

# GETTING STARTED WITH



### ABSTRACT

This manual provides the basic information needed to start using SHAPE PHX, Planning & Development’s comprehensive Land Management Information System.



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## Introduction & Purpose

In 2016, the city of Phoenix Planning & Development Department (PDD) embarked on a journey that would result in the Land Management Information System that we call SHAPE PHX. Our existing systems were aging, KIVA was over 20 years old, and this journey will put PDD in a solid position to support the city of Phoenix residents.

Salesforce was the chosen platform, using Clariti as the application, which will work in concert with other applications like Skedulo for inspections, and Bluebeam for electronic plan review, to improve the workflow for staff and service for PDD's customers.

The purpose of this guide is to introduce city of Phoenix staff users to the basic features within the application, explain some of the key differences between the old and new way of doing things, and provide a reference guide to consult when there are questions in the future.

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## Overview

### What is SHAPE PHX?

SHAPE PHX is the comprehensive Land Management Information System adopted by the city of Phoenix Planning & Development Department (PDD). It replaced the multitude of systems that PDD had been using to issue and manage permits, plan reviews, inspections, planning, historic preservation, and other activities for many years. The oldest system, KIVA, had been in place since 1993. PlanWeb, the custom application for Planning & Zoning, was more than 15 years old. Neither of these programs were connected to the others requiring data entry in multiple systems.

SHAPE PHX offers a complete system for all city staff using the permitting system, not just those in PDD, allowing users to access information on zoning adjustments, code modifications, fire inspections, flood plain, etc., in one place.

### How will SHAPE PHX be Released?

SHAPE PHX will be delivered in two releases. This reduces the risk by allowing part of the business to migrate to the new system and part of it to remain in the old system. Moving the United States fifth largest municipality's entire Planning & Development Department operation to a new Land Management Information System is a big undertaking. The decision was made to split the transfer in this way:

#### What is in Release 1?

- ◆ Enhanced Public Portal
  - Single sign-on for city services through a universal city account
  - Ability to start application online
  - Capacity to pay online for any ongoing projects
  - Addition of Automated Clearing House (ACH) as a payment method
  - Means to track all aspects of a project with hyperlinks
  - WhatFix for tutorials and quick reference to materials and TRT documents
- ◆ Interfaces
  - Arizona Registrar of Contractors (AZROC)
  - Geographic Information Systems (GIS)
- ◆ Residential Plan Review
  - Single Family Detached
  - Single Family Attached
  - Duplex
  - Self Cert Plan Reviews – Residential
  - Photovoltaic systems
- ◆ Residential Permits, including:
  - Quick (Online) Permits
  - Additions/Remodels
  - Manufactured homes
  - Demolition
  - Fences

- Swimming Pools
- ◆ Impact Fees
- ◆ Residential Inspections
  - General Inspections
  - Remote Video Inspections
- ◆ Historic Preservation:
  - Certificates of No Effect
  - Requests for Demolition Approval (properties that have historic designation)
  - Demolition Application Reviews (residential properties 50 years of age or older in the Downtown Code)
- ◆ Civil Permits (Only Over-the-Counter permits are in Release 1)
  - Driveways
  - Sewer Lateral Taps
  - Pavement Restoration
- ◆ Code Enforcement, including:
  - Non-permitted construction
  - Signs
  - After-hours Noise
  - Grading & Drainage
- ◆ Elevators
  - New residential elevators
  - Modernizations/repairs
  - Annual Inspections
- ◆ Licensing
  - Self-Certification
  - Annual Facilities Permit (AFP) Annual Registrations only
  - Annual Elevator Inspections
  - Fire Operating Licenses
    - Medical Facility Permit
    - Daycare Facilities, Commercial, 1-50
    - Daycare Facilities, Commercial, 50+
    - Hospital/Nursing Home
    - Nursing Homes
    - Assisted Living Facilities
    - Behavioral Health Care Facilities, Group I-1
    - Developmentally Disabled Group Care Homes, Group I-1
    - Juvenile Group Home
    - Educational Facility, Grade K-12
    - Covered and Open Mall Buildings
    - Correctional Facilities
  - Pyrotechnicians and Blasters
  - Journeymen and Apprentice



- ◆ Enhanced Mobile Capabilities
  - Route optimization
  - Talk-to-text capability in Skedulo
  - Photo/video uploads in the field
  - Advanced inspection management
- Reports related to Release 1 functionality

#### What is in Release 2?

- ◆ Commercial Plan Review, Permits, and inspections, including:
  - Review and Inspection of all commercial occupancy types
  - (AFP) – all other aspects not included above
  - Building Code Modifications not covered in Release 1
  - Residential Subdivisions
  - Building
  - Civil
  - Fire
  - Pre-Apps and Preliminary Meetings
- ◆ Historic Preservation
  - Certificates of Appropriateness
  - Request for Certification of Economic Hardship
  - Demolition Application Reviews (non-residential properties 50 years of age or older not covered in R1)
- ◆ Public hearings
- ◆ Office of Customer Advocacy
- ◆ Planning
  - Long Range Planning
  - Signs
  - Site Planning
  - Zoning
- ◆ Self-Certification for items related to Release 2 functionality
- ◆ Fire Complaints
- ◆ Reports related to Release 2 functionality

While part of the staff will be using both systems (what is sometimes referred to as the swivel chair effect) for about one year, this improves the overall outcome substantially and gives PDD an opportunity to make improvements for Release 2 based on the results of Release 1.

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*Note: This guide contains information on Release 1. It will be updated with the codes, abbreviations, and inspection types that are relevant to Release 2 when the time comes.*

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## The SHAPE PHX Constellation of Applications

SHAPE PHX is comprised of multiple applications, or apps, that work in concert with one another to help staff complete their daily tasks. Many of the applications that are used today will be replaced. In fact, the electronic document management system that the department used for many years, SIRE, has already been replaced with OnBase. Figure 1 shows you how information will flow between the applications. Figure 2 explains the relationship between today's systems and the new SHAPE PHX applications.

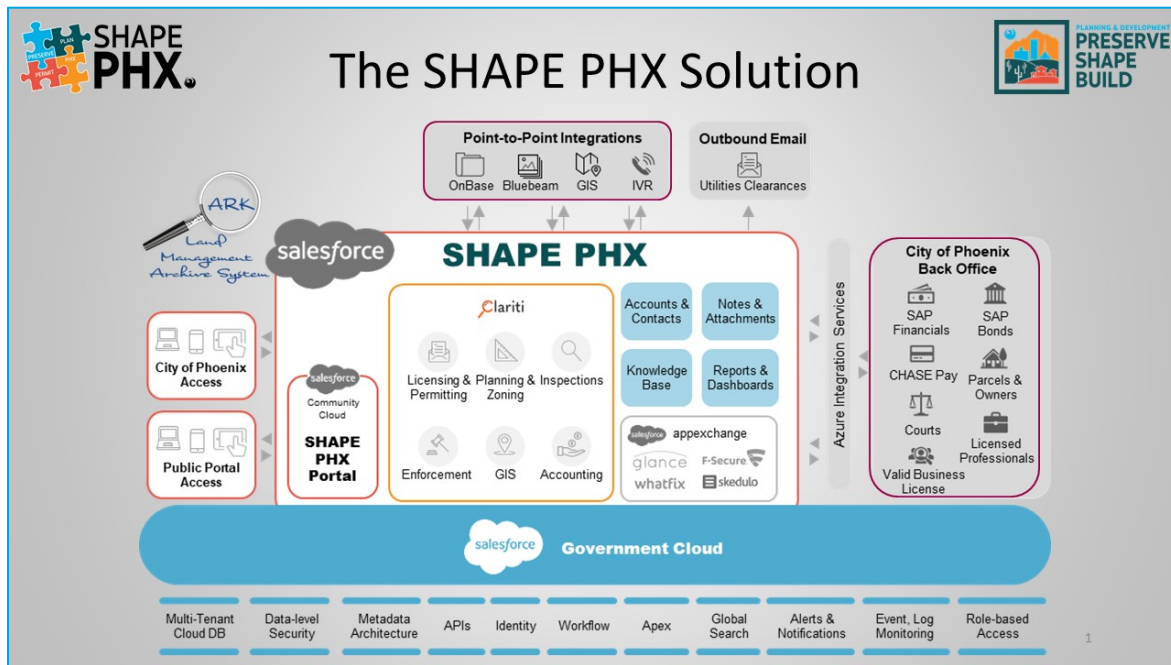


Figure 1

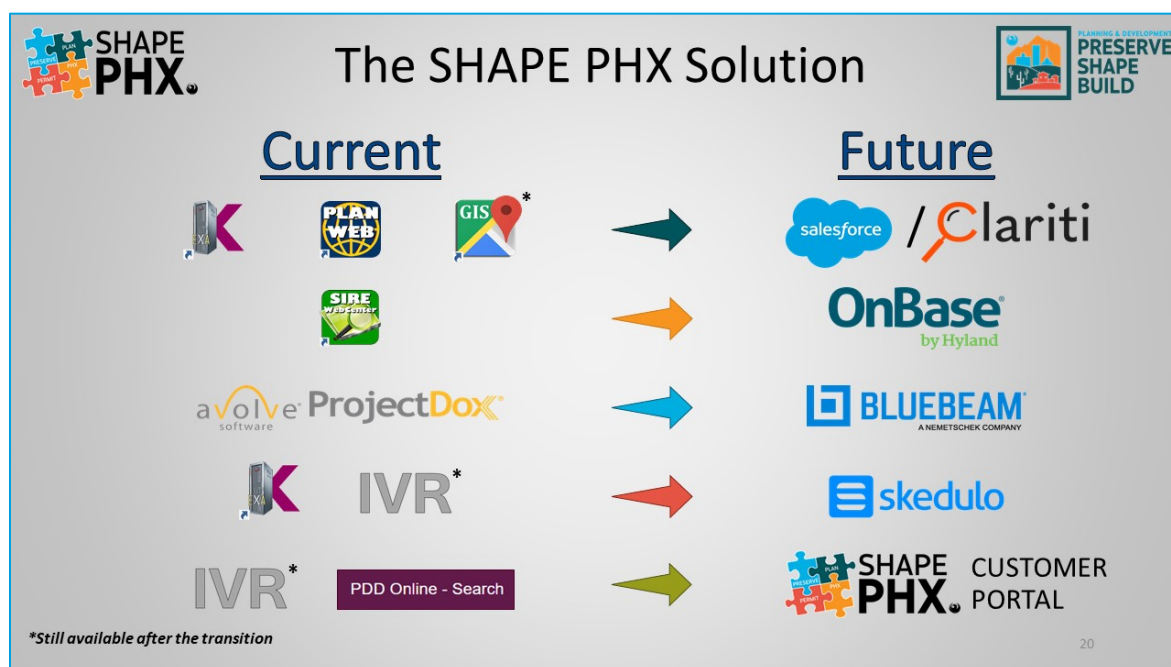


Figure 2



One exciting new feature is that SHAPE PHX and Skedulo both have desktop modules and mobile options.

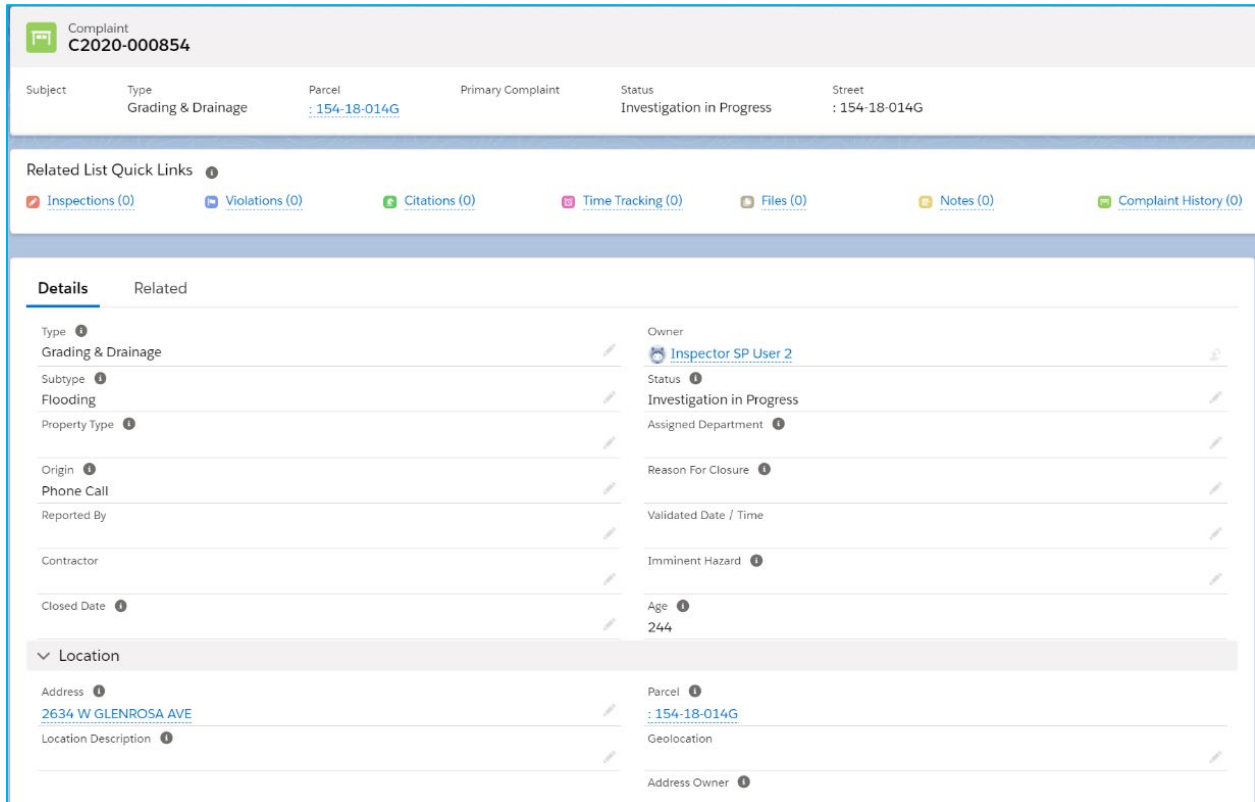


Figure 3 At your desk, the SHAPE PHX application, built using Salesforce and Clariti, will make completing your permitting and plan reviews a breeze.

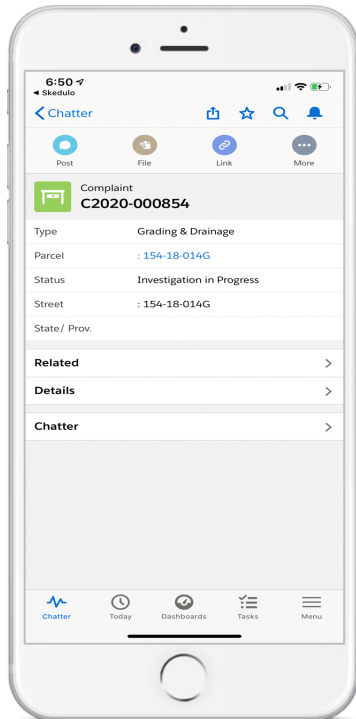


Figure 4 SHAPE PHX can be accessed anywhere using the Salesforce mobile app. Looking up a permit or complaint while in the field has never been easier.



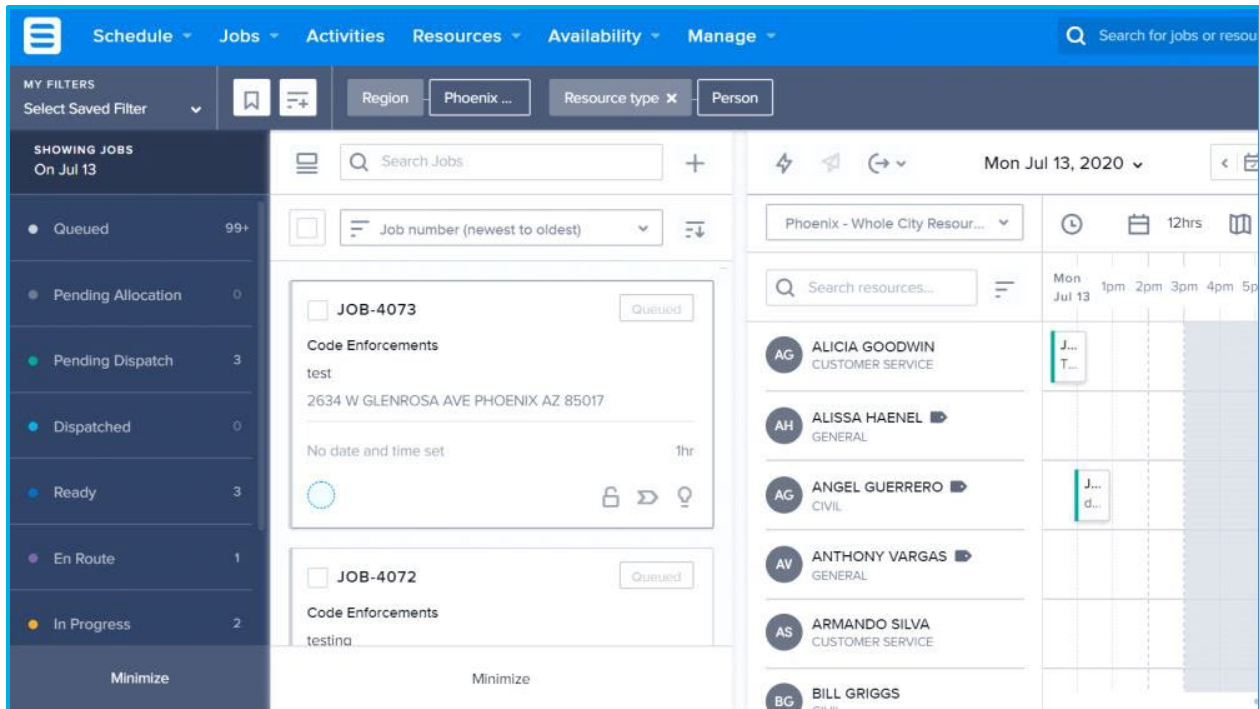


Figure 5 The Skedulo desktop app makes assigning and scheduling inspections effortless, with features like route optimization and drag-and-drop.

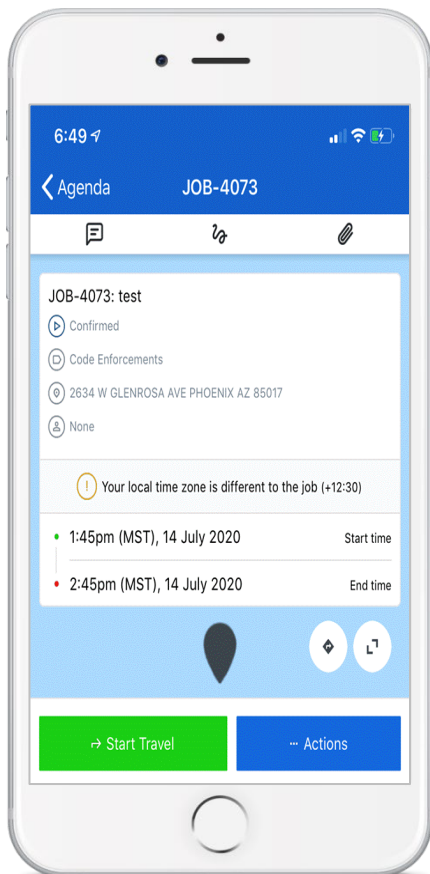


Figure 6 The Skedulo mobile app puts new tools in Inspectors' hand, with talk-to-text to record findings, the ability to associate pictures directly to the inspection, and easy access to all of the day's jobs.





## Electronic Plan Review (EPR)

### A New Solution

At the beginning of project, the SHAPE PHX RFP allowed options to propose a new EPR application or provide an integration with the existing PDD Avolve ProjectDox application. Three of the seven offerors proposed integrating with the existing PDD Avolve ProjectDox application. During the design stage of the project, the evaluation committee, PDD Subject Matter Experts, and Gartner, who has provided preparation, planning and quality assurance services throughout the project, conducted working sessions to perform further impact analysis on EPR integration points. The primary goal was to eliminate “swivel chair” work efforts that currently reside in our business process.

During the RFP process, Gartner recommended creating an EPR Focus Group, comprised of PDD staff familiar with current practices, as EPR was determined to be a significant risk for overall project acceptance. The EPR Focus Group consists of stakeholders from different sections in PDD that would participate in design sessions, identifying opportunities for improvement, and acted as advocates for user acceptance. It was during a design session where it was discovered there were some gaps between the paper and electronic plan review process.

To achieve City’s desired business processes and provide a more seamless Electronic Plan Review solution, the EPR Focus Group in consultation with Deputy Director over Plan Review decided to pursue other available options for Electronic Plan Review. After extensive research, a Clariti integration with the Bluebeam markup tool was identified as viable option. Bluebeam is a markup tool only but will allow for most of the workflow processes to be handled by Clariti, creating a more seamless workflow by eliminating unnecessary steps, allow tight mirroring for both paper and electronic plan review workflows which reduces the swivel chair effect and communication touch-points. The EPR Focus Group and the SHAPE PHX team believe this approach solves integration issues, provides improved user experience, and will gain wider user acceptance.

Recommendations from the EPR Focus Group, went through the SHAPE PHX Project Governance Process in September of 2020. Each committee unanimously approved the recommendations of switching from ProjectDox to the Clariti/Bluebeam integration.



### What is Bluebeam?

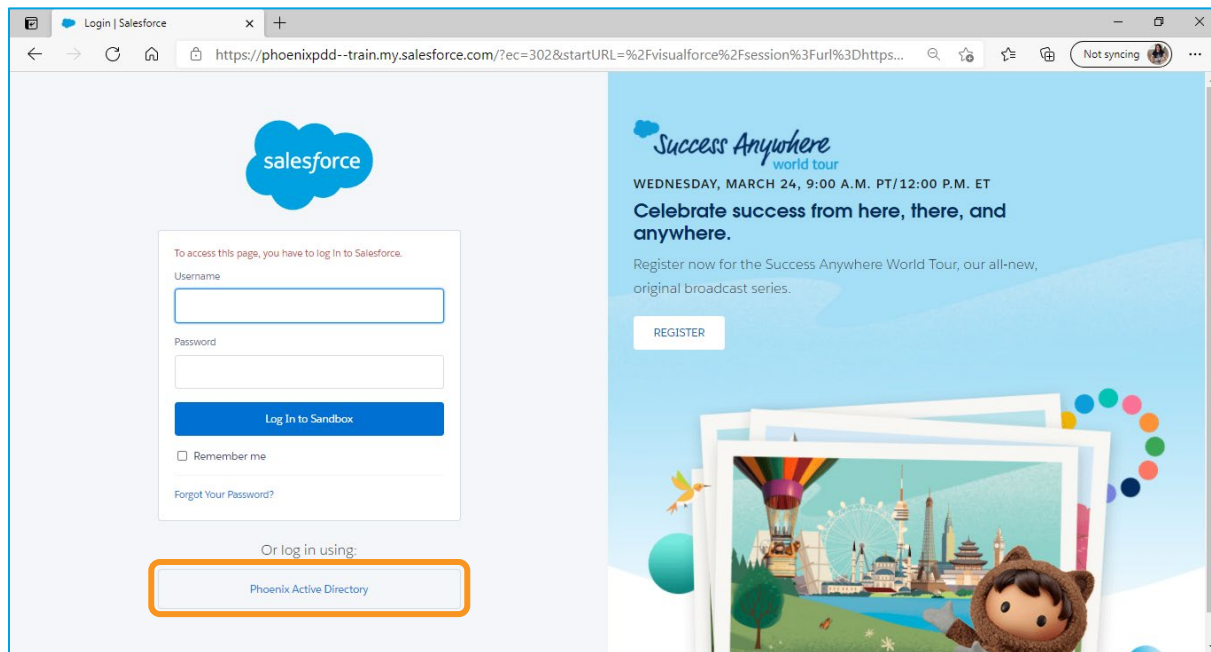
Bluebeam is a robust plan review editing software application that will be integrated into the Clariti system. Some of Bluebeam’s capabilities include plan review, file management and real time collaboration, along with a dynamic and customizable markup tool chest.

## Accessing SHAPE PHX

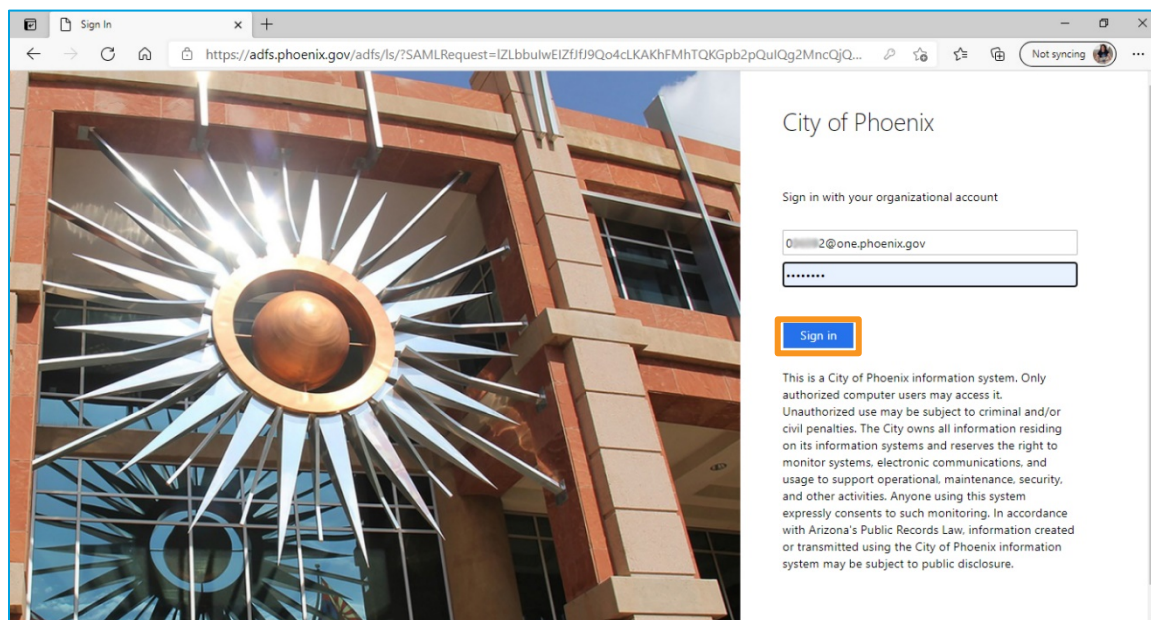
SHAPE PHX should be accessed using Microsoft Edge, which is the city of Phoenix’s preferred browser. To log in to SHAPE PHX, navigate to: [insert link here](#)



Click on *Phoenix Active Directory* to utilize the same username and password that gives you access to your laptop or desktop computer at work.



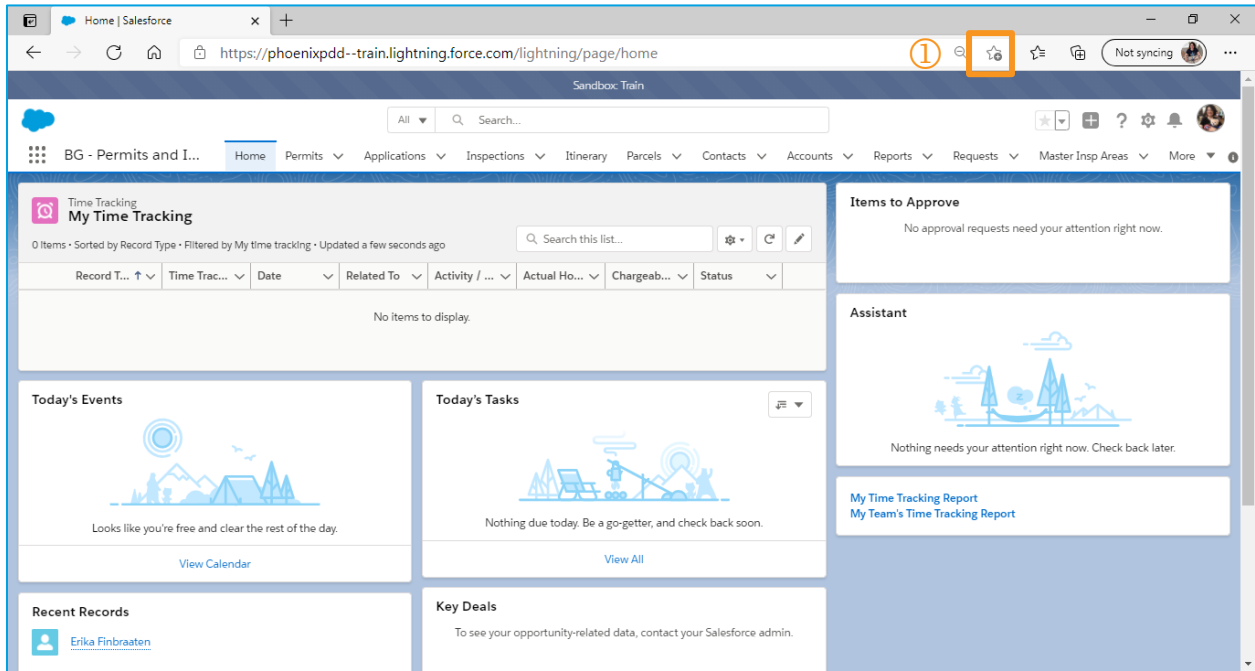
This will direct you to this screen, where you will enter your username and password just as you do when logging on to Windows. This can be either your employee id number @one.phoenix.gov ([000000@one.phoenix.gov](mailto:000000@one.phoenix.gov)) or your email address. Click *Sign in*.



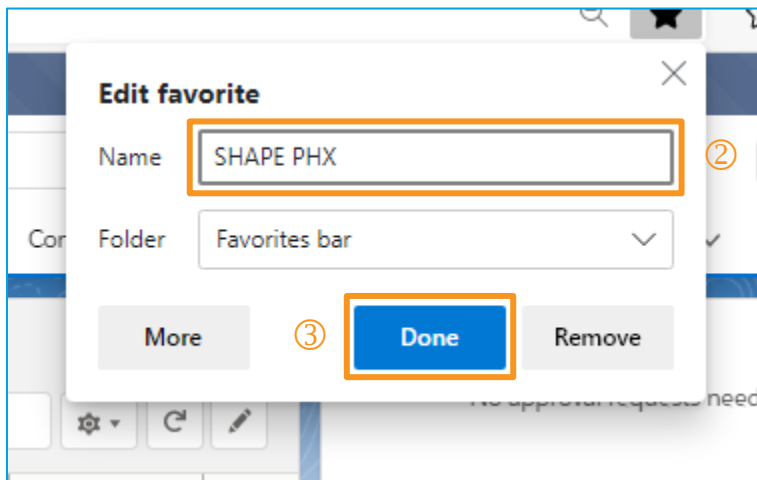


## Bookmark SHAPE PHX for Easy Access

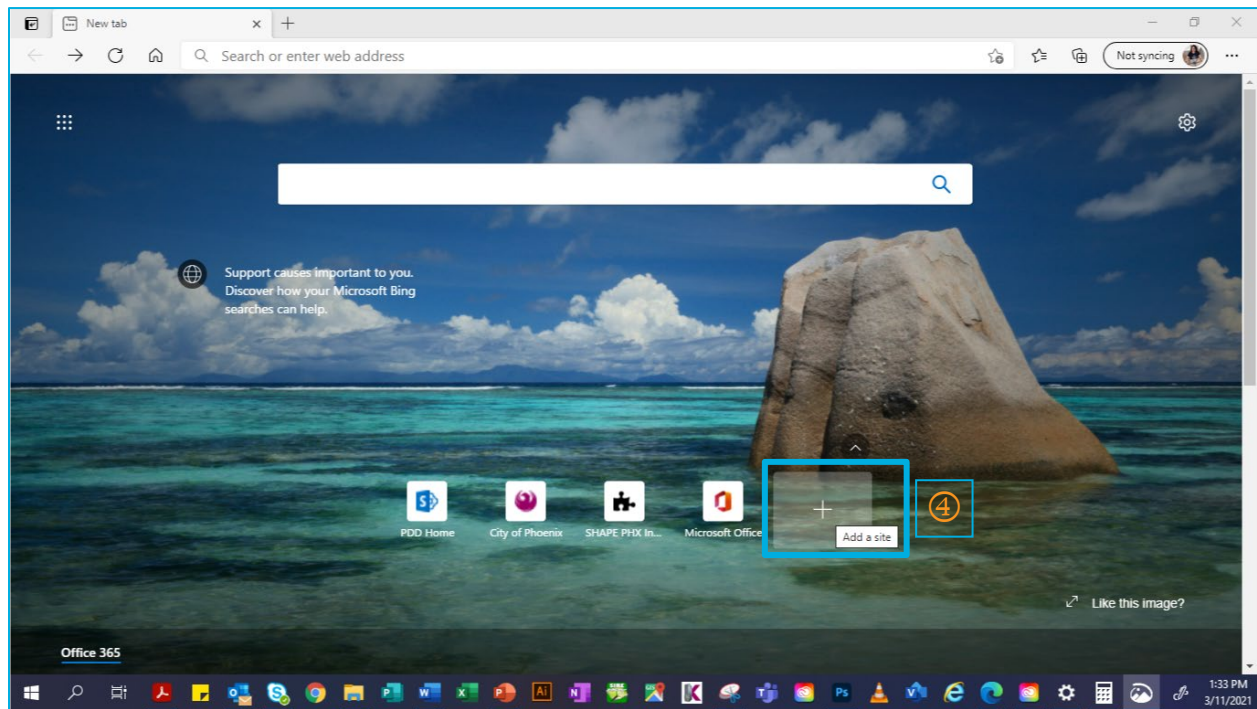
To bookmark SHAPE PHX in Microsoft Edge, the preferred browser for the application, click the star in right-hand side of the address bar (①).



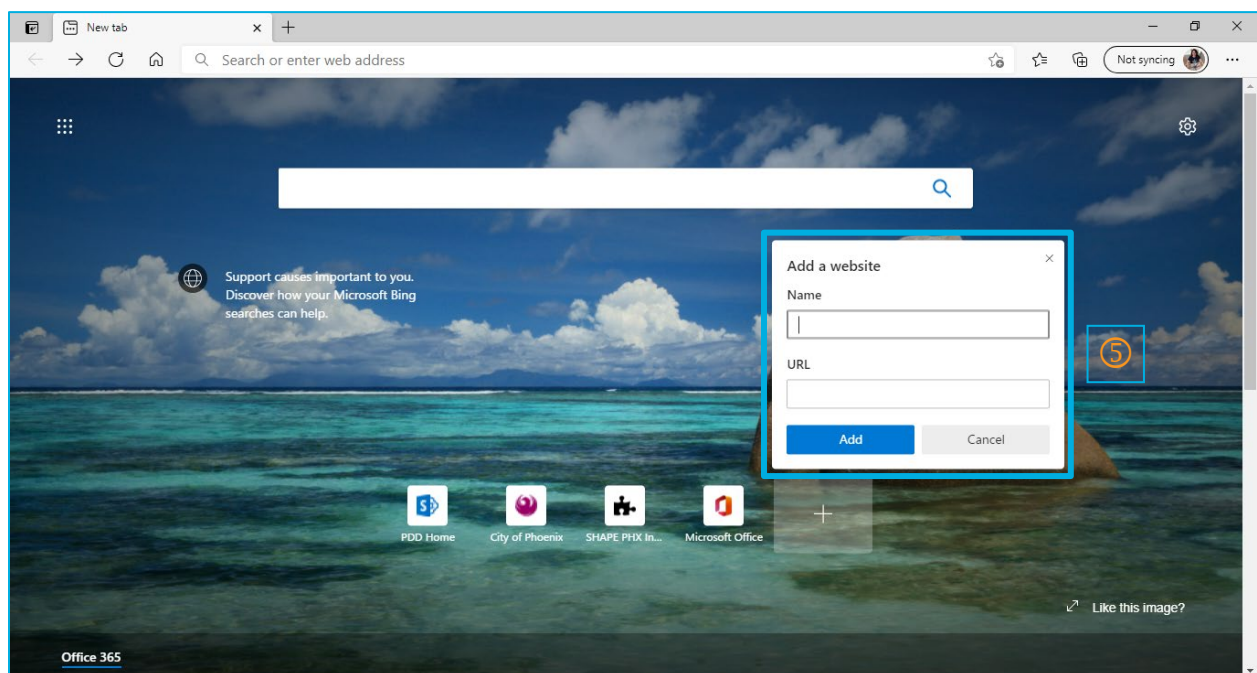
Update the name to SHAPE PHX (②) and click done (③).



To pin a link to the Microsoft Edge Home Page, click on the *Plus Sign* (+),



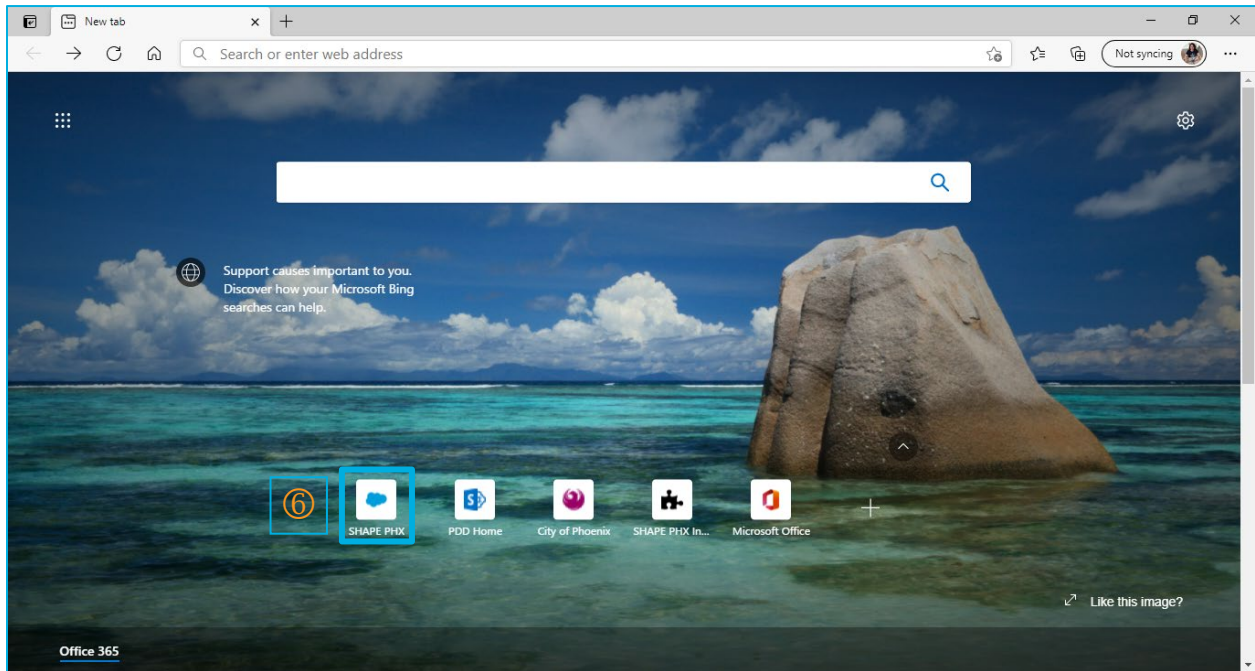
Enter the *Name* for the shortcut and copy and paste the *URL* and click *Add* (+).







There is now a shortcut to SHAPE PHX on your Microsoft Edge Home Page (6).



### Logging In

To log in after you have set up your password, click on your bookmark and enter your username and password.

### SHAPE PHX Home Page Toolbar



Here is a more detailed look at the icons on the SHAPE PHX Home page toolbar:

**Favorites:** This reveals shortcuts to the things you use frequently in SHAPE PHX. Click the Star icon when on a record, dashboard, or an object you use regularly for quick reference.

**Global Actions Menu:** This provides quick options to create a new activity (task, event, log a call, email, or a note).

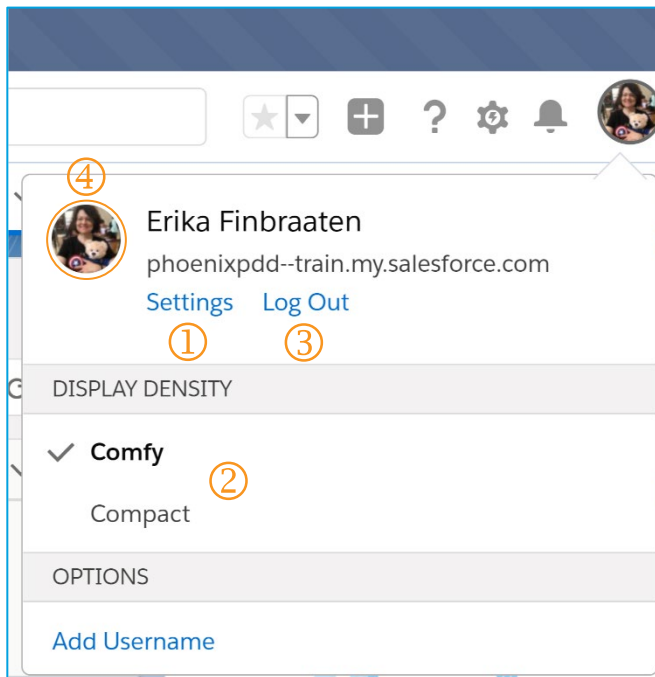
**Setup:** This icon is available in the training environment but will not be available to all users in production.

**Help and Training:** You can view additional Salesforce trainings and support here.

**Notifications:** This icon provides an alert when key events occur in SHAPE PHX that you should know about or that require your attention. Example: if you are mentioned in Chatter posts (explained later) or assigned a task.

**View Profile:** You can view and update your profile, settings, and log out.

## Updating Your Profile



① **Settings:** This gives you access to many different options, including My Personal Information. See below for more information.

② **Display Density:** This setting allows you to determine how densely packed the information will be on your screen, i.e., how many lines will show on the screen at a time.

③ To **Log Out** when you are done for the day, click here.

④ By clicking on the icon here, you can access your *User Details* and change your photo and other information. (See the screenshot below).

⑤ To change the photo, click on the camera icon (in the orange square) next to the photo or picture of the Trailblazer (Figure 7).

⑥ You can even change the banner photo! Just click on the camera icon on the right-hand side of the screen.

⑦ You can also add a mini-bio of yourself by clicking on the pencil icon!

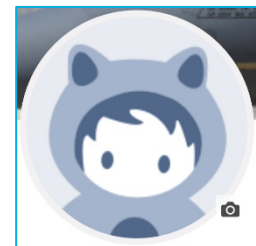
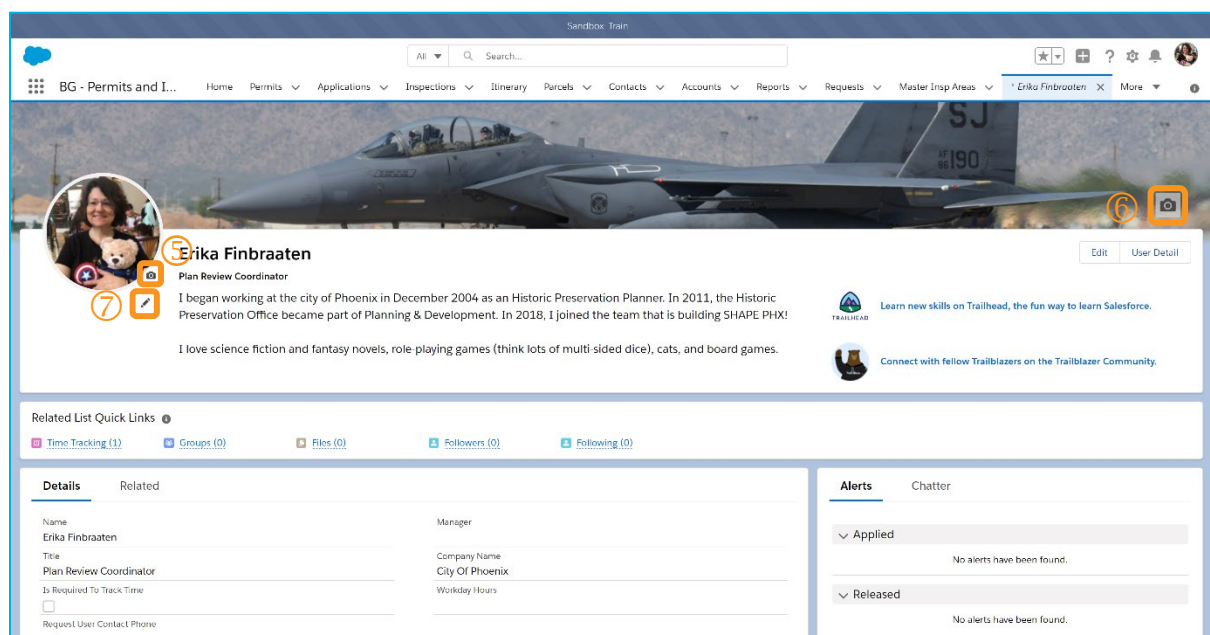
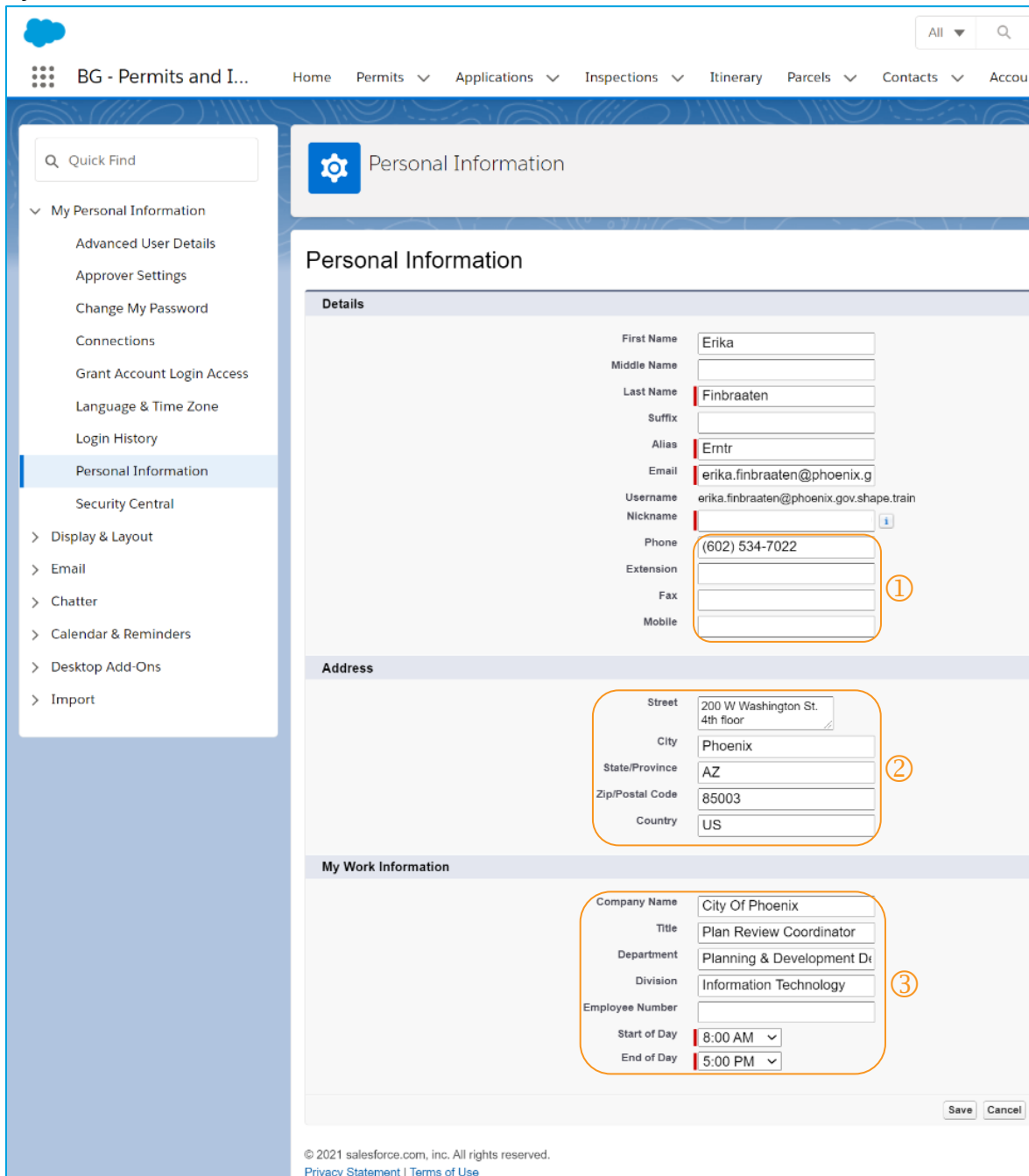


Figure 7 The Trailblazer



## Settings

The *Settings* menu provides access to many important options, such as your *Personal Information*.



**Personal Information**

**Details**

First Name	Erika
Middle Name	
Last Name	Finbraaten
Suffix	
Alias	Emtr
Email	erika.finbraaten@phoenix.g
Username	erika.finbraaten@phoenix.gov.shape.train
Nickname	
Phone	(602) 534-7022
Extension	
Fax	
Mobile	

**Address**

Street	200 W Washington St. 4th floor
City	Phoenix
State/Province	AZ
Zip/Postal Code	85003
Country	US

**My Work Information**

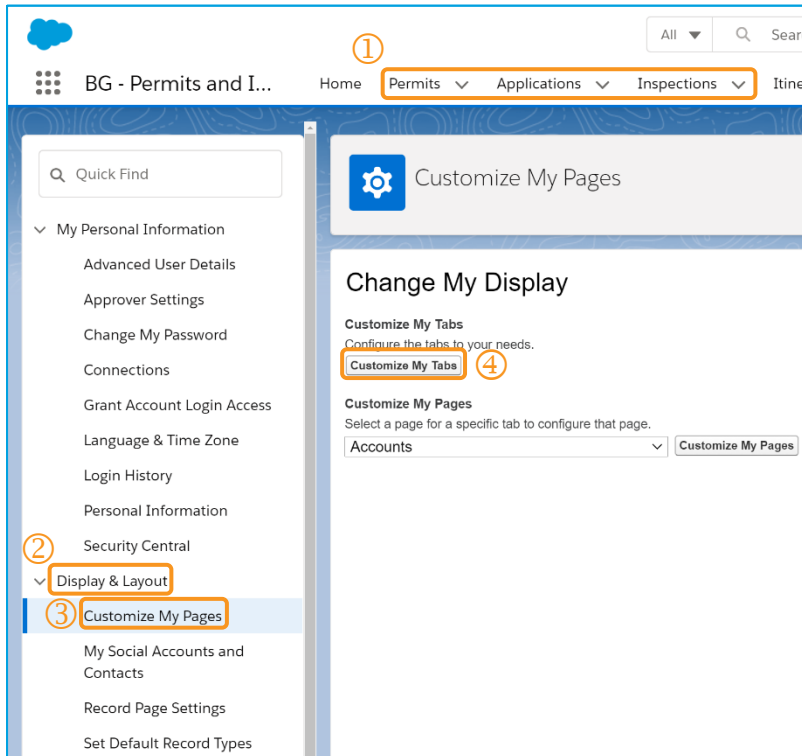
Company Name	City Of Phoenix
Title	Plan Review Coordinator
Department	Planning & Development D
Division	Information Technology
Employee Number	
Start of Day	8:00 AM
End of Day	5:00 PM

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Some of the details will be prefilled, and others will be locked down and accessible only to those with sufficient privileges to make the changes. When you first access the system, take a few minutes to set up your profile and add your contact information, like your phone number (①), work location (②), and department, division, and title (③).

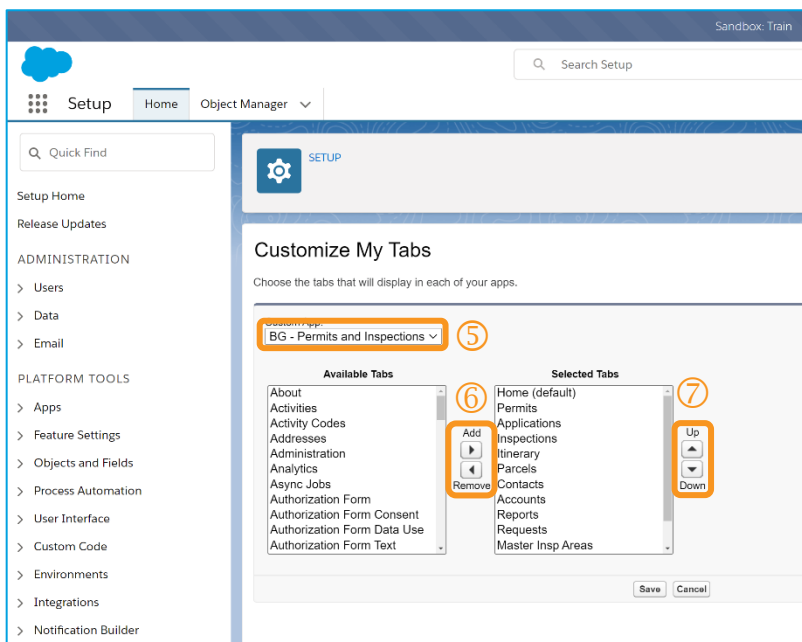
## Customizing the Screens to Fit Your Needs

The tabs at the top of the screen (1) are not static. They can be changed to fit your needs; you can move them around and add tabs you need or remove tabs that you don't. To do so, follow these steps:



- 2 Select *Display & Layout*,
- 3 Then *Customize My Pages*,
- 4 Next click on *Customize My Tabs*, which will take you to the *Customize My Tabs* page in *Setup*.
- 5 Select App that you want to customize. Here we have selected *Permits and Inspections*.

You can *Add* and *Remove* Tabs from this App. For example, if you issue *Permits* but do not perform *Inspections*, you may want to remove *Inspections* from your Tabs. You'll still be able to access them elsewhere, but they won't be at your fingertips.



- 7 You can also move them *Up* and *Down* in priority. If you work on *Permits* and *Reports* more often than anything else, you'll want those listed first.

### Customize My Tabs

Choose the tabs that will display in each of your apps.

Custom App: BG - Permits and Inspections

Available Tabs		Selected Tabs
About	Add	Home (default)
Activities		Permits
Activity Codes	Remove	Applications
Addresses		Inspections
Administration		Itinerary
Analytics		Parcels
Async Jobs		Contacts
Authorization Form		Accounts
Authorization Form Consent		Reports
Authorization Form Data Use		Requests
Authorization Form Text		Master Insp Areas

Up Down

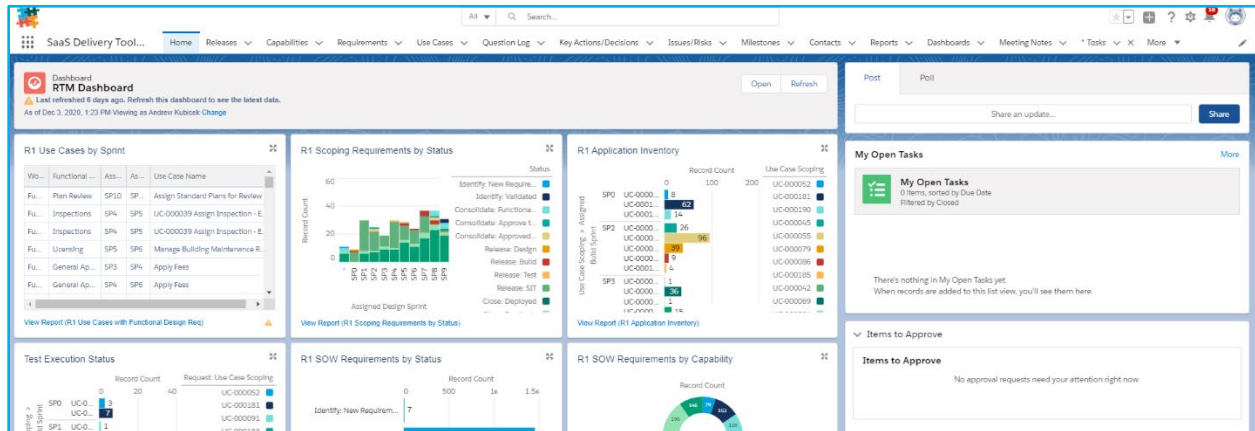
Save Cancel

- ⑧ To Remove the *Inspections* tab, click on *Inspections*, and then
- ⑨ Click on the arrow left pointing (for *Remove*). To Add a tab, click on the right pointing arrow (for *Add*).
- ⑩ Once you have made all of the changes that you wish to make, click *Save*.

## Basic Navigation

### Dashboard

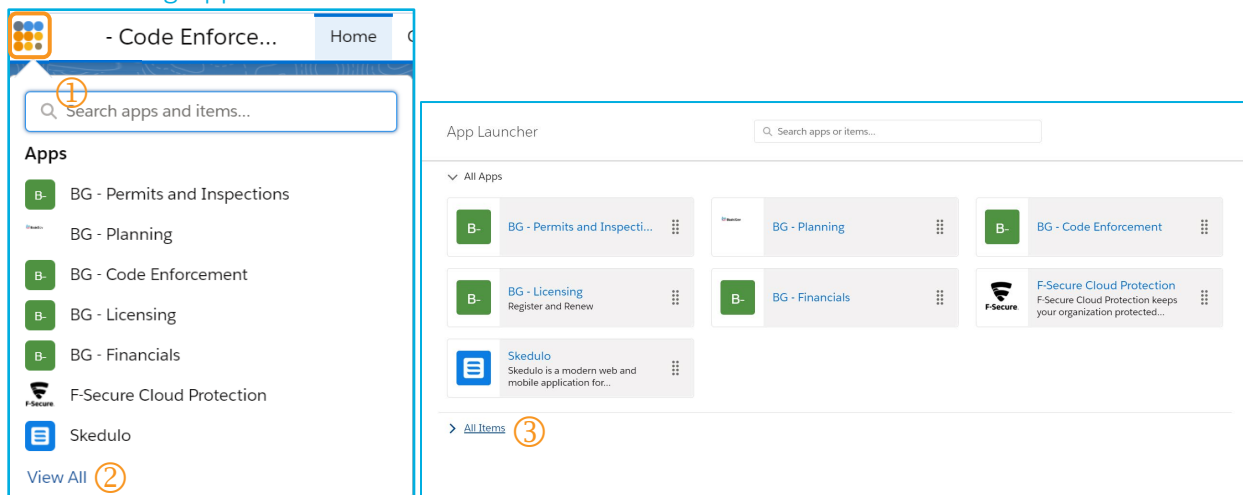
The Dashboard is an interface which shows data from SHAPE PHX reports as visual components such as charts, gauges, tables, metrics, or Visualforce pages, providing a snapshot of key metrics and performance indicators.



### App Launcher (aka “The Waffle”)

Users can access various apps available within SHAPE PHX through the App Launcher.

#### Accessing Apps

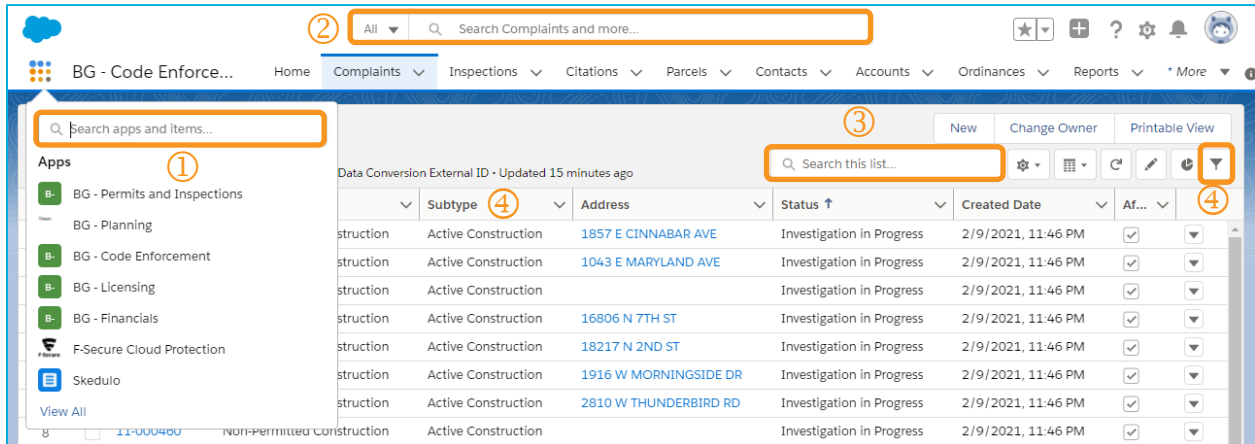


- ① Users have access to various apps and items available in SHAPE PHX by clicking the app launcher aka “The Waffle”.
- ② To view all apps and items in the app launcher, click View All.
- ③ After the clicking View All, a window will open displaying all the apps and items in Salesforce. Click on the All Apps or All Items link(s) to view or minimize the field.

### Searching for a Record

Search is a feature that lets you search for information that matches specified keywords in SHAPE PHX. *Note: There is no wild card in SHAPE PHX to use in your search.*

## Search for Records or Entities

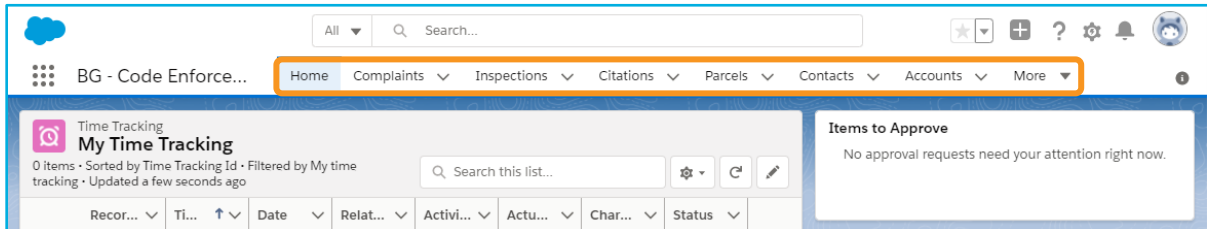


- ① Click on the *App Launcher* and use the search field to look up apps and items provided in the internal organization across all objects.
- ② The *Global Search* field feature is used to find the records (applications, permits, fees, etc.) you want to look up. This feature will search all objects and text fields including subjects, descriptions, phone numbers, and email addresses.
  - By clicking the *All* drop-down arrow, you can limit the scope search to a record needed at the moment. For example, if you want to research Permits only. You would click on the *All* drop-down arrow and select *Permits* from the list and enter the tracking number.
- ③ The *Search This List* feature can be used to search for records within the selected object.
- ④ Use the filter button to filter records based on other fields in the object.
  - For example, if you want to filter Active Construction. You would enter “Subtype” as the field and “Active Construction” as the Value in the filter fields.

## Navigation Tabs

### Primary Navigation Tabs

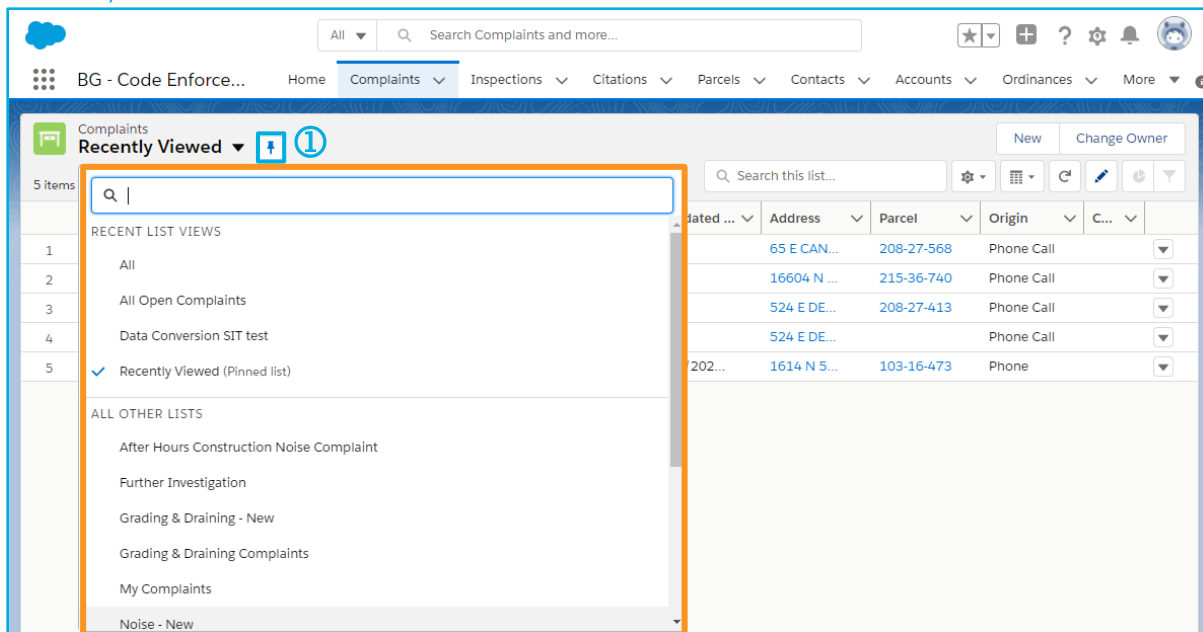
Navigation tabs in Salesforce (SHAPE PHX) let you select and view object home pages.



The primary navigation tabs appear at the top of the screen in SHAPE PHX to enable users to browse different objects. Each tab contains a list of all the records of a particular type, filtered by a user-selected view. Click the relevant tab name to navigate to the respective page to view, organize, track, and maintain all records within a tab. For example, clicking the *Accounts* tab displays recently viewed accounts.

*Note: The tabs displayed may differ based on the user role.*

## Recently Viewed Records



In any tab selected, recently viewed records will appear in your list view. To view or create a different list view, click on the *Recently Viewed* drop-down arrow and choose one by clicking it. List views are filtered and structured categories of records in SHAPE PHX.

- Users can view the lists of records from a particular tab. The default feature of any list view is *Recently Viewed*. This list view will always be blank.
- Each object has its own set of prebuilt List Views available to all users. Users can also customize their own List Views to simplify navigation.
- On the *Inspections tab*, the *Recently Viewed* list view will show any inspection from any module - code enforcement, permits, etc. that users recently viewed.

① *To have a list view automatically default each time you open a tab, click on the pinned list icon. To change a pinned list, select a new list view from the list in the "All Other Lists" section (shown above) and click on the pinned list icon.*

### Navigate to a Record

To navigate and open a Record, users can click on any blue hyperlink in the List View and Related List Quick Links section or Related tab.



## Record List View

50+ Items - Sorted by Number - Filtered by All permits - Updated a few seconds ago

Number	Type	Status	Street	Applicant	Issue Date	Alert
1 <b>CTR-102001416</b>	Building	Submitted				🔔
2 CTR-102001417	Building	Submitted				🔔
3 CTR-102001418	Building	Issued				🔔
4 CTR-102001419	Building	Submitted				🔔
5 CTR-102001420	Building	Pending Plan Review		Test Contact		🔔
6 CTR-102001421	Building	Issued		Test Contact	11/26/2020	🔔
7 CTR-102001422	Building	Issued		Test Contact	11/26/2020	🔔
8 CTR-102001424	Building	Issued		Test Contact	11/26/2020	🔔
9 CTR-102001425	Building	Pending Plan Review		Payal Jagtap		🔔
10 CTR-102001426	Building	Approved Pending Payment				🔔
11 CTR-102001427	Building	Final Review				🔔
12 CTR-102001428	Building	Approved Quick Permit		Payal Jagtap		🔔
13 CTR-102001429	Building	Final Review		Test Contact		🔔
14 CTR-102001430	Building	Pending Plan Review		Test Contact		🔔
15 CTR-102001431	Building	Approved Pending Payment		Test Contact		🔔

- ① To open a record in the List View. Click on a blue hyperlink to a Record you want to view.

## Related List Quick Links

Permit CTR-102001416

Permit Type: Construction and Trades Residential | Status: Submitted | Issue Date: | Expiration Date: |

Related List Quick Links

- Requests (0)
- Contractors (0)
- Work Items (10+)
- Submissions (0)
- Reviews (0)
- Inspections (0)
- Fees (0)
- Payments (0)
- Permit History (0)
- Time Tracking (0)

Details **Related** Activity Chatter Alerts

Requests (0) Contractors (0) Work Items (10+)

Number	Description	Unit of Me...	Quantity	Value Per U...	Total Item V...
1 0000313	Existing SF prior to Add...	SQ FT	1.0	\$0.00	\$0.00
2 0000314	New SF 1st Floor livable	SQ FT	2.0	\$111.00	\$222.00
3 0000315	New SF 2nd Floor livable	SQ FT	1.0	\$101.90	\$101.90
4 0000316	New SF 3rd Floor livable	SQ FT	4.0	\$101.90	\$407.60
5 0000317	New SF Detached Build...	SQ FT	3.0	\$101.90	\$305.70
6 0000318	New SF Finished Base...	SQ FT	1.0	\$101.90	\$101.90
7 0000319	New SF Garage	SQ FT	1.0	\$39.60	\$39.60
8 0000320	New SF Other	SQ FT	3.0	\$39.60	\$118.80
9 0000321	New SF Patio	SQ FT	1.0	\$39.60	\$39.60
10 0000322	New SF Porch	SQ FT	4.0	\$39.60	\$158.40

Activity: No next steps. To get things moving, add a task or set up a meeting.

- ② To navigate to a related record from within an open record, click on the blue hyperlink in the *Related List Quick Links* section.
- ③ In the record, you can click the *Related* tab to view other related records. Click on the blue hyperlink to open the record you want to view.

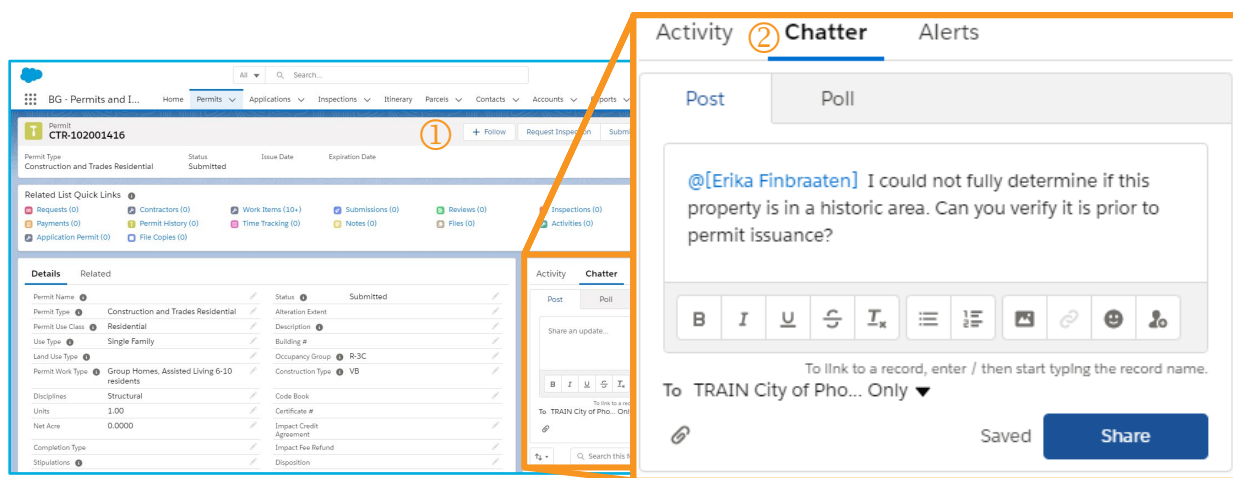
## Chatter

### What is Chatter?

**Chatter** is a collaborative application that allows users to stay updated on recent developments to a record. It is a business communication tool designed to help users to connect with their peers and share real-time business information securely. It enables them to share and collaborate, create a community, follow people or groups, and seek expert advice. This functionality can be used to follow permits, applications, plan reviews, etc. in SHAPE PHX.

The Chatter Feed is a history of updates and conversation between teams related to a specific record. Users can leverage the Chatter Feed to facilitate collaboration and promote transparency on record types.

### How to use Chatter



- ① **Follow Button:** You can click the *Follow* button on the desired record to be notified via email of any updates made by any City employee to that record
- ② **Chatter Tab:** Click the *Chatter* tab to display the Chatter Feed. You can view a history of updates on the record from this tab. You can also post updates to keep your colleagues informed.
- ③ **Comment Box:** Enter your updates in the comments box. Remember to *@mention* the person who you are communicating with, so that he/she is notified once you share the update.

*Note: Only enter appropriate comments in the Comment Box. Comments entered in Chatter are public record, recorded in the system and viewable by all users that have access to that record.*

- ④ **Formatting Toolbar:** Use the formatting toolbar to format and organize text or insert images.
- ⑤ **Share Button:** Click *Share* to communicate your updates to anyone you have *@mentioned* and everyone who is following the record. Once shared, a record of the communication lives in the Chatter Feed.

## Permit Classification

### Old Permit Nomenclature

KIVA was PDD's Permit, Plan Review, Land Information System (LIS) & Inspections Tracking System for over 28 years. It managed the plan review process and issuing and inspection of permits for all development in the city of Phoenix. KIVA used an extensive list of permit and plan review codes when creating the customers' documents. Each code was categorized into one of four modules: plan review, permit (building), general and occupancy.

#### Data Conversion

When it came time to initiate SHAPE PHX, only active (in-flight) records and those that expired after January 1, 2021, were transferred to the new application. To minimize confusion and simplify research, the existing permit or plan review numbers from KIVA were retained and work will continue under those numbers until completed. Any new permits or plan reviews will be given SHAPE PHX numbers.

#### ARK Land Management Information System

Permits that were not considered active were copied into ARK, PDD's Land Management Information System, which houses the legacy data from KIVA for staff to research and review as needed without the expense of training staff to use KIVA or maintain it. The list of [KIVA Permit and Plan Review Types](#) is available to help staff determine which type of permit or plan review they are viewing in ARK, when doing research, or SHAPE PHX, when looking at converted records.  
(Not available to view on cell phones)



### New Permit Nomenclature

There were over 400 permit and plan review types in KIVA. SHAPE PHX simplifies things by using five primary descriptors for each permit. This will determine fees and downstream workflows.

#### Use Class

There are two *Use Class* options in SHAPE PHX:

- a. Residential
  - i. Residential
  - ii. Residential Sales or Construction Office
- b. Commercial (*this option will be available in release 2*)

#### Use Type

The next descriptor describes is the *Use Type*, for Release 1, which is restricted to primarily Residential permit types. They are:

- a. Single Family
- b. Single Family Attached
- c. Duplex
- d. Mobile Home
- e. Factory Built Building

### Permit Type

Rather than calling everything a permit as we did in KIVA, they will be classified as one of the following:

- a. Complaint
- b. Equipment
- c. Inspection
- d. License/Registration
- e. Review
- f. Clearance
- g. Permit

### Work Type

The next step will be to select the *Work Type* to be completed. Only those types associated with the *Permit Type* selected will be available in the drop-down list. For example, if you select civil, then work types Lateral Tap, Pavement Restoration, and Driveway are available.

They are:

- a. Group Homes, Assisted Living
- b. Change of Occupancy
- c. Revision to Approved Plan
- d. New Primary Building w/or w/o accessory structures
- e. New Accessory structure
- f. Addition and remodel
- g. Addition only
- h. Remodel – interior only
- i. Remodel – with exterior impact
- j. Repairs, Replacements
- k. Upgrades (Mechanical, Elevator)
- l. Service Upgrade – Electrical
- m. Installation - Mobile Home, Factory Built Building
- n. Modification - Elevator
- o. Demolition
- p. Submitting a New Standard Plan
- q. Standard Pool
- r. Custom Pool
- s. Fence and / or Retaining Wall
- t. Temporary Fence
- u. Extended Hours
- v. Lateral Tap
- w. Pavement Restoration
- x. Driveway



### Disciplines

To enable the system to select the proper reviews and inspections, one or more of the following disciplines are selected.

- a. Structural
- b. Electrical
- c. Mechanical
- d. Plumbing

And with that, a permit has been assembled. The next steps include adding information about the plan review, address, applicant, and contractor information.

### Plan Review Process

There are two primary descriptors for the plan review process. They are:

#### *Plan Submission type:*

- a. Quick Permit<sup>1</sup>
- b. Electronic Plan Review
- c. Paper Plan Review
- d. Self-Certified

#### *Plan Review type:*

- a. Self-Certified
- b. Permit by Inspection
- c. Minor
- d. Major

A list of the permit abbreviations and the rest of the numbering scheme are available in [Appendix C](#).

Rather than utilizing the old permit types and scope codes, SHAPE PHX will gather the information in a new way that not only allows PDD to report on it more accurately, but to define the work being performed and assess fees and assign resources more easily. Through a series of questions, which determine then next group of choices available staff using SHAPE PHX or the customer using the Customer Portal can easily define the permit for which the application is being submitted.

See the table on the next page for an illustration of how this works.

---

<sup>1</sup> Quick Permits are the same as the online permits in KIVA.

**Permit Name:** New HVAC  
**Property Address:** 6540 N 7th Ave #50  
**Permit Number:** CTR-102101853  
**Description:** Replace rooftop HVAC with larger unit

**NEW PERMIT**

- **Construction & Trades Residential**
- Civil
- Demolition
- Elevator – New
- Elevator – Repair or Modification
- Pool
- Quick Estimate
- Quick Permit
- Standard Plan

**PERMIT**

- **Construction & Trades Residential**
- Estimate

**PERMIT USE CLASS**

- **Residential**
- Residential Sales / Construction Office

**USE TYPE**

- **Single Family**
- Single Family Attached
- Duplex
- Mobile Home
- Factory Built Building

**LAND USE TYPE**

- **Single Family**

**WORK TYPE<sup>1</sup>**

- Group Homes, Assisted Living 6-10 Residents
- Change of Occupancy
- Revision to Approved Plan
- New Custom home w/ or without accessory structures
- New Accessory Structure
- Addition and Remodel
- Addition only
- Remodel – interior only
- Remodel – with exterior impact
- **Repairs, Replacements**
- Upgrades – Mechanical, Elevator, Energy
- Service Upgrade – Electrical
- New Standard Home from Standard Plan
- Fence and / or Retaining Wall
- Temporary Fence
- Installation – Mobile Home, Factory Built Building

**WORK ITEMS<sup>2</sup>**

- Accessory Structure
- Construction Details
- Electrical
- Fence and Retaining Wall
- **HVAC**
  - Evaporative Cooler
  - Install Evaporative Cooler
  - Replace Furnace or Air Conditioner
  - **Replace Rooftop AC with new support needed**
- New and Addition
- Plumbing and Mechanical
- Remodel
- Roofing
- Water and Sewer

<sup>1</sup> **WORK TYPES:** (SHAPE PHX) The method used to add fees to the PERMIT while at the same time describing the work the PERMIT covers.

<sup>2</sup> **WORK ITEMS:** (SHAPE PHX) Items available from a pull-down menu of options that will define the description of the work and also assist in creating the fees for the PERMIT. Work Items can be checked to either display, or not display, on printed permits.



## How Does This Translate?

Looking at this residential demolition permit (RDEM 20014948) that was imported during data conversion, you can see how the fields from the old system and SHAPE PHX match up. As mentioned above, permits that began in KIVA but were converted to SHAPE PHX retained their KIVA numbering. Any new permits associated with the property will be given a SHAPE PHX number.

**Permit RDEM 20014948** ①

Permit Type: Demolition | Status: Issued | Issue Date: 3/9/2020 | Expiration Date: 5/8/2020

**Related List Quick Links**

- Requests (0)
- Contractors (1)
- Work Items (0)
- Submissions (0)
- Reviews (0)
- Inspections (1)
- Fees (1)
- Payments (0)
- Activities (0)
- Related Complaints (0)

**Details** | Related

**Permit Name** ②: INTERIOR KITCHEN AND BATH DEMO

**Permit Type**: Demolition

**Permit Use Class**: Residential

**Use Type**: 1

**Permit Work Type** ③: Demolition

**Status**: Issued

**Description**: INTERIOR KITCHEN AND BATH DEMO

**Building #**: 1

**Location Information**

Address: 3908 N 42ND PL

Historic Preservation

① Permit Number  
② Permit Name  
③ Permit Work

File Actions Query Permits Land Project Insp Help Window

PERMIT ENTRY

Application Address Owner Quantity Struct Scope Discipline Profess Applicant Fee Calc C Of A Payments Issue Pmt Plan Route Insp Hist

**Application Creation**

Scope ③: DEMOLITION | Description: DEMO PERMIT ONLY

Application ①: RDEM 20014948 | Permit Name ②: INTERIOR KITCHEN AND BATH DEMO

Project Number: 99-40287 | Project Name: LONG MANOR | Update Project

**Site Coordinate**

SE Coordinates N/S: | SE Coordinates E/W: | Qtr Section: |  
NW Coordinates N/S: | NW Coordinates E/W: | Zoning: |

CITA (Sec 114) Violation |  Temp |  Issue | Issued: CES1 | 09-MAR-2020

How Taken: COUNTER

Required C of O: COFC | CERTIFICATE OF COMPLETION

App Lead: COUNTER9 | COUNTER, NINE

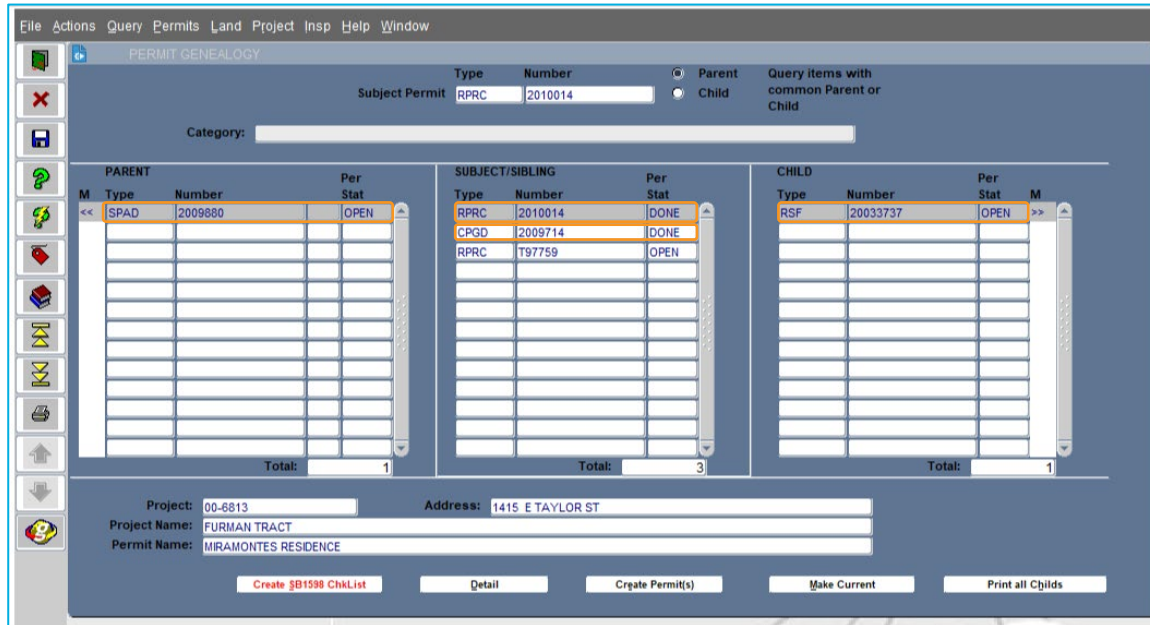
Accepted By: JEA | EARHART, JOHN | Date: 09-MAR-2020

Temporary Number: RDEM | T804794

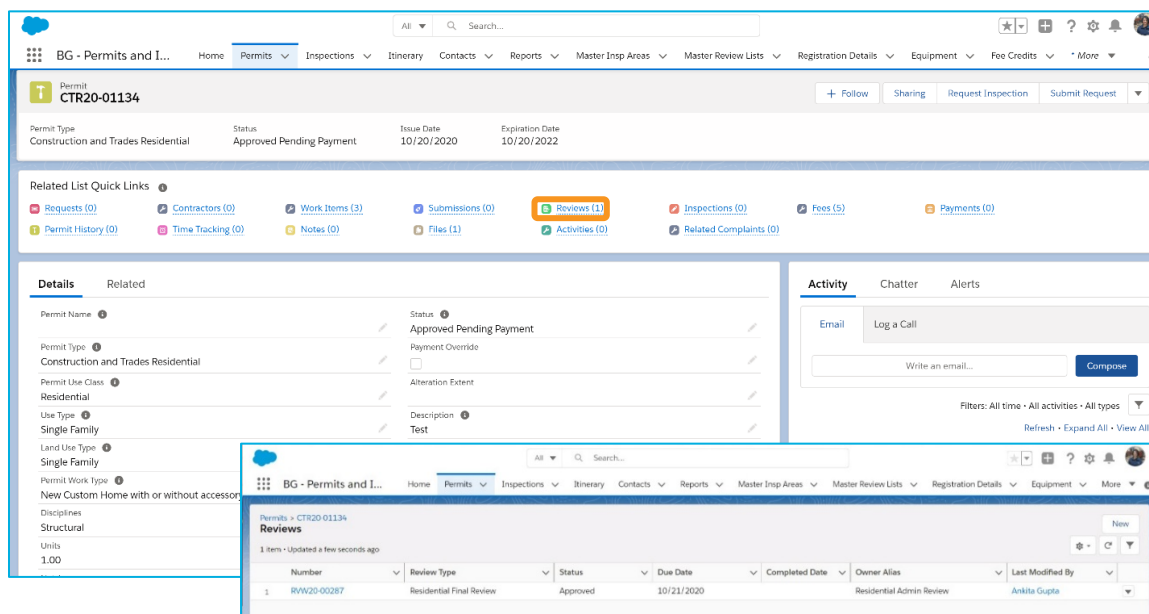
① Application  
② Permit Name  
③ Scope

## One Permit with Associated Reviews

In the past, a new custom home had an SPAD, an RPRC (RES PLAN REVIEW - CUSTOM), a CPGD (CIVIL PLAN GRADING & DRAINAGE), and finally, the RSF (RES SINGLE FAMILY) permit. City of Phoenix customers applied for the plan review (RPRC), and any associated reviews, and once the plan reviews were completed by staff, they applied for the permit (RSF).



In SHAPE PHX, there will be one *Object*, the *Permit*, to which all *Reviews* are associated, and they are accessible via the *Reviews* hyperlink. You can either click on the link to open it in the current window, or right-click to open it in a new tab or a new window.

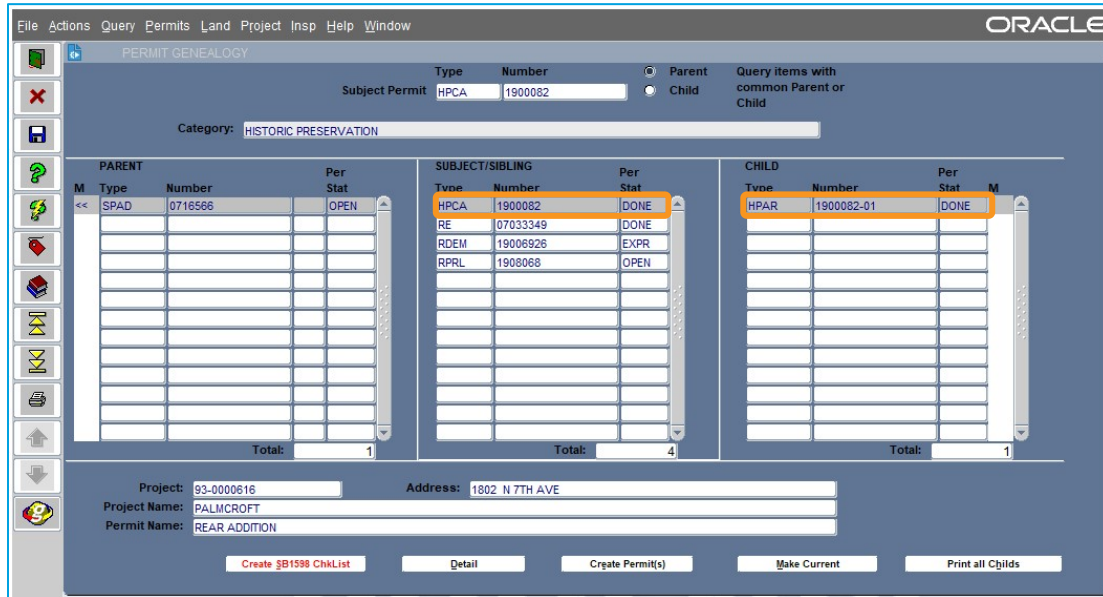




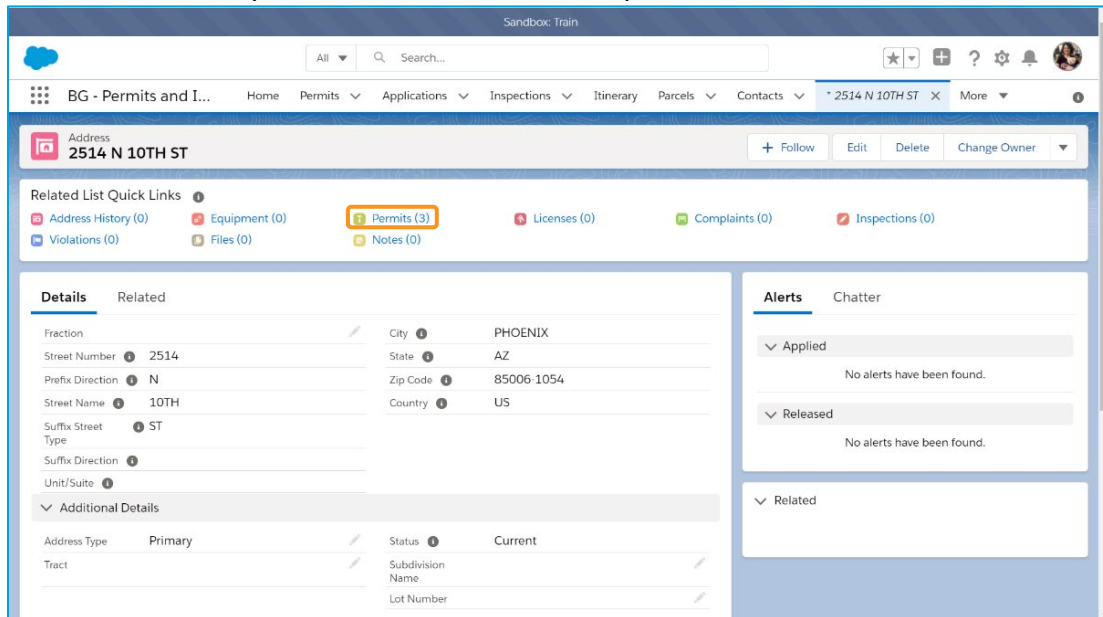
Some of this functionality will not be activated until Release 2, however, when most of the Civil permits are added to the system.

### Where is Permit Genealogy in SHAPE PHX?

To show the relationship between a permit, plan review, revision or other items related to a parcel, KIVA had what was referred to as Permit Genealogy. Staff could easily discern that HPAR 1900082-01 was a revision to HPCA 1900082.



In SHAPE PHX, this is accomplished through related or linked records. Hyperlinks under *Related List Quick Links* identify areas where associated records can be found. For example, for this parcel, if you click on *Permits*, which is followed by the number three in parenthesis. These associations are made by the address and assessor's parcel number.



That click will take you to the *Permits* screen listing all permits associated to that property.

Number	Permit Type	Permit Work Type	Status	Street	Applicant	Issue Date
1 ENR-452100002	Energy System	Installation	Draft			
2 CTR-102100081	Construction and Trades Residential	Fence and / or Retaining Wall	Issued			4/12/2021
3 PR-122100003	Pool	Standard Pool	Corrections Required			
4 CTR-102100083	Construction and Trades Residential	Addition and remodel	Admin Review			
5 CTR-102100087	Construction and Trades Residential	Upgrades - Mechanical, Elevator, Energy System	Submitted			

In this next example, notice that there are four *Inspections*, one *Complaint*, and one *Violation*.

Address: 16425 N 33RD DR

Related List Quick Links:

- Address History (0)
- Equipment (0)
- Permits (0)
- Licenses (0)
- Complaints (1)
- Inspections (4)
- Violations (1)
- Files (0)
- Notes (0)

Details:

Fraction: \_\_\_\_\_ City: PHOENIX

Street Number: 16425 State: AZ

Prefix Direction: N Zip Code: 85053-2902

Street Name: 33RD Country: US

Suffix Street Type: DR

Suffix Direction: \_\_\_\_\_

Alerts:

- Applied: No alerts have been found.
- Released: No alerts have been found.
- Related: \_\_\_\_\_

Sandbox: Train

Addresses > 16425 N 33RD DR

### Violations

1 item · Updated a few seconds ago

Number	Type	Status	Comments	Location	Compliance D...	Corrected Date	Complaint
1	<a href="#">VI-0306694</a>	<a href="#">PERMIT VIOLATION</a>			2/24/2012	1/24/2012	

As before, clicking on the hyperlink will take you to the screen with the list of violations associated to that address. From here, you can select the Violation by clicking on the number to view the details (①). Just like on the Web sites that you visit when you are at home, everything that is blue and underlined is a hyperlink in SHAPE PHX, too. For example, clicking on *Permit Violation* (②) on either the *Violations* list or the violation itself, takes you to the *Permit Violation* screen.

Sandbox: Train

BG - Permits and I... Home Permits Applications Inspections Itinerary Parcels Contacts \* PERMIT VIOLATION X \* More

### Violation VI-0306694

+ Follow Edit Delete Clone

**Details** Related

Ordinance	PERMIT VIOLATION	Status	Closed - Corrected
Type	<a href="#">PERMIT VIOLATION</a>	Complaint	<a href="#">11-001478</a>
Violation Code	PCC 2006	Violation Date	1/24/2012
Violation Code Number	9-113.6.3	Compliance Due Date	2/24/2012
Address	<a href="#">16425 N 33RD DR</a>	Corrected Date	1/24/2012
Days to correct - User defined	30		

**Description**

Charge Description  
Failure to obtain the required building permit.

Description  
Construction work was or is being performed without the required building permit. Using, maintaining or occupying a structure that was built, altered or improved without a valid building permit.

**Alerts** Chatter

Applied  
No alerts have been found.

Released  
No alerts have been found.

Related

The *Permit Violation* screen gives the details on the Phoenix City Code section that has been violated, its description, and what the required remedy would be.

Ordinance  
PERMIT VIOLATION

Related List Quick Links ●

[Violations \(10+\)](#)

**Details**

Related

Name PERMIT VIOLATION	Code PCC 2006
Code Number <b>9-113.6.3</b>	Section
Days to correct 0	Section Number
Citation Amount	Active <input type="checkbox"/>
Dangerous <input type="checkbox"/>	Owner <a href="#">Data Conversion</a>
Estimated Cost	First Reinspection
Data Conversion External ID KIVA_9-113.6.3_10/13/2014	Second Reinspection
Short Description Performing work without permit.	
Description Construction work was or is being performed without the required building permit. Using, maintaining or occupying a structure that was built, altered or improved without a valid building permit.	
Abatement Requirement Obtain a building permit from the Planning and Development Department located at 200 W Washington Street 2nd floor.	
Charge Description Failure to obtain the required building permit.	
Created By <a href="#">Data Conversion</a> , 2/9/2021, 3:34 PM	Last Modified By <a href="#">Data Conversion</a> , 2/9/2021, 3:34 PM
Record Type Ordinance	

This provides easy access to information that PDD staff once had to look up on the intranet, such as the section of City Code for which a violation had been written, saving them time while interacting with the customer. This is just one of the new features of SHAPE PHX that is designed to improve staff work experience and customer service.

## Where is My Tickler?

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*This aspect of [Getting Started with SHAPE PHX](#) is under construction. We will update you when more information is available.*

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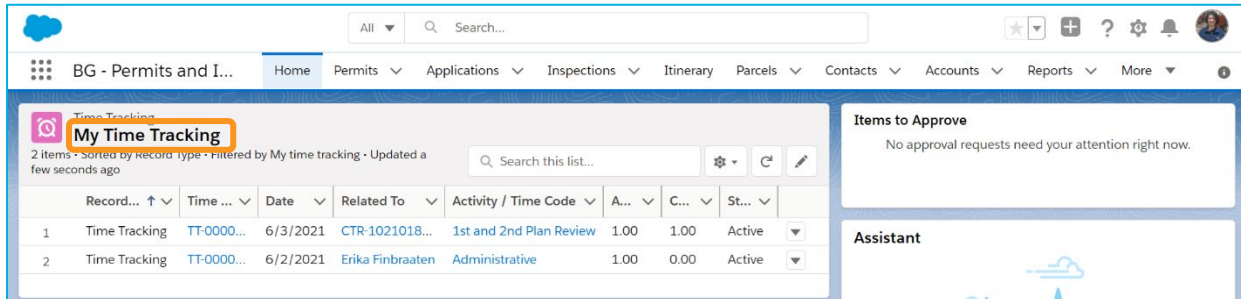


## Time Tracking

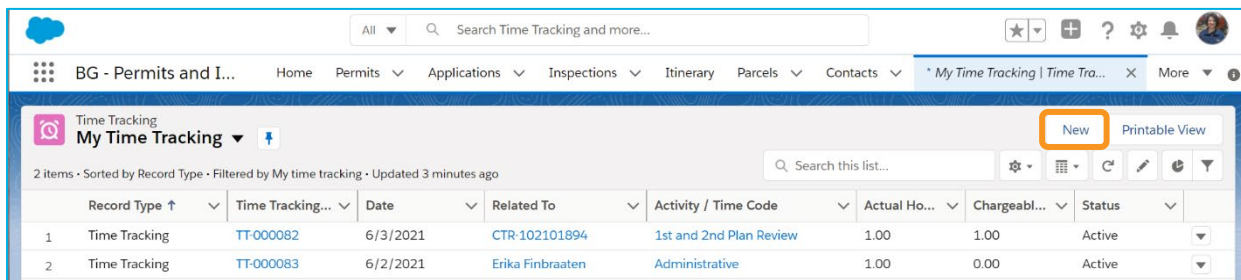
Many PDD staff are required to track their time as part of their daily activities, and this practice will continue in SHAPE PHX. Time can be entered from the Time Tracking screen or from the Permit, Plan Review, or Inspection on which staff is working. The list of new Activity/Time Codes is in [Appendix J](#) of this document.

### Administrative Time

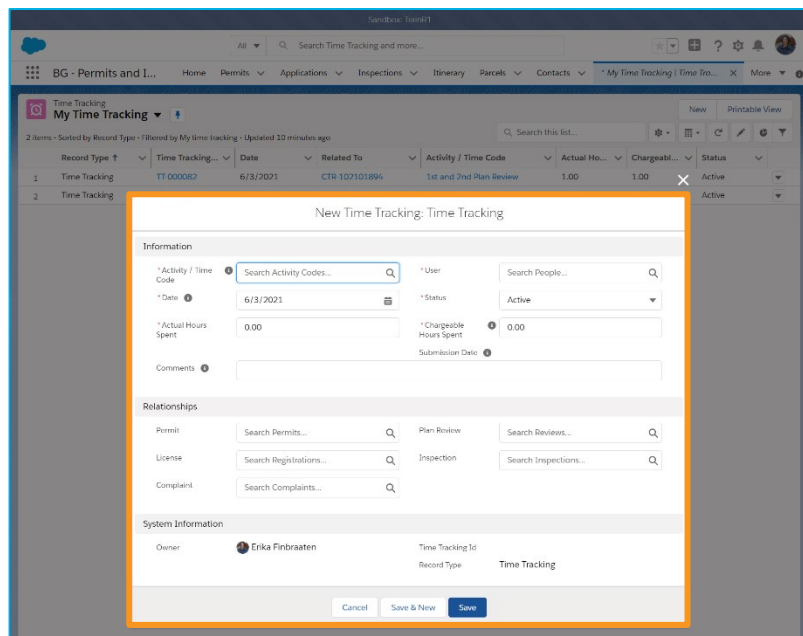
To enter administrative time, that which is not billable or associated with a Permit, click on *My Time Tracking* from the Home Screen.



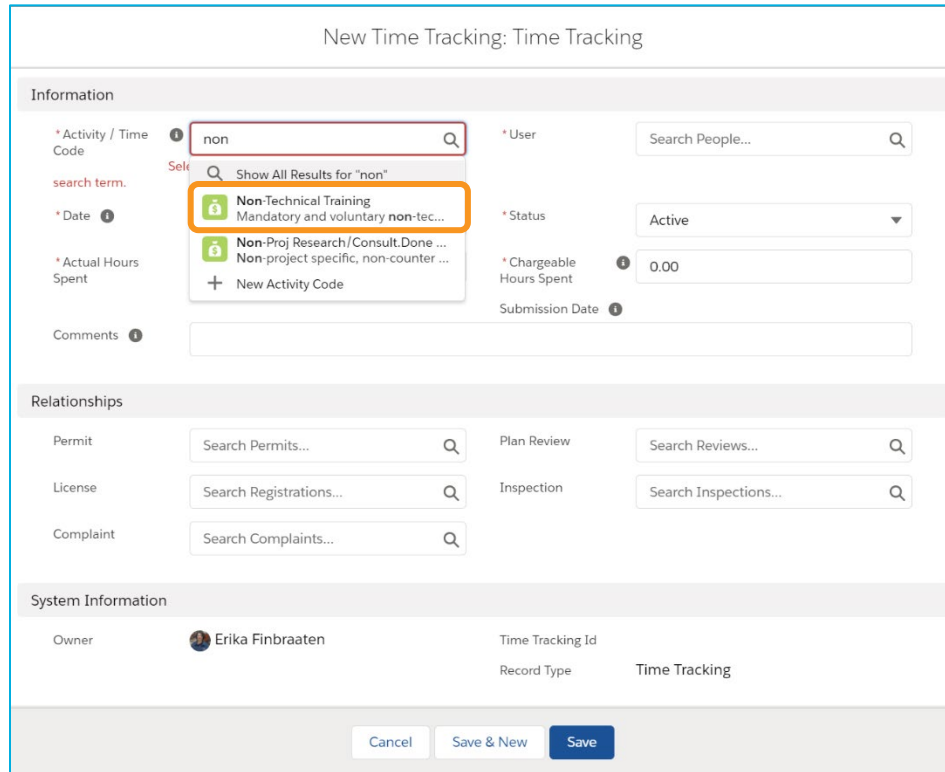
On the Time Tracking screen, you can pin lists such as All, My Time Tracking, or Recently Viewed. To enter time from this screen, click on *New*.



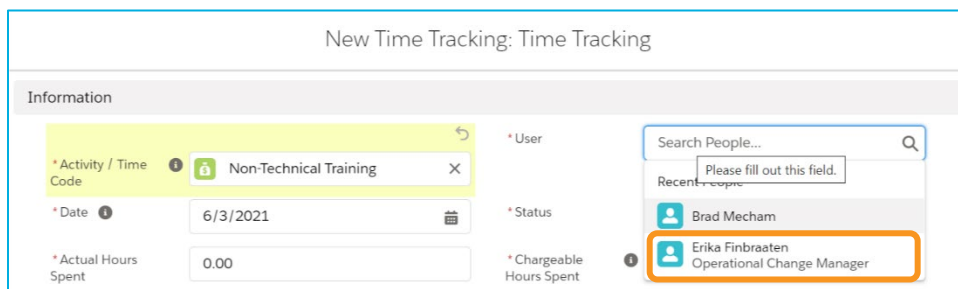
The *New Time Tracking* screen (to the right) will pop up over the current screen for you to enter your time.



In this example, we will log time for the *Getting Started with SHAPE PHX* class. Check the “Time Tracking Activity Codes” in [Appendix J](#) for the appropriate Activity Code to enter into the *Activity / Time Code* box. You will need at least two characters from the code to begin the search. In the *Activity / Time Code* box, enter the beginning of the code Non-Technical Training. As you can see, the search brings up the results that match the search parameters. Select *Non-Technical Training*.



In the *User* field, enter your name, or select it from the list if it is available. Other names may appear in the list if you have reviewed their information in SHAPE PHX.



If you are not entering the time on the same date as the event occurred, be sure to correct the *Date* to accurately record the day that you took the training class.

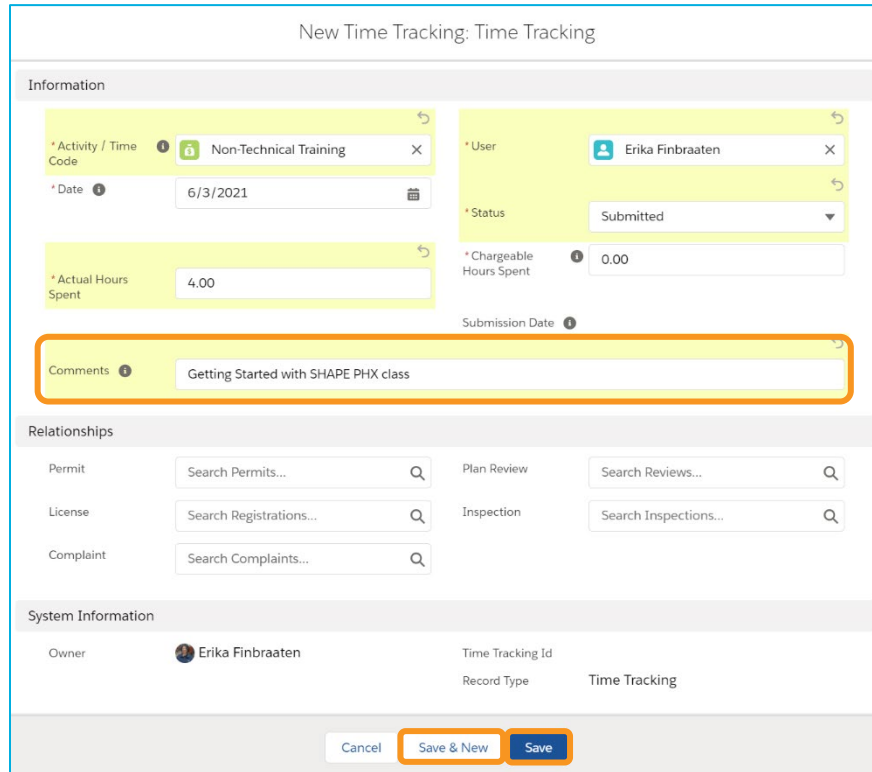
The *Status* options are *Active*, *Submitted*, and *Re-opened*. While you are recording time, the status should be *Active*. Once the record is completed, change the status to *Submitted*. If you need to modify a record that has been *Submitted*, you must contact your supervisor to have the

record *Re-opened*. An error message will display if you attempt to reopen a record that you created.

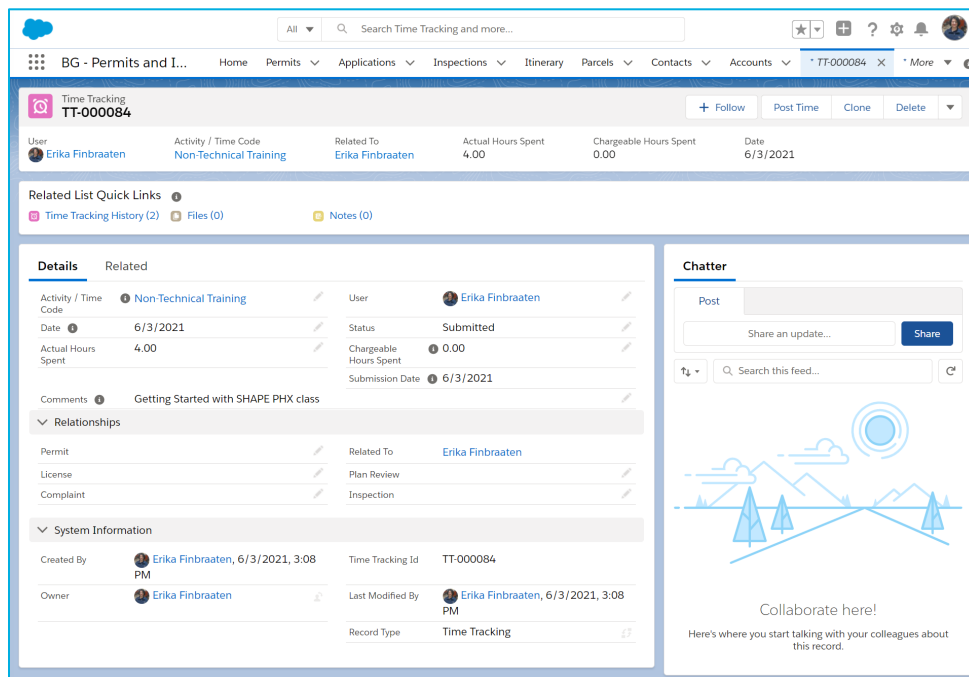
Enter the time spent in the class, 4 hours, and the chargeable or billable hours, 0 hours, next.



Enter *Comments* describing the activity, if appropriate. Since this Activity is not related to a review or inspection, you can now click *Save* or *Save & New*.



If you click *Save*, you will receive a message that the record has been created and the new record will appear on your screen. If you click *Save & New*, you will see the message that the record has been created and a *New Time Tracking Record* entry box will appear.



1      2      3

Time Tracking  
TT-000084

User: Erika Finbraaten

+ Follow   **Post Time**   Clone   Delete

Activity / Time Code	Related To	Actual Hours Spent	Chargeable Hours Spent	Date
Non-Technical Training	Erika Finbraaten	4.00	0.00	6/3/2021

To enter new records, you can also click on *Post Time*. 1 From this screen, you'll notice that your name is already filled in where the *User* is required.

### Post Time

\* Activity / Time Code ?

\* Status

Active

\* Actual Hours Spent

\* Chargeable Hours Spent ?

\* Date ?

Submission Date ?

Permit

Plan Review

License

Inspection

Complaint

User

Erika Finbraaten
×

Comments ?

Cancel   Save

You can also *Clone* the record. 2 This duplicates all the attributes of the record being cloned. You could then change the date, hours, and description of the class to SHAPE PHX Inspections & Skedulo if you would like.

### New Time Tracking: Time Tracking

**Information**

\* Activity / Time Code ?

Non-Technical Training ×

\* User

Erika Finbraaten ×

\* Date ?

\* Status

Submitted

\* Actual Hours Spent

\* Chargeable Hours Spent ?

Submission Date ?

Comments ?

**Relationships**

Permit

Plan Review

License

Inspection

Complaint

**System Information**

Owner

Erika Finbraaten

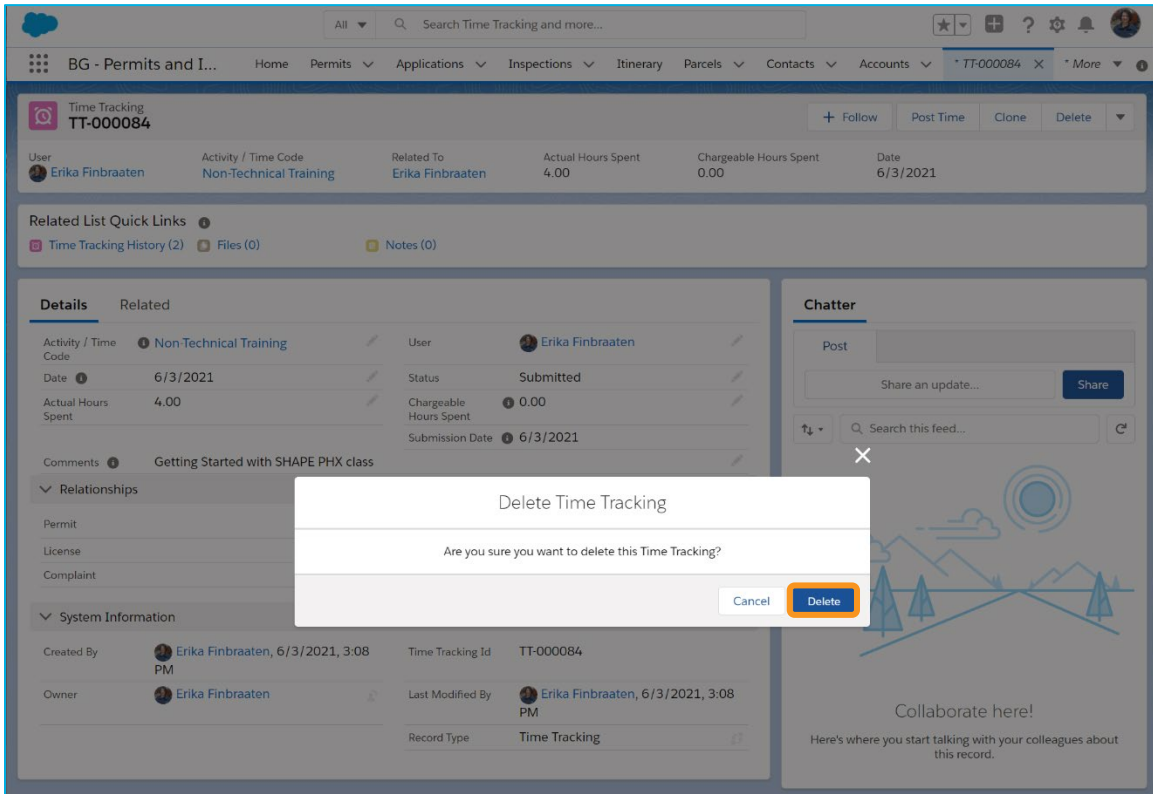
Time Tracking Id

Record Type

Time Tracking

Cancel   Save & New   Save

If you need to delete a record, click *Delete*. 3 The system will verify that you are certain that you wish to do so. If you are, click the *Delete* button in the pop-up window as shown below.



## Billable Time

The easiest way to record Billable or Chargeable hours is from within the Object to which you wish to associate the time. As you have seen, it is possible to indicate the relationship between the time entered on the screen when you created the record from the Time Tracking screen, but you must know the Permit, Plan Review, License, Inspection, or Complaint number to do so.

**New Time Tracking: Time Tracking**

**Information**

\*Activity / Time Code: 1st and 2nd Plan Review

\*Date: 6/3/2021

\*Actual Hours Spent: 0.00

\*User: Search People...

\*Status: Active

\*Chargeable Hours Spent: 0.00

Submission Date

Comments

**Relationships**

Permit: Search Permits...

License: Search Registrations...

Complaint: Search Complaints...

Plan Review: Search Reviews...

Inspection: Search Inspections...

**System Information**

Owner: Erika Finbraaten

Time Tracking Id

Record Type: Time Tracking

Buttons: Cancel, Save & New, Save

To quickly associate the time with the record, click on *Time Tracking* from the *Related Listed Quick Links*. If the link is not showing, click *Show All* (where *Show Less* appears now).

Permit: CTR-102101894

Permit Type: Construction and Trades Residential

Status: Plan Review

Issue Date

Expiration Date

**Related List Quick Links**

- Requests (0)
- Inspections (0)
- Files (1)
- Contractors (0)
- Fees (1)
- Activities (0)
- Work Items (2)
- Payments (1)
- Related Complaints (0)
- Milestones (1)
- Permit History (10+)
- Application Permit (0)
- Submissions (6)
- Time Tracking (1)**
- File Copies (0)
- Reviews (0)
- Notes (1)

Show Less

From the *Time Tracking* screen, click *Post Time*.

Permits > CTR-102101894

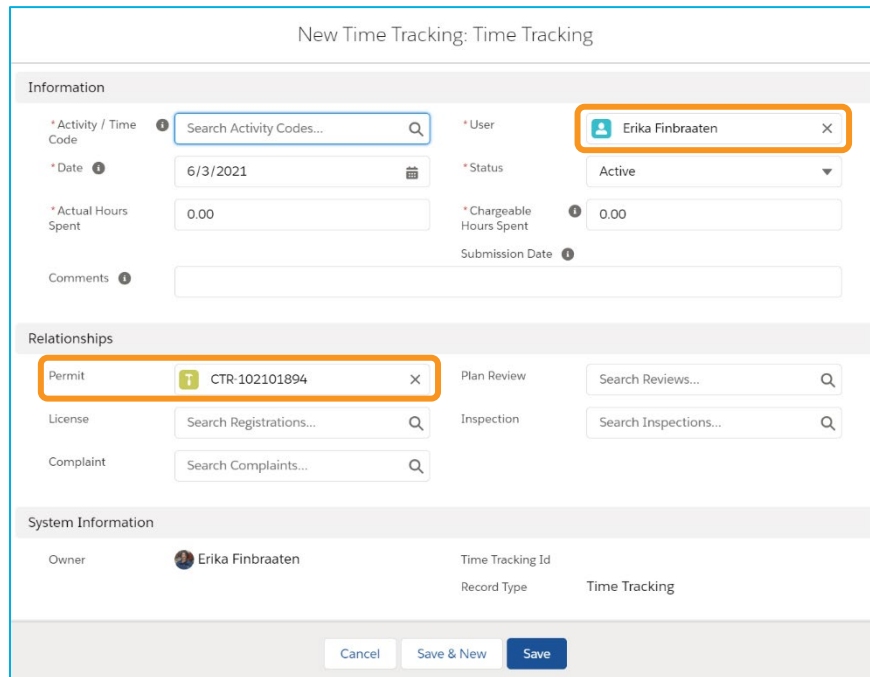
**Time Tracking**

1 Item - Updated a few seconds ago

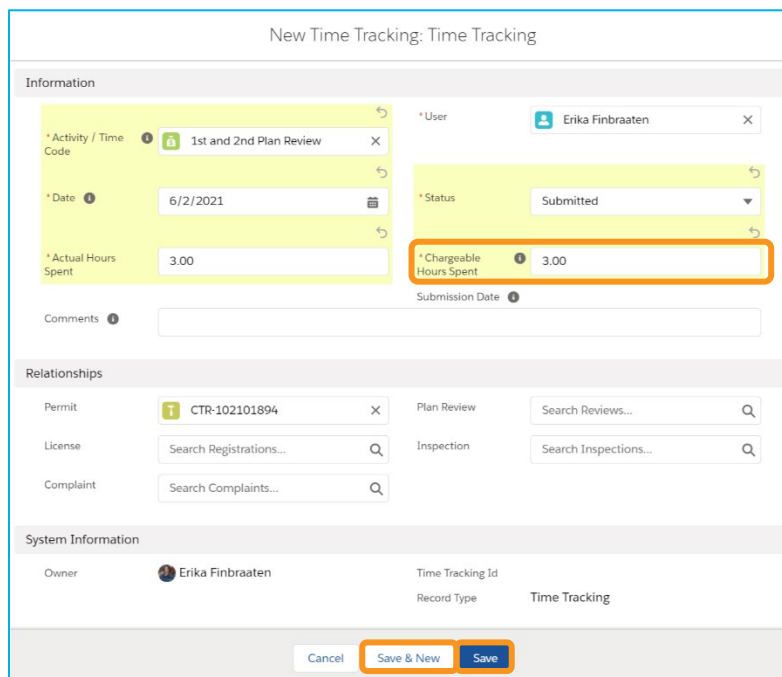
Post Time

	Date	Time Tracking Id	Actual Hours Spent	Chargeable Hours ...	Activity / Time Code	Status
1	6/3/2021	TT-000082	1.00	1.00	1st and 2nd Plan Review	Submitted

A *New Time Tracking* entry screen will appear on your screen. Notice that not only is the name of the *User* here, but so is the *Object* (Permit CTR-102101894) from which we started.

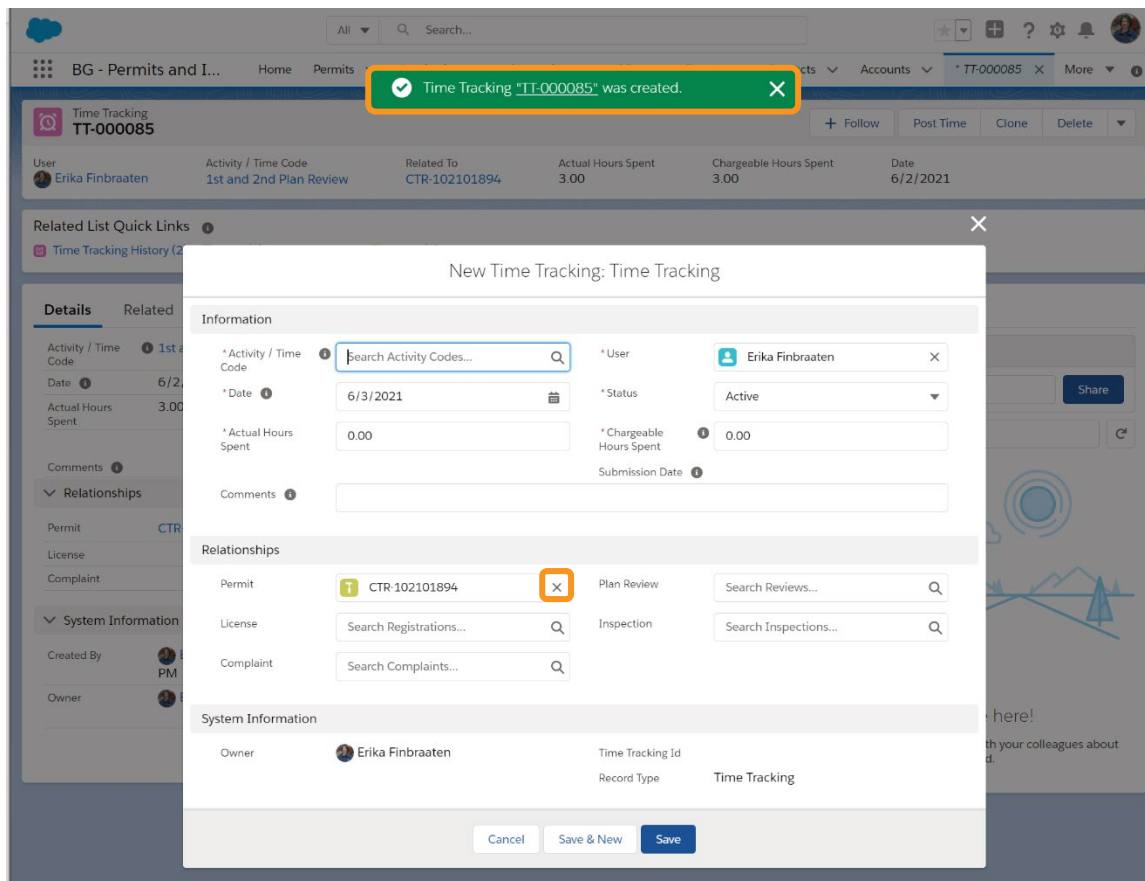


The rest of the process is the same as before, with one important difference. In this instance, we will record the *Actual Hours* and *Chargeable Hours*, but the *Chargeable Hours* may not be zero as they would be for training or staff meetings.



As before, you can either click *Save* or *Save & New* to complete the record.

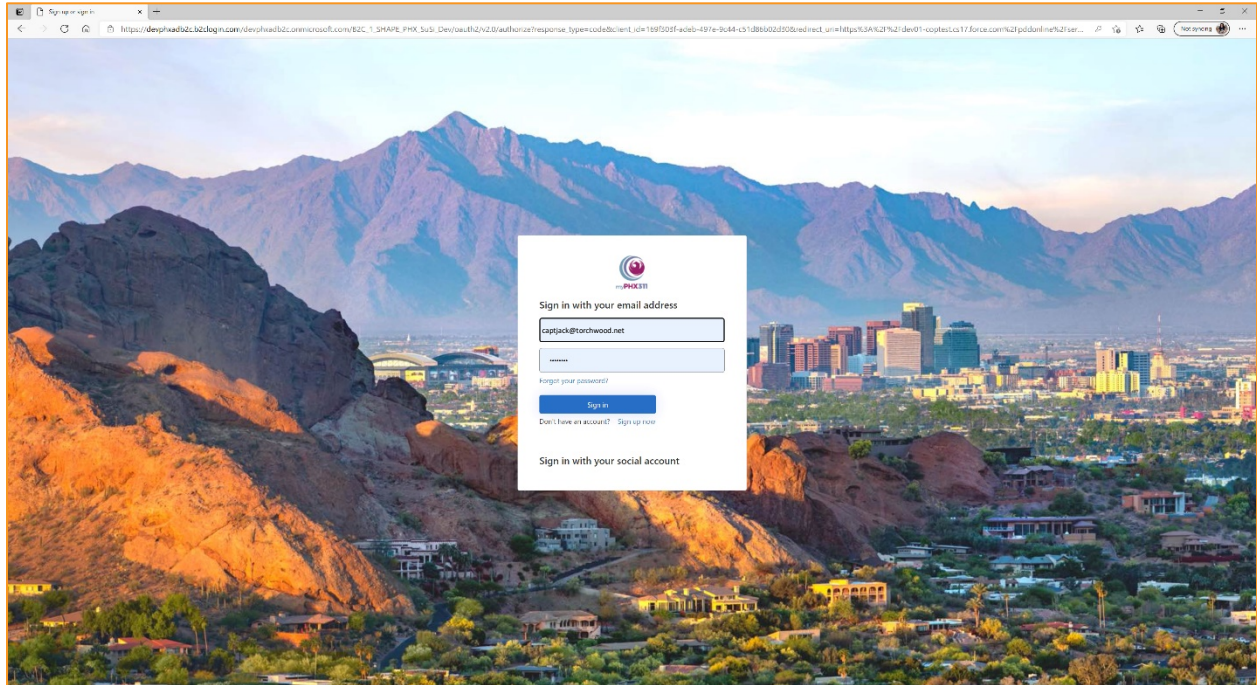
If you click *Save & New*, you will receive the message that the record has been created and a *New Time Tracking Record* entry box will appear.



From here you can enter more time for this Object, in this case, Permit CTR-102101894, or you can click on the x in the Permit box to dismiss the current permit and enter another *Relationship*.

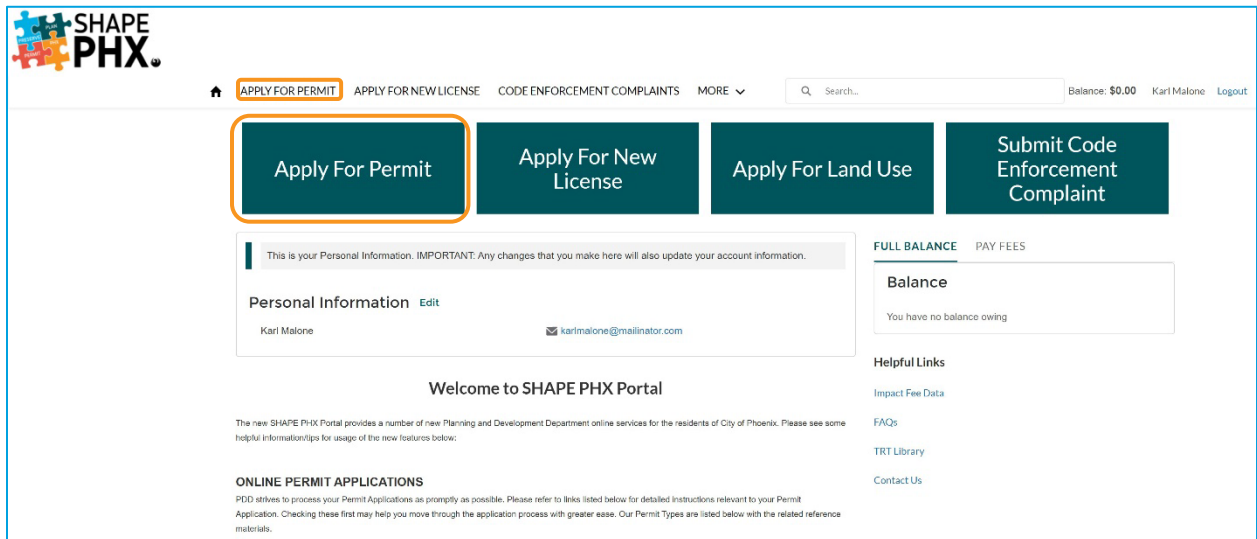
## Customer Portal

The SHAPE PHX Customer Portal will allow the public to do the following tasks online: submit a project, request meetings, check the status of a plan review, pay fees, request inspections, submit code enforcement complaints, and submit questions or answers to reviewers. It is part of myPHX311, which allows them to access many city department’s functions with one account.



### Applying for a Permit

To start a new permit application, the applicant clicks on *APPLY FOR PERMIT*. If they are not a Registered User (they do not have a SHAPE PHX account), they will be asked to sign up for one.



As discussed in the previous section, New Permit Nomenclature, the permit types that we are used to in KIVA are being replaced and there will be fewer of them in SHAPE PHX. Some examples: CTR (Construction & Trades-Residential), DMR (Demolition-Residential), ENR (Energy System-Residential), and PR (Pool-Residential). Select the *Permit Type*, in this case, Construction & Trades-Residential or CTR.

[APPLY FOR PERMIT](#)
[APPLY FOR NEW LICENSE](#)
[REPORT AN ISSUE](#)
[MORE](#)
Balance: \$0.00   Erika Davidson   [Logout](#)

### Permit Application

Cancel

#### Select Permit Type

Please select the Permit type that you want to create

Next

Construction  
and Trades  
Residential

Select this permit type if your scope of work includes general residential construction, including custom homes, additions or remodels, Detached Structures, fence installation, or miscellaneous repairs/replacements etc.

Civil

Select this permit type if your scope of work includes any off-site work in the public right of way or on-site work for lateral tap, pavement restoration, or driveways. Any Civil permit applications related to work outside of the specified activities should be applied for via PDD Online.

Demolition

Select this permit type if your scope of work includes total, partial, or interior demolition of a structure. Note, most demolition permits can be issued after initial counter review and payment. However, when significant structural demolition occurs, a plan review may be required.

Elevator - New

Select this permit type if your scope of work includes the installation of a new elevator.

Elevator - Repair or Modification

Select this permit type if your scope of work includes the installation of a new elevator.

Pool

Select this permit type if your scope of work includes the construction of a new pool/spa as well as attached water features that add a surcharge or load to a pool/spa design and the associated pool/spa equipment. Any attached or detached structures to the pool should be included in this permit as well as any new fence work to comply with city regulations.

Quick Estimate

Select this permit type if you are only interested in estimating fees for your specific scope of work. Note, this permit type will not submit a permit application and fees may vary in the actual permit application.

Quick Permit

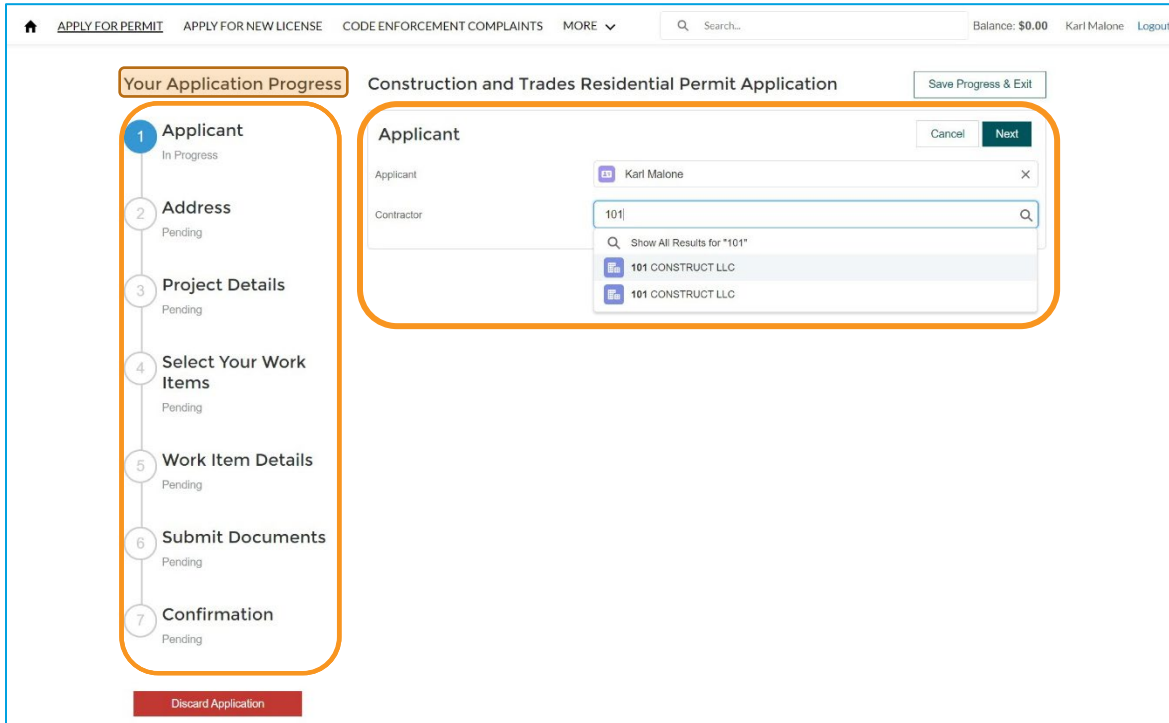
This permit type is available for limited scope of work activities. Select this permit type only if your scope of work includes one of the following: Field Consultation for Future Work, Water Heater Replacement Electric Residential, Water Heater Replacement Gas Residential, Repipe water lines, Minor plumbing work or repairs, Gas Line Repair or Replace - please indicate # linear feet, Gas Clearance, Electrical Minor Work, Electrical Meter Socket Replacement, Electrical Service Clearance, Upgrade of electrical service.

Standard Plan

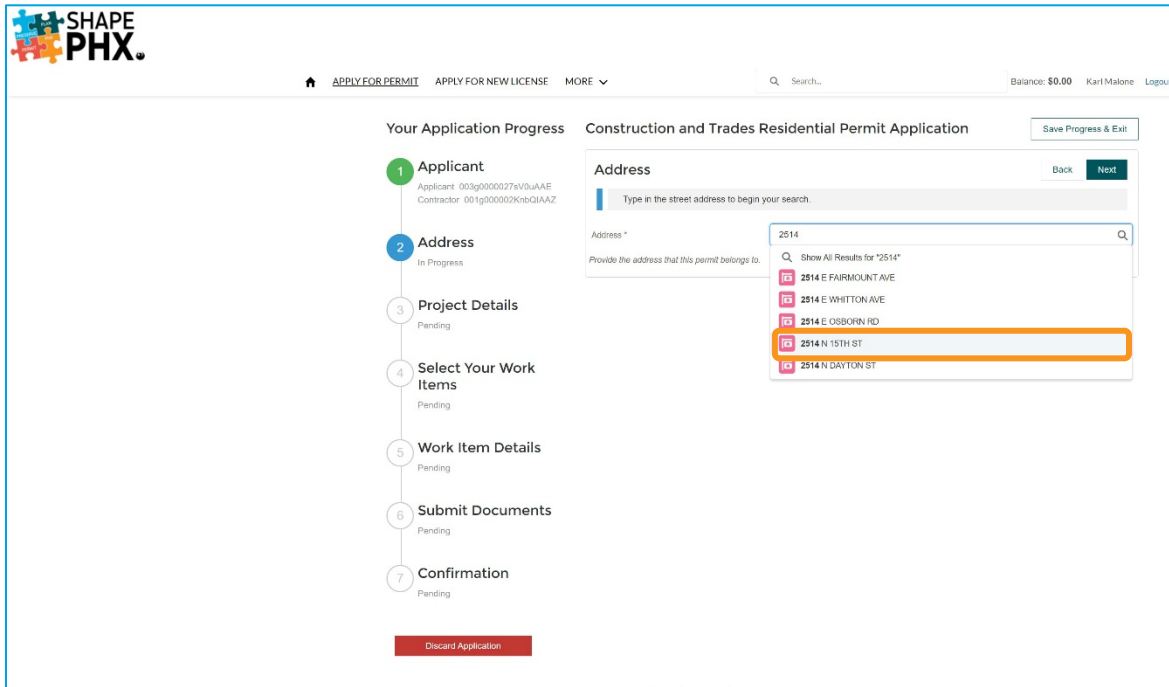
Select this permit type for approval of standard home design plans to be used for construction on multiple lots within a particular subdivision, or for infill lots throughout the City of Phoenix. Note, a separate construction and trades permit and plot plan approval will be required prior to actual construction.



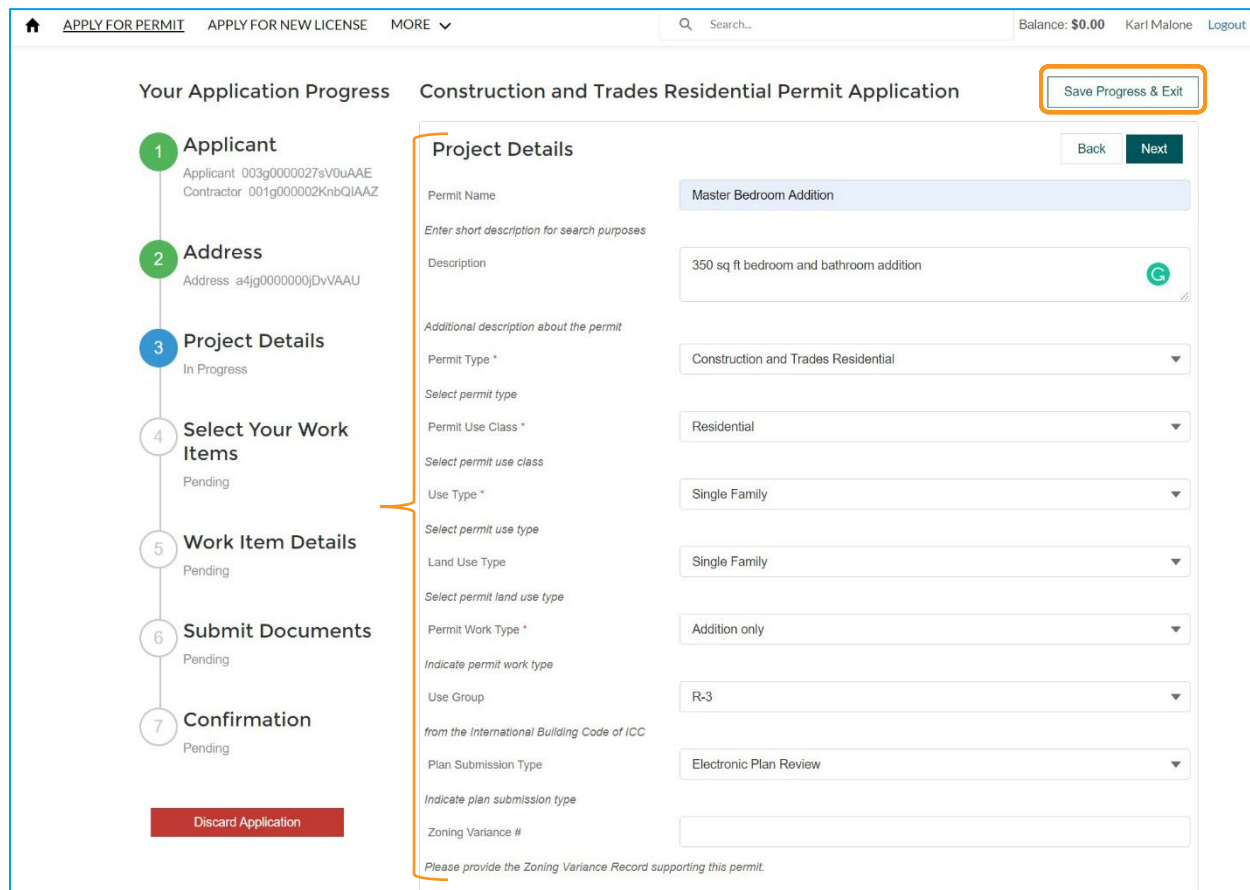
The applicant is ready to progress through their application. The first step is entering the applicant and contractor information. If the contractor is in the system, they can select their name from the drop-down list, or they can enter the name.



Through a series of questions, the applicant is lead through the submittal process. The progress bar shows them where they are in the process.



The *Project Details* are added next, which sets up a series of questions regarding the *Work Items*.



**Your Application Progress**

- 1 Applicant
- 2 Address
- 3 Project Details **In Progress**
- 4 Select Your Work Items **Pending**
- 5 Work Item Details **Pending**
- 6 Submit Documents **Pending**
- 7 Confirmation **Pending**

**Construction and Trades Residential Permit Application**

Balance: \$0.00 Karl Malone Logout

**Project Details** Save Progress & Exit Back Next

Permit Name: Master Bedroom Addition

*Enter short description for search purposes*

Description: 350 sq ft bedroom and bathroom addition

*Additional description about the permit*

Permit Type \*: Construction and Trades Residential

*Select permit type*

Permit Use Class \*: Residential

*Select permit use class*

Use Type \*: Single Family

*Select permit use type*

Land Use Type: Single Family

*Select permit land use type*

Permit Work Type \*: Addition only

*Indicate permit work type*

Use Group: R-3

*from the International Building Code of ICC*

Plan Submission Type: Electronic Plan Review

*Indicate plan submission type*

Zoning Variance #

*Please provide the Zoning Variance Record supporting this permit.*

Discard Application

Note the *Save Progress & Exit* button. If the applicant needs to pause their application for any reason, they can save their work and come back to it at a later date. It will be waiting for them in their list of permits with the status *Draft*.

After entering the *Project Details*, the applicant selects the work items. They are grouped together by type and only the items that are relevant for the permit application are included. For this application, the groups include:

- Construction details
- Electrical
- Fence and Retaining Wall
- Accessory Structure
- HVAC
- New and Addition (which relates to the square footage being worked on)
- Plumbing and Mechanical
- Remodel
- Roofing
- Water and Sewer

The applicant selects all that apply from each group to build their permit and begin determining their fees and the reviews and inspections that will be needed.

The screenshot displays the 'Select Your Work Items' step of a permit application process. On the left, a vertical progress bar shows seven steps: 1. Applicant, 2. Address, 3. Project Details, 4. Select Your Work Items (current step), 5. Work Item Details, 6. Submit Documents, and 7. Confirmation. A 'Discard Application' button is located below the progress bar. The main content area is titled 'Construction and Trades Residential Permit Application' and includes a 'Save Progress & Exit' button. Below the title, a 'Select Your Work Items' section contains a 'Back' and 'Next' button. A grey instruction box states: 'This is a 2-step process. First, select all the Work Items that apply and click Next. Then, click Edit to specify details relevant to the Work Items and click Save.' The work items are grouped into several categories:

- Construction Details (Select all that apply):**
  - Fireplaces zero clearance or masonry
  - Foundation Type
- Electrical (Select all that apply):**
  - Electrical Meter Socket Replacement
  - Electrical Minor Work
  - Electrical service 100 amp 1 phase
  - Electrical service 100 amp 3 phase
  - Electrical service 200 amp 1 phase
  - Electrical service 200 amp 3 phase
  - Electrical service 400 amp 1 phase
  - Electrical service 400 amp 3 phase
  - Electrical service 600 amp 1 phase
  - Electrical service 600 amp 3 phase
  - Electrical service 800 amp 1 phase
  - Electrical service 800 amp 3 phase
  - Electrical Service Clearance
  - Rewiring Residential
- Fence and Retaining Wall (Select all that apply):**
  - Fence Combo Masonry and Wrought Iron
  - Fence Dooley Block
  - Fence Masonry
  - Fence Ornamental or Wrought Iron
  - Fence Wood, Chain Link or Mesh
  - Retaining Wall 3 ft to 6 ft
  - Retaining Wall less than 3 ft high
  - Retaining Wall Over 6 ft
- Accessory Structure (Select all that apply):**
  - New Garage Attached
  - New Garage Detached

Next the applicant enters specific detail about the *Work Items*. Based on this information, the fees are calculated.

[APPLY FOR PERMIT](#)
[APPLY FOR NEW LICENSE](#)
[CODE ENFORCEMENT COMPLAINTS](#)
[MORE](#)




 Balance: \$0.00   Karl Malone   Logout

### Your Application Progress

- 1 Applicant**  
Applicant: 003g0000027sV0uAAE  
Contractor: 001g000002KnbQIAAZ
- 2 Address**  
Address: a4jg000000JdvVAAU
- 3 Project Details**  
Permit Type: Construction and Trades...  
Permit Use Class: Residential  
Use Type: Single Family
- 4 Select Your Work Items**  
4 Total Work Items
- 5 Work Item Details**  
In Progress
- 6 Submit Documents**  
Pending
- 7 Confirmation**  
Pending

Discard Application

### Construction and Trades Residential Permit Application

Save Progress & Exit

Back
Next

#### Electrical

**Electrical Minor Work**

Enter quantity

\$1,500.00

×

Description	* Unit of Measure	* Quantity	Add
Electrical Minor Work	EACH	10	Add
<input checked="" type="checkbox"/> Display on Permit?			Another

**Foundation Type**

Select foundations type

\$0.00   ×

Description	* Display on Permit?	Add Another
Raised	<input checked="" type="checkbox"/>	Add Another

**New Plumbing Fixtures**

Enter total of new fixture units

\$0.00   ×

Description	* Unit of Measure	* Quantity	Add
New Plumbing Fixtures	EACH	7	Add
<input checked="" type="checkbox"/> Display on Permit?			Another

**New and Addition**

**New SF 1st Floor livable**

Select for Plan- 1st floor livable

\$38,850.00

×

Description	Work Type	* Unit of Measure	Add
New SF 1st Floor livable	New Custom Home with or w	SQ FT	Add
<input type="text" value="350"/>		<input checked="" type="checkbox"/> Display on Permit?	Another

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The applicant can upload files, even if they are planning to drop off paper plans. Perhaps they have a large document or photos or other items that they would like to include in the application.

One of the noteworthy upgrades for PDD customers is that there will be one interface. They will not have to interact with Bluebeam website directly to submit their plans. SHAPE PHX will accept their application, plans, and any other plan review related documentation in one place.

The screenshot shows a web interface for a permit application. At the top, there are navigation links: 'APPLY FOR PERMIT', 'APPLY FOR NEW LICENSE', and 'MORE'. A search bar and user information (Balance: \$0.00, Karl Malone, Logout) are also present. The main content area is titled 'Your Application Progress' and 'Construction and Trades Residential Permit Application'. A progress bar on the left shows seven steps: 1. Applicant, 2. Address, 3. Project Details, 4. Select Your Work Items, 5. Work Item Details, 6. Submit Documents (In Progress), and 7. Confirmation (Pending). The 'Submit Documents' step is active, showing a 'Submit Documents' section with a 'Back' and 'Next' button. Below this is an 'Additional Documents' section with an 'Upload Files' button. A table lists the uploaded files:

DESCRIPTION	FILE NAME
blue_print_draft_set_1600_clr_9721	blue_print_draft_set_1600_clr_9721.png

A red 'X' icon is visible next to the file name. At the bottom left, there is a 'Discard Application' button.

The applicant will be able to review their application on the *Confirmation* page. The applicant has the option to *Discard Application* being reviewed or click *Submit Permit Application* at the bottom of the application confirmation screen.

APPLY FOR PERMIT APPLY FOR NEW LICENSE MORE
Search...
Balance: \$0.00 Karl Malone Logout

### Your Application Progress

- 1 Applicant**  
Applicant: 003g0000027sV0uAAE  
Contractor: 001g000002Kri9QIAAZ
- 2 Address**  
Address: a4jg000000jDvVAAU
- 3 Project Details**  
Permit Type: Construction and Trades...  
Permit Use Class: Residential  
Use Type: Single Family
- 4 Select Your Work Items**  
5 Total Work Items
- 5 Work Item Details**  
Estimated Total Work Item Cost: \$41750
- 6 Submit Documents**  
1 of 1 Documents Uploaded
- 7 Confirmation**  
In Progress

Discard Application

### Confirmation

Review the details of your application. If you need to modify details in any section, click Edit in the section header. An estimated Total Fee is shown here (including Taxes and Other charges).

**Applicant** Edit

Applicant: Karl Malone

Contractor: 101 CONSTRUCT LLC

**Address** Edit

Address: 2514 N 15TH ST

**Project Details** Edit

Permit Name: Master Bedroom Addition

Description: 350 sq ft bedroom and bathroom addition

Permit Type: Construction and Trades Residential

Permit Use Class: Residential

Use Type: Single Family

Land Use Type: Single Family

Permit Work Type: Addition only

Use Group: R-3

Plan Submission Type: Electronic Plan Review

Zoning Variance #:

**Work Item Details** Edit

Electrical	Description	Amount
16 x Electrical Minor Work	Electrical Minor Work Description, EACH Unit of Measure, false Display on Permit?	\$2,400.00
<b>New and Addition</b>		
350 x New SF 1st Floor livable	New SF 1st Floor livable Description, New Custom Home with or without accessory structures Work Type, SQ FT Unit of Measure, false Display on Permit?	\$38,850.00

**Plumbing and Mechanical**

1 x Water Heater Replacement Gas Residential	Water Heater Replacement Gas Residential Description, EACH Unit of Measure, false Display on Permit?	\$500.00
--	--	----------

**Work Items (No Fee):**

1031 x Existing SF prior to Addition	Existing SF prior to Addition Description, SQ FT Unit of Measure, false Display on Permit?	\$0.00
7 x New Plumbing Fixtures	New Plumbing Fixtures Description, EACH Unit of Measure, false Display on Permit?	\$0.00
1 x Raised	Raised Description, false Display on Permit?	\$0.00

**Total (6 items)** \$40,850.00

**Submit Documents** Edit

**Additional Documents**

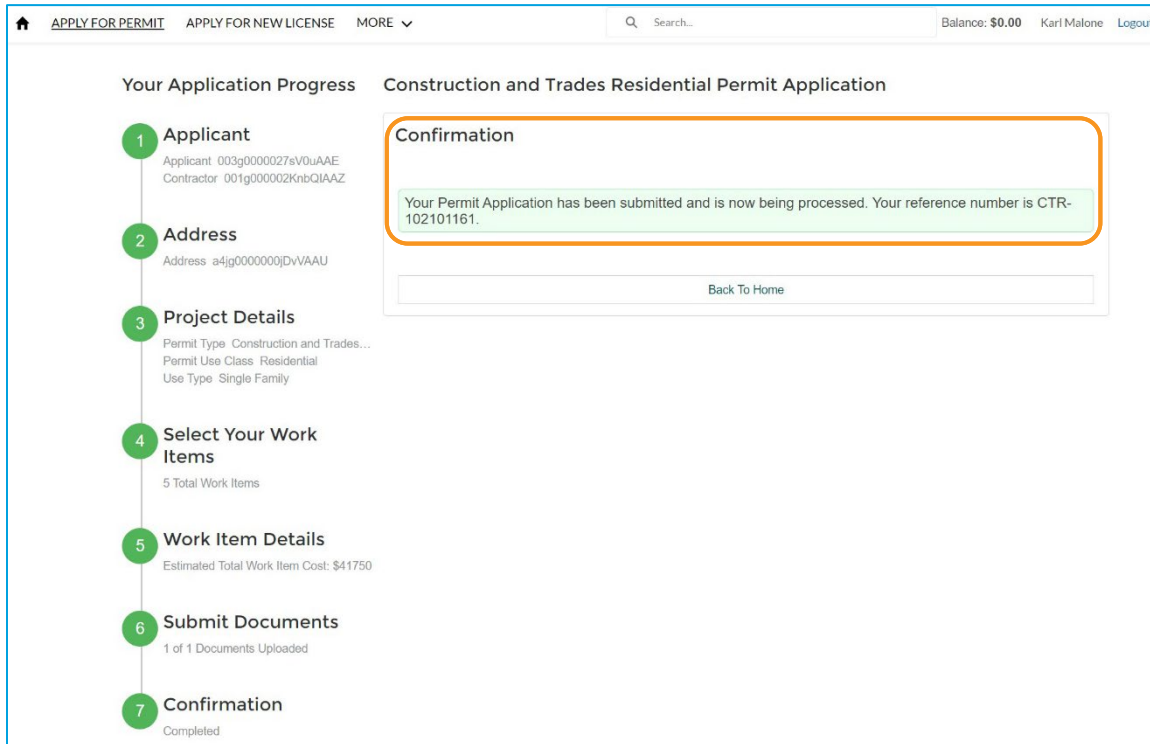
DESCRIPTION	FILE NAME
blue_print_draft_set_1600_cir_9721	blue_print_draft_set_1600_cir_9721.png

Submit Permit Application

Don't see what you are looking for?

CONTACT US

The applicant will receive a confirmation they successfully submitted their application along with the permit number. An email confirmation will also be sent to the applicant.



**Your Application Progress**

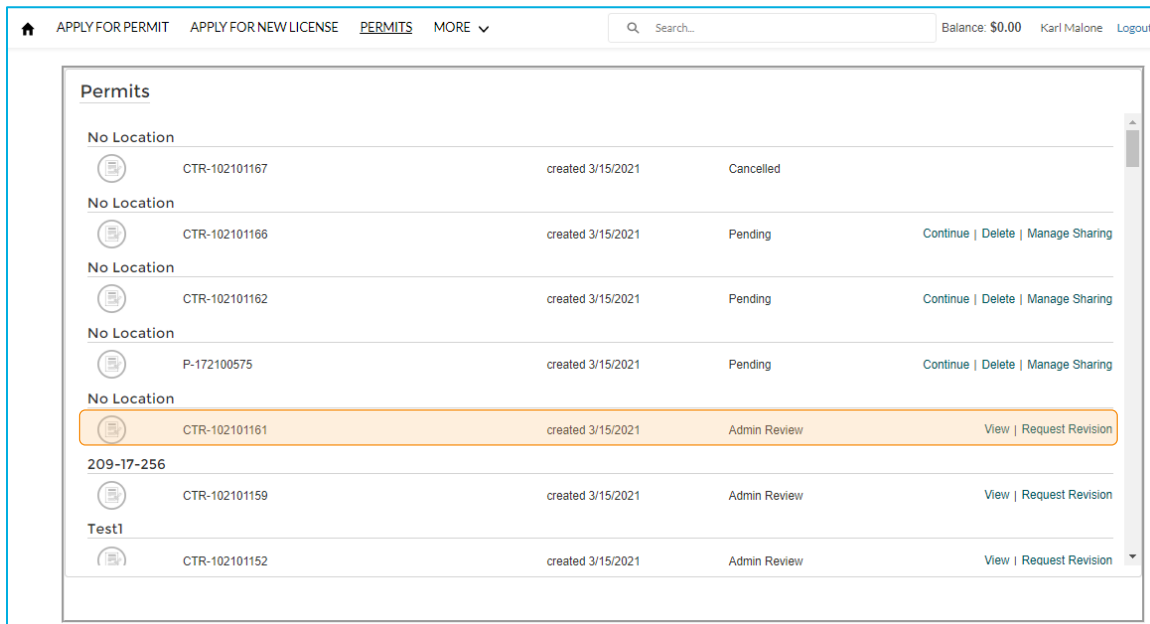
- 1 Applicant**  
Applicant: 003g0000027eV0uAAE  
Contractor: 001g000002KnbQIAAZ
- 2 Address**  
Address: a4jg000000jDvVAUU
- 3 Project Details**  
Permit Type: Construction and Trades...  
Permit Use Class: Residential  
Use Type: Single Family
- 4 Select Your Work Items**  
5 Total Work Items
- 5 Work Item Details**  
Estimated Total Work Item Cost: \$41750
- 6 Submit Documents**  
1 of 1 Documents Uploaded
- 7 Confirmation**  
Completed

**Confirmation**

Your Permit Application has been submitted and is now being processed. Your reference number is CTR-102101161.

[Back To Home](#)

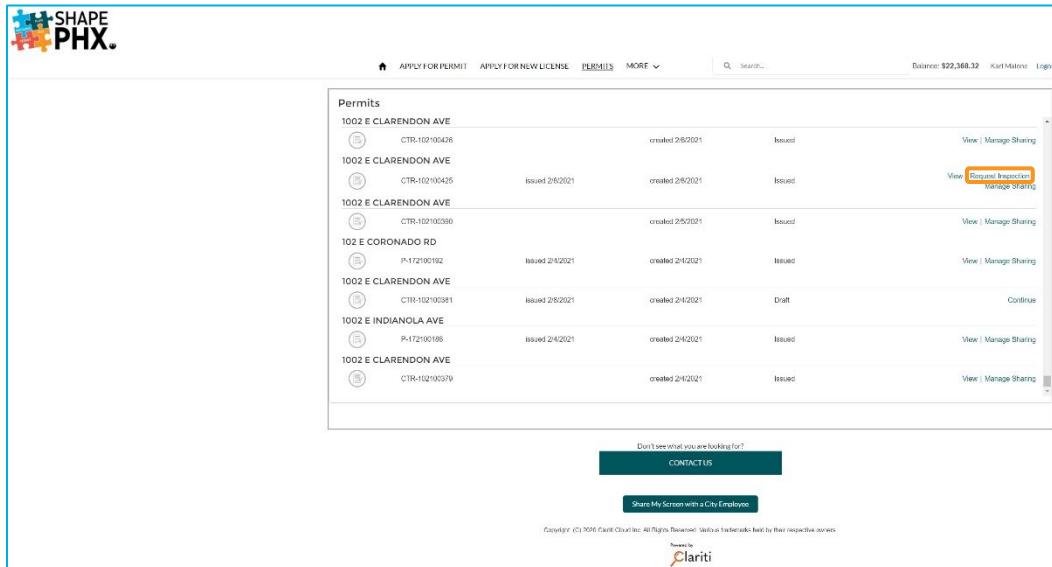
The permit is now in Administrative Review. The applicant cannot modify the application without contacting staff by clicking the *Request Revision* button.



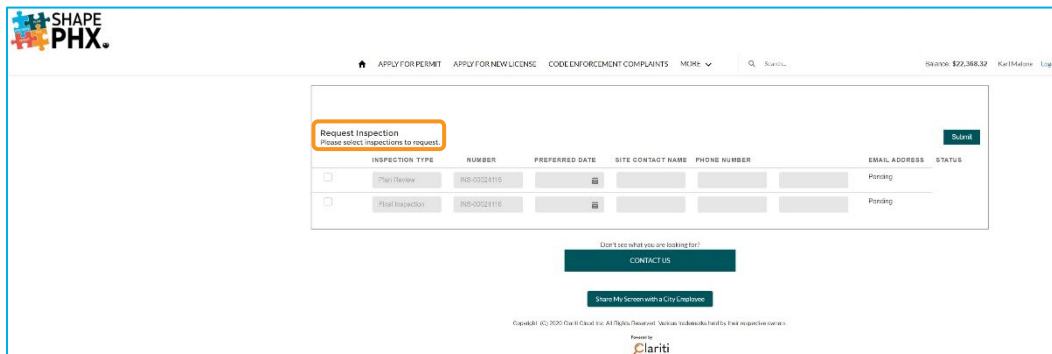
Permit ID	Created	Status	Actions
CTR-102101167	created 3/15/2021	Cancelled	
CTR-102101166	created 3/15/2021	Pending	<a href="#">Continue</a>   <a href="#">Delete</a>   <a href="#">Manage Sharing</a>
CTR-102101162	created 3/15/2021	Pending	<a href="#">Continue</a>   <a href="#">Delete</a>   <a href="#">Manage Sharing</a>
P-172100575	created 3/15/2021	Pending	<a href="#">Continue</a>   <a href="#">Delete</a>   <a href="#">Manage Sharing</a>
CTR-102101161	created 3/15/2021	Admin Review	<a href="#">View</a>   <a href="#">Request Revision</a>
CTR-102101159	created 3/15/2021	Admin Review	<a href="#">View</a>   <a href="#">Request Revision</a>
CTR-102101152	created 3/15/2021	Admin Review	<a href="#">View</a>   <a href="#">Request Revision</a>

## Requesting an Inspection

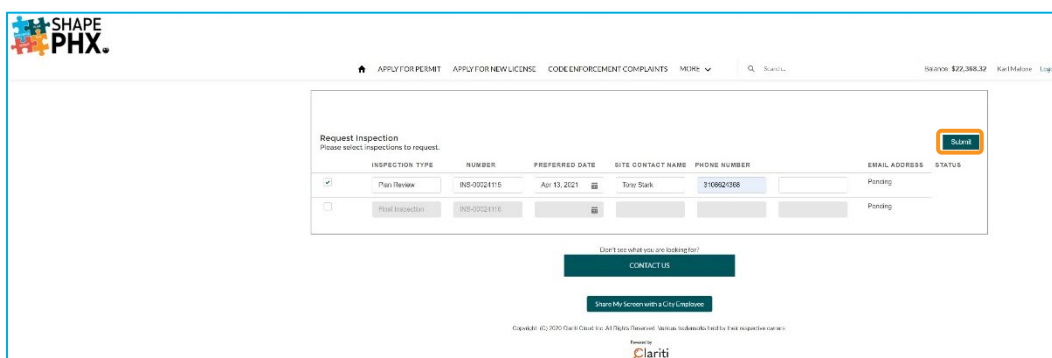
Requesting an inspection can be done through IVR as it is today, or through the SHAPE PHX Customer Portal. First, the applicant locates the permit for which they need an inspection and clicks *Request Inspection*.



Next, they select the inspection that they wish to schedule.

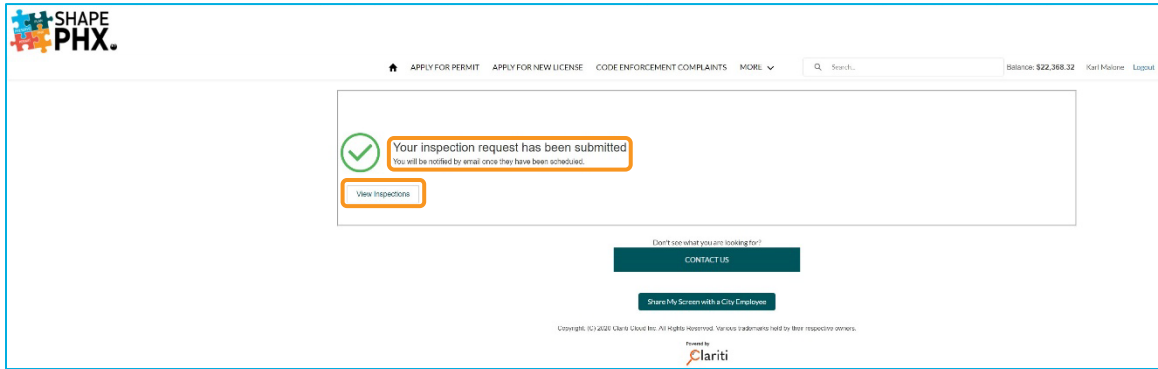


After entering the details for the inspection, *Preferred Date/Time*, *Contact Name*, *Phone Number*, and *Email* information, they click *Submit*.



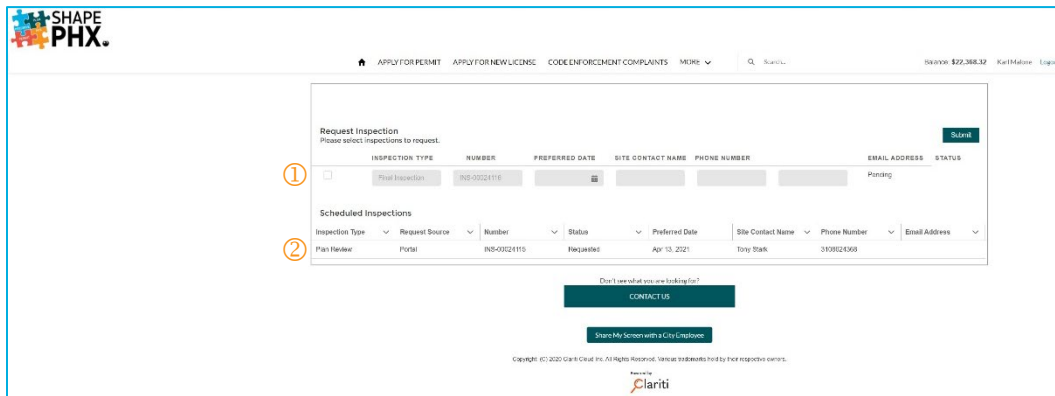


The customer will receive a confirmation of their request.



If they click on the *View Inspections* button, it takes them to a screen that shows them:

- ① The inspections that have yet to be scheduled; and
- ② The inspection that they have just scheduled.



## Improving Customer Service

The best part of SHAPE PHX for our customers will be the SHAPE PHX Customer Portal. The Portal will be available 24/7, and allow them to do the following from any location:

- Submit applications;
- Check plan review status;
- Communicate with staff;
- Request meetings with staff;
- Upload documents;
- Use a modernized, integrated Electronic Plan Review via Bluebeam®;
- Request inspections;
- Pay fees online; and
- More!

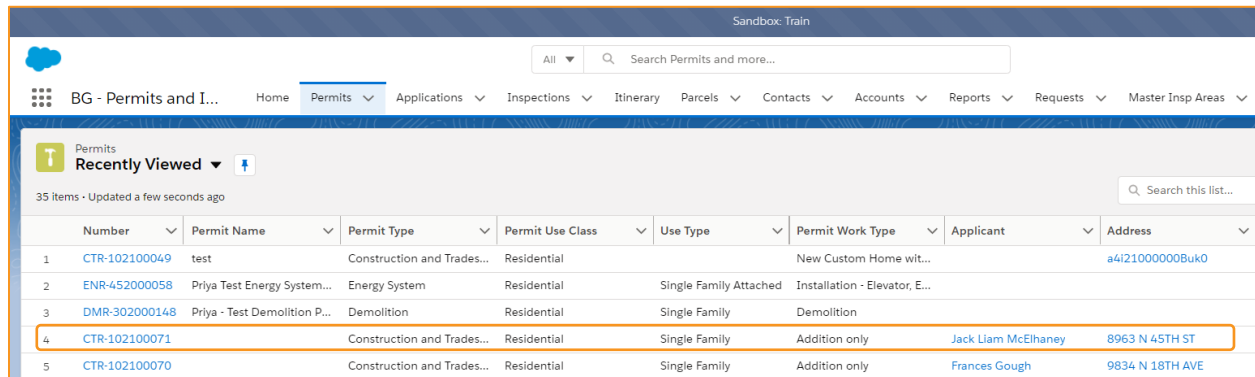
It will encourage electronic submittals, which will reduce data entry by staff, communication with staff through the portal, and fewer trips for our customers downtown. The possibilities are endless, and it starts this summer!

## Tips & Tricks

### Multiple Copies of SHAPE PHX

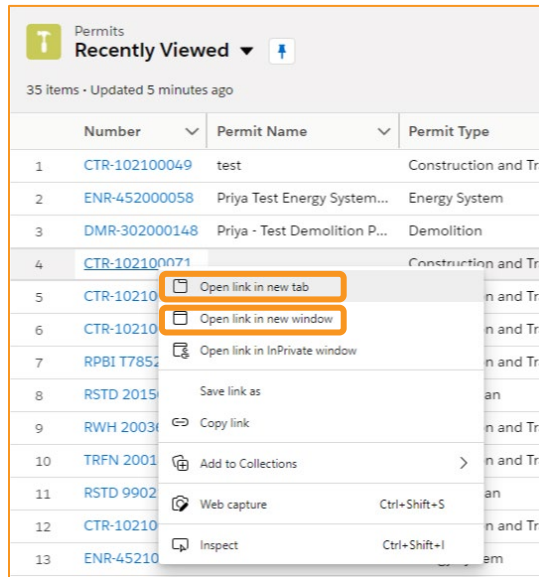
Many KIVA users have multiple copies of the program open on their desktop at one time so that they can look up several items at once. Rather than having to log in to SHAPE PHX more than once, it's easy to have numerous instances of the program on your desktop at once.

There are two ways to do it. Remember that everything in SHAPE PHX that is blue and underlined is a hyperlink. For the outlined permit below, there are three items that you can select, the *Permit Number*, the *Applicant*, and the *Address*.



	Number	Permit Name	Permit Type	Permit Use Class	Use Type	Permit Work Type	Applicant	Address
1	<a href="#">CTR-102100049</a>	test	Construction and Trades...	Residential		New Custom Home wit...		<a href="#">a4121000000Buk0</a>
2	<a href="#">ENR-452000058</a>	Priya Test Energy System...	Energy System	Residential	Single Family Attached	Installation - Elevator, E...		
3	<a href="#">DMR-302000148</a>	Priya - Test Demolition P...	Demolition	Residential	Single Family	Demolition		
4	<a href="#">CTR-102100071</a>		Construction and Trades...	Residential	Single Family	Addition only	<a href="#">Jack Liam McElhaney</a>	<a href="#">8963 N 45TH ST</a>
5	<a href="#">CTR-102100070</a>		Construction and Trades...	Residential	Single Family	Addition only	<a href="#">Frances Gough</a>	<a href="#">9834 N 18TH AVE</a>

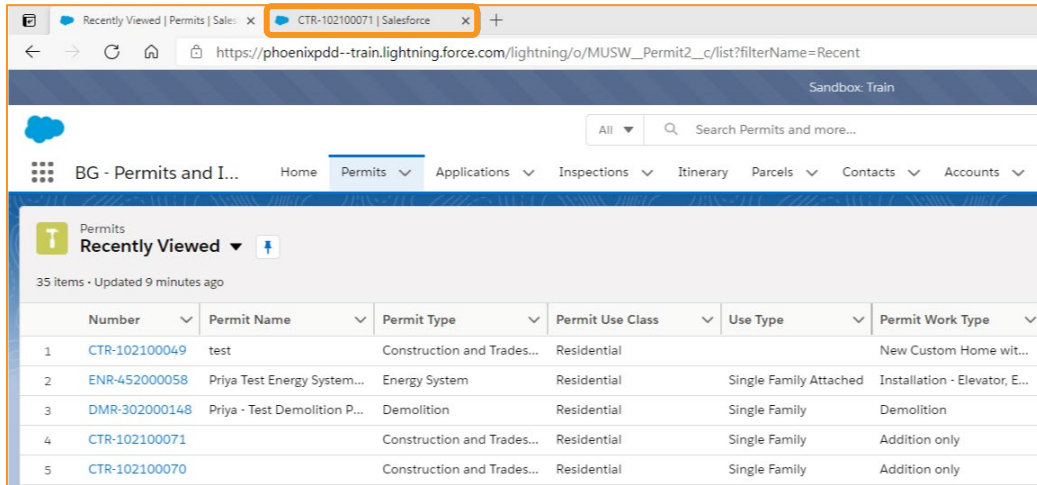
Select the item that you wish to open and right-click (click on it using the right-hand button on your mouse) and select either *Open link in new tab* or *Open link in new window*.



	Number	Permit Name	Permit Type
1	<a href="#">CTR-102100049</a>	test	Construction and Tre
2	<a href="#">ENR-452000058</a>	Priya Test Energy System...	Energy System
3	<a href="#">DMR-302000148</a>	Priya - Test Demolition P...	Demolition
4	<a href="#">CTR-102100071</a>		Construction and Tre
5	<a href="#">CTR-10210</a>		n and Tre
6	<a href="#">CTR-10210</a>		n and Tre
7	<a href="#">RPBI 17852</a>		n and Tre
8	<a href="#">RSTD 2015</a>	Save link as	an
9	<a href="#">RWH 20038</a>	Copy link	n and Tre
10	<a href="#">TRFN 2001</a>	Add to Collections	n and Tre
11	<a href="#">RSTD 9902</a>	Web capture	an
12	<a href="#">CTR-10210</a>	Inspect	n and Tre
13	<a href="#">ENR-45210</a>		erm

If you select *Open link in new window*, a separate window will open that you can place on a second monitor, if you have one.

If you select *Open link in new tab*, a new tab will appear in the window that you have open behind the ones currently in place.



You can do this with different apps; for example, you could have *Permits and Inspections* open in one window or tab, and *Code Enforcement* in another one. If you are required to track your time, you could have a separate window or tab for *Time Tracking*. The best part is that you only have to enter your username and password once!

## Print Screen


There are many ways to print a portion or all of the screen that you are viewing.

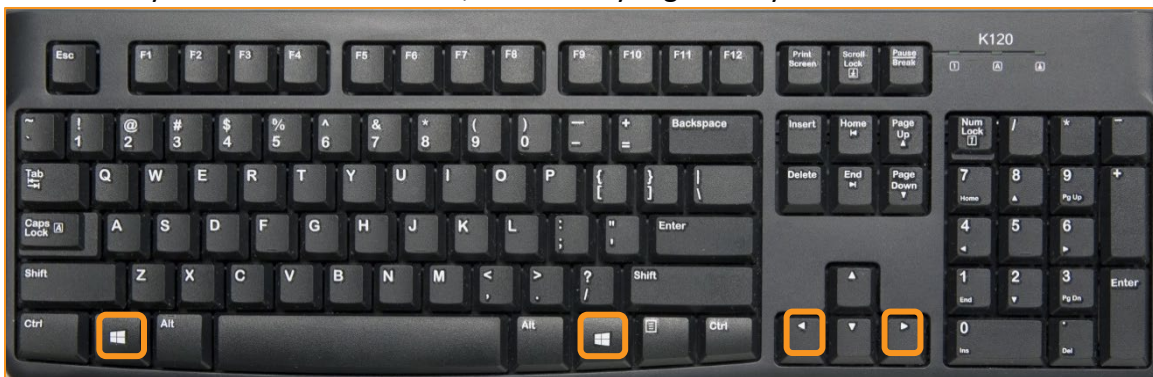
1. Press *PrtScn* key at the top of your keyboard; to the right – sometimes next to the *F Lock* keys or sometimes above the keypad. Press it 1 time and then you can open Word or an email and press *Ctrl + V* to paste
  - a. Pro – Uses 1 key
  - b. Con – if you have dual monitors, it takes a picture of both.
2. Press *Ctrl + Alt + PrtScn* simultaneously.
  - a. Pro – Takes a print screen of only the window you have “active”
  - b. Con – Doesn’t really allow for menu selecting
3. Use Snipping Tool that comes with your computer
  - a. Pros – Has a Mode and Delay option which allows you to highlight the menu and capture the menu
    - It’s free
  - b. Con – Sometimes not very clear
    - Need to do double-work for the delay options and menu capturing
  - c. How to Access it:
    - Click on magnifying glass in the lower left hand corner of your screen
    - Type in Snipping Tool
    - A little window appears and lets you take “snip-its” of a screen
4. Buy a program called Snagit from TechSmith. <https://www.techsmith.com/snagit-pricing.html>

- a. Pro – Program that allows capturing print screens via special keyboard commands that you can create so you don’t have to rely on your mouse or doing double-work. If you have the program open in the background all the time, anytime you click the keyboard combo, takes the images for you.
  - Get to the pixel level for easy and CLEAR copying
- b. Con – Costs extra

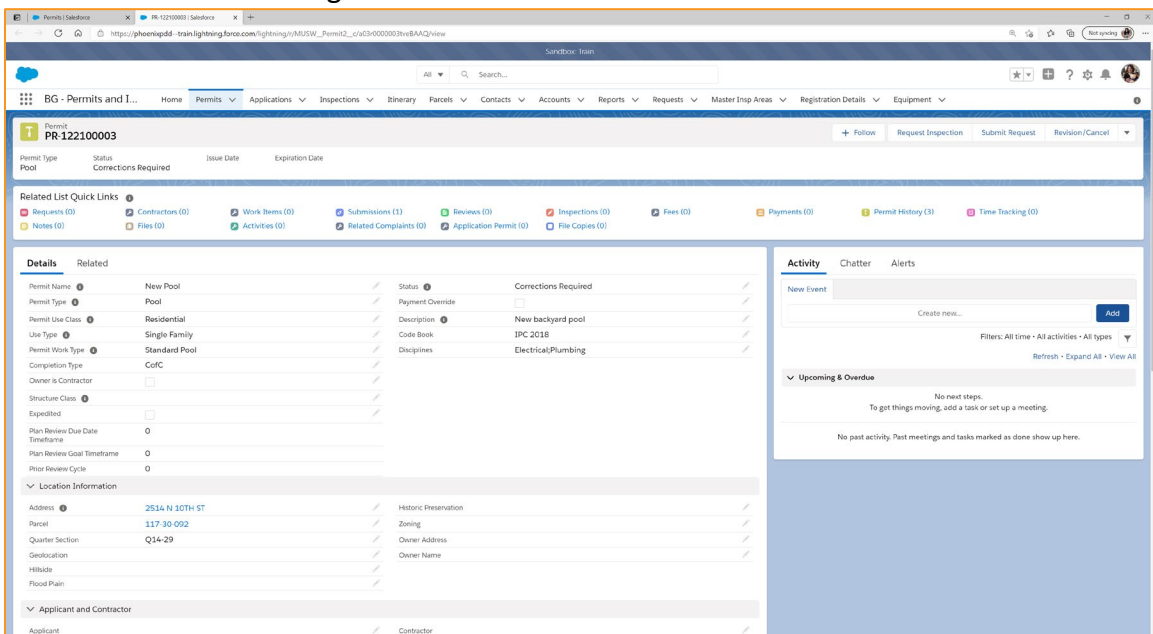
## Split Screen

If you don’t have two monitors, or if you want to view two windows side-by-side on the same one, here’s a tip that allows you to do so on one screen. Make sure that you have your instances of SHAPE PHX open in separate Windows. (This will also work with other applications, such as Word or WebEx.)

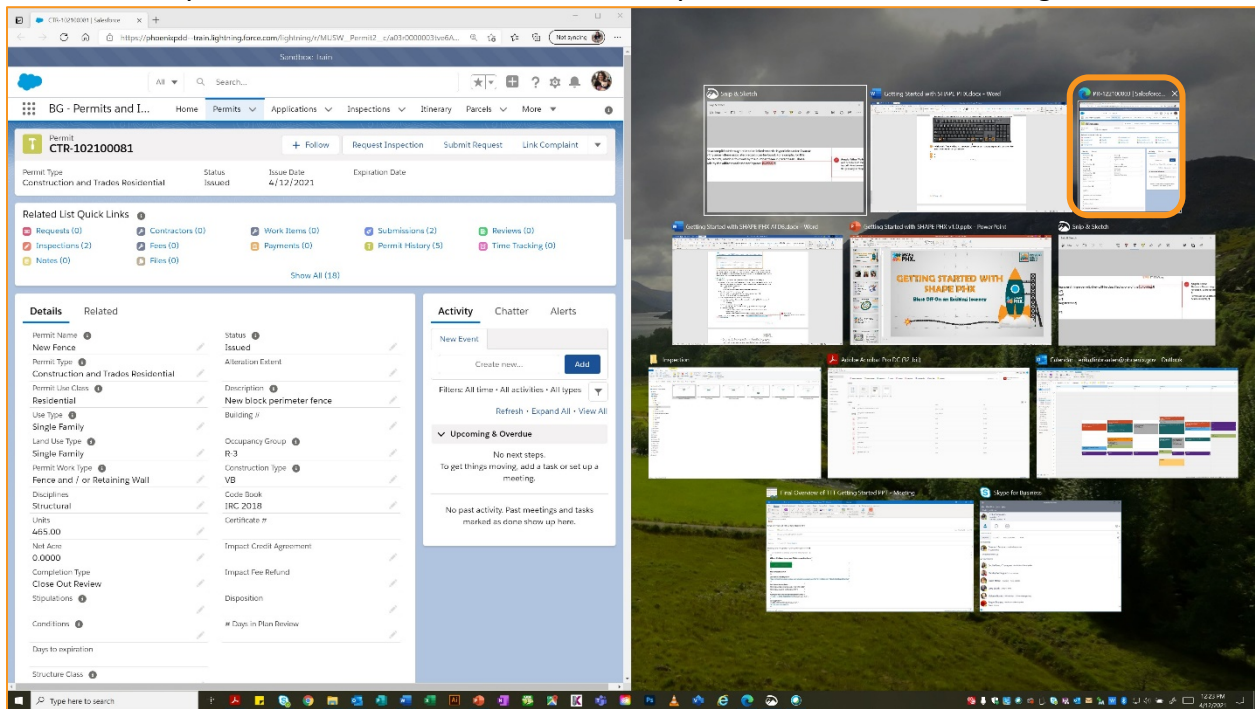
- 1 On your Windows keyboard, locate the Windows key: . Depending on your keyboard, there may be one or two of them, but this key is generally on the bottom row.



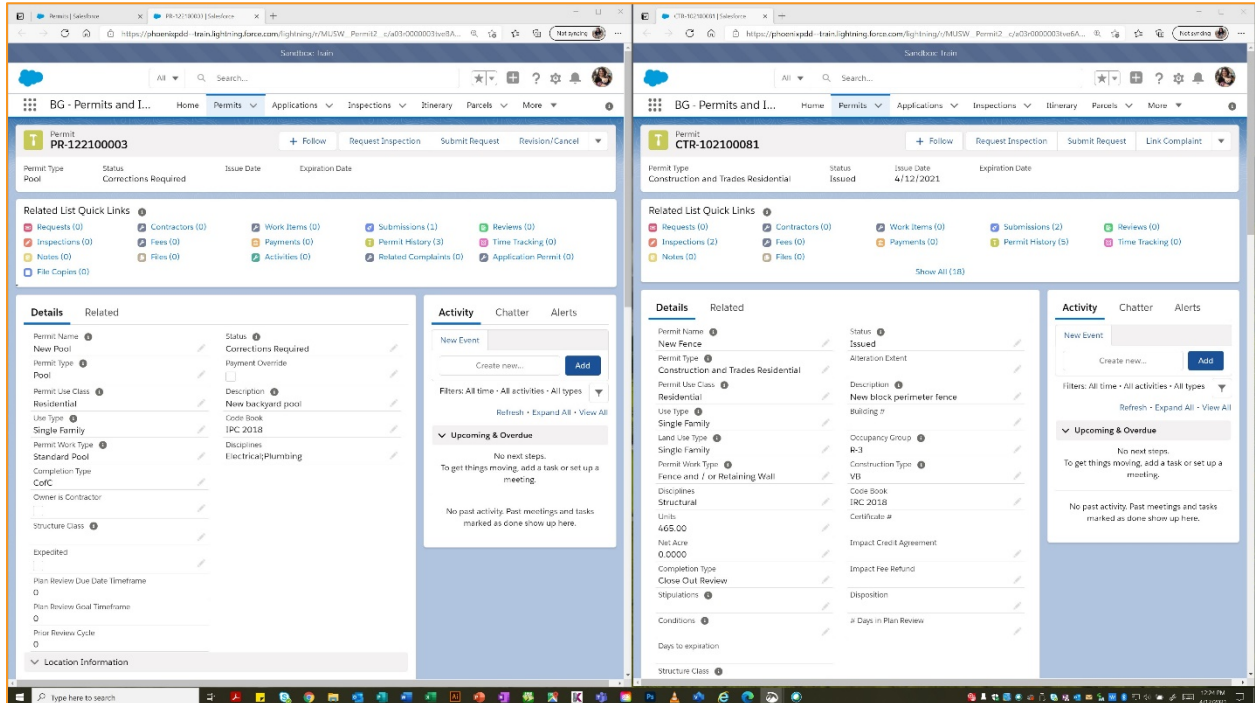
- 2 While in the first Window that you want to view on your screen, depress the Windows key and either the left or right arrow.



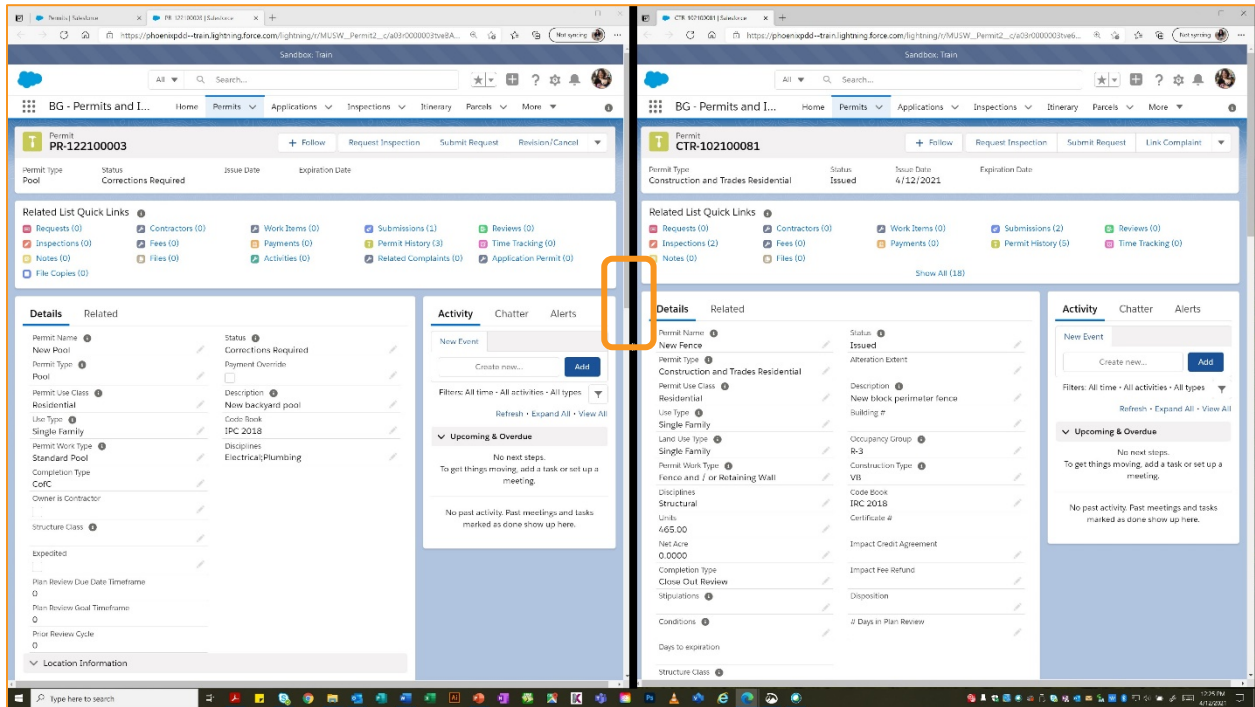
3 You will be given a view of the Windows that you have open so that you can select the one the you want to view on the other half of your screen. Select that image.



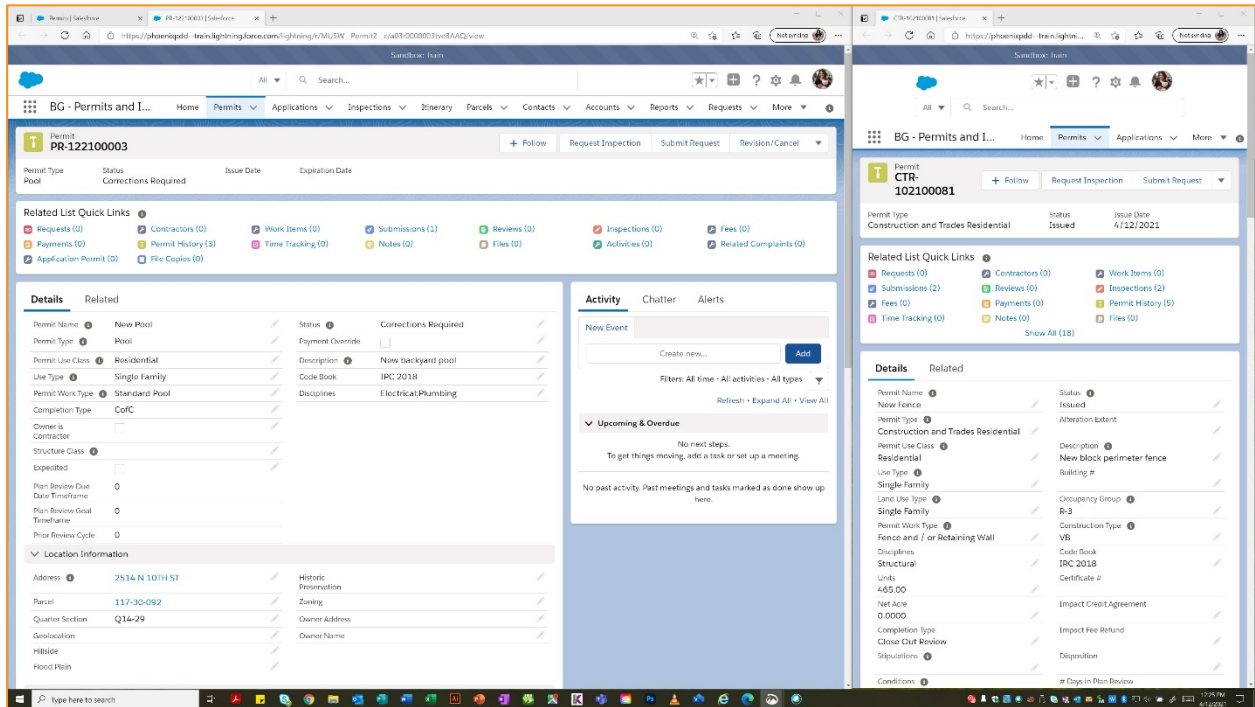
4 You now have both Windows on one screen.



- 5 If you would like one side to be larger than the other, place your cursor on the seam between the two images. Using your mouse, slide the bar to one side or the other until the screens are the size that you want.



- 6 For example, if you wanted to view more of the details on PR-122100003 and less of CTR-102100081, this would be the result.



This tip is helpful in many other instances, like taking notes during a WebEx meeting. Try it for yourself.

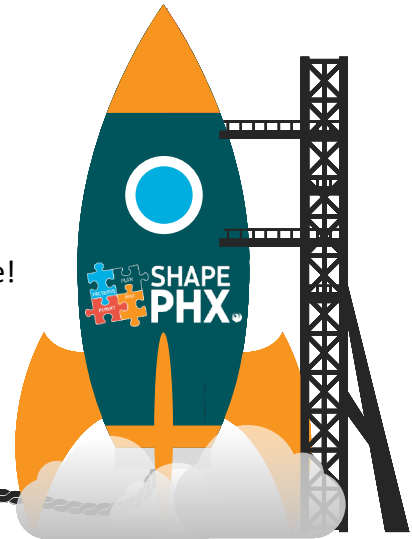
## Conclusion

SHAPE PHX is an amazing tool that will help city of Phoenix staff work smarter, not harder. It offers improved security and access to our customers, allowing them to submit plans, review the status of their plan review, or pay their fees, any time day, or night.

Thank you for joining us as we blast off into the Planning & Development Department and the city of Phoenix's bright future!

Be sure to bookmark the SHAPE PHX intranet site where you'll find this guidebook and other informative tools:

<https://cityofphoenix.sharepoint.com/sites/pdd/shapephx>.



# GETTING STARTED WITH



# APPENDIX

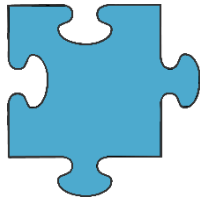


## Appendix A – Important Links

### Internet Links for SHAPE PHX



ARK: <https://pddisapps.phoenix.gov/ark>



SHAPE PHX Training Documents & Reference Guides

<https://cityofphoenix.sharepoint.com/sites/pdd/SHAPE%20PHX%20Training%20Documents/Forms/AllItems.aspx>





To Be Provided at Release 1 Go Live



To Be Provided at Release 1 Go Live

### Accessing the Mobile Applications:

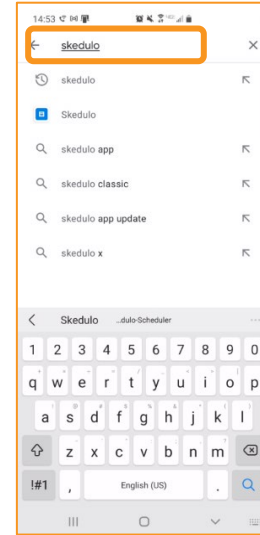
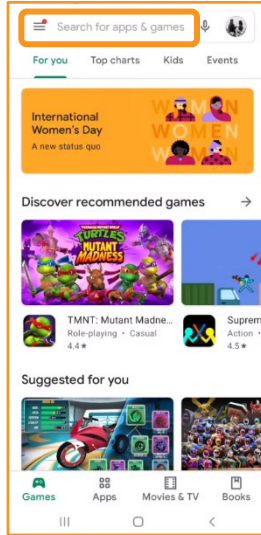
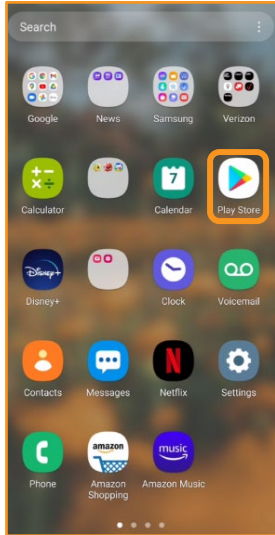
OPERATING SYSTEM	TYPE	SUPPORTED MODELS	OPERATING SYSTEM REQUIREMENT
 <b>Android</b>	Phone	All major Android devices.	Android version 7.0 or later, any device released in the last three years are supported. <i>The app is optimized for Samsung and Google Pixel devices.</i>
	Tablet	Samsung tablets released in the last 3 years.	Android version 7.0 or later.
 <b>Apple</b>	Phone	iPhone 7 or later	iOS 12.0.0 or later versions
	Tablet	iPad 5th Gen or later iPad Air 2 or later iPad Mini or later	iOS 12.0.0 or later versions

## Appendix A – Important Links

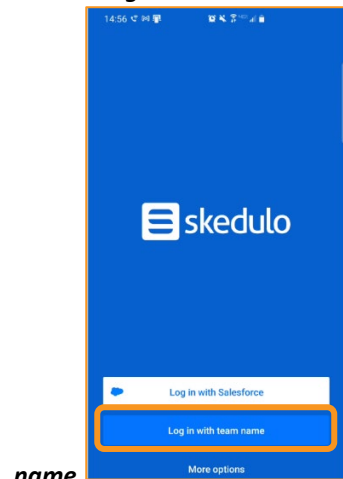
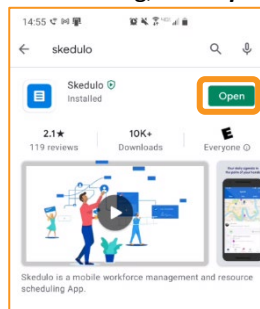
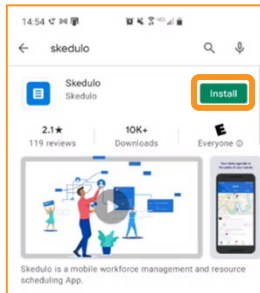
### Android

To download the applications to your Android device:

1. Go to the Google Play Store.
2. Click on search bar to enter the name of the application:
3. Type the name of the application into the box.

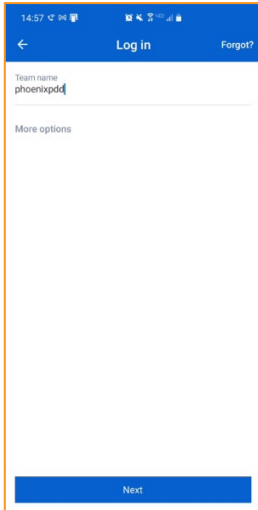


4. For Skedulo, select the app called Skedulo and click **Install**:
5. Once Skedulo has finished downloading, click **Open**.
6. Choose **Log in with team name**

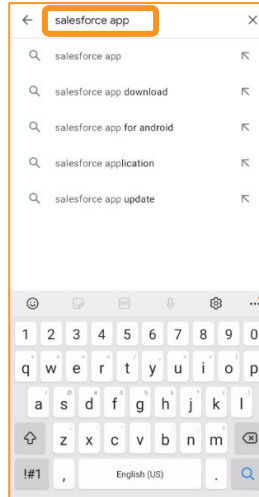


*name.*

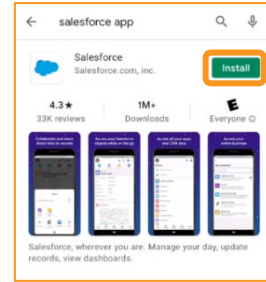
7. Enter the **Team name** phoenixpdd.



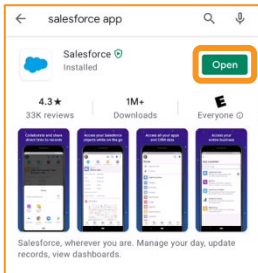
8. For SHAPE PHX, search for the **Salesforce app**.



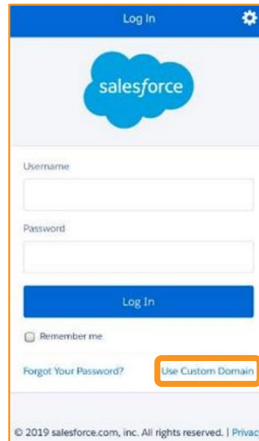
9. After you have located it, click **Install**.



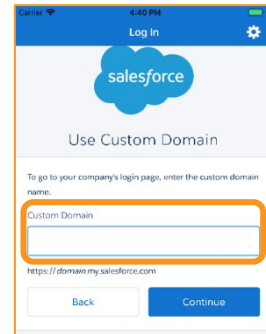
10. Once Salesforce has finished downloading, click **Open**.



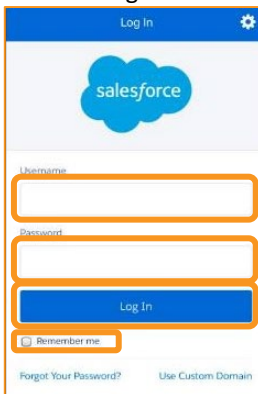
11. Click on Use Custom Domain.



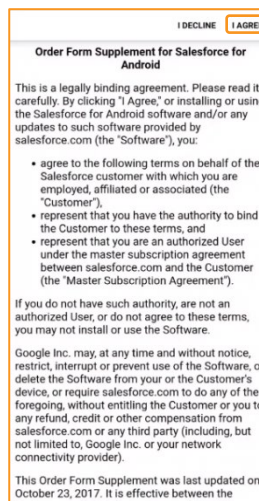
12. Enter phoenixpdd--trainr1 in the Custom Domain box.



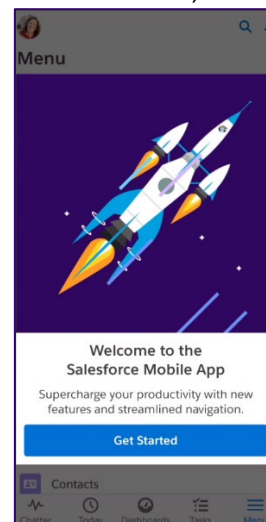
13. On the Log In Screen:
  - a. Enter SHAPE PHX Username (FirstName.LastName@phoenix.gov.shape.train)
  - b. Enter Password
  - c. Check Remember me
  - d. Click Log In



14. Click "I AGREE."



15. Click Get Started,



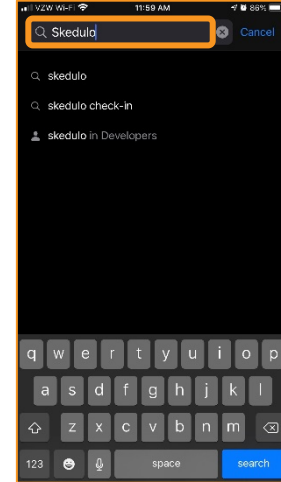
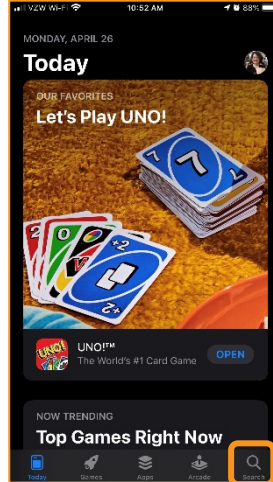
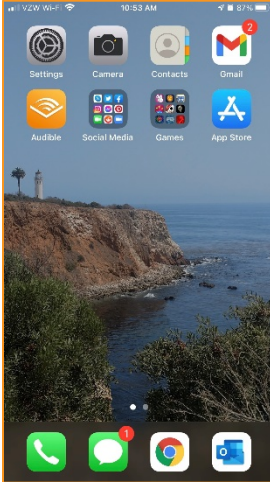
16. Click the X to exit the helpful information.

## Appendix A – Important Links

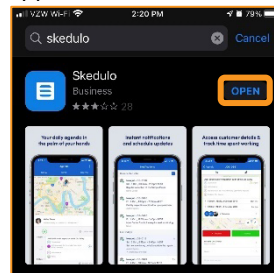
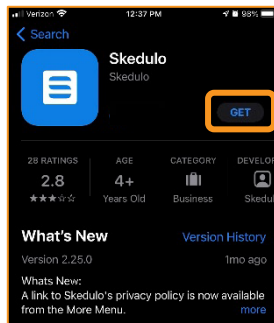
### Apple

To download the applications to your iOS (Apple) device.

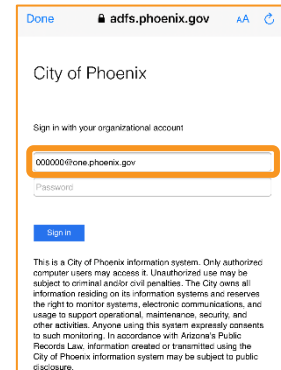
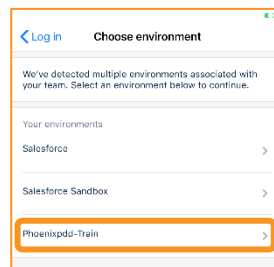
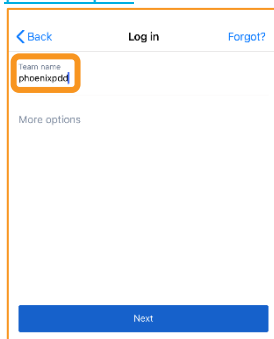
1. Go the Apple App Store:
2. Click on the magnifying glass to perform a search:
3. Type the name of the application into the box.



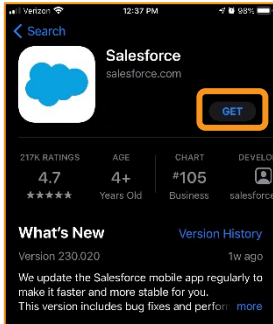
4. For Skedulo, select the app called Skedulo and click **GET**:
5. Click **OPEN** to begin using the application.
6. Choose **Log in with team name**.



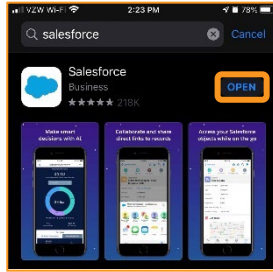
7. Enter the **Team name** [phoenixpdd](#).
8. Select the appropriate environment.
9. Enter your Phoenix Active Directory username and password. (Either your email address or employee id and [@one.phoenix.gov](#)).



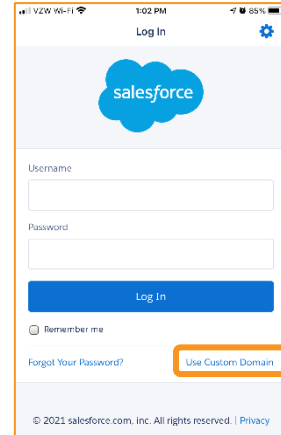
10. For SHAPE PHX, you will need to search for the **Salesforce app** in the Apple App Store. Click **GET**.



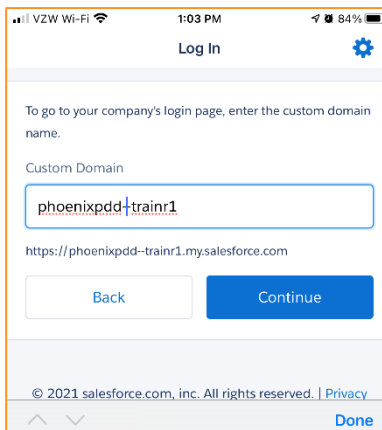
11. Click **OPEN** to begin using the application.



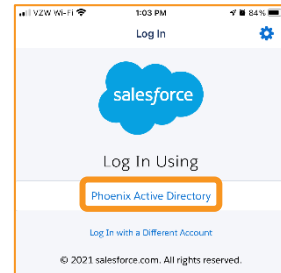
12. Open the app and click on **Use Custom Domain**.



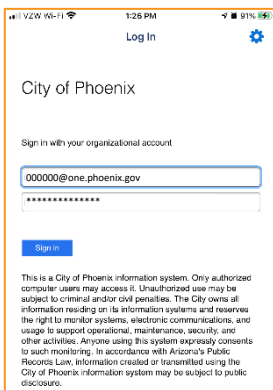
13. Enter [phoenixpdd--trainr1](#) for the **Custom Domain**. **Note:** there are *two dashes* (where the blue cursor is located on the screen capture to the right) and *not* an m-dash (extra-long dash). The iPhone changes this to an m-dash, so you will need to type it with a space between the dashes and go back and remove it once you are done typing the domain into the field.



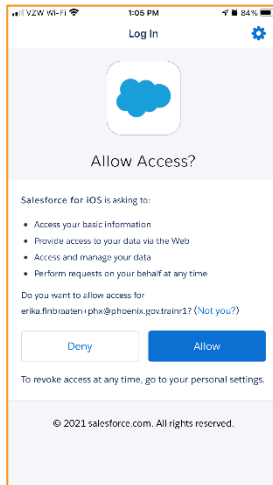
14. Click on **Log in Using Phoenix Active Directory**.



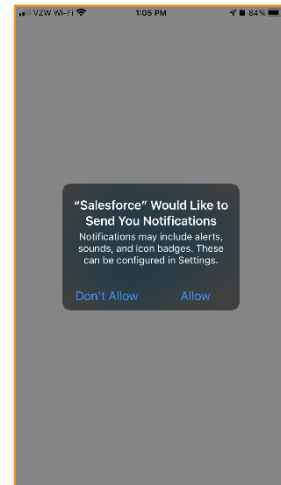
15. Enter your Phoenix Active Directory username and password. (Either your email address or employee id and @one.phoenix.gov).



16. Click **Allow** here.

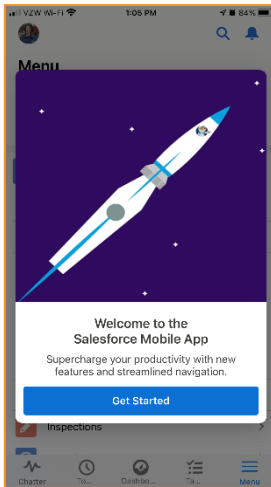


17. And click **Allow** here.



## Appendix A – Important Links

18. And you are ready to begin!





## Appendix B – Glossary of Terms

The Glossary of Terms is also available at: [SHAPE PHX Training Documents.](#)

**TERM:** (APPLICATION NAME) Section of Origin (if differing definitions exists by section, i.e., Planning, HP, Inspections, Plan Review) Definition. *SEE EQUIVALENT TERM (APPLICATION NAME).* Words within a definition that are in all capital letters can be found elsewhere as terms in the glossary.

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**@MENTION:** (SHAPE PHX) An @mention (or at mention) is the @ symbol followed by a person's or group's name, for example, @Bob Smith or @DocTeam. You can @mention people in CHATTER posts and comments. When you @mention someone, the @mention links to their profile, the post or comment displays in their feed, and they are emailed a notification.

**ACCOUNT:** (SHAPE PHX) Companies or individuals with which the city does business.

**ACTION TICKLER LIST:** (KIVA) A list of plan reviews that are assigned to a specific individual to complete. General ticklers can be used for distribution of work amongst a group or section. Informally known as the Tickler. *This term will be retired with KIVA. Although there is no direct equivalent to this term in SHAPE PHX, there are list views, such as My Permits and Today's Tasks, that will show the permits that are assigned to a reviewer.*

**ACTIVE DIRECTORY:** (BOTH) The system that provides access to the City of Phoenix computer network. This information allows you to login by either using your email address or your employee identification number followed by City's network name (000000@one.phoenix.gov).

**ACTIVITY:** 1. (SHAPE PHX) An event, a task, a call you've logged, or an email you've sent. You can relate an activity to other records, such as an ACCOUNT, a lead, an opportunity, or a case.  
2. (SKEDULO) An activity (event), which can include hearing, call, meeting, investigation, inquiry or other that is logged on a record (e.g. permit, INSPECTION, plan review, etc.). The activity can include the following information assigned to, start (date and time), end (date and time), location, related record number and attendees.  
3. (KIVA) A list of activities necessary to complete the plan review and the sequence they should be completed in. The activities are a listing defaulted by the plan review type but the ability to add or delete exists. Within each activity, there are a list of actions. The actions list the start (date and time), end (date and time) and the decision.

**ALERT:** (SHAPE PHX) This offers up a pop-up to provide information to assist the user in completing a task. A user can apply an alert to any record. Alert types include notices, holds or lock. Once an alert is applied, when a user accesses the record a pop-up displays to provide an overview of the alert and access to the alert record. *See HOLD (SHAPE PHX), LOCK (SHAPE PHX), AND NOTICE (SHAPE PHX) SEE FLAG (KIVA)*

**APN:** (SHAPE PHX / KIVA) *SEE ASSESSOR PARCEL NUMBER*

## Appendix B – Glossary of Terms

**APPLICANT:** (SHAPE PHX / KIVA) A person applying for a PERMIT or license. After applying, an applicant can also make a request (e.g. meeting, INSPECTION, review, etc.)

**APPROVAL PROCESS:** (SHAPE PHX) An approval process automates of how records are approved in SHAPE PHX. It specifies each step of approval, including from whom to request approval and what to do at each point of the process.

**ARK:** (SHAPE PHX) ARK is the data archive system that is used for researching records that were created when KIVA was active. It is a read-only database and cannot be altered. Most of the information that was in KIVA is available at the user's fingertips, but REPORTS and some information may require a Help Desk ticket to retrieve.

**ASSESSOR PARCEL NUMBER:** (SHAPE PHX / KIVA) The Assessor Parcel Number (APN), sometimes known as the Tax Parcel Number, is an identification number that is assigned to a parcel of land by the responsible government.

**ASSET:** (SKEDULO) A vehicle or other piece of equipment, such as a phone or tablet, that is used by a RESOURCE to perform a JOB.

**ATTRIBUTES:** 1. (SKEDULO) RESOURCES can be accredited skill TAGS (or attributes) that are used to track specific job-related skills, certifications, and licensing. *RELATED TO TAGS.*  
2. (SHAPE PHX) Details regarding a property such as whether it is in an impact fee area, what its historic preservation status is, or if it is in a flood zone.

**AVAILABILITY:** (SKEDULO) The times an inspector can be scheduled an INSPECTION/Job. These times are defined (e.g. general availability (normal working hours) or extra periods (times outside of normal working hours)). *RELATED TO AVAILABILITY CONSOLE.*

**AVAILABILITY CONSOLE:** (SKEDULO) Accessible by supervisors through the Skedulo console. Displays a calendar-like view with their team's schedules/availability. This allows the supervisor to approve or decline an INSPECTION or meeting request from one screen/web browser.

**CENSUS CODE:** (SHAPE PHX) These codes coincide with the Structure Codes from KIVA. The Census Codes are used by staff to report to MAG and the State Demographers office the changes in the number of dwelling units within the city of Phoenix. To accurately capture that data, the Structure Codes that are used in KIVA must include the appropriate Census Codes for single family homes, duplexes, etc., so that we can record the number of dwelling units constructed and demolished each year for population and Census projections.

**CHATTER:** (SHAPE PHX) Chatter is a collaboration space within SHAPE PHX that allows you to either make notes for yourself or collaborate with colleagues. You can use Chatter to get input, advice, and guidance, or to follow the progress of an application. You can at mention another user by using @ and their name (@MENTION) and they'll be alerted that their assistance is requested, with a link to the relevant content. Although Chatter is for internal use only, it is part of the public record and subject to requests for information by the public.



**CHILD RECORD:** (SHAPE PHX / KIVA) A record created from another record. The record of origin is known as the Parent Record. Also known as a Related RECORD.

**CLEARANCE CHECKLIST:** (KIVA) The clearance checklist is a master schedule and plan by discipline for completing the review. It allows the assignment of activities and also includes the correction comments, due dates, and decision dates. *There is no direct equivalent feature in SHAPE PHX and will be handled through new features. This term will be retired with KIVA.*

**CLOUD COMPUTING:** (SHAPE PHX) A type of internet-based computing where different services including servers, storage and applications are delivered via the internet.

**CODE TABLE:** (SHAPE PHX) A table of commonly used code or ordinance sections used by staff. This table will not contain the whole code, just the most commonly used sections codes used when noting corrections on plans. The code verbiage in this table is an exact copy from the code book. The table can be updated by the SHAPE PHX administrative team at any time.

**CORRECTION COMMENTS TABLE:** (SHAPE PHX) A table of commonly used staff comments related to code sections or ordinances to help the customer understand what they need to do to move to the next stage in the process. The table can be updated by the SHAPE PHX administrative team at any time.

**CONDITIONAL HOLD:** (KIVA) Informal. *SEE COND-PERM (KIVA) or HOLD (SHAPE PHX)*

**COND-PERM:** (KIVA) A hold on a PLAN REVIEW or PERMIT until a condition is met. A COND-PERM will allow changes to be made to a PLAN REVIEW or PERMIT but will not allow the PERMIT to be issued and will not accept final INSPECTION requests or issuance of a Certificate of Occupancy. No final INSPECTIONS may be requested through PDD Online or the IVR system until the hold is resolved. *SEE HOLD (SHAPE PHX) This term will be retired with KIVA.*

**CONTACT** (SHAPE PHX / KIVA): The person who should be contacted with any questions or for additional information.

**DASHBOARD:** (SHAPE PHX) Displays as the user's homepage. It shows data customized to the user's profile; for example, the information shown on an inspector's home page may be different from a plan reviewers home page. Information displayed may include, My Time Tracking, Today's Tasks, Today's Events, Recent Records, etc.

**DEFECT:** (SHAPE PHX) A defect is any issue that can temporarily stop a business process from completing. This could be a coding issue, a misspelling on a list view, or simply a missing piece of information on a business process. There are 5 levels of severity, 5 being the highest or most impactful to 1 being closer to an inconvenience.

**DISCIPLINES:** (SHAPE PHX) The specialties or fields of focus for which inspections are performed on construction projects completed within the city of Phoenix, such as Structural, Mechanical, Electrical, or Plumbing.

## Appendix B – Glossary of Terms

**EMAIL ALERT:** (SHAPE PHX) An action performed in SHAPE PHX that automatically generates and sends an email to a specified recipient.

**EMAIL TEMPLATE:** (SHAPE PHX) An email or letter that contains a standard predefined message, such as a request for documentation from an applicant.

**FIELD LEVEL HELP:** (SHAPE PHX) Custom help text that you can see when you hover a mouse over the help icon adjacent to a field.

**FINAL REVIEW:** (SHAPE PHX) A review of a project before a PERMIT is issued based on approved plans and payment of fees.

**FLAG:** (KIVA) For notification purposes; advises staff of conditions or important information related to a parcel or area. A FLAG will allow changes to be made to a PLAN REVIEW or PERMIT and will allow the PERMIT to be issued and/or finalized. It may need to be acknowledged by the individual that is entering the PERMIT by signing it off. *SEE ALERT (SHAPE PHX) This term will be retired with KIVA.*

**FOLLOW:** (SHAPE PHX) A subscription to a user or record that lets you see related updates in your CHATTER feed. Follow a user to see the user's posts. Follow a record to see posts, comments, and field changes.

**FUNCTION KEYS:** (KIVA) Function keys are located at the top of the keyboard and labeled "F1" through "F12". They have been assigned a specific value in KIVA to provide quick access to the most common KIVA commands. The command or key value is listed to the right of the function key. *There is no direct equivalent feature in SHAPE PHX. This term will be retired with KIVA.*

**GENEAOLOGY:** (KIVA) The history of PERMITS and projects associated with a parcel; how all the PLAN REVIEWS and PERMITS get tied together within a project. Allows users to take a PERMIT and trace the history of the project by viewing the parent, subject/sibling, and child PERMITS for the selected PERMIT. *This term will be retired with KIVA but will be used in the ARK system.* The relationship between PERMITS, PLAN REVIEWS, INSPECTIONS, and other OBJECTS in SHAPE PHX will be handled through the *Related List Quick Links feature* and other hyperlinks.

**HARD HOLD:** (KIVA) Informal. Completely locks the parcel from any action. Requires specific permission to remove. There are two types in KIVA. *SEE HARD-PROJ (KIVA) or HARD-PERM (KIVA) SEE LOCK (SHAPE PHX) for nearest equivalent. This term will be retired with KIVA.*

**HARD-PERM:** (KIVA) A hard hold on a PLAN REVIEW or PERMIT. A HARD-PERM will not allow any changes to be made to a PLAN REVIEW or PERMIT and will not allow the PERMIT to be issued. No INSPECTIONS may be requested through PDD Online or the IVR system until the hold is resolved. *SEE LOCK (SHAPE PHX). This term will be retired with KIVA.*

**HARD-PROJ:** (KIVA) A hard hold on an entire PROJECT. A HARD-PROJ hold will not allow any changes to be made on any PLAN REVIEWS and PERMITS associated with an entire PROJECT. HARD-PROJ holds may only be placed on PROJECTS by staff that has the applicable security. Typically, this security is only given to the director, assistant directors, or deputy directors. No INSPECTIONS may be requested through PDD Online or the IVR



## Appendix B – Glossary of Terms

system until the hold is resolved. *SEE LOCK (SHAPE PHX). This term will be retired with KIVA.*

## Appendix B – Glossary of Terms

- HOLD:** (SHAPE PHX) A hold is placed on specific field and can include the status of a record. Fields that have a hold placed on them cannot be modified. When placing a hold on the status of a record, you can restrict how far into a workflow the record can proceed. For example, you can put a hold on a permit status field, but it could only apply to the Approved status. A PERMIT can go through the workflow, but it is prevented from achieving an Approved status until the hold is removed. Holds cannot be applied to related records. A hold requires permission to remove. *SEE COND-PERM (KIVA), SEE ALERT (SHAPE PHX)*
- HOLIDAYS:** (SKEDULO) Planned days off (a period of unavailability), e.g., Christmas, New Year. Holidays can be global (impacting all regions) or region-specific. Holidays will automatically impact the availability of RESOURCES in an affected region.
- INCLUSION:** (SKEDULO) Using inclusion (or exclusion), organizations can allow (or prevent) access to certain customer ACCOUNTS.
- INSPECTION:** (SHAPE PHX / KIVA) A testing of something against standards established by the site. An inspection can be to determine the integrity of a building, to verify that a service request has been completed, etc.
- INSPECTION JOB:** (SHAPE PHX) The term utilized in SKEDULO to represent an INSPECTION. A job record allows and SHAPE PHX to sync INSPECTION information. A job will remain in the inspector queue until assigned to a specific inspector.
- INSPECTION QUEUE:** (SHAPE PHX) A listing of INSPECTIONS that have not been assigned to an individual inspector. The supervisor has access to a master queue showing assigned and unassigned INSPECTIONS. A supervisor can assign an INSPECTION to any inspector. An individual inspector can only assign an INSPECTION to themselves. Once assigned, the INSPECTION will display on the individual inspector's queue. *SEE INSPECTOR DAILY LOG (KIVA)*
- INSPECTION RECORD:** 1. (SHAPE PHX) The OBJECT for an INSPECTION containing the INSPECTION type, results, comments, and completion dates.  
2. (KIVA) The INSPECTION history and results screens containing INSPECTION type, results, comments, and completion dates.
- INSPECTION RESULTS:** (KIVA) The outcome of a completed INSPECTION captured in the INSPECTION history and results screen, e.g., Pass, Fail. *SEE INSPECTION RECORD (SHAPE PHX)*
- INSPECTION STATUS:** (KIVA) The Inspection Status screen displays the Inspection necessary to close the PERMIT, the Utility Clearances that have been granted; the Disciplines associated with the Inspections, and the information on the PERMIT Signoff.
- INSPECTION TYPE:** (KIVA) The specific category of INSPECTION pertaining to work completed, typically by discipline, e.g., Structural-Framing, Foundation, Electrical-Rough electrical. *SEE INSPECTION RECORD (SHAPE PHX)*
- INSPECTOR DAILY LOG:** (KIVA) The work entered for the day in the Inspection Results screen. *SEE INSPECTION QUEUE (SHAPE PHX)*

- IVR:** (SHAPE PHX / KIVA) Interactive Voice Response. Phone system used by customers to request INSPECTIONS.
- JOB:** (SKEDULO) A job is an INSPECTION being provided at a location, assigned to an inspector, at a certain time for an APPLICANT. This includes INSPECTIONS for Code Enforcement, Construction PERMIT Inspections and Elevator Annual Inspections.
- JOB CARD:** (SKEDULO) Job cards contain the details of requested customer meeting or INSPECTION. They may, or may not, include scheduling information (date/time), or JOB tasks.
- JOB NAME:** (SKEDULO) The number allocated to the job record in SHAPE PHX and displayed in Skedulo on the job card (e.g., JOB-0024).
- JOB STATUS:** (SKEDULO) An automatically updated status which reflects the progress of an INSPECTION based on completed tasks.
- JOB TIME CONSTRAINTS:** (SKEDULO) Job time constraints. These can specify the start and/or end time of an INSPECTION or meeting based on the type (e.g., elevator INSPECTION, plan review meeting, etc.) Also known as JTC.
- JOB TYPE:** (SKEDULO) Job Types are used to reflect the individual types of services (job categories) that need to be delivered as part of a work order. They can have a default duration and can also have predefined TAGS and tasks.
- JUST IN TIME:** (SKEDULO) The automated scheduling of JOBS to a RESOURCE—allocating a JOB to a RESOURCE immediately before they start the JOB; queued up "just in time" to the workforce. Also known as JIT.
- LETTER:** 1. (SHAPE PHX) Built from a template to pull together information and then emailed and or sent via US Postal Service (USPS). Can be modified by the USER in SHAPE PHX.  
2. (KIVA) Considered a REPORT but it pulls information into an Oracle form builder and is sent via e-mail or USPS. Cannot be modified by USER in KIVA.
- LICENSE:** (SHAPE PHX / KIVA) A license is granted to an individual or facility. Types of licenses include journeyman, apprentice, Self-Certified Professionals, Peer Review, Special Inspector, Pyro, Blaster and AFP/BMR (Annual Facilities Permit/Building Maintenance Registration).
- LIST VIEW:** (SHAPE PHX) A display of alike records which includes high-level information (e.g., link to record, record type, status, etc.). It can be sorted to display specific types of records or sorted to display the records in a specific order.
- LOCATION:** (SKEDULO) One account can have many locations (i.e., addresses). Locations are optional in Skedulo, as the destination of a JOB may simply be the account address. Create a location record if you're going to have multiple JOBS for the different locations on the same account. The JOB address (which is populated from the location address) is key to scheduling as it is used to calculate drive times and plot JOBS on the map.

## Appendix B – Glossary of Terms

**LOCK:** (SHAPE PHX) With this status, nothing can be done with an account. No PERMITS can be issued, or INSPECTIONS requested. Requires specific permission to remove. It stops all related records (including CHILD RECORDS) from proceeding or being created, modified, or deleted. SHAPE PHX will allow a request to be sent to the person with those permissions and they can remotely remove release the lock temporarily. The Override request is good for two hours. Once it is removed, there is only a five minute window to conduct the transaction. *SEE HARD-PROJ (KIVA) or HARD-PERM (KIVA). SEE ALERT (SHAPE PHX)*

**MASTER INSPECTION LIST:** (KIVA) The list of all INSPECTION types by discipline and type that will include all major development types, e.g., Residential, Commercial, Civil, Fire. *SEE INSPECTION TYPE (SHAPE PHX).*

**MDEV:** (KIVA) “Master Development” – A piece of property that may have multiple developments within a single overall master plan. For example, a developer is planning a new community, the MDEV is the placeholder PERMIT type for the planned community that may consist of one or more PROJECTS. *This term will be retired with KIVA.*

**MESSAGE LINE:** (KIVA) The Message Line shows any system or error messages, number of records, fields with function key, and the function key value. If your screen is too large, the message line will not be visible. *There is no direct equivalent feature in SHAPE PHX. This term will be retired with KIVA.*

**MESSAGE, CHATTER:** (SHAPE PHX) A CHATTER message is a private communication with other CHATTER users. Use messages to send your manager a question privately, or to communicate with a few select people when a discussion isn't relevant to everyone you work with. Messages don't appear in your feed, your profile, or any other part of CHATTER that's publicly visible. *It is important to remember that these messages are considered part of the public record and can be requested by the public at any time.*

**MILESTONES:** (SHAPE PHX) Milestones are required steps in the process. They're metrics that represent service levels to provide to each of your customers. Milestones in SHAPE PHX include: Admin Review, Plan Review, Final Review (only when permit final review outcome is "Action Required" - otherwise final review is part of Plan Review Milestone), and Self-Certified Audit.

**NAVIGATION TAB:** (SHAPE PHX) A tab with a drop-down button in SHAPE PHX that lets you select and view OBJECT home pages.

**NOTICE: (SHAPE PHX)** A notice on a record or file displays information but does not stop work from being done to the record; it is an information only pop-up. A notice can apply to a current record or all related records. For example, for a permit and all its related reviews and INSPECTIONS.

**NOTIFICATION:** (KIVA) Communication sent to the APPLICANT of a submitted PROJECT.

Notification may be delivered manually by staff or automatically by the system per a workflow trigger point such as during the administrative prelog review, at the end of a PLAN REVIEW cycle, or to notify of any action completed and/or required Notification language may include outstanding items such as correction comments, fees or holds including required action, or any other outlined deficiencies.

**OBJECT:** (SHAPE PHX) An object allows you to store information in SHAPE PHX. The object is the overall definition of the type of information you are storing. For example, a Permit or an Inspection is an Object in SHAPE PHX. For each object, your organization will have multiple records that store the information about specific instances of that type of data. Also known as Records.

**OPERATING PERMIT:** (SHAPE PHX) A PERMIT that is generated to track a required annual INSPECTION of a system, piece of equipment, or facility in order to remain in operation.

**OPTIMIZED SCHEDULING:** (SKEDULO) The optimize scheduling engine attempts to find the best scheduling solution (based on the optimize settings) for the JOB(s) selected within the current scheduling view. Skedulo uses optimization to efficiently schedule multiple JOBS and RESOURCES across a scheduling window, considering multiple constraints such as skills matching, RESOURCE availability, location, and travel time.

**OWNER:** (SHAPE PHX) An individual user to which a record (for example, a contact or PERMIT) is assigned.

**PARCEL FLAG:** (KIVA) A flag placed on a specific address to be evaluated prior conducting a review or INSPECTION. Parcel flags will apply to any PERMIT for that particular parcel. *This term will be retired with KIVA. SEE ALSO ALERT (SHAPE PHX), HOLD (SHAPE PHX), LOCK (SHAPE PHX) AND NOTICE (SHAPE PHX).*

**PARCEL GENEALOGY:** (SHAPE PHX / KIVA) The history of changes to a parcel over time with parent and child parcels, where the parent parcel is the original parcel and the child parcel(s) is the result of a split or join.

**PARENT RECORD:** (SHAPE PHX / KIVA) The originating record in GENEALOGY; a record created from this record is known as a CHILD RECORD.

**PERMIT:** 1. (SHAPE PHX / KIVA) An authorization to begin construction. It is either created after completion of a PLAN REVIEW or, for limited scopes of work, it could be issued over-the-counter (or online) without a PLAN REVIEW.

2. (KIVA) Most entries in KIVA, including a PLAN REVIEW, are referred to as a PERMIT by the system.

**PERMIT CATEGORIES:** 1. (SHAPE PHX) Permit Categories will describe what is the customer is applying for or submitting to Planning and Development. The permit categories in SHAPE PHX are Clearance, Complaint, Equipment, Inspection, License, Permit, and Review.

2. (KIVA) They used to identify PROJECTS of interest, such as Five-Day Site Plan Review, Historic Preservation, Citation Cases and more. *RELATED TO PERMIT CATEGORY CHECKBOXES.*

## Appendix B – Glossary of Terms

**PERMIT CATEGORY CHECKBOXES:** (KIVA) These checkboxes were created to identify PROJECTS of interest with a tag and to aid in information retrieval for REPORTS, PLAN REVIEW turnaround, and other criteria. Behind the scenes, some categories will alert the inspectors of additional items to look for on an INSPECTION. At least one box was required to be checked. *This term will be retired with KIVA.*

**PERMIT / PLAN CODE:** (KIVA) The alpha or alphanumeric prefix to a PERMIT or plan review number that indicates the PERMIT or plan review type. Also known as Permit / Plan Type. *This term will be retired with KIVA.*

**PERMIT FLAG:** (KIVA) A FLAG placed on a specific permit to be evaluated and reviewed prior to conducting a review or INSPECTION. *This term will be retired with KIVA.*

**PERMIT GENEALOGY:** (KIVA) The history of PERMITS and PROJECTS associated with a parcel; how all the PLAN REVIEWS and PERMITS are tied together within a PROJECT. Allows users to take a permit and trace the history of the PROJECT by viewing the parent, subject/sibling, and child PERMITS for the selected PERMIT. *This term will be retired with KIVA but will be used in the ARK system.* The relationship between PERMITS, PLAN REVIEWS, INSPECTIONS, and other OBJECTS in SHAPE PHX will be handled through the *Related List Quick Links feature* and other hyperlinks.

**PERMIT NAME:** (KIVA) A concise description or title for the work to be performed under the PERMIT.

**PICKLIST:** (SHAPE PHX) A list of options available for a specific field in a SHAPE PHX RECORD OBJECT, for example, the Industry field for accounts. Users can choose a single value from a list of options rather than type an entry directly in the field.

**PICKLIST VALUES:** (SHAPE PHX) Selections displayed in a drop-down list for a particular field. Some values come predefined by the SHAPE PHX team, and other values can be changed or defined by an administrator.

**PID:** (KIVA) PERMIT Identification number. A number used in the background of KIVA to easily identify each PERMIT. *This term will be retired with KIVA.*

**PIN:** (KIVA) Parcel Identification Number---. A number used in the background of KIVA to easily identify each parcel. *This term will be retired with KIVA.*

**PLACEHOLDER PERMIT TYPES:** (KIVA) Placeholder PERMIT types, e.g., SDEV, SPAD, and MDEV, are a method of organizing and tying together PROJECTS that are related to one another. *These terms will be retired with KIVA.*

**PLAN SUBMISSION TYPE:** (SHAPE PHX) When you create a PERMIT the first action taken is to select the “plan submission type,” e.g., Construction and Trades, Civil, Pool.

**PORTAL:** (SHAPE PHX) Web access point for SHAPE PHX to be used by both City customers and can be used by staff. People with accounts can accomplish the actions the portal was designed for that their security access allows. Without an account, (i.e., for GUEST USERS) it is mostly a search tool. This only provides access to Planning & Development.

**PROJECT:** (KIVA) A planned development that may include a number of related PERMITS.



**PROPERTY OWNER:** (SHAPE PHX / KIVA) The property owner of record according to Maricopa County Records and/or the owner on the application submitted to staff.

**QUEUE: (SHAPE PHX)** The general queue is a list of records (e.g. plan reviews, admin reviews, INSPECTIONS, etc.) awaiting assignment. Once assigned, the RECORD is displayed on an individual owner's queue. A supervisor has access to a queue which includes assigned and unassigned RECORDS.

**QUICK PERMIT:** (SHAPE PHX) A permit that can be purchased online because it does not require plans to be submitted and reviewed. Examples include water heater replacements, repipe waterline for bathroom(s), gas line repair, or an upgrade to electrical service. Currently, these are the online permits.

**RECORD:** (SHAPE PHX / KIVA) An entry in the database for a particular data item, e.g., a PERMIT, PLAN REVIEW, or receipt of payment. A record is a single instance of a SHAPE PHX OBJECT.

**RECURRING SCHEDULE:** (SKEDULO) A Skedulo feature that allows a scheduler to create JOBS that appear as part of a repeating pattern. The app groups JOBS on a recurring schedule. For example, a regular trip with pre-set customer visits.

**REGION:** (SKEDULO) Regions are used to segment working areas, for example, Peter can work in city "a," but not "b." JOBS and RESOURCES are associated with a region.

**REGION (SECONDARY):** (SKEDULO) A secondary REGION permits a RESOURCE to work across regions (or territories), this can be assigned in addition to their primary REGION.

**REGION (TEMPORARY):** (SKEDULO) A temporary REGION allows a RESOURCE to work in a different region (that can be in a different time zone), for a set period, e.g., a traveling RESOURCE.

**REGISTERED USER:** (SHAPE PHX) External user of SHAPE PHX, such as an architect, contractor, or property owner, who uses SHAPE PHX to submit applications, view the status of said applications, or request meetings or INSPECTIONS. They can create plan submissions, apply for a license, pay fees, or request INSPECTIONS.

**REPORT:** 1. (SHAPE PHX) A collection of data points with a specific filter. There are going to be predetermined reports that can be easily customizable by the user.  
2. (KIVA) A collection of data points with a specific filter. This is created by the programmers and not easily editable. Most LETTERS were classified as reports in KIVA and given a report number. Other uses were for lists of data and they were not editable.

**RESOURCE:** (SKEDULO) A resource is defined as either a person or a physical ASSET that is in the field. A "Person" resource is associated with a SHAPE PHX user record, e.g., an inspector. However, an ASSET resource requires no user record as it is typically an object (e.g., a truck).

**RESOURCE REQUIREMENTS:** (SKEDULO) RESOURCE requirements define the number of RESOURCES and skills they must have to fulfill a JOB assignment.

**ROSTERS:** (SKEDULO) A collection of SHIFTS over a set period. A roster can be replicated by copying a number of SHIFTS for one period to another.

## Appendix B – Glossary of Terms

**SCHEDULER:** (SKEDULO) A scheduler (or dispatcher) is a function of an organization. Typically, responsible for the creation, dispatch, and maintenance of JOBS to the RESOURCES out in the field. The supervisors will be the schedulers.

**SCOPE CODE:** (KIVA) Text templates that are automatically entered into the scope of work to assist in communicating specific information for PLAN REVIEW, research, and creation of a PERMIT. *This term will be retired with KIVA.*

**SCOPE OF WORK:** (KIVA) The Scope of Work is a description of what is being done under the PERMIT in question.

**SDEV:** (KIVA) “Site Development” – The SDEV is the placeholder PERMIT type for each of the PROJECTS. For example, a shopping center, church, schools, or subdivision is a *PROJECT*. The SDEV placeholder will be the starting point and will link all SPADs, PLAN REVIEWS / PERMITS in GENEALOGY. *This term will be retired with KIVA.*

**SHIFT:** (SKEDULO) Shifts are defined periods of work within a rostered day. In Skedulo, a scheduler can overlay a RESOURCE'S availability on their shift(s) to identify conflicts with JOB ALLOCATIONS.

**SKEDULO:** (SHAPE PHX) Skedulo is an application that works in concert with SHAPE PHX to schedule INSPECTIONS and meetings. It can be used on mobile devices or desktop or laptop computers. It has route optimization capabilities, allows real-time updates in the field of INSPECTION results, and can store and upload images. When connectivity is not available, the data is stored and updates the next time the device is in range.

**SPAD:** (KIVA) “Site Pad” – A piece of property that has a defined boundary and has been or could be assigned a permanent street address. The SPAD is the addressable commercial building, suite, single family home and/or residential lot. *This term will be retired with KIVA.*

**SUGGEST:** (SKEDULO) The suggestion engine is suitable for finding a slot in the schedule for a single JOB.

**SUMMARY REPORT** (SHAPE PHX): Summary REPORTS are similar to tabular REPORTS, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source REPORT for dashboard components. Use this type for a REPORT to show subtotals based on the value of a particular field or when you want to create a hierarchical list, such as all opportunities for your team, with subtotaled by Stage and OWNEROWNEROWNERS.

**TABULAR REPORTS:** (SHAPE PHX) This is the most basic type of REPORT; the output is organized in multicolumn, multirow format, with each column corresponding to a column in the database.

**TAGS, GROUPS:** (SKEDULO) Tags can be used to categorize RESOURCES. For example, use tags to group skillsets of people, and use custom categories for physical ASSETS. JOBS can have "required tags;" e.g., an Electrical INSPECTION requires the Electrical Tag. Tags can also be "global" which applies to both "Person" and "ASSET" RESOURCE types—they are used in the scheduling process matching JOBS with RESOURCES that have the corresponding tags. Tags are used to define a special skill such as RVI (Remote Video Inspection).

**TAGS, SKILLS:** (SKEDULO) These identify competencies that RESOURCES have obtained, such as specific certifications, that make them appropriate for certain types of JOBS. These specialties assist Skedulo with auto-scheduling JOBS based on the skills that are required to complete them.

**TICKLER:** (SHAPE PHX): *SEE ACTION TICKLER LIST.*

**TICKLER DATE:** (KIVA) The tickler date is the date by which an ACTIVITY should be completed and is what causes the item to be displayed on a reviewer's action tickler list. *This term will be retired with KIVA. This will be called the due date in SHAPE PHX.*

**TIME TRACKING:** (SHAPE PHX / KIVA) Used by staff to record the amount of time spent on each PLAN REVIEW or other ACTIVITY throughout the day so that the time can be charged against the PLAN REVIEWS or INSPECTIONS.

**TOPICS, CHATTER:** (SHAPE PHX) When you post or comment in CHATTER, you can associate your post or comment with all other posts and comments on the same subject by adding a topic. A topic is a way to categorize your post or comment so other staff can find it more easily. Topics also help you discover people and groups that are knowledgeable and interested in the same topics. *Although Chatter is for internal use only, it is part of the public record and subject to requests for information by the public.*

**TOPICS, CHATTER ANSWERS:** (SHAPE PHX) The sidebar that lists data categories from which your staff can browse questions and replies. *Although Chatter is for internal use only, it is part of the public record and subject to requests for information by the public.*

**UNAVAILABILITY:** (SKEDULO) Unavailability is time off, or a period when a RESOURCE is unavailable to work, e.g., due to sickness or vacation. *RELATED TO AVAILABILITY CONSOLE.*

**UNREGISTERED USER:** (SHAPE PHX) A user who can access the SHAPE PHX CUSTOMER PORTAL via the unregistered user license associated with SHAPE PHX. Their access to OBJECTS and data is controlled by public access settings on the unregistered user profile. For example, an unregistered user can view a verified complaint, but cannot create a request for an enforcement action. Sometimes called a guest user.

**USER:** (SHAPE PHX / KIVA) A person granted permission by the city of Phoenix to access information on the city's network and for a limited number of programs/applications.

**VALIDATED DATE/TIME:** (SHAPE PHX) The date/time on which the complaint was confirmed or authenticated by an inspection, moving the complaint from an investigation to a complaint and triggering a Notice of Code Violation and the subsequent workflow.

## Appendix B – Glossary of Terms

**VEHICLE ROUTE PLANNING:** (SKEDULO) Used in the Skedulo web app feature "Optimize" and "Suggest." It is a Skedulo service that balances JOBS and RESOURCES. It provides the scheduler with the most effective routes for their RESOURCES. Also known as VRP.

*RELATED TO OPTIMIZED SCHEDULING.*

**WILDCARDS:** (KIVA) Characters inserted into a search term to expand the search parameters to make up a match pattern. In KIVA, the Wildcards were the "%" (percent sign) and the "\_" (underscore). Wildcards are not necessary in SHAPE PHX.

**WORK ITEMS:** (SHAPE PHX) Items available from a pull-down menu of options that will define the description of the work and also assist in creating the fees for the PERMIT. Work Items can be checked to either display, or not display, on printed permits.

**WORK TYPES:** (SHAPE PHX) The method used to add fees to the PERMIT while at the same time describing the work the PERMIT covers.

**WORKFLOW ACTION:** (SHAPE PHX) A workflow action, such as an email alert, field update, outbound message, or task, fires when the conditions of a workflow rule are met.

**WORKFLOW RULE:** (SHAPE PHX) A workflow rule sets workflow actions into motion when its designated conditions are met. You can configure workflow actions to execute immediately when a record meets the conditions in your workflow rule or set time triggers that execute the workflow actions on a specific day.

## Appendix C – SHAPE PHX Numbering Scheme

### Prefixes

The prefixes for various numbers in SHAPE PHX, such as permits, citations, licenses, or applications, their definition, object type, and the number format are listed below.

#### Sorted by Prefix

PREFIX	DEFINITION	OBJECT TYPE	NUMBER FORMAT
N/A	Bond	Bond	{000000}
12	Citation Approved (the number 12 is required by the court's interface)	Citation	12{000000}
AFP	Annual Facilities Program	License	AFP-{00000}
AFPF	Annual Facilities Program	Detail	AFPF-{00000}
AOP	Master Registration, Annual Operating Permit	License	AOP-{00000}
APP	Apprentice	License	APP-{00000}
AZSB	AZ Board State License	Detail	AZSB-{00000}
BL	Blaster	License	BL-{00000}
BMR	Building Maintenance Registration	License	BMR-{00000}
BN	Cash Bond	Deposit	BN-{000000}
C	Complaint	Complaint	C{yyyy}-{000000}
CITA	Citation	Citation	CITA{yy}-{000000}
CLD	Class Details	Detail	CLD-{00000}
CM	Comment	Comment	CM-{000000}
CMOD	Code Modification	Application	CMOD-{yy}-{00000}
CTC-11	Construction & Trades Residential; Residential Sales/Construction Office	Permit	CTC-11{yy}{00000}
CTR-10	Construction & Trades Residential; Residential	Permit	CTR-10{yy}{00000}
CVC-16	Civil; Residential Sales/Construction Office	Permit	CVC-16{yy}{00000}
CVR-15	Civil; Residential	Permit	CVR-15{yy}{00000}
DEP	Deposit	Deposit	DEP-{000000}
DMC-31	Demolition; Residential Sales/Construction Office	Permit	DMC-31{yy}{00000}
DMR-30	Demolition; Residential	Permit	DMR-30{yy}{00000}
ELC-41	Elevator; Residential Sales/Construction Office	Permit	ELC-41{yy}{00000}
ELR-40	Elevator; Residential	Permit	ELR-40{yy}{00000}
ENC-46	Energy System; Residential Sales/Construction Office	Permit	ENC-46{yy}{00000}
ENR-45	Energy System; Residential	Permit	ENR-45{yy}{00000}
EST-50	Estimate; Estimate	Permit	EST-50{yy}{00000}
ESTC-52	Draft; Estimate; Residential Sales/Construction Office	Permit	ESTC-52{yy}{00000}
ESTR-51	Draft; Estimate; Residential	Permit	ESTR-51{yy}{00000}
EXD	Exam Details	Detail	EXD-{00000}
GC	Grandfather	Credit	GC-{00000}
INS	Inspection	Inspection	INS-{00000000}
IT	Item	Item	IT-{00000000}
JOB	Inspection Job (from Skedulo)	Inspection	JOB-{0000}
JY	Journeyman	License	JY-{00000}
OP-E	Elevator Operating Permit	License	OP-E-{00000}
P-17	Placeholder for Permits that do not have a type assigned yet	Permit	P-17{yy}{00000}
PR	Peer Reviewer	License	PR-{00000}
PR-12	Pool; Residential	Permit	PR-12{yy}{00000}
PY	Payment	Payment	PY-{000000}

## Appendix C – SHAPE PHX Numbering Scheme

PREFIX	DEFINITION	OBJECT TYPE	NUMBER FORMAT
<b>PY</b>	Pyrotechnician	License	PY-{00000}
<b>QPR-20</b>	Quick Permit; Residential <sup>2</sup>	Permit	QPR-20{yy}{00000}
<b>R</b>	Receipt	Receipt	R-{0000000}
<b>R-17</b>	Registration for Users	License	R-17{yy}{00000}
<b>REF</b>	Refund Request	Request	REF{yy}-{000000}
<b>REQ</b>	Request	Request	REQ{yy}-{00000}
<b>RF</b>	Bulk Refund	Credit	RF-{00000}
<b>RRF</b>	Receipt Refund	Receipt Refund	RRF{yy}-{000000}
<b>RVW</b>	Review	Review	RVW{yy}-{00000}
<b>SCP</b>	Self-Certified Professional	License	SCP-{00000}
<b>SI</b>	Special Inspector	License	SI-{00000}
<b>SPC-22</b>	Standard Plan; Residential Sales/Construction Office	Permit	SPC-22{yy}{00000}
<b>SPR-21</b>	Standard Plan; Residential	Permit	SPR-21{yy}{00000}
<b>T</b>	Temporary Number for Equipment	Equipment	T-{000000}
<b>T</b>	Transaction	Transaction	T-{000000000}
<b>TR</b>	Trust Account	Deposit	TR-{000000}
<b>TT</b>	Time Tracking	Detail	TT-{000000}
<b>VI</b>	Permit Violation	Violation	VI-{0000000}

### Sorted by Object Type and Prefix

PREFIX	DEFINITION	OBJECT TYPE	NUMBER FORMAT
<b>CMOD</b>	Code Modification	Application	CMOD-{yy}-{00000}
<b>N/A</b>	Bond	Bond	{000000}
<b>12</b>	Citation Approved (the number 12 is required by the court's interface)	Citation	12{000000}
<b>CITA</b>	Citation	Citation	CITA{yy}-{000000}
<b>CM</b>	Comment	Comment	CM-{000000}
<b>C</b>	Complaint	Complaint	C{yyyy}-{000000}
<b>GC</b>	Grandfather	Credit	GC-{00000}
<b>RF</b>	Bulk Refund	Credit	RF-{00000}
<b>BN</b>	Cash Bond	Deposit	BN-{000000}
<b>DEP</b>	Deposit	Deposit	DEP-{000000}
<b>TR</b>	Trust Account	Deposit	TR-{000000}
<b>AFPF</b>	Annual Facilities Program	Detail	AFPF-{00000}
<b>AZSB</b>	AZ Board State License	Detail	AZSB-{00000}
<b>CLD</b>	Class Details	Detail	CLD-{00000}
<b>EXD</b>	Exam Details	Detail	EXD-{00000}
<b>TT</b>	Time Tracking	Detail	TT-{000000}
<b>T</b>	Temporary Number for Equipment	Equipment	T-{000000}
<b>INS</b>	Inspection	Inspection	INS-{00000000}
<b>JOB</b>	Inspection Job (from Skedulo)	Inspection	JOB-{0000}
<b>IT</b>	Item	Item	IT-{00000000}
<b>AFP</b>	Annual Facilities Program	License	AFP-{00000}
<b>AOP</b>	Master Registration, Annual Operating Permit	License	AOP-{00000}
<b>APP</b>	Apprentice	License	APP-{00000}
<b>BL</b>	Blaster	License	BL-{00000}
<b>BMR</b>	Building Maintenance Registration	License	BMR-{00000}

<sup>2</sup> Quick Permits are same as the online permits in KIVA.

## Appendix C – SHAPE PHX Numbering Scheme

PREFIX	DEFINITION	OBJECT TYPE	NUMBER FORMAT
JY	Journeyman	License	JY-{00000}
OP-E	Elevator Operating Permit	License	OP-E-{00000}
PR	Peer Reviewer	License	PR-{00000}
PY	Pyrotechnician	License	PY-{00000}
R-17	Registration for Users	License	R-17{yy}{00000}
SCP	Self-Certified Professional	License	SCP-{00000}
SI	Special Inspector	License	SI-{00000}
PY	Payment	Payment	PY-{000000}
CTC-11	Construction & Trades Residential; Residential Sales/Construction Office	Permit	CTC-11{yy}{00000}
CTR-10	Construction & Trades Residential; Residential	Permit	CTR-10{yy}{00000}
CVC-16	Civil; Residential Sales/Construction Office	Permit	CVC-16{yy}{00000}
CVR-15	Civil; Residential	Permit	CVR-15{yy}{00000}
DMC-31	Demolition; Residential Sales/Construction Office	Permit	DMC-31{yy}{00000}
DMR-30	Demolition; Residential	Permit	DMR-30{yy}{00000}
ELC-41	Elevator; Residential Sales/Construction Office	Permit	ELC-41{yy}{00000}
ELR-40	Elevator; Residential	Permit	ELR-40{yy}{00000}
ENC-46	Energy System; Residential Sales/Construction Office	Permit	ENC-46{yy}{00000}
ENR-45	Energy System; Residential	Permit	ENR-45{yy}{00000}
EST-50	Estimate; Estimate	Permit	EST-50{yy}{00000}
ESTC-52	Draft; Estimate; Residential Sales/Construction Office	Permit	ESTC-52{yy}{00000}
ESTR-51	Draft; Estimate; Residential	Permit	ESTR-51{yy}{00000}
P-17	Placeholder for Permits that do not have a type assigned yet	Permit	P-17{yy}{00000}
PR-12	Pool; Residential	Permit	PR-12{yy}{00000}
QPR-20	Quick Permit; Residential <sup>3</sup>	Permit	QPR-20{yy}{00000}
SPC-22	Standard Plan; Residential Sales/Construction Office	Permit	SPC-22{yy}{00000}
SPR-21	Standard Plan; Residential	Permit	SPR-21{yy}{00000}
R	Receipt	Receipt	R-{0000000}
RRF	Receipt Refund	Receipt Refund	RRF{yy}-{000000}
REF	Refund Request	Request	REF{yy}-{000000}
REQ	Request	Request	REQ{yy}-{00000}
RVW	Review	Review	RVW{yy}-{00000}
T	Transaction	Transaction	T-{000000000}
VI	Permit Violation	Violation	VI-{0000000}

### Suffixes

Permits can have one of two suffixes, listed below. For example, CTR stands for Construction & Trades Residential, whereas CTC denotes Construction & Trades Commercial. In Release 1, CTC is limited to the Residential Sales/Construction Office. For Release 2, when the remainder of the commercial permits are migrated to SHAPE PHX, CTC would encompass all commercial permits. This table, and the *Getting Started with SHAPE PHX* guide, will be updated for Release 2.

Suffix	Definition
C	Commercial
R	Residential

<sup>3</sup> Quick Permits are same as the online permits in KIVA.

## Appendix D – Structure Class (Census Codes)

In order to complete the Structure Class field, you need to know a minimum of the first two characters of the Census Code Name for the list to give you options from which to select. Here is the complete list of Census Codes for your convenience.

**TIP:** It also can be found in SHAPE PHX by clicking on the *App Launcher* (the “waffle,”) selecting *All Items*, and choosing *Census Codes*. To view the complete list, click the down arrow next to *Recently Viewed* and select *All*.

STRUCTURE CLASS	CENSUS CODE NAME	CENSUS CODE	USE CLASS	WORK TYPE
01	Single Family Detached	101	Residential	
010	Single Family Attached	102	Residential	
010	Industrial Buildings- Warehouses, Etc.	320	Commercial	
011	Public Owned Housing	110	Commercial	
011	Guest Houses	113	Residential	
011	Parking Garages-Open to Public Use	321	Commercial	
012	Res. Garages, Carports & Detached Storage	436	Residential	
013	Service Stations & Auto Repair Shops	322	Commercial	
014	Hospitals & Institutional Buildings	323	Commercial	
015	Office, Banks & Professional Buildings	324	Commercial	
016	Public Works & Utility Buildings	325	Commercial	
017	Schools & Educational Buildings	326	Commercial	
018	Stores & Mercantile Buildings	330	Commercial	
019	Other Non-Residential-Carports Etc.	328	Commercial	
02	Duplexes	103	Residential	
020	Structures Other Than Buildings	329	Commercial	
021	Other Non-Housekeeping Shelters (Rooming)	214	Commercial	
021	Additions & Alterations to Houses & Apts	434	Residential	
022	Additions & Alterations-Non Residential	437	Commercial	Addition and remodel; Addition only; Remodel - interior only; Remodel - with exterior impact; Remodel
023	Res. Demo or Move Out For 1 Family	645	Residential	
023	Res. Demo or Move Out For 2 Family	646	Residential	
023	Res. Demo or Move Out For 3 & 4 Family	647	Residential	
023	Res. Demo or Move Out, 5 Fam. Or More	648	Commercial	
023	Photovoltaic - Residential	801	Residential	



## Appendix D– Census Code/Structure Class

STRUCTURE CLASS	CENSUS CODE NAME	CENSUS CODE	USE CLASS	WORK TYPE
024	Demo or Move Out - All Other Buildings	644	Commercial	
024	Geo-Thermal - Residential	802	Residential	
025	Wind Energy Devices - Residential	803	Residential	
026	Residential Non Structural Projects	439	Residential	Group Homes, Assisted Living 6-10 residents; Change of Occupancy; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; Remodel - interior only; Remodel - with exterior impact; Repairs, Replacements; Upgrades - Mechanical, Elevator, Energy System; Service Upgrade - Electrical; Installation; Modification - Elevator; Demolition; Submitting a New Standard Plan; Revision to Approved Plan; New Standard Home from Standard Plan; Standard Pool; Custom Pool; Fence and / or Retaining Wall; Temporary Fence; Lateral Tap; Pavement Restoration; Driveway; Installation - Mobile Home, Factory Built Building; Fire Sprinklers; Residential; Remodel; Installation - Elevator, Fire Safety Equipment
027	Other Renewal Green Energy Equip - Res	804	Residential	
028	Non Residential Non Structural Projects	440	Commercial	Group Homes, Assisted Living 6-10 residents; Change of Occupancy; New Custom Home with or without accessory structures; New Accessory structure; Repairs, Replacements; Service Upgrade - Electrical; Installation; Demolition; Submitting a New Standard Plan; Revision to Approved Plan; New Standard Home from Standard Plan; Revision to Standard Plan; Standard Pool; Custom Pool; Fence and / or Retaining Wall; Temporary Fence; Lateral Tap; Pavement Restoration; Driveway; Installation - Mobile Home, Factory Built Building; Fire Sprinklers; Residential; Installation - Elevator, Fire Safety Equipment
029	Photovoltaic - Commercial	806	Commercial	
03	3 and 4 Family Units	104	Residential	
030	Geo-Thermal - Commercial	807	Commercial	
030	Mobile Homes (First Time Space Occupied)	300	Residential	
030	Mobile Homes Utilities Hookups	301	Residential	

## Appendix D– Census Code/Structure Class

STRUCTURE CLASS	CENSUS CODE NAME	CENSUS CODE	USE CLASS	WORK TYPE
031	Wind Energy Devices - Commercial	808	Commercial	
031	Charter Schools Non-Exempt	317	Commercial	
032	Other Renewal Green Energy Equip. - Comm	809	Commercial	
033	Solar or Wind or Other Non-Petroleum	810	Commercial	
034	Mini-Marts with Fuel	340	Commercial	
034	Service Station - Fuel & Repair	341	Commercial	
037	Fences	991	Residential	
039	Swimming Pools & Spas	992	Residential	
04	5 To 9 Family Units	105	Commercial	
040	Periodic and Routine Elevator Inspection	995	Commercial	Upgrades - Mechanical, Elevator, Energy System; Modification - Elevator
040	Residential Elevators	995	Residential	
040	Foundation Only	107	Commercial	
05	Res Bldg Movd into COP/Non-Res Converted	999	Residential	
050	All Agricultural	500	Commercial	
06	Hotels, Motels, Cabins for Transient Use	213	Commercial	
060	Site Commercial		Commercial	
063	Site Residential Single Lot		Residential	
066	Site Subdivision		Residential	
07	10 or More Family Units	106	Commercial	
070	Civil Commercial		Commercial	
073	Civil Residential Single Lot		Residential	
076	Civil Subdivision		Residential	
08	Amusement & Recreational Buildings	318	Commercial	
080	Signs and Sign Structures	994	Commercial	
080	Sign Temporary		Commercial	
080	Sign Billboard		Commercial	
09	Religious Buildings-Church, Convents, Etc.	319	Commercial	
090	Fire Prevention Permits		Commercial	
095	Buildings, Non Res., Relocated into City	999	Commercial	
096	Buildings Relocated from City	109	Commercial	
098	Residential to Commercial Conv	600	Commercial	
099	Mechanical - No Value	995	Residential	
099	Plumbing - No Value	996	Residential	
099	Electrical - No Value	997	Residential	
099	Completion of Prep Permit/Staff Consult	700	Commercial	

## Appendix E – Work Items

After the *Permit Type* is selected, the *Work Types* are entered, indicating the work the permit covers. To specify the exact nature of that work, *Work Items* are chosen.

For example:

Permit Type: CTR-10 (Construction & Trades Residential)

Work Type: Remodel

Work Items: Conversion of garage carport or patio to living space.

The list below includes the Work Items included in Release 1.

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
<b>Backflow installation</b>	Quantity (Qty) Only Each	Construction and Trades Residential	Plumbing and Mechanical	Backflow installation
<b>Backflow installation</b>	Qty Only Each	Estimate	Plumbing and Mechanical	Backflow installation
<b>Battery Storage</b>	Qty Only Each	Energy System	Accessory Structure	Battery Storage
<b>Conversion of carport to garage</b>	Qty Only Sq Ft	Construction and Trades Residential	Remodel	Conversion of carport to garage
<b>Conversion of carport to garage</b>	Qty Only Sq Ft	Estimate	Remodel	Conversion of carport to garage
<b>Conversion of garage carport or patio to living space</b>	Qty Only Sq Ft	Construction and Trades Residential	Remodel	Conversion of garage carport or patio to living space
<b>Conversion of garage carport or patio to living space</b>	Qty Only Sq Ft	Estimate	Remodel	Conversion of garage carport or patio to living space
<b>Demolition - Accessory/Attached Structure</b>	Qty Only Sq Ft	Demolition	Demolition Residential	Demolition - Accessory/Attached Structure
<b>Demolition - Primary Residence</b>	Qty Only Sq Ft	Demolition	Demolition Residential	Demolition - Primary Residence
<b>Detach Solar Structure</b>	Qty Only Sq Ft	Energy System	Accessory Structure	Detach Solar Structure
<b>Dummy Data</b>	Qty Only Sq Ft	Civil	New and Addition	New SF 1st Floor livable
<b>Electrical Meter Socket Replacement</b>	Qty Only Each	Construction and Trades Residential	Electrical	Electrical Meter Socket Replacement
<b>Electrical Meter Socket Replacement</b>	Qty Only Each	Estimate	Electrical	Electrical Meter Socket Replacement
<b>Electrical Meter Socket Replacement</b>	Qty Only Each	Quick Permit	Electrical	Electrical Meter Socket Replacement
<b>Electrical Minor Work</b>	Qty Only Each	Construction and Trades Residential	Electrical	Electrical Minor Work
<b>Electrical Minor Work</b>	Qty Only Each	Estimate	Electrical	Electrical Minor Work
<b>Electrical Minor Work</b>	Qty Only Each	Quick Permit	Electrical	Electrical Minor Work
<b>Electrical service 100 amp 1 phase</b>	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 100 amp 1 phase

## Appendix E– Work Items

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
Electrical service 100 amp 1 phase	Qty Only Each	Estimate	Electrical	Electrical service 100 amp 1 phase
Electrical service 100 amp 1 phase	Qty Only Each	Quick Permit	Electrical	Upgrade of electrical service to 100 AMP 1 Phase
Electrical service 100 amp 3 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 100 amp 3 phase
Electrical service 100 amp 3 phase	Qty Only Each	Estimate	Electrical	Electrical service 100 amp 3 phase
Electrical service 100 amp 3 phase	Qty Only Each	Quick Permit	Electrical	Upgrade of electrical service to 100 AMP 3 Phase
Electrical service 200 amp 1 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 200 amp 1 phase
Electrical service 200 amp 1 phase	Qty Only Each	Estimate	Electrical	Electrical service 200 amp 1 phase
Electrical service 200 amp 1 phase	Qty Only Each	Quick Permit	Electrical	Upgrade of electrical service to 200 AMP 1 Phase
Electrical service 200 amp 3 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 200 amp 3 phase
Electrical service 200 amp 3 phase	Qty Only Each	Estimate	Electrical	Electrical service 200 amp 3 phase
Electrical service 200 amp 3 phase	Qty Only Each	Quick Permit	Electrical	Upgrade of electrical service to 200 AMP 3 Phase
Electrical service 400 amp 1 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 400 amp 1 phase
Electrical service 400 amp 1 phase	Qty Only Each	Estimate	Electrical	Electrical service 400 amp 1 phase
Electrical service 400 amp 3 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 400 amp 3 phase
Electrical service 400 amp 3 phase	Qty Only Each	Estimate	Electrical	Electrical service 400 amp 3 phase
Electrical service 600 amp 1 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 600 amp 1 phase
Electrical service 600 amp 1 phase	Qty Only Each	Estimate	Electrical	Electrical service 600 amp 1 phase
Electrical service 600 amp 3 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 600 amp 3 phase
Electrical service 600 amp 3 phase	Qty Only Each	Estimate	Electrical	Electrical service 600 amp 3 phase
Electrical service 800 amp 1 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 800 amp 1 phase
Electrical service 800 amp 1 phase	Qty Only Each	Estimate	Electrical	Electrical service 800 amp 1 phase
Electrical service 800 amp 3 phase	Qty Only Each	Construction and Trades Residential	Electrical	Electrical service 800 amp 3 phase
Electrical service 800 amp 3 phase	Qty Only Each	Estimate	Electrical	Electrical service 800 amp 3 phase

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
Electrical Service Clearance	Qty Only Each	Construction and Trades Residential	Electrical	Electrical Service Clearance
Electrical Service Clearance	Qty Only Each	Estimate	Electrical	Electrical Service Clearance
Electrical Service Clearance	Qty Only Each	Quick Permit	Electrical	Electrical Service Clearance
Elevation Type	Qty Only Each	Standard Plan	Elevation Type	Elevation Type
Elevator Chair Lift	Qty Only Each	Elevator - New	Elevator	Elevator Chair Lift
Elevator Dumbwaiter	Qty Only Each	Elevator - New	Elevator	Elevator Dumbwaiter
Elevator Residential 2 level	Qty Only Each	Elevator - New	Elevator	Elevator Residential 2 level
Elevator Residential 3 level	Qty Only Each	Elevator - New	Elevator	Elevator Residential 3 level
Escalator	Qty Only Each	Elevator - New	Elevator	Escalator
Evaporative Cooler	Qty Only Each	Construction and Trades Residential	HVAC	Evaporative Cooler
Evaporative Cooler	Qty Only Each	Estimate	HVAC	Evaporative Cooler
Existing Plumbing Fixtures	Qty Only No Value	Construction and Trades Residential	Plumbing and Mechanical	Existing Plumbing Fixtures
Existing Plumbing Fixtures	Qty Only No Value	Estimate	Plumbing and Mechanical	Existing Plumbing Fixtures
Existing Remodel SF Livable	Qty Only Sq Ft	Construction and Trades Residential	Remodel	Existing Remodel SF Livable
Existing Remodel SF Livable	Qty Only Sq Ft	Estimate	Remodel	Existing Remodel SF Livable
Existing Remodel SF Other	Qty Only Sq Ft	Construction and Trades Residential	Remodel	Existing Remodel SF Other
Existing Remodel SF Other	Qty Only Sq Ft	Estimate	Remodel	Existing Remodel SF Other
Existing SF prior to Addition	Qty Only Sq Ft	Construction and Trades Residential	New and Addition	Existing SF prior to Addition
Fence Combo Masonry and Wrought Iron	Qty Only Linear Ft	Construction and Trades Residential	Fence and Retaining Wall	Fence Combo Masonry and Wrought Iron
Fence Combo Masonry and Wrought Iron	Qty Only Linear Ft	Estimate	Fence and Retaining Wall	Fence Combo Masonry and Wrought Iron
Fence Combo Masonry and Wrought Iron	Qty Only Linear Ft	Pool	Fence and Retaining Wall	Fence Combo Masonry and Wrought Iron
Fence Dooley Block	Qty Only Linear Ft	Construction and Trades Residential	Fence and Retaining Wall	Fence Dooley Block
Fence Dooley Block	Qty Only Linear Ft	Estimate	Fence and Retaining Wall	Fence Dooley Block
Fence Dooley Block	Qty Only Linear Ft	Pool	Fence and Retaining Wall	Fence Dooley Block
Fence Masonry	Qty Only Linear Ft	Construction and Trades Residential	Fence and Retaining Wall	Fence Masonry
Fence Masonry	Qty Only Linear Ft	Estimate	Fence and Retaining Wall	Fence Masonry

## Appendix E– Work Items

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
<b>Fence Masonry</b>	Qty Only Linear Ft	Pool	Fence and Retaining Wall	Fence Masonry
<b>Fence Ornamental or Wrought Iron</b>	Qty Only Linear Ft	Construction and Trades Residential	Fence and Retaining Wall	Fence Ornamental or Wrought Iron
<b>Fence Ornamental or Wrought Iron</b>	Qty Only Linear Ft	Estimate	Fence and Retaining Wall	Fence Ornamental or Wrought Iron
<b>Fence Ornamental or Wrought Iron</b>	Qty Only Linear Ft	Pool	Fence and Retaining Wall	Fence Ornamental or Wrought Iron
<b>Fence Wood, Chain Link or Mesh</b>	Qty Only Linear Ft	Construction and Trades Residential	Fence and Retaining Wall	Fence Wood, Chain Link or Mesh
<b>Fence Wood, Chain Link or Mesh</b>	Qty Only Linear Ft	Estimate	Fence and Retaining Wall	Fence Wood, Chain Link or Mesh
<b>Fence Wood, Chain Link or Mesh</b>	Qty Only Linear Ft	Pool	Fence and Retaining Wall	Fence Wood, Chain Link or Mesh
<b>Field Consultation for Future Work</b>	Qty Only No UOM	Quick Permit	Inspection Request	Field Consultation for Future Work
<b>Fireplaces zero clearance or masonry</b>	Qty Only Each	Construction and Trades Residential	Construction Details	Fireplaces zero clearance or masonry
<b>Fireplaces zero clearance or masonry</b>	Qty Only Each	Estimate	Construction Details	Fireplaces zero clearance or masonry
<b>Foundation type</b>	Foundation Type	Construction and Trades Residential	Construction Details	Foundation Type
<b>Foundation type</b>	Foundation Type	Estimate	Construction Details	Foundation Type
<b>Gas Clearance</b>	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Gas Clearance
<b>Gas Clearance</b>	Qty Only Each	Estimate	Plumbing and Mechanical	Gas Clearance
<b>Gas Clearance</b>	Qty Only Each	Quick Permit	Plumbing and Mechanical	Gas Clearance
<b>Gas Line Repair or Replace</b>	Qty Only Linear Ft	Construction and Trades Residential	Plumbing and Mechanical	Gas Line Repair or Replace
<b>Gas Line Repair or Replace</b>	Qty Only Linear Ft	Estimate	Plumbing and Mechanical	Gas Line Repair or Replace
<b>Gas Line Repair or Replace</b>	Qty Only Linear Ft	Quick Permit	Plumbing and Mechanical	Gas Line Repair or Replace - please indicate # linear feet
<b>Gas Meter Relocate</b>	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Gas Meter Relocate
<b>Gas Meter Relocate</b>	Qty Only Each	Estimate	Plumbing and Mechanical	Gas Meter Relocate
<b>Gas or Propane New Line</b>	Qty Only Linear Ft	Construction and Trades Residential	Plumbing and Mechanical	Gas or Propane New Line
<b>Gas or Propane New Line</b>	Qty Only Linear Ft	Estimate	Plumbing and Mechanical	Gas or Propane New Line
<b>Gas Test</b>	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Gas Test
<b>Gas Test</b>	Qty Only Each	Estimate	Plumbing and Mechanical	Gas Test

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
Grotto	Qty Only Each	Pool	Pool	Grotto
Grotto with Waterfall	Qty Only Each	Pool	Pool	Grotto with Waterfall
Grotto with Waterfall and slide	Qty Only Each	Pool	Pool	Grotto with Waterfall and slide
Install Evaporative Cooler	Qty Only Each	Construction and Trades Residential	HVAC	Install Evaporative Cooler
Install Evaporative Cooler	Qty Only Each	Estimate	HVAC	Install Evaporative Cooler
New Finished Basement	Use Group Sq Ft Res	Construction and Trades Residential	New and Addition	New Finished Basement
New Finished Basement	Qty Only Sq Ft	Estimate	New and Addition	New Finished Basement
New Finished Basement	Qty Only Sq Ft	Standard Plan	New and Addition	New Finished Basement
New Garage Attached	Qty Only Sq Ft	Construction and Trades Residential	Accessory Structure	New Garage Attached
New Garage Attached	Qty Only Sq Ft	Estimate	Accessory Structure	New Garage Attached
New Garage Attached	Qty Only Sq Ft	Standard Plan	Accessory Structure	New Garage Attached
New Garage Detached	Qty Only Sq Ft	Construction and Trades Residential	Accessory Structure	New Garage Detached
New Garage Detached	Qty Only Sq Ft	Estimate	Accessory Structure	New Garage Detached
New Garage Detached	Qty Only Sq Ft	Standard Plan	Accessory Structure	New Garage Detached
New Plumbing fixtures	Qty Only No Value	Construction and Trades Residential	Plumbing and Mechanical	New Plumbing Fixtures
New Plumbing fixtures	Qty Only No Value	Estimate	Plumbing and Mechanical	New Plumbing Fixtures
New SF 1st Floor livable	Use Group Sq Ft Res	Construction and Trades Residential	New and Addition	New SF 1st Floor livable
New SF 1st Floor livable	Qty Only Sq Ft	Estimate	New and Addition	New SF 1st Floor livable
New SF 1st Floor livable	Qty Only Sq Ft	Standard Plan	New and Addition	New SF 1st Floor livable
New SF 2nd Floor livable	Use Group Sq Ft Res	Construction and Trades Residential	New and Addition	New SF 2nd Floor livable
New SF 2nd Floor livable	Qty Only Sq Ft	Estimate	New and Addition	New SF 2nd Floor livable
New SF 2nd Floor livable	Qty Only Sq Ft	Standard Plan	New and Addition	New SF 2nd Floor livable
New SF 3rd Floor livable	Use Group Sq Ft Res	Construction and Trades Residential	New and Addition	New SF 3rd Floor livable
New SF 3rd Floor livable	Qty Only Sq Ft	Estimate	New and Addition	New SF 3rd Floor livable
New SF 3rd Floor livable	Qty Only Sq Ft	Standard Plan	New and Addition	New SF 3rd Floor livable
New SF Detached Building livable	Use Group Sq Ft Res	Construction and Trades Residential	Accessory Structure	New SF Detached Building livable

## Appendix E– Work Items

<b>WORK ITEM NAME</b>	<b>RECORD TYPE</b>	<b>PERMIT TYPE</b>	<b>WORK TYPE</b>	<b>DESCRIPTION</b>
<b>New SF Detached Building livable</b>	Qty Only Sq Ft	Estimate	Accessory Structure	New SF Detached Building livable
<b>New SF Detached Building livable</b>	Qty Only Sq Ft	Standard Plan	Accessory Structure	New SF Detached Building livable
<b>New SF Detached Building non-livable</b>	Qty Only Sq Ft	Construction and Trades Residential	Accessory Structure	New SF Detached Building non-livable
<b>New SF Detached Building non-livable</b>	Qty Only Sq Ft	Estimate	Accessory Structure	New SF Detached Building non-livable
<b>New SF Detached Building non-livable</b>	Qty Only Sq Ft	Standard Plan	Accessory Structure	New SF Detached Building non-livable
<b>New SF Garage</b>	Qty Only Sq Ft	Construction and Trades Residential	New and Addition	New SF Garage
<b>New SF Garage</b>	Qty Only Sq Ft	Estimate	New and Addition	New SF Garage
<b>New SF Garage</b>	Qty Only Sq Ft	Standard Plan	New and Addition	New SF Garage
<b>New SF Other livable</b>	Use Group Sq Ft Res	Construction and Trades Residential	New and Addition	New SF Other livable
<b>New SF Other livable</b>	Qty Only Sq Ft	Estimate	New and Addition	New SF Other livable
<b>New SF Other livable</b>	Qty Only Sq Ft	Standard Plan	New and Addition	New SF Other livable
<b>New SF Other non-livable</b>	Qty Only Sq Ft	Construction and Trades Residential	New and Addition	New SF Other non-livable
<b>New SF Other non-livable</b>	Qty Only Sq Ft	Estimate	New and Addition	New SF Other non-livable
<b>New SF Other non-livable</b>	Qty Only Sq Ft	Standard Plan	New and Addition	New SF Other non-livable
<b>New SF Patio</b>	Qty Only Sq Ft	Construction and Trades Residential	New and Addition	New SF Patio
<b>New SF Patio</b>	Qty Only Sq Ft	Estimate	New and Addition	New SF Patio
<b>New SF Patio</b>	Qty Only Sq Ft	Standard Plan	New and Addition	New SF Patio
<b>New SF Porch</b>	Qty Only Sq Ft	Construction and Trades Residential	New and Addition	New SF Porch
<b>New SF Porch</b>	Qty Only Sq Ft	Estimate	New and Addition	New SF Porch
<b>New SF Porch</b>	Qty Only Sq Ft	Standard Plan	New and Addition	New SF Porch
<b>New Unfinished Basement</b>	Qty Only Sq Ft	Construction and Trades Residential	New and Addition	New Unfinished Basement
<b>New Unfinished Basement</b>	Qty Only Sq Ft	Estimate	New and Addition	New Unfinished Basement
<b>New Unfinished Basement</b>	Qty Only Sq Ft	Standard Plan	New and Addition	New Unfinished Basement
<b>Photovoltaic System Residential</b>	Kilowatt	Energy System	Photovoltaic	Photovoltaic System Residential
<b>Plumbing Minor Work</b>	Qty Only Each	Quick Permit	Plumbing and Mechanical	Minor plumbing work or repairs



<b>WORK ITEM NAME</b>	<b>RECORD TYPE</b>	<b>PERMIT TYPE</b>	<b>WORK TYPE</b>	<b>DESCRIPTION</b>
<b>Pool Electrical Sub Panel</b>	Qty Only No UOM	Pool	Electrical	Pool Electrical Sub Panel (in AMPS)
<b>Pool Heater Electric</b>	Qty Only Each	Pool	Pool	Pool Heater Electric
<b>Pool Heater Gas</b>	Qty Only Each	Pool	Pool	Pool Heater Gas
<b>Pool Lights</b>	Qty Only No UOM	Pool	Electrical	Pool Lights (in Watts)
<b>Pool New</b>	Qty Only Sq Ft	Pool	Pool	Pool New
<b>Pool Pump</b>	Qty Only No UOM	Pool	Electrical	Pool Pump (in HPs)
<b>Repipe water line 1 bath</b>	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Repipe water line 1 bath
<b>Repipe water line 1 bath</b>	Qty Only Each	Estimate	Plumbing and Mechanical	Repipe water line 1 bath
<b>Repipe water line 1 bath</b>	Qty Only Each	Quick Permit	Plumbing and Mechanical	Repipe water line 1 bath
<b>Repipe water line 2 bath</b>	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Repipe water line 2 bath
<b>Repipe water line 2 bath</b>	Qty Only Each	Estimate	Plumbing and Mechanical	Repipe water line 2 bath
<b>Repipe water line 2 bath</b>	Qty Only Each	Quick Permit	Plumbing and Mechanical	Repipe water line 2 bath
<b>Repipe water line 3 or more baths</b>	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Repipe water line 3 or more baths
<b>Repipe water line 3 or more baths</b>	Qty Only Each	Estimate	Plumbing and Mechanical	Repipe water line 3 or more baths
<b>Repipe water line 3 or more baths</b>	Qty Only Each	Quick Permit	Plumbing and Mechanical	Repipe water line 3 or more baths
<b>Replace Furnace or Air Conditioner</b>	Qty Only Each	Construction and Trades Residential	HVAC	Replace Furnace or Air Conditioner
<b>Replace Furnace or Air Conditioner</b>	Qty Only Each	Estimate	HVAC	Replace Furnace or Air Conditioner
<b>Replace Rooftop AC with new support needed</b>	Qty Only Each	Construction and Trades Residential	HVAC	Replace Rooftop AC with new support needed
<b>Replace Rooftop AC with new support needed</b>	Qty Only Each	Estimate	HVAC	Replace Rooftop AC with new support needed
<b>Retaining Wall 3 ft to 6 ft</b>	Qty Only Linear Ft	Construction and Trades Residential	Fence and Retaining Wall	Retaining Wall 3 ft to 6 ft
<b>Retaining Wall 3 ft to 6 ft</b>	Qty Only Linear Ft	Estimate	Fence and Retaining Wall	Retaining Wall 3 ft to 6 ft
<b>Retaining Wall less than 3 ft high</b>	Qty Only Linear Ft	Construction and Trades Residential	Fence and Retaining Wall	Retaining Wall less than 3 ft high
<b>Retaining Wall less than 3 ft high</b>	Qty Only Linear Ft	Estimate	Fence and Retaining Wall	Retaining Wall less than 3 ft high
<b>Retaining Wall Over 6 ft</b>	Qty Only Linear Ft	Construction and Trades Residential	Fence and Retaining Wall	Retaining Wall Over 6 ft
<b>Retaining Wall Over 6 ft</b>	Qty Only Linear Ft	Estimate	Fence and Retaining Wall	Retaining Wall Over 6 ft
<b>Retention Volume</b>	Qty Only No UOM	Pool	Pool Additional Details	Retention Volume (in CU FT)
<b>Rewire or rebuild pool</b>	Qty Only Each	Pool	Pool	Rewire or rebuild pool

## Appendix E– Work Items

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
Rewiring Residential	Qty Only Sq Ft	Construction and Trades Residential	Electrical	Rewiring Residential
Rewiring Residential	Qty Only Sq Ft	Estimate	Electrical	Rewiring Residential
Roofing Change asphalt to tile with structural upgrade	Qty Only Each	Construction and Trades Residential	Roofing	Roofing Change asphalt to tile with structural upgrade
Roofing Change asphalt to tile with structural upgrade	Qty Only Each	Estimate	Roofing	Roofing Change asphalt to tile with structural upgrade
Roofing Shingles Tear off and replace	Qty Only Sq Ft	Construction and Trades Residential	Roofing	Roofing Shingles Tear off and replace
Roofing Shingles Tear off and replace	Qty Only Sq Ft	Estimate	Roofing	Roofing Shingles Tear off and replace
Septic System	Qty Only No UOM	Pool	Pool Additional Details	Septic System
Shade Structure Aluminum with Lattice Roof	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Aluminum with Lattice Roof
Shade Structure Aluminum with Lattice Roof	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Aluminum with Lattice Roof
Shade Structure Aluminum with Lattice Roof	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Aluminum with Lattice Roof
Shade Structure Aluminum with Membrane Roof	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Aluminum with Membrane Roof
Shade Structure Aluminum with Membrane Roof	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Aluminum with Membrane Roof
Shade Structure Aluminum with Membrane Roof	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Aluminum with Membrane Roof
Shade Structure Aluminum with Solid/Metal Roof	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Aluminum with Solid/Metal Roof
Shade Structure Aluminum with Solid/Metal Roof	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Aluminum with Solid/Metal Roof
Shade Structure Aluminum with Solid/Metal Roof	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Aluminum with Solid/Metal Roof
Shade Structure Masonry or Steel with Membrane Roof	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Masonry or Steel with Membrane Roof
Shade Structure Masonry or Steel with Membrane Roof	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Masonry or Steel with Membrane Roof

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
Shade Structure Masonry or Steel with Membrane Roof	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Masonry or Steel with Membrane Roof
Shade Structure Masonry or Wood with Membrane Roof	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Masonry or Wood with Membrane Roof
Shade Structure Masonry or Wood with Membrane Roof	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Masonry or Wood with Membrane Roof
Shade Structure Masonry or Wood with Membrane Roof	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Masonry or Wood with Membrane Roof
Shade Structure Steel with Membrane Roof	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Steel with Membrane Roof
Shade Structure Steel with Membrane Roof	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Steel with Membrane Roof
Shade Structure Steel with Membrane Roof	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Steel with Membrane Roof
Shade Structure Steel with Solid or Metal Roof	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Steel with Solid or Metal Roof
Shade Structure Steel with Solid or Metal Roof	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Steel with Solid or Metal Roof
Shade Structure Steel with Solid or Metal Roof	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Steel with Solid or Metal Roof
Shade Structure Wood Deck	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Wood Deck
Shade Structure Wood Deck	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Wood Deck
Shade Structure Wood Deck	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Wood Deck
Shade Structure Wood Structure with or without Membrane Roof	Qty Only Sq Ft	Construction and Trades Residential	Shade Structure	Shade Structure Wood Structure with or without Membrane Roof
Shade Structure Wood Structure with or without Membrane Roof	Qty Only Sq Ft	Estimate	Shade Structure	Shade Structure Wood Structure with or without Membrane Roof
Shade Structure Wood Structure with	Qty Only Sq Ft	Standard Plan	Shade Structure	Shade Structure Wood Structure with or

## Appendix E– Work Items

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
or without Membrane Roof				without Membrane Roof
Sheds and Detached Storage Buildings Prebuilt	Qty Only Sq Ft	Construction and Trades Residential	Accessory Structure	Sheds and Detached Storage Buildings Prebuilt
Sheds and Detached Storage Buildings Prebuilt	Qty Only Sq Ft	Estimate	Accessory Structure	Sheds and Detached Storage Buildings Prebuilt
Sheds and Detached Storage Buildings Site Built	Qty Only Sq Ft	Construction and Trades Residential	Accessory Structure	Sheds and Detached Storage Buildings Site Built
Sheds and Detached Storage Buildings Site Built	Qty Only Sq Ft	Estimate	Accessory Structure	Sheds and Detached Storage Buildings Site Built
Solar Water Heater Residential	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Solar Water Heater Residential
Solar Water Heater Residential	Qty Only Each	Estimate	Plumbing and Mechanical	Solar Water Heater Residential
Spa Lights	Qty Only No UOM	Pool	Electrical	Spa Lights (in Watts)
Spa New	Qty Only Sq Ft	Pool	Pool	Spa New
Spa Pump	Qty Only No UOM	Pool	Electrical	Spa Pump (in HPs)
Water and Sewer New or Replacement sewer line	Qty Only Linear Ft	Construction and Trades Residential	Water and Sewer	Water and Sewer New or Replacement sewer line
Water and Sewer New or Replacement sewer line	Qty Only Linear Ft	Estimate	Water and Sewer	Water and Sewer New or Replacement sewer line
Water and Sewer New or Replacement water line	Qty Only Linear Ft	Construction and Trades Residential	Water and Sewer	Water and Sewer New or Replacement water line
Water and Sewer New or Replacement water line	Qty Only Linear Ft	Estimate	Water and Sewer	Water and Sewer New or Replacement water line
Water Heater Replacement Electric Residential	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Water Heater Replacement Electric Residential
Water Heater Replacement Electric Residential	Qty Only Each	Estimate	Plumbing and Mechanical	Water Heater Replacement Electric Residential
Water Heater Replacement Electric Residential	Qty Only Each	Quick Permit	Plumbing and Mechanical	Water Heater Replacement Electric Residential
Water Heater Replacement Gas Residential	Qty Only Each	Construction and Trades Residential	Plumbing and Mechanical	Water Heater Replacement Gas Residential
Water Heater Replacement Gas Residential	Qty Only Each	Estimate	Plumbing and Mechanical	Water Heater Replacement Gas Residential
Water Heater Replacement, Gas Res	Qty Only Each	Quick Permit	Plumbing and Mechanical	Water Heater Replacement Gas Residential

WORK ITEM NAME	RECORD TYPE	PERMIT TYPE	WORK TYPE	DESCRIPTION
<b>Water Meter 0.75 inch</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 0.75 inch
<b>Water Meter 0.75 inch</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 0.75 inch
<b>Water Meter 1 inch</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 1 inch
<b>Water Meter 1 inch</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 1 inch
<b>Water Meter 1.5 inch</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 1.5 inch
<b>Water Meter 1.5 inch</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 1.5 inch
<b>Water Meter 2 inch Compound or Displacement</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 2 inch Compound or Displacement
<b>Water Meter 2 inch Compound or Displacement</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 2 inch Compound or Displacement
<b>Water Meter 2 inch Turbine</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 2 inch Turbine
<b>Water Meter 2 inch Turbine</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 2 inch Turbine
<b>Water Meter 3 inch Compound</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 3 inch Compound
<b>Water Meter 3 inch Compound</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 3 inch Compound
<b>Water Meter 3 inch Turbine</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 3 inch Turbine
<b>Water Meter 3 inch Turbine</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 3 inch Turbine
<b>Water Meter 4 inch Compound or Displacement</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 4 inch Compound or Displacement
<b>Water Meter 4 inch Compound or Displacement</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 4 inch Compound or Displacement
<b>Water Meter 4 inch Turbine</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 4 inch Turbine
<b>Water Meter 4 inch Turbine</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 4 inch Turbine
<b>Water Meter 6 inch Compound or Displacement</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 6 inch Compound or Displacement
<b>Water Meter 6 inch Compound or Displacement</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 6 inch Compound or Displacement
<b>Water Meter 6 inch Turbine</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 6 inch Turbine
<b>Water Meter 6 inch Turbine</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 6 inch Turbine

## Appendix E– Work Items

<b>WORK ITEM NAME</b>	<b>RECORD TYPE</b>	<b>PERMIT TYPE</b>	<b>WORK TYPE</b>	<b>DESCRIPTION</b>
<b>Water Meter 8 inch Compound or Displacement</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 8 inch Compound or Displacement
<b>Water Meter 8 inch Compound or Displacement</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 8 inch Compound or Displacement
<b>Water Meter 8 inch Turbine</b>	Qty Only No Value	Construction and Trades Residential	Water and Sewer	Water Meter 8 inch Turbine
<b>Water Meter 8 inch Turbine</b>	Qty Only No Value	Estimate	Water and Sewer	Water Meter 8 inch Turbine
<b>Windows residential replacement</b>	Qty Only Each	Construction and Trades Residential	Remodel	Windows residential replacement
<b>Windows residential replacement</b>	Qty Only Each	Estimate	Remodel	Windows residential replacement

## Appendix F – Inspection Zones

<b>ZONE/TAG NAME</b>	<b>DEFINITION</b>
<b>CITA AFTER HRS</b>	Citation After Hours
<b>REMOTE VIDEO</b>	Remote Video
<b>CITA_RES-1</b>	Citation-Residential
<b>CITA_RES-2</b>	Citation-Residential
<b>CITA_RES-3</b>	Citation-Residential
<b>CITA_RES-4</b>	Citation-Residential
<b>CITA-1</b>	Citation
<b>CITA-2</b>	Citation
<b>CITA-3</b>	Citation
<b>CITA-4</b>	Citation
<b>ELEV-1</b>	Elevator
<b>ELEV-2</b>	Elevator
<b>ELEV-3</b>	Elevator
<b>ELEV-4</b>	Elevator
<b>ELEV-5</b>	Elevator
<b>ELEV-6</b>	Elevator
<b>FIRE-1RV1</b>	Fire-PDD
<b>FIRE-PDD-2</b>	Fire-PDD
<b>FIRE-PDD-3</b>	Fire-PDD
<b>FIRE-PDD-4</b>	Fire-PDD
<b>FIRE-PDD-5</b>	Fire-PDD
<b>FIRE-PDD-6</b>	Fire-PDD
<b>GEN-101</b>	General
<b>GEN-102</b>	General
<b>GEN-103</b>	General
<b>GEN-104</b>	General
<b>GEN-105</b>	General
<b>GEN-1RV2</b>	General
<b>GEN-200</b>	General
<b>GEN-201</b>	General
<b>GEN-202</b>	General
<b>GEN-203</b>	General
<b>GEN-204</b>	General
<b>GEN-205</b>	General
<b>GEN-300</b>	General
<b>GEN-301</b>	General

<b>ZONE/TAG NAME</b>	<b>DEFINITION</b>
<b>GEN-302</b>	General
<b>GEN-303</b>	General
<b>GEN-304</b>	General
<b>GEN-305</b>	General
<b>GEN-400</b>	General
<b>GEN-401</b>	General
<b>GEN-402</b>	General
<b>GEN-403</b>	General
<b>GEN-404</b>	General
<b>GEN-405</b>	General
<b>PEI-552</b>	Civil
<b>PEI-553</b>	Civil
<b>PEI-554</b>	Civil
<b>PEI-555</b>	Civil
<b>PEI-556</b>	Civil
<b>PEI-562</b>	Civil
<b>PEI-563</b>	Civil
<b>PEI-564</b>	Civil
<b>PEI-565</b>	Civil
<b>PEI-566</b>	Civil
<b>PEI-572</b>	Civil
<b>PEI-573</b>	Civil
<b>PEI-574</b>	Civil
<b>PEI-575</b>	Civil
<b>PEI-576</b>	Civil
<b>SIGN-1</b>	Sign
<b>SIGN-2</b>	Sign
<b>SIGN-4</b>	Sign

## Appendix G – Inspection Results

<b>Status</b>	<b>Definition</b>
<b>Pending</b>	Inspection is being performed but is not completed yet.
<b>Requested</b>	The customer has requested an inspection that will appear in the assigned inspector’s queue.
<b>Scheduled</b>	The inspection is scheduled in SHAPE PHX as a default inspection but has not been requested by the customer yet.
<b>Pass</b>	The inspection has been passed by the inspector.
<b>Fail</b>	The inspection has been failed by the inspector.
<b>Cancelled</b>	The inspection was cancelled by the applicant/requestor or inspector as noted.
<b>No Access</b>	The inspector was unable to access the site to complete the inspection.
<b>Out of Service</b>	The equipment or facility is no longer in service.
<b>Conditional Pass</b>	A portion of an inspection is passed or has a condition noted for the passing of the inspection.



## Appendix H – Inspection List

INSPECTION NAME	PERMIT TYPE	DISCIPLINES	WORK TYPE	INSPECTION CODE
<b>Acceptance Test</b>	Elevator	Elevator	Installation; Repair; Modification	499
<b>ADULT CARE HOME (6-10)</b>	Construction and Trades Residential	Structural	Group Homes, Assisted Living 6-10 residents	695
<b>Adult Care Home</b>	Construction and Trades Residential	Structural	Group Homes, Assisted Living 6-10 residents	690
<b>Annual Facility Inspection</b>			Repairs, Replacements; Service Upgrade - Electrical	
<b>Annual Facility Inspection</b>				
<b>Basement Wall</b>	Construction and Trades Residential	Structural	Standard Pool; Custom Pool	617
<b>Bond Beam</b>	Pool	Structural	Standard Pool; Custom Pool	619
<b>Bonds - Admin, Research, Investigation</b>	Civil	Civil	Lateral Tap; Driveway	526
<b>Complaint</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	505
<b>Demolition / Site Clearance</b>	Demolition		Demolition	614
<b>Desert Preservation</b>	Construction and Trades Residential	Civil		687
<b>ENERGY</b>	Construction and Trades Residential	Structural	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	697
<b>Engineering and Streets Assistance</b>	Civil	Civil	Driveway	550
<b>Fence / Retaining Wall</b>	Construction and Trades Residential	Structural	Fence and / or Retaining Wall; Temporary Fence	675
<b>Field Status Check</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	519
<b>Final Inspection</b>	Construction and Trades Residential; Pool; Demolition; Quick Permit	Structural	Group Homes, Assisted Living 6-10 residents; Change of Occupancy; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; Remodel - interior only; Remodel - with exterior impact; Repairs, Replacements; Upgrades - Mechanical, Elevator, Energy System; Service Upgrade - Electrical; Installation; Demolition; Submitting a New Standard Plan; Revision to Approved Plan; New Standard Home from Standard Plan; Standard Pool; Custom Pool; Fence and / or Retaining Wall; Temporary Fence; Lateral Tap; Pavement Restoration;	699

## Appendix H – Master Inspection List

INSPECTION NAME	PERMIT TYPE	DISCIPLINES	WORK TYPE	INSPECTION CODE
			Driveway; Installation - Mobile Home, Factory Built Building; Remodel	
<b>Final Inspection / Project Engineering</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	599
<b>Final Inspection</b>	Construction and Trades Residential	Fire-PDD	Fire Sprinklers	999
<b>Final Inspection</b>	Construction and Trades Residential	Elevator	Installation; Repair; Modification	499
<b>Final Inspection</b>	Construction and Trades Residential; Pool; Demolition; Quick Permit		Group Homes, Assisted Living 6-10 residents; Change of Occupancy; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; Remodel - interior only; Remodel - with exterior impact; Repairs, Replacements; Upgrades - Mechanical, Elevator, Energy System; Service Upgrade - Electrical; Installation; Demolition; Submitting a New Standard Plan; Revision to Approved Plan; New Standard Home from Standard Plan; Standard Pool; Custom Pool; Fence and / or Retaining Wall; Temporary Fence; Lateral Tap; Pavement Restoration; Driveway; Installation - Mobile Home, Factory Built Building; Remodel	699
<b>Final Walk Through</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	590
<b>Final / Project Engineering</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	599
<b>Fire Damage</b>	Construction and Trades Residential	Fire-PDD		680
<b>Footing / Ufer<sup>4</sup></b>	Construction and Trades Residential	Electrical	New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan; Fence and / or Retaining Wall	615
<b>Foundation</b>	Construction and Trades Residential	Structural	New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan; Fence and / or Retaining Wall	621
<b>Framing</b>	Construction and Trades Residential	Structural	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	630

<sup>4</sup> The Ufer ground is an electrical earth grounding method developed during World War II. It uses a concrete-encased electrode to improve grounding in dry areas. The technique is used in construction of concrete foundations.

## Appendix H – Master Inspection List

INSPECTION NAME	PERMIT TYPE	DISCIPLINES	WORK TYPE	INSPECTION CODE
<b>Gas Piping</b>	Construction and Trades Residential	Mechanical	New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	635
<b>Grading and Drainage</b>	Construction and Trades Residential	Civil	New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	685
<b>Grotto, Water Feature or Rock Fall</b>	Pool	Structural	Standard Pool; Custom Pool	670
<b>Grout / Masonry</b>	Construction and Trades Residential	Structural	New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	618
<b>Hillside</b>	Construction and Trades Residential			686
<b>In Progress Inspection</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	512
<b>Information</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	508
<b>Insulation</b>	Construction and Trades Residential	Structural	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	660
<b>Job Meeting</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	502
<b>Job Meeting</b>	Construction and Trades Residential			602
<b>Material Testing Administration</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	520
<b>Mechanical</b>	Construction and Trades Residential	Mechanical	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	650
<b>Misc. Project Engineering</b>	Civil	Civil	Lateral Tap; Driveway	500
<b>Miscellaneous General</b>	Construction and Trades Residential			600
<b>Mobile Home / Zoning</b>	Construction and Trades Residential		Installation - Mobile Home, Factory Built Building	655
<b>NSD Assistance</b>	Civil	Civil	Driveway	541

## Appendix H – Master Inspection List

INSPECTION NAME	PERMIT TYPE	DISCIPLINES	WORK TYPE	INSPECTION CODE
<b>Plan Review</b>	Construction and Trades Residential		New Accessory structure; Addition only; Remodel - interior only; Remodel - with exterior impact	609
<b>Pool Bonding Grid</b>	Pool	Structural	Standard Pool; Custom Pool	674
<b>Pre-Drywall (Framing, Electrical, Plumbing, Mechanical)</b>	Construction and Trades Residential	Structural	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	625
<b>Pre-Gunite</b>	Pool	Structural	Standard Pool; Custom Pool	671
<b>PRE-LATH</b>	Construction and Trades Residential	Structural	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	628
<b>Pre-Plaster</b>	Pool	Structural	Standard Pool; Custom Pool	672
<b>Pre-Slab</b>	Construction and Trades Residential	Structural	New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	620
<b>Prelim Final Walk Through</b>	Civil	Civil	Driveway	589
<b>Project Coordination</b>	Civil	Civil	Pavement Restoration; Driveway	516
<b>Pull Permit</b>	Civil	Civil	Driveway	583
<b>Research</b>	Civil	Civil	Lateral Tap; Driveway	511
<b>Risk Management Dept Assistance</b>	Civil	Civil	Driveway	549
<b>Rough Electrical</b>	Construction and Trades Residential	Electrical	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	631
<b>Rough Plumbing</b>	Construction and Trades Residential	Plumbing	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	632
<b>Shear Nail</b>	Construction and Trades Residential	Structural	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	627

## Appendix H – Master Inspection List

INSPECTION NAME	PERMIT TYPE	DISCIPLINES	WORK TYPE	INSPECTION CODE
<b>Soil, Sewer, Water, Copper</b>	Construction and Trades Residential	Plumbing	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	622
<b>Solid Waste Dept Assistance</b>	Civil	Civil	Lateral Tap	547
<b>Spas</b>	Pool	Structural	Standard Pool; Custom Pool	673
<b>Special Inspection - Third Party</b>	Construction and Trades Residential		Group Homes, Assisted Living 6-10 residents; Change of Occupancy; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; Remodel - interior only; Remodel - with exterior impact; Repairs, Replacements; Upgrades - Mechanical, Elevator, Energy System; Service Upgrade - Electrical; Installation; Demolition; Submitting a New Standard Plan; Revision to Approved Plan; New Standard Home from Standard Plan; Standard Pool; Custom Pool; Fence and / or Retaining Wall; Temporary Fence; Lateral Tap; Pavement Restoration; Driveway; Installation - Mobile Home, Factory Built Building; Remodel	
<b>Special Inspection - Third Party</b>	Pool			
<b>Special Inspection - Third Party</b>	Civil			
<b>St Transportation Dept Assistance</b>	Civil	Civil	Driveway	545
<b>Stemwall / Foundation</b>	Construction and Trades Residential	Structural	New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	616
<b>Strap and Brace</b>	Construction and Trades Residential	Structural	New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	626
<b>TOP OUT</b>	Construction and Trades Residential	Plumbing	Group Homes, Assisted Living 6-10 residents; New Custom Home with or without accessory structures; New Accessory structure; Addition and remodel; Addition only; New Standard Home from Standard Plan	633
<b>Traffic Control</b>	Civil	Civil	Lateral Tap; Pavement Restoration; Driveway	515
<b>Training</b>	Civil	Civil	Driveway	503

## Appendix H – Master Inspection List

INSPECTION NAME	PERMIT TYPE	DISCIPLINES	WORK TYPE	INSPECTION CODE
<b>Unsafe Condition</b>	Civil	Civil	Lateral Tap; Driveway	507
<b>Valve and Manhole Adjustments</b>	Civil	Civil	Pavement Restoration	524
<b>Warranty Work (Original Contractor)</b>	Civil	Civil	Lateral Tap; Driveway	595
<b>Work W/O Permit</b>	Civil	Civil	Lateral Tap; Driveway	506

## Appendix I – KIVA Flag to SHAPE PHX Alerts

There are three types of ALERTS:

1. **NOTICE:** Notice is an informational message to the user. This alert does not stop workflow.
2. **HOLD:** A hold will stop workflow. Direction to release to be provided within the alert note.
3. **LOCK:** All progress stops. No further action can occur for point of placement (Permit, Contact, Contractor, etc.) Direction to release to be provided within the alert note.

Auto = Alert is automatically generated based on GIS/Permitting system results

Manual = Staff add Alert to workflow. Alert can be placed on field or permit.

KIVA CODE	KIVA DESCRIPTION	SHAPE ALERT NAME	ALERT TYPE
ADD'L PLAN	ADDITIONAL PLAN REVIEW REQUIRED	<b>Additional Submittal Required</b>	HOLD
ADDN METER		<b>Additional Meter</b>	HOLD
COFOHOLD	DESCRIBE REASON FOR C OF O HOLD	<b>C of O / C Hold</b>	HOLD
COMMENT	REVIEWER COMMENT	<b>Reviewer Comment</b>	HOLD
CONTR	A CONTRACTOR IS REQUIRED FOR THE PERMIT	<b>Contractor Required</b>	HOLD
DEFERRED	DEFERRED SUBMITTAL REQUESTED	<b>Deferred Submittal Requested</b>	HOLD
DEVL AGR	DEVL AGR @ 24TH & CAMELBACK. EXP 6/2/21	<b>WSD Development Agreement Area</b>	HOLD
DOF FEES	DOF & WRA FEES	<b>DOF / WRA Fees</b>	HOLD
DOF-ANTHEM	DOF FEES IN ANTHEM AREA	<b>Anthem DOF</b>	NOTICE
DVAO	DEER VALLEY AIRPORT OVERLAY DISTRICT	<b>Deer Valley Airport Overlay</b>	HOLD
ENVR	POTENTIAL ENVIRONMENTAL CONDITIONS	<b>Potential Environmental Conditions</b>	NOTICE
FAA (Elevations) 1125 - 1850	AVIATION HEIGHT ZONING RESTRICTION	<b>FAA Zoning Height Restriction</b>	NOTICE
FAA 50, 75, 100, 150 FT, FAA NO HAZ	FAA NO HAZARD - 50, 75, 100, 150 FEET FAA NO HAZARD, FAA 7460 REQUIRED	<b>FAA No Hazard</b>	HOLD
INV FEE COMPLAINT	COMPLAINT FOR ACTIVE NON-PERM CONST RECD NON-PERMITTED CONSTRUCTION INV FEE	<b>Non-Perm Construction</b>	HOLD
NCASPD	NORTH CENTRAL AVE SPECIAL PLANNING DIST	<b>North Central Ave Special Planning Dist</b>	HOLD
NON-PMT IN	NON-PAYMENT OF INVOICE	<b>Non-Payment Invoice</b>	LOCK
NOTIFY	NOTIFY	<b>Notify</b>	NOTICE
NOTIFY DIR	NOTIFY DIRECTOR'S STAFF	<b>Director's Office Approval Required</b>	LOCK
NOTIFY DIR	NOTIFY DIRECTOR'S STAFF	<b>Notify Director's Office</b>	NOTICE
NSF	NON-SUFFICIENT CHECK	<b>Non-Sufficient Funds</b>	LOCK
PEER REV	PEER REVIEW REQUIRED	<b>Peer Review Required-Elec</b>	HOLD

## Appendix H – KIVA Flag to SHAPE PHX Alerts

KIVA CODE	KIVA DESCRIPTION	SHAPE ALERT NAME	ALERT TYPE
<b>RRQUIETZON</b>	RAILROAD QUIET ZONE	<b>Railroad Quiet Zone</b>	HOLD
<b>SECTION114</b>	NON-PERM CONSTRUCTION-SEC 114 FEES APPLY	<b>Non-Perm Construction-Sec 114 Fees Apply</b>	HOLD
<b>SIC</b>	SPECIAL INSPECTION CERT REQ'D	<b>Special Inspection Cert Required</b>	NOTICE
<b>STOP WORK</b>	CONSTRUCTION MUST STOP PROVIDE DETAIL	<b>Stop Work</b>	LOCK
<b>SUSPEND</b>	PERMIT SUSPENDED	<b>Permit Suspended</b>	LOCK
<b>SWRREPAY</b>	SEWER REPAYMENT AGREEMENT	<b>Repayment Agreement Area</b>	HOLD
<b>WTRREPAY</b>	WATER REPAYMENT AGREEMENT		
<b>WRA MULTI</b>	MULTIPLE WRA FEES FOR A PARCEL	<b>WRA Adjusted Area</b>	HOLD
<b>WTR METER</b>	NEW/REPLACEMENT WATER METER REQUIRED	<b>Water Meter Required</b>	HOLD
<i>(New)</i>		<b>Civil Parent Permit</b>	NOTICE
<i>(New)</i>		<b>Government Mall Overlay</b>	HOLD
<i>(New)</i>		<b>Out-of-State Contractor</b>	HOLD



## Appendix J – Time Tracking Activity Codes

For those who are required to track their time, the following list will be used for the Activity/Time Codes. The KIVA Time Code is included for your reference, to allow you to find the code that you are used to using and select the associated code that will be used in SHAPE PHX. When entering time in SHAPE PHX, you will need at least two characters from the Activity/Time Code for it to *Search Activity Codes*.

KIVA TIME CODE	ACTIVITY / TIME CODE	ACTIVITY DESCRIPTION	ACTIVITY TYPE	BILLABLE?
NEW	Application Requests	Time counter/team support/administrative staff spend creating and processing indirect permit/plan review related applications. Including: Expedited Request, Extensions, After Hours, Water Meter Tap Investigations, Fire Flow Requests, etc.	TIME	NO
NEW	Commercial Const Inspection	Conduct commercial building inspections. Includes time spent conferring and consulting with contractors, developers, owners, etc.	ACTIVITY	YES
NEW	Fire Prevention Inspection	Conduct fire prevention inspections. Includes time spent conferring and consulting with contractors, developers, owners, etc.	ACTIVITY	YES
NEW	Landscape/ Environmental Inspection	Conducts environmental and landscape inspections. Includes time spent conferring and consulting with contractors, developers, owners, etc.	ACTIVITY	YES
NEW	Public Records Research	Time spent researching, collecting, and preparing records packages for public records request.	TIME	NO
NEW	Sign Inspection	Conduct sign inspections. Includes time spent conferring and consulting with contractors, developers, owners, etc.	ACTIVITY	YES
NEW	Zoning PDD Review	Time spent meeting, commenting, and review of development related projects.	ACTIVITY	YES
101	Counter Service	Time spent by Counter staff, assisting walk-in customers.	TIME	NO
102	Pre-Application	Time spent on projects in the pre-application stage. preparation for preapplication meetings, including research, coordination, preparation, and attending meetings.	ACTIVITY	YES
103	Preliminary	Time spent on projects in the preliminary review stage, preparation for preliminary meetings, including research, coordination, preparation, and attending meetings, from the acceptance of the preliminary submittal to the log-in of construction plans. Includes one initial meeting and one follow-up meeting per discipline. Use Code Project Meeting/Fact Finding/Technical Advice for additional meetings.	ACTIVITY	YES
104	Field Trip	Field investigation of a site during the pre-application and preliminary review stages	ACTIVITY	YES
105	Abandonment Review	"Time spent related to abandonments, including research, coordination, routing, processing, comments and associated meetings.	ACTIVITY	YES

## Appendix I – Time Tracking Activity Codes

KIVA TIME CODE	ACTIVITY / TIME CODE	ACTIVITY DESCRIPTION	ACTIVITY TYPE	BILLABLE?
106	Single Family Design Review	Time spent reviewing design review submittals, developing design review comments, meeting with customers, verifying standard plans and preparing development agreements.	ACTIVITY	YES
107	Major Site Plans and Amendments	Time spent reviewing major site plans and amendments to projects, including research, coordination, and meetings from submittal to approval.	ACTIVITY	YES
108	Zoning Process Review	Time spent meeting and commenting on zoning actions, Planning Hearing Officer Actions, General Plan Amendments, and Zoning Administrator actions.	ACTIVITY	YES
109	Site Project Meeting	Time spent in cost recovered meetings related to a project above and beyond those normally associated with the pre-application and preliminary review process. This may involve meetings related to projects that do not yet have assigned tracking numbers.	ACTIVITY	YES
110	Appeals / Modifications	Time spent related to appeals and modifications of codes and ordinances. This includes research, coordination, routing, processing, comments, and associated meetings.	ACTIVITY	YES
111	Minor Site Plans and Amendments	Time spent, primarily by Counter staff, reviewing minor site plans and Amendments from plan log-in through permitting.	ACTIVITY	YES
112	Dedication Review	Time spent related to dedications, including research, coordination, routing, and processing.	ACTIVITY	YES
113	PCD Master Plan Review	Time spent on PCD Master Plan Review, including master report review, master plan review, coordination, and any other related work.	ACTIVITY	YES
201	1st and 2nd Plan Review	First review of construction documents includes plot plan review and application review for fax, drop-off, phone and over the counter permits, phone calls, impromptu meetings, and time to process permit. Second review of construction documents including phone calls.	ACTIVITY	YES
203	3rd Plan Review	Third review of construction documents including phone calls.	ACTIVITY	YES
204	4th Plan Review	Fourth review of construction documents including phone calls. This review is to be done only with the approval of the Team Leader or a Team Manager.	ACTIVITY	YES
208	Mylar Processing	All activity related to processing a final plat after plan review is complete. Includes research, coordination, routing, processing, comments, associated meetings, legal description, and RCA.	ACTIVITY	YES
209	Field Review	Meetings and/or reviews conducted in the field as part of the construction document review process	ACTIVITY	YES

## Appendix J – Time Tracking Activity Codes

KIVA TIME CODE	ACTIVITY / TIME CODE	ACTIVITY DESCRIPTION	ACTIVITY TYPE	BILLABLE?
210	Project Mtg/Fact Finding/Tech. Advice	Project meetings that take place at the request of the customer for plan review pre-submittal meetings or plan review coordination meetings to discuss plan review comments. Time spent providing technical guidance and consultation, which is project related. Use this time code for meetings which are in addition to the initial meeting and one follow-up meeting per discipline in Code 103 - Preliminary.	ACTIVITY	YES
301	Site Inspection	Conduct site inspections. Includes time spent conferring and consulting with contactors, developers, owners, etc.	ACTIVITY	YES
302	Civil Const Inspection	Conduct civil inspections. Includes time spent conferring and consulting with contactors, developers, owners, etc.	ACTIVITY	YES
303	Residential Const Inspection	Conduct residential building inspections. Includes time spent conferring and consulting with contactors, developers, owners, etc.	ACTIVITY	YES
304	Project Meeting	Used by plan review staff who participate in or conduct a project meeting in the field as part of an inspection activity	ACTIVITY	YES
305	Code Enforcement Complaint	Time support and inspection team spend creating and processing complaint submissions: documentation and processing.	ACTIVITY	YES
401	Staff Meeting	Monthly managers meeting or other staff related meetings	TIME	NO
402	Technical Training	Technical staff meetings, job-related technical training, technical seminars, conferences, and professional development	TIME	NO
403	Team Meeting	Weekly team meetings or other scheduled or unscheduled team meetings	TIME	NO
404	Non-Technical Training	Mandatory and voluntary non-technical training sponsored by the City or Department.	TIME	NO
405	Professional Association & Outreach	Time spent with professional associations in an active role such as conducting training or presentations, professional outreach, or serving on boards or committees	TIME	NO
406	Administrative	Time spent exclusively on administrative-related activities including breaks, staff meetings, team meetings, etc. Also includes time spent with professional associations in an active role such as conducting training or presentations or serving on boards or committees.	TIME	NO
407	Committee Work	Time spent working on special Department or City projects, teams, process developments, or committees such as CSFD and food drive.	TIME	NO
408	Employee Leave	Leave time taken as vacation, sick, FMLA, medical appointments, jury duty, bereavement, industrial, or other leave.	TIME	NO
409	Holiday Leave	City paid holiday	TIME	NO

## Appendix I – Time Tracking Activity Codes

KIVA TIME CODE	ACTIVITY / TIME CODE	ACTIVITY DESCRIPTION	ACTIVITY TYPE	BILLABLE?
501	Fact Finding	Time spent for fact-finding for potential projects during due diligence	ACTIVITY	YES
502	Non-Proj Research/ Consult	Time spent assisting telephone and walk-in customers (other than at the counter) on non-project research, special requests, and consultation. This includes time spent by staff assisting customers through email and phone calls that are not related to a specific project.	TIME	NO
504	Technical Advice/ Consultation/Staff	Time spent providing technical guidance and consultation to staff and co-workers	TIME	NO
505	Plan Processing	Time counter/team support/administrative staff spends processing and routing plans other than scheduled Counter shift	TIME	NO
506	Permit Processing	Time counter/team support/administrative staff spend creating and processing permits other than scheduled Counter shift	TIME	NO
800	Code Enforcement Field Investigation	Conduct field investigation. Includes times spend conferring and consulting with contractors, developers, owners, etc.	ACTIVITY	YES
801	Code Enforcement Research	Conduct research related to code enforcement complaint. Includes times spend conferring and consulting with contractors, developers, owners, etc.	ACTIVITY	YES
802	Code Enforcement Court	Time spent related to court preparation, documentation, and court attendance. Includes times spend conferring and consulting with law department, management, etc.	ACTIVITY	YES

## Appendix K – KIVA Permits Included in Release 1

SHAPE PHX TARGET	KIVA PERMIT COUNT	NOTES
<b>Complaint</b>	4	Note that the complaint type mapping cannot be distinguished from this count. KIVA complaint types are <b>CINV, RINV, SGNV and GINV</b> which does not reflect the actual complaint type: Noise, Non-permitted Construction, Illegal Sign, Grading & Drainage. Fire complaints are not included in the count. ( <i>Fire complaints will be handled in Release 2.</i> )
<b>Equipment</b>	10	Such as Dumbwaiters, Escalators, Freight Elevators, Moving Walks, etc. <b>EDMB, EESC, EFRT, EHYD, ELFT, ELUL, EMAT, ERES, ETRC, EWLK</b>
<b>License</b>	15	Annual Facilities Permits, Medical Facilities, Day Care, Assisted Living & Group Homes, Schools, Malls, and Blasting Permits. Count includes 10 Fire Annual Inspection processes that will be managed under License object; Includes AFP and BMR; Count <i>does not</i> include Journeymen, Apprentice, Special Inspector, Self-Certified Professional as these were not listed in the KIVA permit list but were listed in the use cases. Includes Facility listing on AFP "License" as License Detail. <b>AFP, BMR, F416, F417, F418, F419, F420, F421, F422, F423, F424, F430, F709, F444, AFPF</b>
<b>Permit</b>	24	Residential Permits, including Demolition, Fences, Swimming Pools, and various trades. ( <i>Includes three Civil permit types: Driveway, Lateral Tap, &amp; Pavement Restoration</i> ) <b>CDW, CLT, CPR, ELEV, FBBR, MHZ, RDEM, RE, REM, RFEN, RM, RPBI, RS, RSC, RSE, RSF, RSFA, RSFC, RSM, RSME, RSP, RSTD, RWH, TRFN</b>
<b>Review</b>	19	Residential plan reviews including HP Certificates of No Effect and Demolition Application Review. <b>DAPP, HPCO, HPDE, HPOR, RCIT, RPDR, RPPR, RPRC, RPRL, RPRM, RPRS, RPRT, RPRU, RPRX, RPSC, RSCA, RVCA, RVSN, RVSX</b>
<b>Request</b>	3	Includes extended work hours and inspections only permit ( <b>EXTH, EXTR, RNSP</b> )
<b>Other</b>	5	Clearances and Applications, such as Code Modification Requests, Certificates of Completion, and Certificates of Occupancy. <b>REC, RMC, COFC, COFO, CMOD</b>
<b>TOTAL</b>	<b>80</b>	



**If you have any questions or concerns regarding SHAPE PHX, please contact the team:**

**By email at:**

[shapephx@phoenix.gov](mailto:shapephx@phoenix.gov)

**On the intranet at:**

<https://cityofphoenix.sharepoint.com/sites/pdd/shapephx>

**For Training materials see:**

<https://cityofphoenix.sharepoint.com/sites/pdd/shapephx/Training%20Documents/Forms/AllItems.aspx>

**And watch your email for information and invites to stay up-to-date!**