the status of a plan/permit, etc.

	Home Dashboar		ay's Inspections Map Search		
My Permits	edit or debit card transactions a	re subject to a 3.5% service l	iee or \$2.00 minimum, whicheve	r is greater.	
Attention O	Pending O	Active O	Recent O	Draft O	
•View My Permits My Plans					
Attention	Pending O	Active O	Recent O	Draft O	

CONFIRMATION EMAIL NOT RECEIVED

If you are trying to create an account and have entered your email address to register, but have not received the confirmation email, please follow the steps below.

- Verify the confirmation email is not in your spam/junk older. The email will be sent from <u>noreply@.org</u> and the subject of the email is Citizen Self Service New User Account Confirmation.
- 2. Please add <u>noreply@.org to</u> your contacts and/or make sure it is whitelisted or marked as a safe sender, depending on your email provider. (If you or your company uses Outlook/Office365, this <u>link</u> may be helpful).

After this has been completed, please navigate back to City of Merced Civic Access portal and try registering again.

FORGOTTEN PASSWORD

- 1. Navigate to the City of Merced Civic Access portal.
- 2. Click on the **Login or Register** tile from the home page.
- 3. Enter username/email and click "Enter."
- 4. Click on "Forgot password?"



5. The following screen will appear. Click on "Send me an email."

A MercedPlanningCSS@proton.me	
Get a verification email	
Send a verification email to M***S@proton.me by clicking on "Send me an email".	
Send me an email	
Back to sign in	

- 6. An email will be sent to the email address entered with a verification code to allow you to reset your password.
- 7. The screen on the following page will appear for you to reset your password.



Reset your Tyler Portico Citizen password

Password requirements:

- × At least 8 characters
- × A lowercase letter
- × An uppercase letter
- × A number
- × No parts of your username

New password



Re-enter password



- × Passwords must match
- Sign me out of all other devices.



Back to sign in

Choose a new password that meets al the criteria listed and click "Reset your password."

UPDATE ACCOUNT INFORMATION

If you need to update your account information (i.e., address, phone number, etc.), follow the steps below.

- 1. Login to your account. The following screen will appear.
- 2. Click on the "My Account" tile.



3. The following screen (on the next page) will appear. Choose the tab that contains the information you wish to update (i.e., Personal Information, Addresses, My Invoices, My Businesses) and make the necessary changes. Once the changes have been made click the "Save" button.

My Account

PERSONAL INFO	ADDRESSES MY INV	OICES MY BUSINESSES	
Personal Info			*REQUIRED
	First Name	Julie	
	Middle Name		
	Last Name	Nelson	
	Company		
	Business Phone	(209) 385-6967	
	Home Phone		
	Mobile Phone	(209) 555-1212	
	Fax		
	Other Phone		
	* Email Address	MercedPlanningCSS@proton.me	
	Contact Preference	Mobile Phone	~
		Save	

HOW TO APPLY FOR A PLANNING APPLICATION

Note: Applications in the Planning Department Application system are referred to as a "Plan." Each application is assigned a Plan Number. If you have multiple applications for one project, each application type is assigned a separate Plan Number for each specific application type.

 Navigate to the City of Merced Civic Access Portal and Login to your account (if you have not already set up an account, please refer to the Create an Account Section.



2. Once you have logged into the Civic Access Portal, you will be taken to your Dashboard (refer to the screenshot on the following page).

ly Permits				
	Danding	Active	Recent	Draft
Attention	Pending	O	O	O
• View My Permits				
.,				
Attention	Pending	Active	Recent	Draft

• View My Plans

Note: Additional information is available if you scroll down on the screen.

nspections			My Invoices	
Requested	Scheduled	Closed	Current O	\$0.00
0	0	0	Past Due O	\$0.00
			Total	\$0.00
w My Inspections			View My Invoices	

My Licenses



APPLY AND SELECT APPLICATION TYPE

3. Click on the "Apply" button to start your application. The Application Assistant Screen will open.

	Assistant				
All		Lo My History		PERMITS	
Show Categori	ies				Show My Templat
	Business License Applicat Category Name: Business License	ion Description: Business License Application			Apply
	Fire Sprinklers: SFD Subse	equent			Apply
	Category Name: Permit	Description: SFD Subsequent FS from a master p	olan.		
	Office/Professional/Retai	I			Apply
	Category Name: Permit	Description: Office/Professional/Retail			

- 4. If you know the type of application you want to apply for, you can type the name in the search bar. If you are unsure and need to see a list of all Planning Applications, click on the "Planning Applications" button in the upper right of the screen (just under the search bar). See the screenshot on the next page for more details.
 - Note: Each application type has a description to help you determine if it is the correct application type for your project. However, we encourage you to contact staff to determine the correct application if you are unsure what process your project will need. You can reach staff by email at planningweb@cityofmerced.org or by phone at 209-388-7373.

All L Trending Image: My History Image: Licenses Supplication Image: PERMITS Ima
Business License Application Appl Category Name: Description:
Category Name: Description:
Fire Sprinklers: SFD Subsequent
Category Name: Description: Permit SFD Subsequent FS from a master plan.

5. Once you have found the type of application you need to apply for, click the "Apply" button.

			M
	Site Plan Review		Apply
[[-7]]	Category Name:	Description:	
	Plan	A discretionary permit reviewed by the Site Plan Review Committee (a staff level	
		committee) to ensure a project complies with the Zoning Ordinance and does not create	
		negative impacts to adjacent properties or the general public.	
		Examples of projects subject to a Site Plan Review Permit include:	
		Major Home Occupations (not including Cottage Food Operators)	
		New Construction in the Industrial Zones	
		Gas Stations/Car Washes in certain Commercial zones.	
		Drive-up and Drive-thru sales in certain Commercial zones.	
		Mobile Food Vendors in certain Commercial zones.	
		Recycling Facilities	
		Alcohol sales in a restaurant in certain Commercial zones	
		Multi-Family Dwellings in certain Commercial zones	
		If you are unsure if your project qualifies for a Site Plan Review Permit, please contact	
		Planning Staff by email at planningweb@cityofmerced.org or by phone at 209-388-7373.	

 \wedge

SELECT LOCATION

6. Next, you will select the location of your project using the GIS Mapping tool. From the screen below, click on the "Add Location" button.

	Home	Dashboard	Apply My Work	Today's Inspections	Map Search Q	
Apply for Plan - Site Plan Revie	ew					*REQUIRED
0(2	3	4	5	6	0
Locations Ty	ype	Contacts	More Info	Attachmen	ts Signature	Review and Submit
LOCATIONS						
Please select all properties invo	Cl	ick Add				
Create Template						Save Draft Next

7. The screen on the following page will appear. You can type in the Address or Assessor's Parcel Number (APN) to navigate to your project site. You may also use your mouse to move the map to the property location by left-clicking the mouse and holding it until the cursor changes to a hand. At this point you can move the map around to the location you are looking for. You may zoom in and out by using the Zoom In (+) and Zoom Out (-) buttons in the lower right corner. If your mouse has a roller, you can use the roller to zoom in and out.



This will help with selecting the parcel(s) in the next step.

8. Once you navigate to your project site, you must select it using one of the tools in the upper right corner of the map. Make sure you can see the individual parcels on the screen as shown below. Next, you will select the parcel your project is on. If you only have one parcel, you could use the "Point" tool, but if you have multiple parcels, you must use the "Polygon" tool.

In the screenshot on the following page, the Point Tool was used the parcel.

	\sim
to	select

Zoom in/out

 Image: Winder Detry Noted
 State

 Image: State
 Image: State

 Image: Image: State
 Image: State

 Image: Ima

The Parcel Information will appear on the left side of the screen.

- 9. The selected parcel will turn blue. A dialogue box opens on the left side giving you the option to select the individual parcel. If multiple parcels were selected, they would all be listed. You could select them individually or use the "Select All" option.
- 10. To select either the individual parcel or use the "Select All" option, click on the box next to the option you are using.

Note: Please make sure you are selecting the correct parcel prior to checking the box to make the final selection.



11. To select multiple parcels at one time, use the polygon tool and draw a polygon around the parcels you wish to select (see instructions on Page 24 of these instructions).

12. Once you have clicked on one of the buttons to make select the parcel, the dialogue box will change and have an "Add" button appear in blue (see next page). At this point, click on the "Add" button to add your project location.



- 13. Now your parcel has been selected and the following screen will appear (see next page). If your project contains more than one parcel, and you didn't use the polygon tool, you can add an additional parcel at this point using the same process for each additional parcel.
- 14. Once all parcels have been selected, click the "Next" button (see screenshot on the next page).



15. To select multiple parcels at one time, you will use the "Polygon" tool. With this tool you can draw a polygon around the parcels you wish to select. To you the "Polygon" tool, click on a starting point at the corner of one of the parcels you wish to select, hold your mouse button down to continue to draw a line around the parcels you are selecting, creating a polygon around the area you wish to select. When you have extended the polygon around all the parcels you wish to select, return to your starting point and double click to release the polygon tool. Your selection will appear as shown on the next page. In order to avoid inadvertently selecting parcels that are not part of your project, draw the polygon inside the parcel lines, but be sure you touch every parcel you wish to include.

Note: If the parcel you are selecting has multiple addresses, each address will appear on the left side of the screen. Use the select all button to select all the addresses associated with the parcel.



PROJECT DESCRIPTION

15. You will now be prompted to provide a detailed description of your project. The description should include the type of use, the number of buildings proposed, and any other pertinent details. Please include any special requests or special circumstances affecting your project.

	2	3	4	5	6	7
Locations	Туре	Contacts	More Info	Attachments	Signature	Review and Subm
AN DETAILS						
ease provide a def	tailed description of yo	ur project. Include a	ny special requests	or special circumsta	nces that may be i	involved in the proj
			ny special requests	or special circumsta	nces that may be i	involved in the proj
	site Plan Review	ur project. Include a	ny special requests	or special circumsta	nces that may be i	involved in the proj
ease provide a def • Plan Type • Description			ny special requests	; or special circumsta	nces that may be i	involved in the proj
• Plan Type			ny special requests	; or special circumsta	nces that may be i	nvolved in the proj
• Plan Type			ny special requests	; or special circumsta	nces that may be i	nvolved in the proj

Å

CONTACTS

16. You will now be prompted to enter contact information. In addition to the applicant, the contact information must include the name of the property, a billing contact, and any design professionals (architects, engineers, draftsperson, land surveyor, etc) involved in the project. The applicant information will auto-populate based on who has signed in to create the application.

	3	9	5	6	7
Locations	Type Contacts	s More Info	Attachments	Signature	Review and Submit
CONTACTS					
Provide the property owner fo	r each property involved i	n the project.			
Please provide a Billing Conta	ct. This will be the persor	n responsible for paying all fees	associated with this	application.	
If you are working with a Desig	gn Professional (architect,	, engineer, draftsperson, etc.), pl	ease provide their c	ontact informa	tion.
Applicant	Billing Contact	Property Owner	Select Type	~	
1	Add	Add	Ad		
Julie Nelson (You)	Contact	Contact	Con	tact	
678 W 18th St , Merced, CA , 95340	+	+	-	F	
		REQUIRED			
Back Create Template				s	Save Draft Next

17. You must provide a Billing Contact as well as the Property Owner. Click on the "Add Contact" button and the screen on the following page will appear. If the contact has not been entered into the system, you will need to use the "Add Manually" option and provide the requested information. If the contact is already in the system, you can search for them using the search bar. You also have the ability to make a contact a "Favorite", so they are easy to find when completing an application.

Home	Dashboard	Apply	My Work	Today's Inspections	Map	Search Q
Back to Application						
Add Contact						
Add Contact As : Billing Contact		If the contact has not been entered into the				
Search Enter Manually My Favorites	system, use the "Enter Manually" button. If th contact has already been entered into the system, you can search for the contact using th					to the
Search Name, E-mail, or Company			S	search bar.		

18. If entering the information manually, the following screen will appear. Provide the information required. Note any field that has an asterisk (*) next to it, is a required field. Once the information has been entered, click on the "Submit" button.

Back to Application	
Add Contact	
Add Contact As : Billing Contact	
Search Enter Manually My Favorites	
Enter Manually	
First Name	John
Last Name	Doe
Company Name	
Email	johndoe@gmail.com
Home Phone	(209) 555-1212
Mobile Phone	(209) 555-2121
Business Phone	(209) 555-2323
	Submit

19. You will be taken back to the "Contacts" screen, and you will see the contact you just entered. From here, you can add the next contact using the same process. Instructions for search for a contact are below.



- 20. If a contact has already been entered into the system, use the search bar to search for the contact. Type in your search criteria such as a first or last name, the first letter of the persons first or last name, or a business name.
- 21. Once your search is complete, if there are any contact matching your criteria, they will appear on the screen. Select the correct contact and click "Add." If you want to add this contact as a Favorite, click the star on the left side of the screen next to the contact's name.



Back to Appl						
Add Contac	t As: Property Owner					
Search	Enter Manually My F	avorites				
Search julie		٩			Sort	Relevance 🗸
Favorite	First Name	Last Name	Address	Company	Email	Action
☆	Julie	Nelson	678 W 18th St Merced CA 95340		MercedPlanningCSS@ proton.me	Add
Results per p	age 10 💙 1-1of 1	< < 1 > >>			Select the	e correct
					contact an "Add" k	

22. Once all your contacts have been entered, press the "Next" button.

		3	4	5	6	7
Locations	Туре	Contacts	More Info	Attachments	Signature	Review and Submi
NTACTS						
vide the property owner's n	ame for each p	property involved in	n your project.			
ou are working with a Desig	n Professional	(architect, enginee	r, draftsperson, etc.), please pro	vide their contact i	nformation.	
Applicant	Billi	ng Contact	Property Owner	Select Type	~	
•		9	•	Ac	ld	
Julie Nelson (You)		ohn Doe	Julie Nelson(You)	Con		
578 W 18th St , Merced, CA , 95340			678 W 18th St , Merced, CA ,			
		Remove	Remove			[
						4

GENERAL INFORMATION

23. The General Information Screen allows you to enter additional details about your project. The questions on this screen will vary depending on the type of application you are applying for. The screen below reflects some of the information requested for a Site Plan Review application. There will typically be several sections with questions related to different aspects of the project. Please note that all fields with an asterisk (*) are required to be completed.

	\checkmark		4	5	6	7
Locations	Туре	Contacts	More Info	Attachments	Signature	Review and Submit
MORE INFO ATTENTION: AN ENVIF APPLICATION, PLEASE RECORD TAB.						
General Info SECTION	I - PROJECT TYPE & D	ETAILS			Ne	ext Section Top Main Menu
*1. Pro	ject Type - Site Plan Re	eview			~	
2.	Describe all proposed	uses.				
*3. Numbe	er of lots/parcels involv pr	ved in oject.				
SECTION	II - ALCOHOL AND TO	BACCO SALES				
1. Alcoh	ol and/or Tobacco Pro	Sold Alcoh	lcoholic Beverages or Toba olic Beverages Sold .co Products Sold	cco Products Sold		

24. Once you have provided all the required information and any additional information requested, press the "Next" button to proceed (see next page).

3. Describe any other uses on the site.		
4. Will there be seating provided for customers?	~	
SECTION VIII - PRELIMINARY APPLICA	ATION	
*1 . Did you apply for a preliminary application?	~	
2. Pre-Application Number:		
Office Use Only	Pre	vious Section Top Main Menu
Zoning		
Zoning General Plan Designation		
General Plan Designation		ļ

ATTACHMENTS

- 25. The next screen will prompt you to add your attachments. The three forms listed below are required for all applications. These forms may be downloaded, completed, and uploaded back into the system.
 - a. Conflict of Interest Form
 - b. Property Owner Authorization Form
 - c. SB 1214 Consent Form

In addition, other attachments will be required depending on the type of application. Examples of other attachments required are:

- 1. Site Plan
- 2. Elevations
- 3. Color Samples

Note that most required attachments must in pdf format. However, additional attachments may be allowed in other formats.



26. Once your attachments have been uploaded, the following screen will appear. To proceed, click on the "Next" button. Please note that in the example below, the attachments have different names than the required form.





SIGNATURE

27. An electronic signature is required to submit the application. Please read this page carefully as your electronic signature confirms that you have the authority to submit this application either as the property owner or on behalf of the property owner. You can choose to draw your signature in the signature box or click the toggle button next to "Enable Type Signature" to type your signature in the signature box. Once you have signed the application with your electronic signature, please press the "Next" button.

ly for Plan - Site P	Plan Review					*REQU
					6	0
Locations	Туре	Contacts	More Info	Attachments	Signature	Review and Subn
ATURE						
igning this applica	ition, you are confi	rming that you are the	property owner or	the authorized agent	of the property ow	ner.
ase type your name as	consent to electronic	ally sign this application.				
e Type Signature	_ Clic	k on the Toggle	Button to all	ow your		
le Type Signature			to be typed.	,		
e Nelson ruary, 02 2025		Signature	to be typed.			
(Dra	w Sigr	nature H	lere	-		
Clear						
ALCOI.						

REVIEW AND SUBMIT

28. The next step is to review and submit your application. The following screen will appear to allow you to review your information. Once you are satisfied with the information being submitted, click on the "Submit" button to finalize your submittal. You will no longer be able to make changes to the application once you have submitted it. However, if there are necessary changes that need to be made, you can contact staff to determine if the changes can be made without requiring a new application. If you need to change any information provided prior to submitting the application, use the "Back" button at the bottom of the screen to go to the screen you need to change.

Apply for Plan - Site Plan Review							*REQUIRE		
							7		
Loc	ations	Туре	Contacts	More Info	Attachments	Signature	Review and Submit		
ocations							Submit		
	Parcel Number		031-141-018						
Basic Info									
	Туре		Site Plan Revie	w					
	Description		construct new office building and associated parking						
	Applied Date		02/02/2025						
Contacts									
	Applicant		Julie Nelson						
			678 W 18th St	678 W 18th St , Merced, CA, , 95340					
	Billing Contact		John Doe						
	Property Owner	•	Julie Nelson						
			678 W 18th St	, Merced, CA, , 95340					

29. After clicking on the "Submit" button, you will be directed to the application success page.

Please read the information on this page carefully. If there are other applications needed for your project, you will need to use the "Continue to Plan" button to go through the application process for the additional applications. An Environmental Review application is required for most applications.

FEES

30. Once all applications are completed and submitted, staff will review the application, determine the fees, and generate an invoice to allow you to pay the fees. Please watch your email and check your dashboard for the invoice and pay the fees promptly. Your application will not proceed until all fees have been paid.