





Each section in this guide is self-contained and takes you through the entire process. If you were to read the Guide from cover to cover, there would be a lot of repetition. So, if you are only interested in Self-Certified Professional Registrations or Permits, you can go straight to that ssection.

The headings in the SHAPE PHX Customer Portal Guide Table of Contents below are hyperlinks to the sections. To access the section that you are interested in reading, click on the title with your mouse pointer and you will be taken there.

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Revised 06/02/2022



Introduction

What is SHAPE PHX?

In 2016, the Planning & Development Department (PDD) embarked on an epic quest to improve our customer service, work processes, and data management by integrating the aging computer systems in use within the department, including the Electronic Plan Review (EPR) system and PDD Online, into one modern system.

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.

SHAPE PHX will give internal and external users the opportunity to communicate more seamlessly and efficiently with all planning, plan review, permitting and inspections related matters as it brings all our business processes into one integrated system.

What is the SHAPE PHX Customer Portal?

The SHAPE PHX Customer Portal is one of the best outcomes of that quest. Providing many new online services for PDD customers and the residents of city of Phoenix, it is a direct connection to PDD which will be available 24/7. Through the Portal, you can:

- Submit applications for permits, licenses, and registrations,
- Check plan review status,
- Communicate with staff,
- Upload documents into the portal,
- Use a modernized, integrated Electronic Plan Review via Bluebeam®,
- Request inspections,
- Pay fees online,
- and more!

We are confident that SHAPE PHX will provide our customers with the best tools available. We hope to continue to grow our online community by providing users with the latest technology to assist them with the city of Phoenix development process.

How will SHAPF PHX be released?

SHAPE PHX will be released in two parts to reduce the risk of an all-or-nothing approach by allowing part of our business operations to migrate into SHAPE PHX first while other operations remain functioning in the existing system, known as KIVA.



What's in Release 1?

Release 1 focuses mainly on residential single-family plan review, permitting and inspections, although there are some other items included in Release 1 that play a role in the residential permitting process like Historic Preservation and over-the-counter civil permits like driveways and sewer tap connections in the city right of way. This will allow projects that require these types of activities to be in one system. Here's a list of some of the items in Release 1:

- Residential Plan Review, including Historic Preservation Certificates of No Effect
- Residential Permits, including Demolition, Fences, and Swimming Pools
- Three over-the-counter Civil Permits: Driveways, Sewer Lateral Taps, and Pavement Restoration
- Non-Permitted Construction
- Elevators

In future releases, you can expect all commercial plan reviews, residential subdivisions, public hearings, such as Historic Preservation and Planning & Zoning hearings, the Office of Customer Advocacy and all remaining building, civil, and fire permits.

- Remaining permits, including: all Building, Civil and Fire
- Commercial Plan Review, including Annual Facilities Program (AFP), Building Code Modifications, and Residential Subdivision
- Historic Preservation Hearings
- Office of Customer Advocacy
- Planning
 - Long Range Planning
 - Signs
 - Site Planning
 - Zoning
- Self-Certification

Essentially, any other plan review, permits, or disciplines not mentioned in Release 1, will be part of future releases.

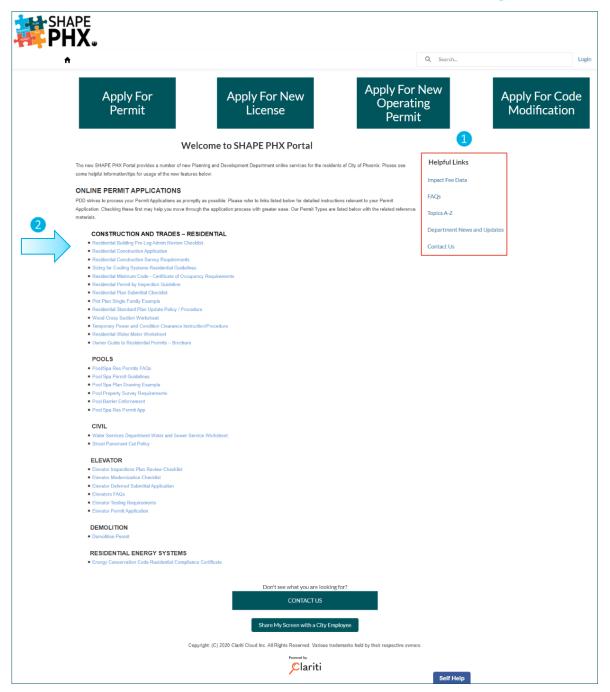
This guide will provide you with an overview of the features that the SHAPE PHX Customer Portal has to offer and how to use them. Within the Portal, as we will call it in the guide, there will be a feature that will allow you to search for information and ask for help. Of course, you can always connect with us through our <u>Contact Us</u> page.



Security

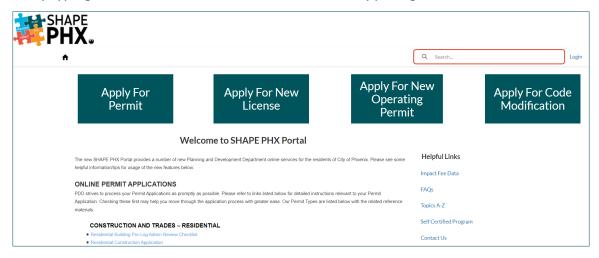
Unregistered & Registered Customers

Some of the features on the Portal are accessible to everyone without an account. *Unregistered Customers* can review Impact Fee Data, FAQs, Topics A-Z, Department News and Updates, and department contact information through the Contact Us links. Information on these topics can be found under the <u>Helpful Links</u> section 1. Other helpful information and documents are located on the left-hand side of the screen under Online Permit Applications 2.

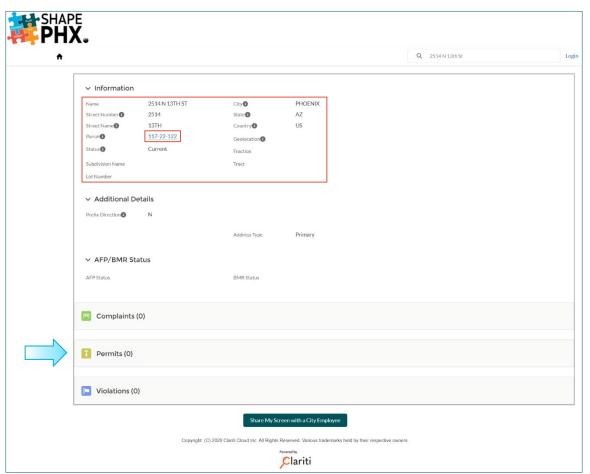




Unregistered Users can also search for permit information on a property in the SHAPE PHX portal by typing the address into the **Search...** box in the upper right-hand corner of the screen.

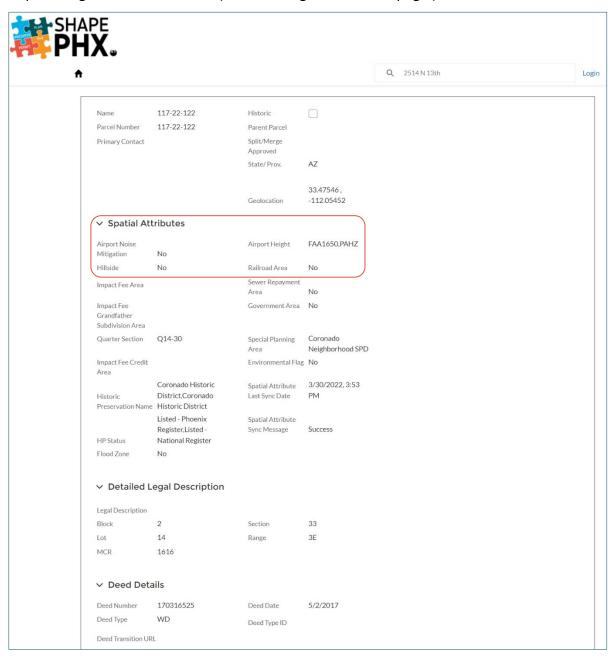


For example, if you enter 2514 N 13th St, you will discover that there are no permits in SHAPE PHX for that address. (NOTE: You will need to check <u>PDD Online</u> for permits that were issued before June 6, 2022.)





By clicking on the hyperlink on the parcel number, you can find additional information regarding the property, such as the Spatial Attributes like Hillside, Historic Preservation, or Airport Height Restricted zones. (See the image on the next page.)



Most of the features on the Portal, however, such as Code Enforcement Complaints or Apply for Permit, require an account.

Apply For Code Modification



Registration / Create an Account

To create your SHAPE PHX Portal account, click on the *Login* button on the Home Page or one of the buttons across the top of the page.

This will take you to the screen to the right. Click on the <u>Sign up now</u> link, just below the blue <u>Sign in</u> button.

You will be taken to a screen that asks for an email address to verify that it is an active account.

Sign in with your email address

Email Address

Password

Forgot your password?

Sign in

Don't have an account?

Sign in with your social account

Apply For New License

Welcome to SHAPE PHX Portal

- Enter your email address.
- Click the <u>Send verification code</u> button. An email, such as the one below, with a six-digit code will be sent to the email address that you input for you to enter on the next screen that appears.

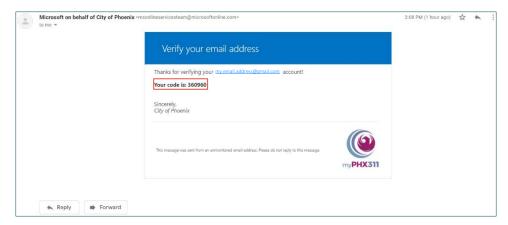


Apply For New

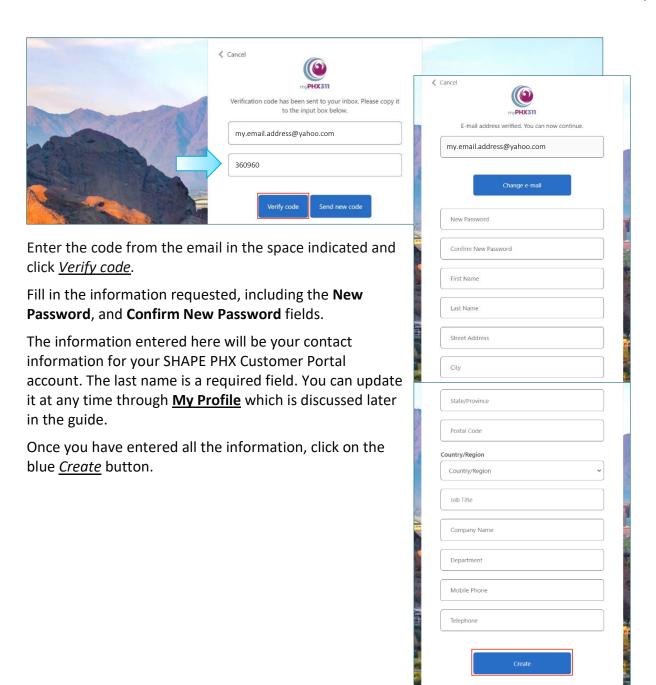
Operating

The email will be addressed to you from Microsoft on behalf of City of Phoenix and include your verification code.

Apply For Permit



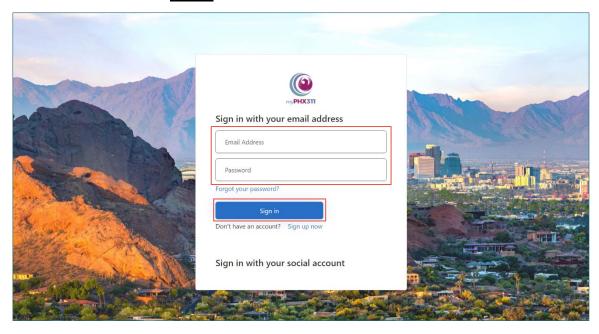






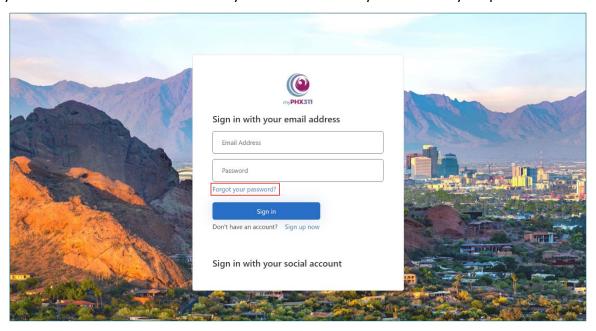
Logging In

When you need to log in to your account, type in your email address and password where indicated and click the blue <u>Sign In</u> button.



Forgot Your Password?

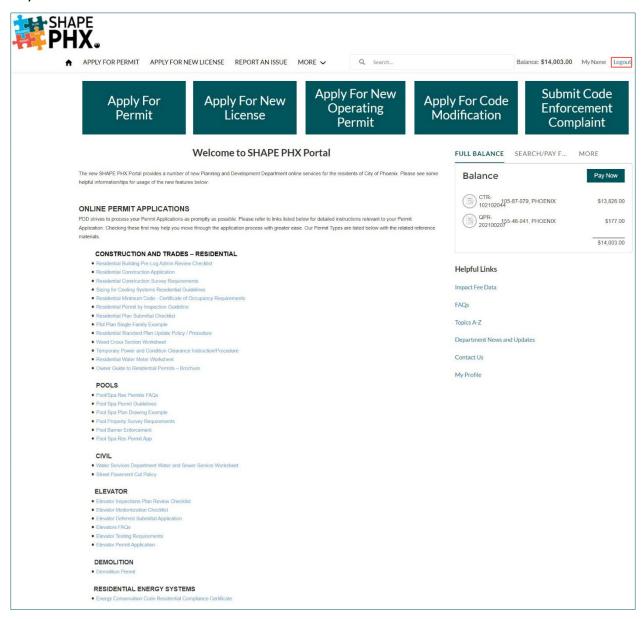
With so many online accounts for work and home, forgetting your password is a common occurrence for many of us. If that happens with your *myPHX311 account*, click on the *Forqot your password*? link and enter your email address. A new six-digit verification code will be sent to you from Microsoft on behalf of City of Phoenix so that you can reset your password.





Logging Out

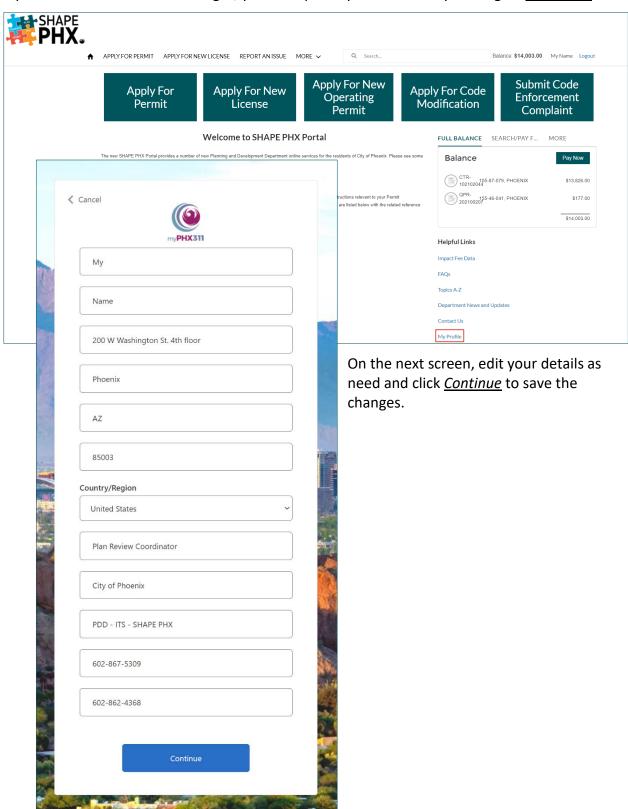
When you are done working in the Portal, click <u>Logout</u> on the right-hand side of the screen next to your name.





Managing Your Profile

If your contact information changes, you can update your account by clicking on My Profile.



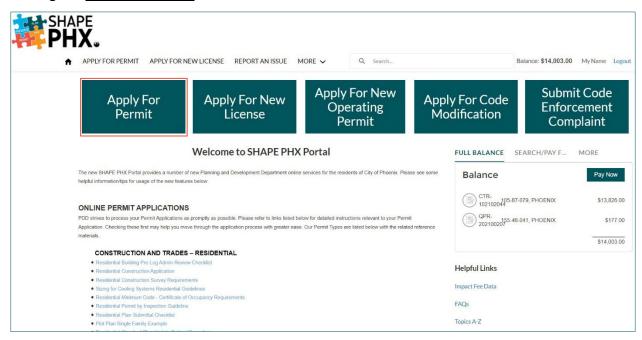


Apply for Permit

What's New?

In PDD Online, you can apply for a handful of simple permits, such as water heater replacements, gas clearances, meter socket replacements, and minor plumbing permits. Those permits are available through the Portal as well, but now you can apply for a permit to build an addition, a new single-family home, a duplex, or a pool, too!

The process is straight forward, and the Portal guides you through step-by-step. You start by clicking the *Apply for Permit* button.



After that, you will select one of the following nine residential Permit Types 2:

- **Civil**: Select this permit type if your scope of work includes *off-site work in the public right of way or on-site work for lateral tap, pavement restoration, or driveways.*
- 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.
- **Demolition**: Select this permit type if your scope of work includes *total, partial, or interior demolition of a structure*.
- **Elevator New**: Select this permit type if your scope of work includes the *installation of* a new elevator.

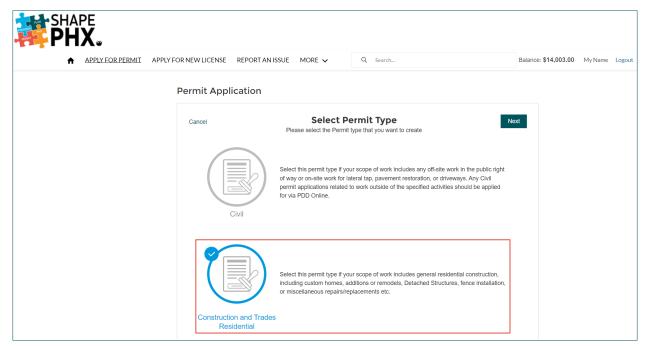
¹ Commercial permits will be available in future releases.

² For a list of the new permit types and their sequence numbers, as well as others, see Appendix B.



- **Elevator Repair or Modification**: Select this permit type if your scope of work includes the *repair or modernization of an existing 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.
- Quick Estimate: Select this permit type if you are interested in a base fee estimate for a
 proposed scope of work. This tool is not designed to be an inclusive list of potential fees.
 Additional fees may be required for a given project including, but not limited to, impact
 fees, water and sewer development and water resource acquisition fees, meter fees,
 expedited fees, etc. Please contact Planning and Development staff for a more detailed
 fee estimate. Fees may vary on the actual 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.

In this example, the **Permit Type** *Construction and Trades Residential* has been selected. To move forward, click *Next*, which is at the upper right-hand corner of the form.





Next, SHAPE PHX asks for information regarding the **Applicant** and the **Contractor**.

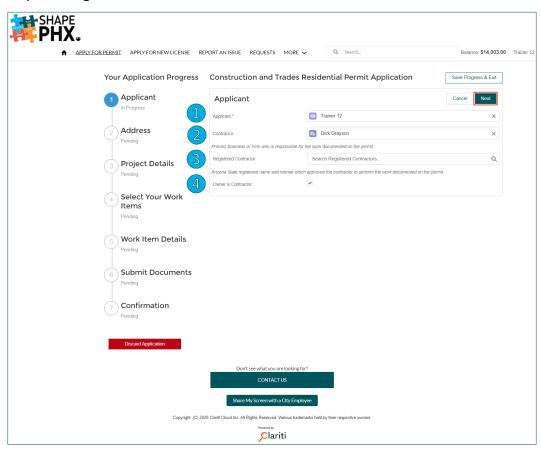
- 1 Your information will be entered in the **Applicant*** field automatically as a logged in user.
- Pollowing that information is the **Contractor**. SHAPE PHX has contact accounts for companies and people who have registered in the system, just like the one from which you are submitting your application. The first Contractor Field references one of those accounts.
- The system will also ask for the **Registered Contractor**. This information comes from the Arizona Registrar of Contractors (https://roc.az.gov/). Many construction jobs require a Registered Contractor and selecting a contractor from this list informs the system that this job has one.
- In certain cases, it is permissible for the owner of the property to act as the contractor.

 There is a check box to indicate if the **Owner is Contractor** on this project.

One of the great aspects of SHAPE PHX is that it can help you with data entry. With at least two characters of the Contractor's name, it will do a search for you.

Once you have entered all the required information here, click Next.

Note: Observe that some fields have a red asterisk (*) after the name. These are the required* fields and must be completed before you click <u>Next</u> to move on to the subsequent stage.

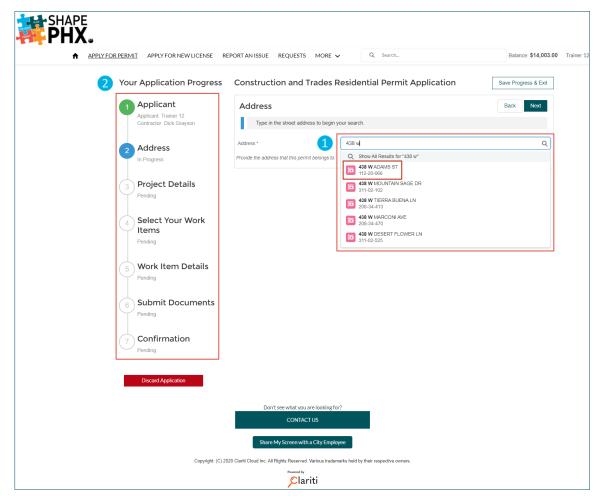




TIP: If at any point while entering the information for your permit application you need to step away to deal with another matter, you can click on the <u>Save Progress & Exit</u> button. Your draft application will be saved to your account and can be accessed from the Permits section at the bottom of the Portal Home Page. Click the <u>Continue</u> button and you can pick up right where you left off.



The next information that SHAPE PHX needs is the <u>Address</u>* where the work will be performed 1. Just as it can search for Contractors, the Portal searches for the right address as you type. When you enter part of the address, it narrows down the possibilities until the correct one displays. You then select the correct one from the list that is provided by the system.



Notice that the left-hand side of the screen shows <u>Your Application Progress</u> 2. This identifies what step you are on, and how many more steps are left!



After all the basic facts have been entered, you'll move on to the **Project Details**. These fields are:

- **1. Permit Type*** this information will be filled in based on the selection that was made in step 1, <u>Construction and Trades Residential</u>.
- **2. Permit Use Class*** For Release 1, there are two options, Residential and Residential Sales or Construction Office. For our example, we've chosen <u>Residential</u>.
- 3. Use Type* Based on the selection made above, the Use Type selections will vary. The Portal guides the user and assists them by eliminating options that are not applicable. The types available here are based on the previous selections: Single Family, Single Family Attached, Duplex, Mobile Home, and Factory Built Building. In the example, we've selected Single Family.
- **4.** Land Use Type Once again, the Portal has reduced the available options based on the previous selections. Had we chosen Duplex in the previous question, more options would be available, but the only option in this case is Single Family, so it is selected here.
- **5. Permit Work Type*** With this item, we begin to enter details that define the Scope of Work for the permit. In our example, the options are:
 - Group Homes, Assisted Living 6-10 residents
 - Change of Occupancy
 - New Custom home with or without accessory structures
 - New Standard Home from Standard Plan
 - New Accessory Structure
 - Addition and Remodel
 - Addition only
 - Remodel interior only
 - Remodel with exterior impact
 - Repairs, Replacements
 - Service Upgrade Electrical
 - Installation Mobile Home, Factory Built Building
 - Revision to Approved Plan
 - Fence and / or Retaining Wall
 - Temporary Fence

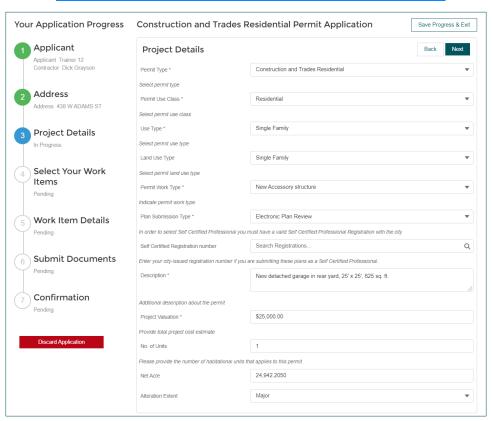
For this project, we are constructing a new detached garage, so we've selected <u>New Accessory Structure</u>.

- **6. Plan Submission Type*** The Portal allows users to submit plans via Electronic Plan Review or to prepare an application ahead of time when submitting paper plans inperson. Professionals who have registered with the city of Phoenix and taken the appropriate Self-Certification training courses may also submit their plans as Self-Certified.
 - Electronic Plan Review
 - Paper Plans
 - Self-Certified Professional Paper Plans
 - Self-Certified Professional Electronic Plan Review



For the example, the selection is Electronic Plan Review.

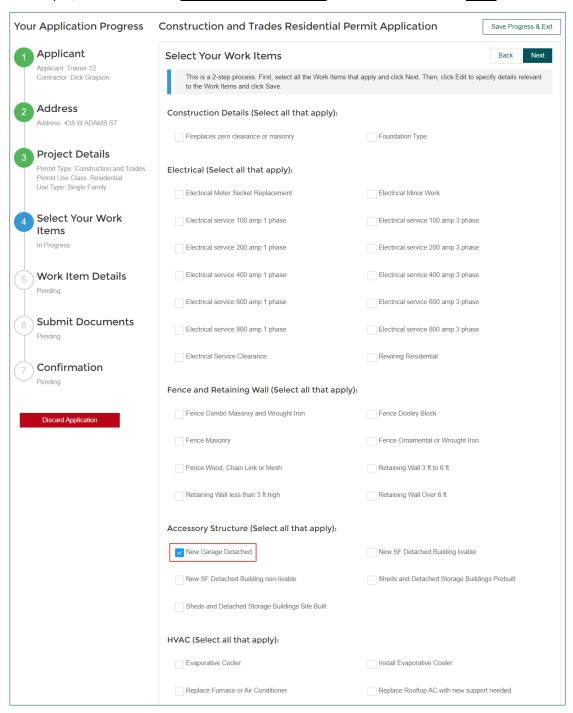
- 7. Self-Certified Registration Number In order to select Self Certified Professional, you must have a valid Self Certified Professional Registration with the city. Enter your city-issued registration number if you are submitting these plans as a Self-Certified Professional. (Not applicable for this example.)
- **8. Description*** Enter a simple description of the work to be performed under the permit. For example, "New detached garage in rear yard, 25' x 25', 625 sf total."
- 9. Project Valuation* Provide a total project cost estimate, for instance, \$35,000.
- **10. No. of Units** Please provide the number of habitational units that applies to this permit. The example provided here is for a garage, so no new habitational units will be built.
- 11. Net Acre Enter the area of the lot or parcel excluding all dedicated streets or alleys and roadway or alley easements but including twenty-five (25) feet of abutting canal right-of-way when the abutting development has complied with the Canal Bank Design Guidelines set forth in Section 507 Tab A of the Zoning Ordinance, including landscaping of canal bank right-of-way.
- **12. Alteration Extent** For more information on how to respond to this question, see page two of the Valuation Guide: Remodeling & Repairs to Existing Buildings.





After you have entered the <u>Project Details</u>, it's time to get specific and <u>Select Your Work Items</u>. There are a lot of options to choose from here (not all of them are shown below); just focus on your Scope of Work.

In the example, we've selected New Garage Detached, after which we click Next.

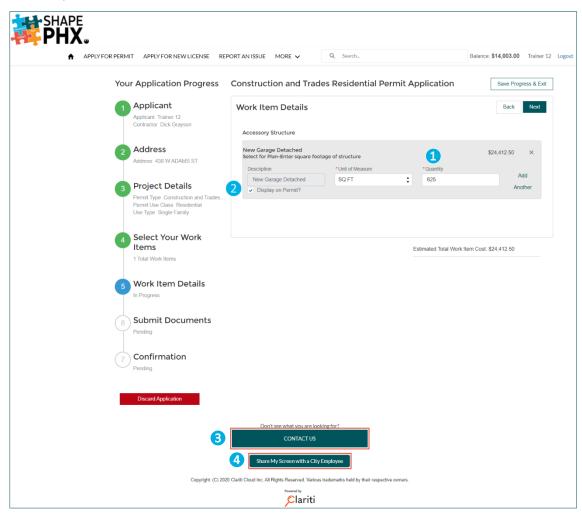




Based on the items that you checked when <u>Selecting Your Work Items</u>, you now need to enter additional information known as <u>Work Item Details</u>. Since only one <u>Work Item</u> was checked, there is only one Work Item Detail that needs to be completed here. The required information will vary depending on the Work Items selected, for example, you may be asked to supply the number of plumbing fixtures if you are adding a new bathroom.

- 1 Enter the total square feet for the new garage under **Quantity***. The Portal then will calculate the valuation for the project upon which the permit fees will be based.
- Click Display on Permit.

Of course, if you have questions while you are working in the Portal, you may click the <u>Contact</u> <u>Us</u> button 3 at the top of the screen to see the list of contact numbers and email addresses for the sections or the <u>Share My Screen with a City Employee</u> button 4 at the bottom to get assistance from PDD Staff. (See the section on <u>Share My Screen with a City Employee</u> for more information.)

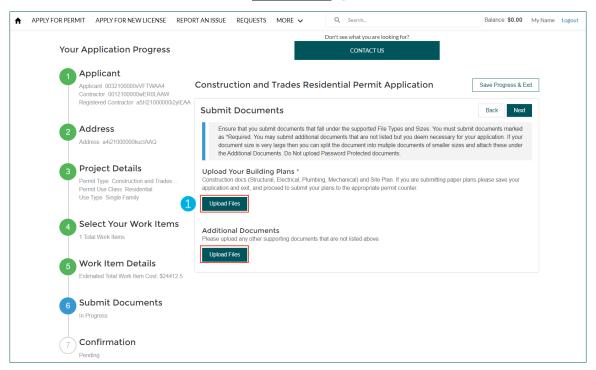


When you have entered all the information for the Work Items that you selected, click Next.

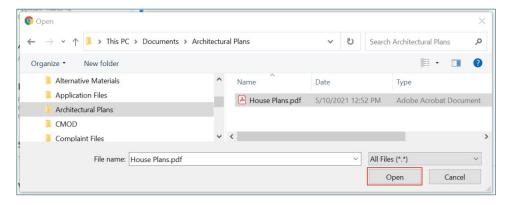


At the beginning of the application, under <u>Project Details</u>, you indicated how the plans would be submitted. For this example, *Electronic Plan Review* was chosen. The next step in the process is to <u>Submit Documents</u>.

To submit construction documents, click *Upload Files* 1.

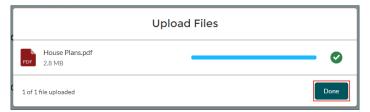


A window will open on your computer so that you can navigate to the location where you have the documents stored. Select the plans that you wish to upload and click *Open*.



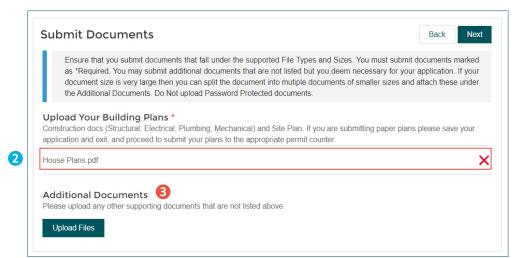


A dialog box will appear and display the upload progress. Once the upload is complete and the green checkmark appears, click *Done*.



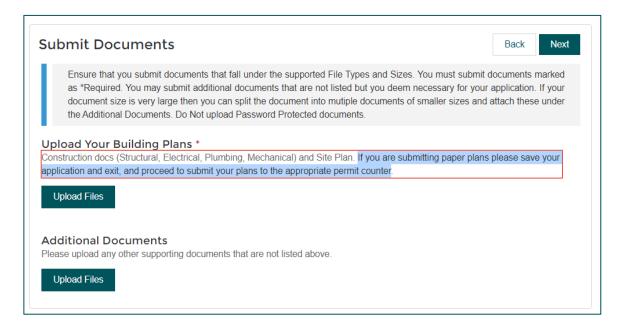
The name of the document will appear on the screen under <u>Upload Your Building Plans</u>* 2. If you have uploaded the wrong document, simply click the red \underline{X} on the right-hand side of the screen to delete the document and start the process again.

The process is the same for **3** Additional Documents. You can include technical specifications, manufacturer's cut sheets, photographs, or other documents to supplement the plans by adding them here.



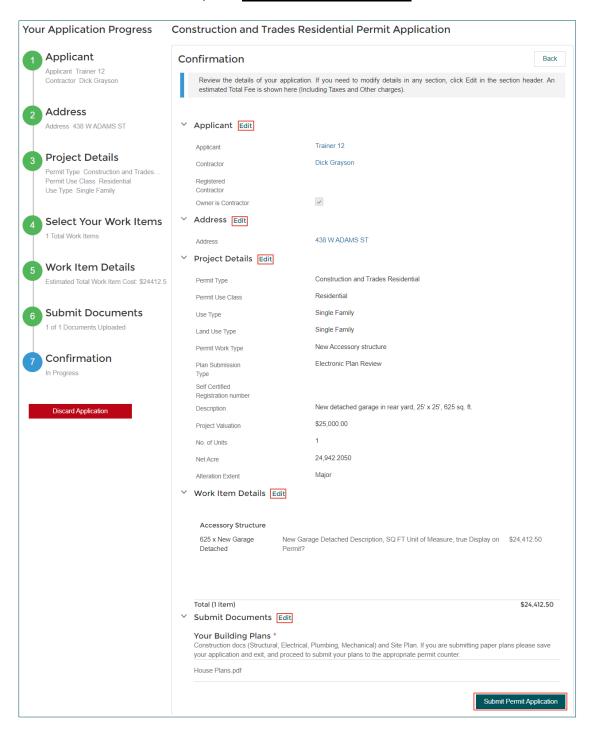


At the beginning of the application process, under <u>Project Details</u>, you may select to submit <u>Paper Plans</u>. The Portal offers you the option to prepare your application before your trip to the Development Center. When you reach the <u>Submit Documents</u> step, the Portal instructs you to save your application and exit and proceed to submit your plans to the appropriate permit counter. When you arrive at City Hall, inform PDD staff that you began your application on the portal, and they will find it and continue the process from there.



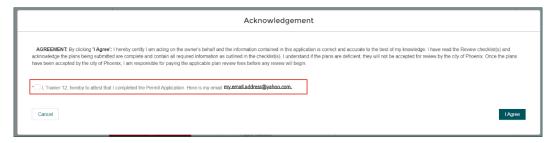


Up next, is the <u>Confirmation</u>. This is an opportunity for you to review all the details in one place to be certain that all the information is accurate. Check the information and if it needs to be updated, click the <u>Edit</u> button next to the section in which the information is located. Once all the information has been verified, click <u>Submit Permit Application</u>.



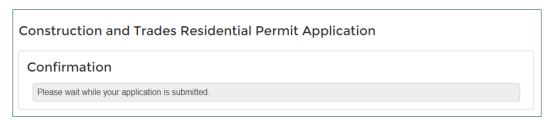


An acknowledgement box will appear, asking you to attest to the fact that the information is accurate, and you have the proper authority to act.

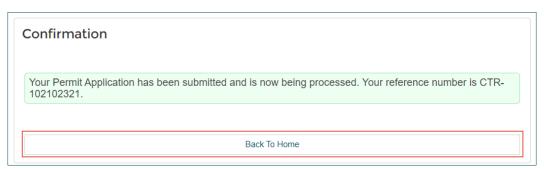


Check the box* and click on the *I Agree* button.

The Portal will give you a message asking you to wait while the application is being submitted,



and then return with the confirmation that your application has been submitted and is being processed. Your permit number will display on the screen. In the case of our example, CTR-102102321.



Clicking <u>Back to Home</u> will take you to the SHAPE PHX Portal home, where you can find the list of your permits at the bottom of the page.



Once you have submitted the application, no changes can be made to it until PDD Staff has completed a review and responded with comments unless you click <u>Request Revision</u> 1 to ask for the plans to be taken out of review so that you can alter them or submit additional information.

Clicking *View*, 2 will take you to a view of the details of your application.

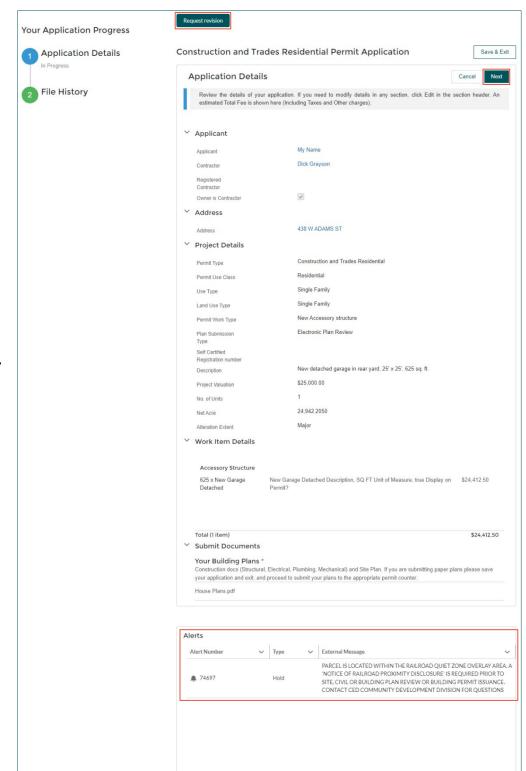




From here, you can review the information that you submitted. You can also Request Revision by clicking on the button on the top of the screen. This will allow you to submit corrected or additional material.

By clicking <u>Next</u>, you can see the file history, which will show you the progress that has been made by PDD staff on your application.

Any Alerts related to the property will also be shown on this screen, alerting you to any special conditions or requirements.





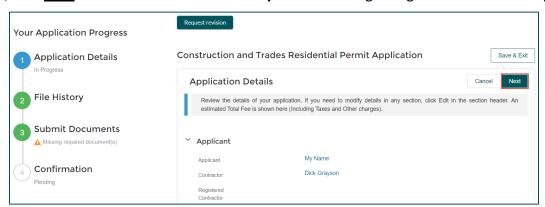
Submitting Corrections (Red Lines)

After PDD Staff has completed the Plan Review, corrections are sometimes required. These are sometimes referred to as Red Lines. You can see the status of your permits from the **Home** screen and scrolling down to see Permits. There are several categories for the permits on the **Permits** page. They are: In-Progress Permits, Historical Permits, Permits with Actions Required, and Permits Shared with Me.

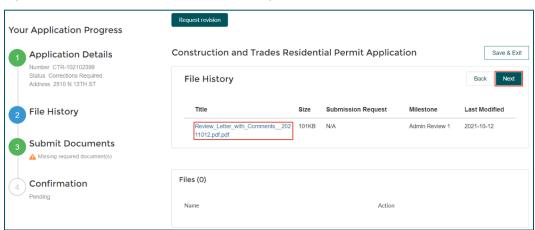
Under *Permits with Actions Required*, you will see permits that require corrections, are ready for payment, and those that have been issued and for which Inspections can be scheduled. (See the section <u>Requesting Inspections</u> for more information.) Locate the permit that has the status of Corrections Required. On the right-hand side, you will see View | Corrections Required.



Click on either link to be taken to the **Application Details** page, which is similar to the summary page that you encountered before you submitted the application. In the upper right-hand corner, click *Next* to move on to the **File History** and details regarding the Corrections Required.

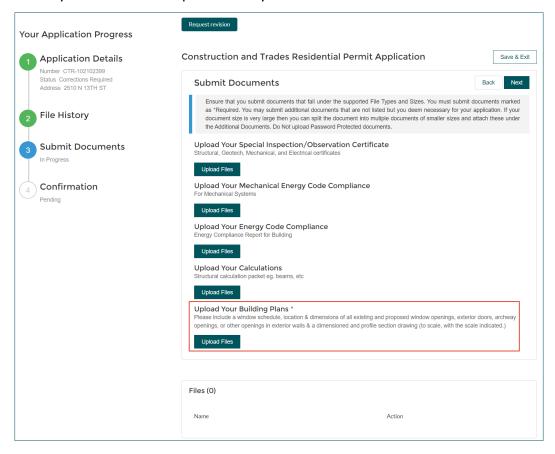


The **File History** page gives you details regarding the status of your permit. For details on the required changes, click on the Review Letter with Comments for information on Plan Review that has been completed. Click Next to move on to what is required on the **Submit Documents** screen.

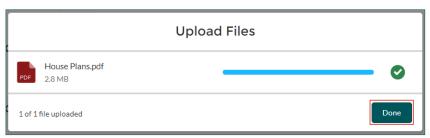




Upload the revised documents, especially those marked as Required (the red asterisk *), just as you did when you submitted the plans initially.

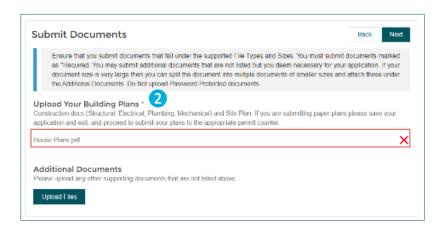


A dialog box will appear and display the upload progress. Once the upload is complete and the green checkmark appears, click *Done*.



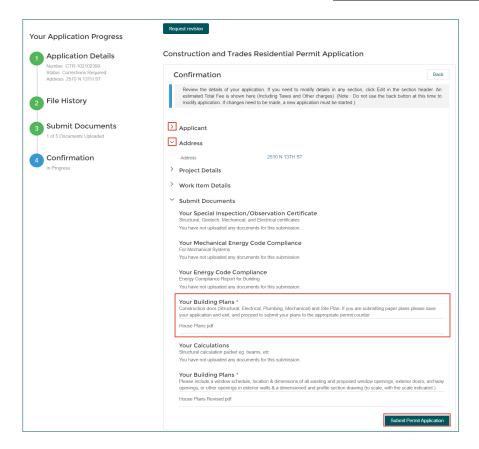


The name of the document will appear on the screen under <u>Upload Your Building Plans</u>* 2. If you have uploaded the wrong document, simply click the red \underline{X} on the right-hand side of the screen to delete the document and start the process again. Click <u>Next</u>.



This takes you to the Confirmation page, where you can review the details of the resubmittal. (In this case, some of the information is hidden so that the image will be smaller in the guide. Notice the arrows to the left of the sections. The arrows that are pointing to the right indicate that the section has been collapsed. To show the information, click on the > and it will become a V and show the details that are currently hidden.)

When you have verified that the information is accurate, click Submit Permit Application.

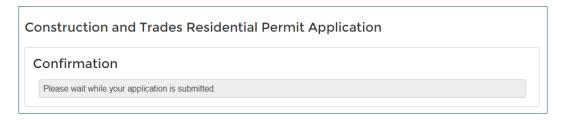




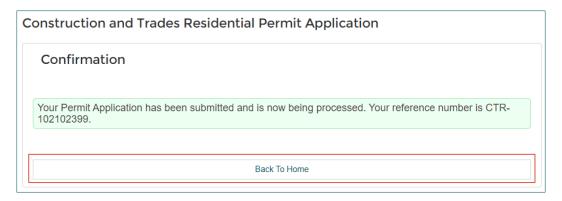
An acknowledgement box will appear, asking you to attest to the fact that the information is accurate, and you have the proper authority to act. Check the box* and click on the <u>I Agree</u> button.



The Portal will give you a message asking you to wait while the application is being submitted, and then return with the confirmation that your application has been submitted and is being processed. Your permit number will display on the screen. In the case of our example, CTR-102102399.



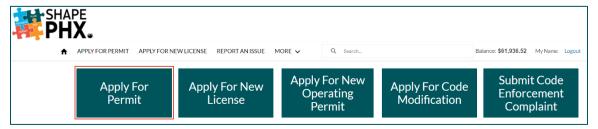
By clicking on the **Back to Home** button, you will return to the Portal Home page.



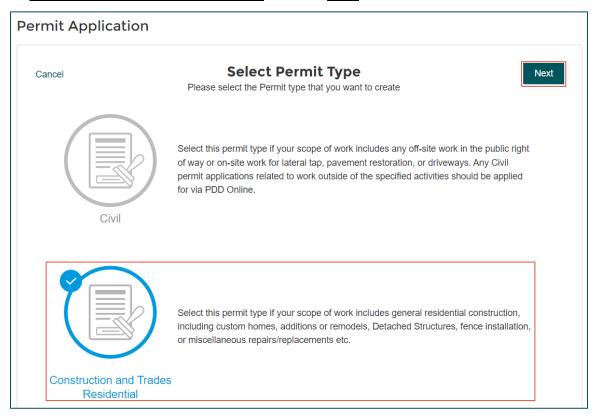


Revisions to an Existing Permit

At some point, you may find that you need to modify a permit that has been issued. The process is similar to requesting a new permit. Start by clicking on **Apply for Permit** on the Home Page.



Select Construction and Trades Residential and click Next.

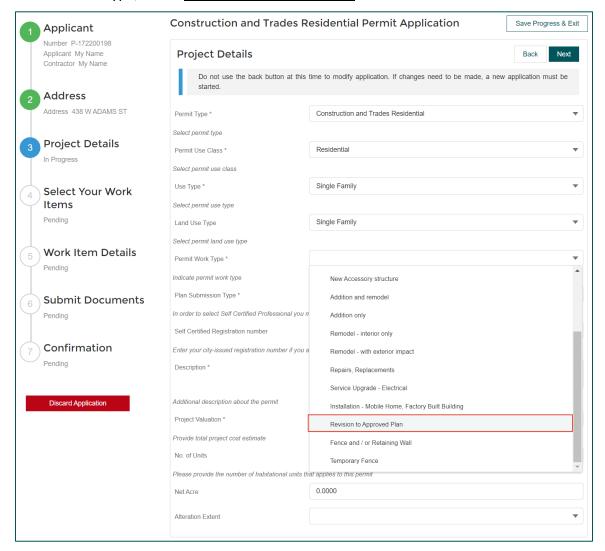


Complete the Applicant and Address steps as you would for a permit and click next. This takes you to the Project Details page.



The Permit Type will be filled in for you. Complete the rest of the fields as you would for any other permit.

For Permit Work Type, select Revision to Approved Plan.



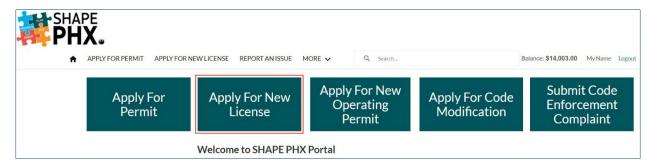
For the Description, include a brief explanation of the work to be completed and **include the Permit Number** for which you are requesting a Revision. This will allow PDD staff to connect the permits to one another.

Complete the remaining steps and submit your Permit application.



Apply for New License

The SHAPE PHX Customer Portal allows for professionals to apply for licenses in four areas: Apprentice/Journeyman, Fire Department, Self-Certified Professionals / Peers, and Special Inspectors. The process is similar to the Permit Application Process. Click <u>Apply for New License</u>.



On the License Application page, you will be asked to select one of the four license types:

Apprentice / Journeyman Registrations:

Select this for a first-time application for either of these registrations. This would include Plumbing or Mechanical trades or both. Plumber, Gas Fitter, and Mechanical are your choices

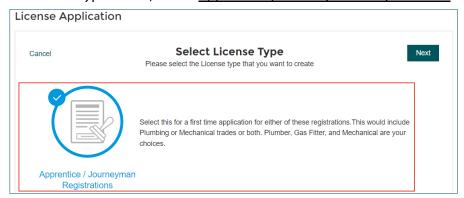
- Fire Department Registrations:
 Select this if you wish to obtain registrations for Pyrotechnician or Blaster. These are required in addition to the ATF and State Blaster License.
- Self-Certified Pro / Peer Reviewer
 Registrations: Select this if you have
 License for a Registrant with the
 Arizona Board of Registration and
 wish to obtain a Self-Certified
 Professional License select this
 button.
- Special Inspector Registrations:
 Select this if you want to participate in the City's Special Inspection program. The complete list available is in the online application and in Appendix B.



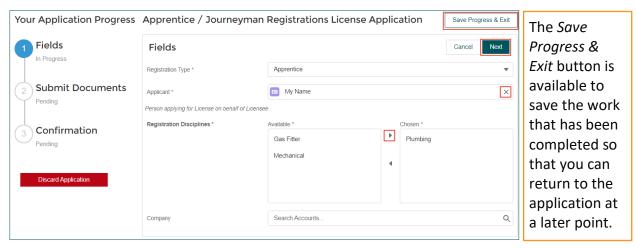


Apprentice / Journeyman Registrations

From the Select License Type menu, chose Apprentice / Journeyman Registrations.



The two *Registration Types* here are Apprentice and Journeyman and this is the first field on this workflow. Select the appropriate License Type from the drop-down menu.



In the Portal, the red asterisk (*) indicates fields which are required on each screen. The *Applicant* field is next and comes pre-populated with the name of the *Registered User*. You can click on the <u>X</u> next to the name to clear the field to enter a different name if you are submitting applications for someone else at your company.

Following the name is the section for the *Registration Disciplines*. There are three *Registration Disciplines* that are available for both Apprentice and Journeyman licenses: <u>Plumbing</u>, <u>Gas Fitter</u>, and <u>Mechanical</u>. Select the applicable discipline(s) by highlighting the discipline and clicking on the <u>arrow</u> pointing to the right to move the discipline from **Available** to **Chosen**. To remove a discipline from **Chosen** to **Available**, highlight that discipline and click the left-pointing arrow. For our example, we've chosen Apprentice: Plumbing.

If a **Company** is sponsoring or is related to the application, you can type in a portion of the name and search the system for the account associated with that **Company** to enter it in the final field.

Once the information has been entered, click the <u>Next</u> button in the upper right-hand corner of the form.



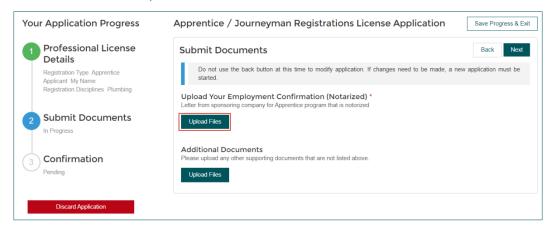
For an application to be considered complete, PDD requires documents to be uploaded for verification by staff to process the registration. Contact staff for information regarding the required documentation at pdd.inspections@phoenix.gov.

The next step in the process is to **Submit Documents**.

The red asterisk (*) indicates fields which are required, in this case:

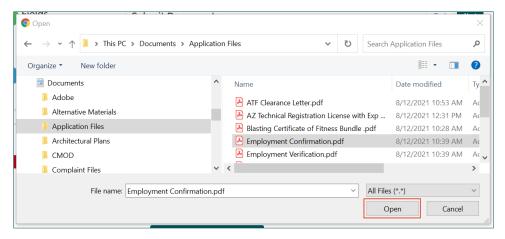
Upload Your Employment Confirmation (Notarized)*

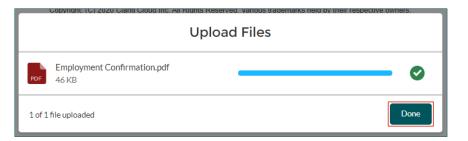
A document must be uploaded to all fields with the red asterisk (*) for the application to be submitted at the end of the process.



Click on the <u>Upload</u> <u>Files</u> button. A window will open on your computer so that you can navigate to the location where you have the construction documents stored. Select the files that you wish to upload and click *Open*.

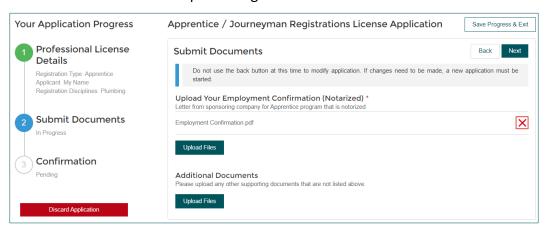
A dialog box will appear and display the upload progress. Once the upload is complete and the green checkmark appears, click *Done*.



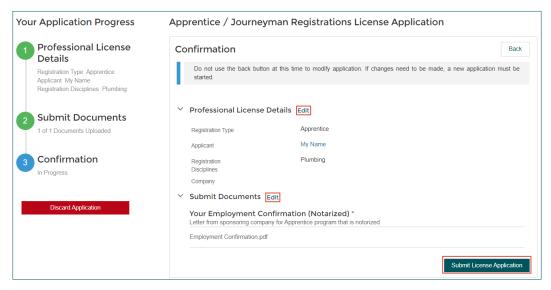




The name of the document will appear on the screen under **Additional Documents**. If you have uploaded the wrong document, simply click the red \underline{X} on the right-hand side of the screen to delete the document and start the process again.



Proceed with the same process for all the required documents. Once you have uploaded the documents, click <u>Next</u> to move on to <u>Confirmation</u>.



This is an opportunity for you to review all the details in one place to be certain that all the information is accurate. Check the information and if it needs to be updated, click the <u>Edit</u> button next to the section in which the information is located. Once all the information has been verified, click **Submit License Application**.

An acknowledgement box will appear, asking you to attest to the fact that the information is accurate, and you have the proper authority to act.

Check the box* and click on the <u>I Agree</u> button.



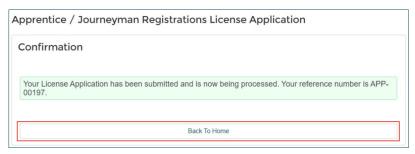


Apply for New License

The Portal will give you a message asking you to wait while the application is being submitted,



and then return with the confirmation that your application has been submitted and is being processed. Your License Application number will display on the screen. In the case of our example, JY-00197.

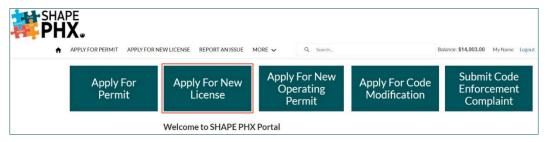


Clicking <u>Back to Home</u> will take you to the SHAPE PHX Portal home, where you can find the list of your <u>In-Progress Licenses</u> at the bottom of the page.

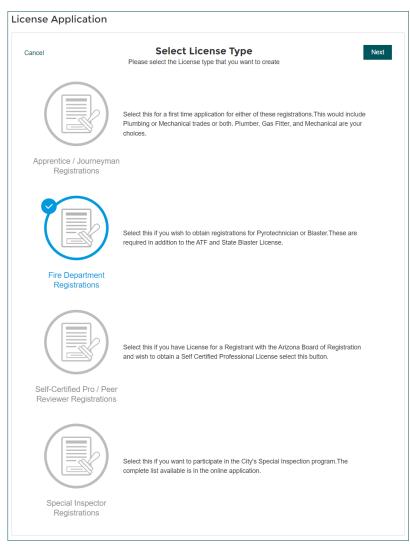


Fire Department Registrations

To begin your Fire Department License application, click Apply for New License.

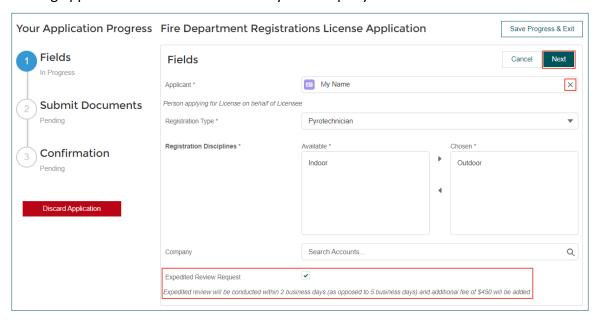


This will take you to the **Select License Type** menu, where you chose *Fire Department Registrations*.





The **Applicant*** field is first and comes pre-populated with the name of the *Registered User*. You can click on the **X** next to the name to clear the field to enter a different name if you are submitting applications for someone else at your company.



The two **Registration Types** here are <u>Pyrotechnician</u> and <u>Blaster</u> and this is the next field on this workflow.

Following the **Registration Type*** is the section for the **Registration Disciplines***. For <u>Pyrotechnician</u>, select either <u>Indoor</u> or <u>Outdoor</u> by highlighting the discipline and clicking on the <u>arrow</u> pointing to the right to move the discipline from **Available** to **Chosen**. To remove a discipline from **Chosen** to **Available**, highlight that discipline and click the left-pointing <u>arrow</u>. For <u>Blaster</u>, select <u>Blaster</u> and click on the <u>arrow</u> pointing to the right to move the discipline from **Available** to **Chosen**. In this example, we'll select <u>Pyrotechnician: Indoor</u>.

You may submit an Expedited Review Request by checking the **Expedited Review Request** box.

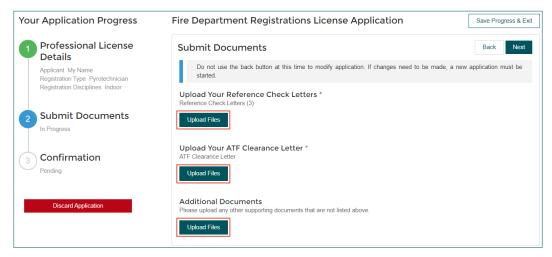
If a **Company** is sponsoring or is related to the application, you can type in a portion of the name and search the system for the account associated with that **Company** to enter it in the final field.

Once the information has been entered, click the <u>Next</u> button in the upper right-hand corner of the form.

For an application to be considered complete, Fire Prevention requires documents to be uploaded for verification by staff to process the registration. Visit the Fire Department's Forms and Applications page at https://www.phoenix.gov/firesite/Pages/formsappsindex.aspx or contact staff for additional information at pfd.prevention@phoenix.gov.



The next step in the process is to **Submit Documents**.

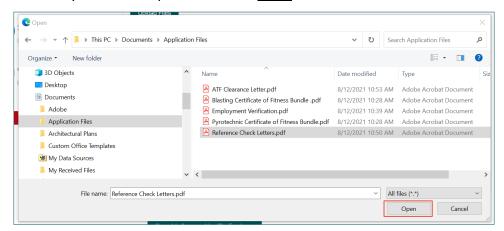


The red asterisk (*) indicates fields which are required, in this case:

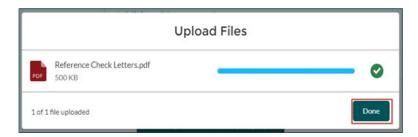
- Upload Your Reference Check Letters*
- Upload ATF Clearance Letter*

You can also upload Additional Documents.

A document must be uploaded to all fields with the red asterisk (*) for the application to be submitted at the end of the process. Click on the <u>Upload Files</u> button. A window will open on your computer so that you can navigate to the location where you have the documents stored. Select the files that you wish to upload and click <u>Open</u>.

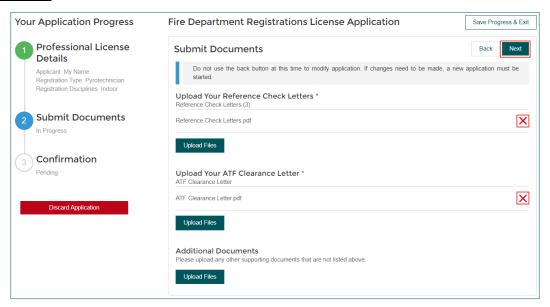


A dialog box will appear and display the upload progress. Once the upload is complete and the green checkmark appears, click *Done*.

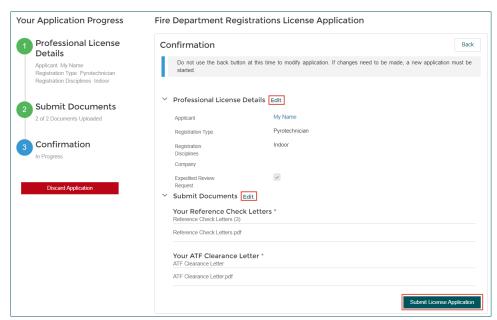




The name of the document will appear on the screen under **Upload Your Reference Checks**. If you have uploaded the wrong document, simply click the red \underline{X} on the right-hand side of the screen to delete the document and start the process again. Proceed with the same process for all the required documents. Once you have uploaded the documents, click **Next** to move on to **Confirmation**.



This your chance to review all the details in one place to be certain that all the information is accurate. Check the information and if it needs to be updated, click the Edit button next to the section in which the information is located. Once all the information has been verified, click **Submit** License Application.





An acknowledgement box will appear, asking you to attest to the fact that the information is accurate, and you have the proper authority to act.

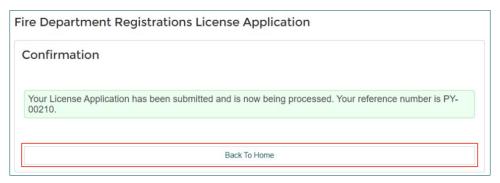


Check the box* and click on the *I Agree* button.

The Portal will give you a message asking you to wait while the application is being submitted,



and then return with the confirmation that your application has been submitted and is being processed. Your License Application number will display on the screen. In the case of our example, PY-00210.

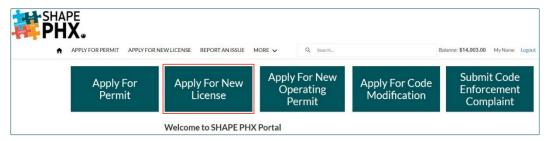


Clicking <u>Back to Home</u> will take you to the SHAPE PHX Portal home, where you can find the list of your <u>In-Progress Licenses</u> at the bottom of the page.

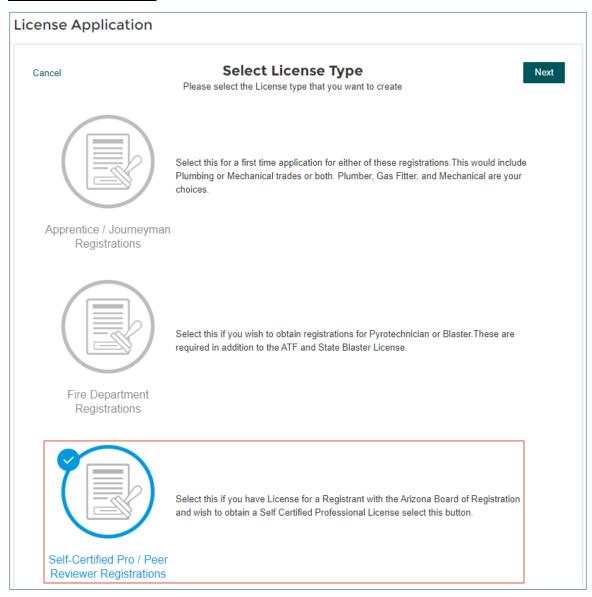


Self-Certified Pro / Peer Reviewer Registrations

To begin your Self-Certified Professional or Peer Reviewer application, click <u>Apply for New License</u>.



This will take you to the **Select License Type** menu, where you chose <u>Self-Certified Pro / Peer Reviewer Registrations</u>.





The **Applicant*** field is first and comes pre-populated with the name of the *Registered User*. You can click on the \underline{X} next to the name to clear the field to enter a different name if you are submitting applications for someone else at your company.

The two **Registration Types** here are <u>Self-Certified Professional</u> and <u>Peer Reviewer</u>.

Following the **Registration Type** is the section for the **Registration Disciplines**. These are the Disciplines associated with the **Registration Types**.

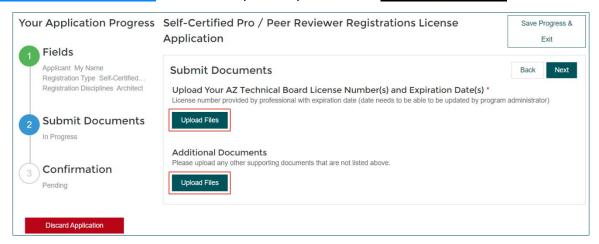
Self-Certified Professional	Peer Reviewer
Architect	Civil Engineer
Structural Engineer	Electrical
Structural Engineer and Peer Reviewer	Structural
Landscape Architect	
Civil Engineer	

For this example, we will select <u>Self-Certified Professional</u>: <u>Architect</u>. To do so, select <u>Architect</u> by highlighting the discipline and clicking on the <u>arrow</u> pointing to the right to move the discipline from **Available** to **Chosen**. To remove a discipline from **Chosen** to **Available**, highlight that discipline and click the left-pointing <u>arrow</u>.

List the name of the **Company** sponsoring or related to the application. Type in a portion of the name and search the system for the account associated with that **Company** to enter it in the final field.

Once the information has been entered, click the $\underline{\textit{Next}}$ button in the upper right-hand corner of the form.

For an application to be considered complete, PDD requires documents to be uploaded for verification by staff to process the registration. Contact staff for additional information at claire.stern@phoenix.gov. The next step in the process is to **Submit Documents**.

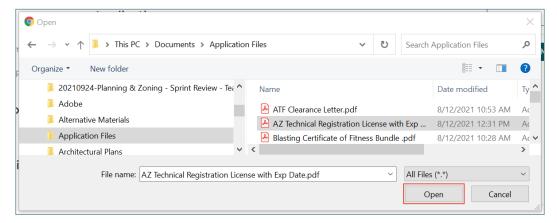


The red asterisk (*) indicates fields which are required, in this case, **Upload Your AZ Technical Board License Number(s) and Expiration Date(s)**. You can also upload **Additional Documents**.

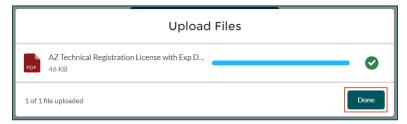
A document must be uploaded to all fields with the red asterisk (*) for the application to be submitted at the end of the process.



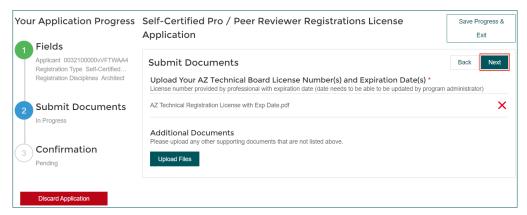
Click on the <u>Upload Files</u> button. A window will open on your computer so that you can navigate to the location where you have the documents stored. Select the files that you wish to upload and click <u>Open</u>.



A dialog box will appear and display the upload progress. Once the upload is complete and the green checkmark appears, click *Done*.



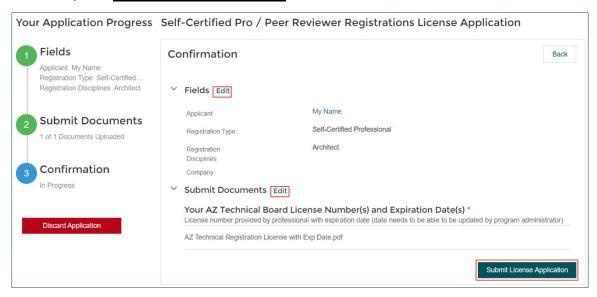
The name of the document will appear on the screen under **Upload Your AZ Technical Board License Number(s)** and **Expiration Date(s)**. If you have uploaded the wrong document, simply click the red \underline{X} on the right-hand side of the screen to delete the document and start the process again.



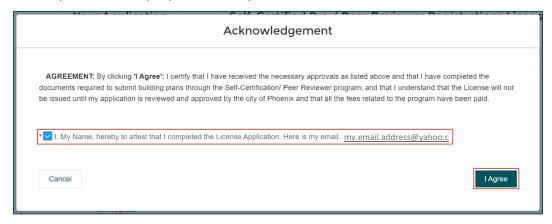
Proceed with the same process for all the required documents. Once you have uploaded the documents, click *Next* to move on to **Confirmation**.



This is an opportunity for you to review all the details in one place to be certain that all the information is accurate. Check the information and if it needs to be updated, click the <u>Edit</u> button next to the section in which the information is located. Once all the information has been verified, click <u>Submit License Application</u>.



An acknowledgement box will appear, asking you to attest to the fact that the information is accurate, and you have the proper authority to act.



Check the box* and click on the *I Agree* button.

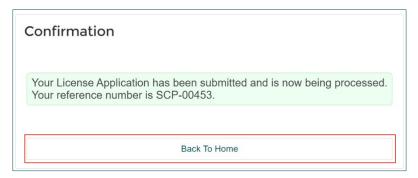
The Portal will give you a message asking you to wait while the application is being submitted,



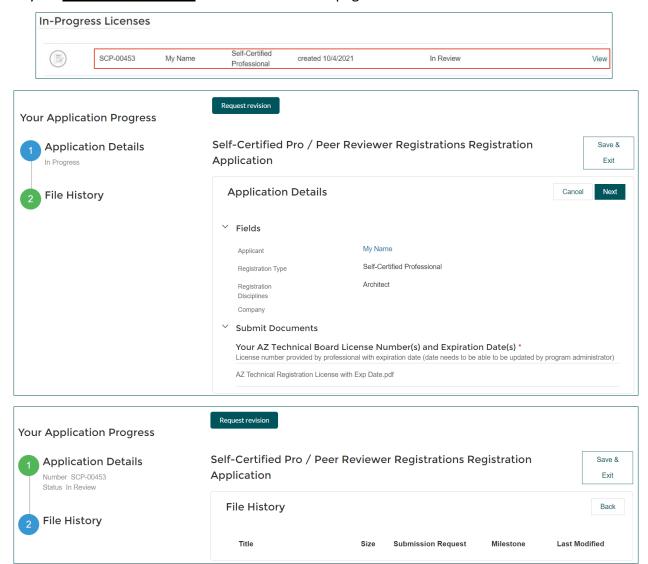
and then return with the confirmation that your application has been submitted and is being processed.



Your License Application number will display on the screen. In the case of our example, SCP-00453.



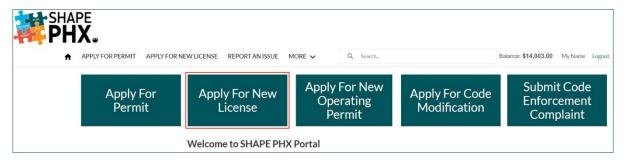
Clicking <u>Back to Home</u> will take you to the SHAPE PHX Portal home, where you can find the list of your <u>In-Progress Licenses</u> at the bottom of the page.





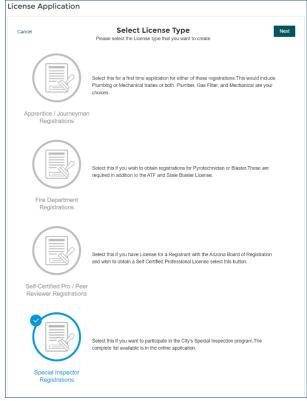
Special Inspector Registrations

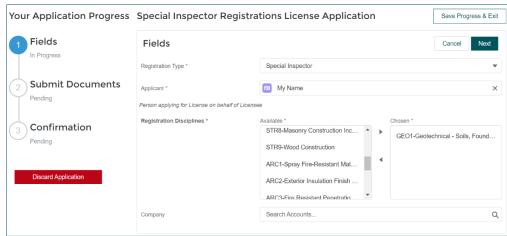
To begin your Special Inspector Registration, click <u>Apply for New License</u>.



This will take you to the **Select License Type** menu, where you chose <u>Special Inspector</u> Registrations.

The **Registration Type** field is first and comes pre-populated with <u>Special Inspector</u>. The next field also comes pre-populated with the name of the *Registered User*. You can click on the <u>X</u> next to the name to clear the field to enter a different name if you are submitting applications for someone else at your company.







Following the name are the **Registration Disciplines**³. There are 20 to choose from:

Structural

- STR1 Structural Special Cases Wall Panels, Curtain Walls and Veneers
- STR2 Structural High Strength Bolting
- STR3 Structural Welding
- STR4 Structural Cold-Formed Steel & Trusses Spanning 60' or Greater
- STR5 Structural Reinforced Concrete
- STR6 Structural Pre-stressed / Precast Concrete Construction
- STR7 Structural Post-Installed Structural Anchors in Concrete
- STR8 Structural Masonry Construction Including Veneer
- STR9 Structural Wood Construction

Geo-Technical

• GEO1 – Geotechnical – Soils, Foundations, Piles

Architectural

- ARC1 Architectural Spray Fire-Resistant Materials
- ARC2 Architectural Exterior insulation and finish system (EIFS)
- ARC3 Architectural Fire-Resistant Penetrations and Joints
- ARC4 Architectural Impervious Moisture Barriers (Future Enhancement)

Mechanical

- MEC1 Mechanical Smoke Control
- MEC2 Mechanical Duct Smoke Detectors
- MEC3 Mechanical Fire and Smoke Dampers
- MEC4 Mechanical Installation of Grease Duct Enclosure, Other Cases
- MEC5 Mechanical Medical Gas and Vacuum Systems

Electrical

• ELE1 – Electrical – Electrical as Allowed Per Code



For **Registration Disciplines**, highlight the applicable discipline(s) and click the <u>arrow</u> pointing to the right to move the discipline from **Available** to **Chosen**. To remove a discipline from **Chosen** to **Available**, highlight that discipline and click the left-pointing <u>arrow</u>. For this example, we have selected <u>GEO1 – Geotechnical – Soils, Foundations, Piles</u>.

If a **Company** is sponsoring or is related to the application, you can type in a portion of the name and search the system for the account associated with that **Company** to enter it in the final field.

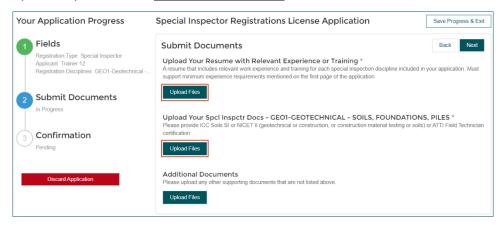
³ See Appendix C for more information about these codes and disciplines.



Once all the information has been entered, click the <u>Next</u> button in the upper right-hand corner of the form.

For an application to be considered complete, PDD requires documents to be uploaded for verification by staff to process the registration. Contact staff for additional information at pdd.inspections@phoenix.gov.

The next step in the process is to **Submit Documents**.

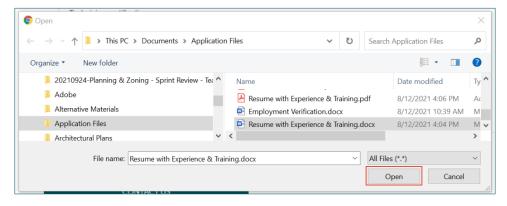


The red asterisk (*) indicates fields which are required, in this case:

- Upload Your Resume with Relevant Experience or Training*
- Upload Your SpcI Inspctr Docs GEO1-GEOTECHNICAL SOILS, FOUNDATIONS, PILES*

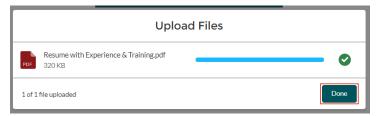
A document must be uploaded to all fields with the red asterisk (*) for the application to be submitted at the end of the process. Click on the <u>Upload Files</u> button.

A window will open on your computer so that you can navigate to the location where you have the documents stored. Select the files that you wish to upload and click *Open*.

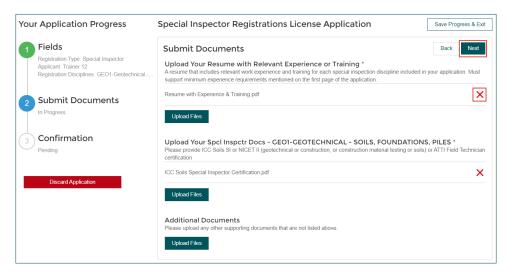




A dialog box will appear and display the upload progress. Once the upload is complete and the green checkmark appears, click *Done*.



The name of the document will appear on the screen under *Upload Your Resume with Relevant Experience or Training*. If you have uploaded the wrong document, simply click the red X on the right-hand side of the screen to delete the document and start the process again.

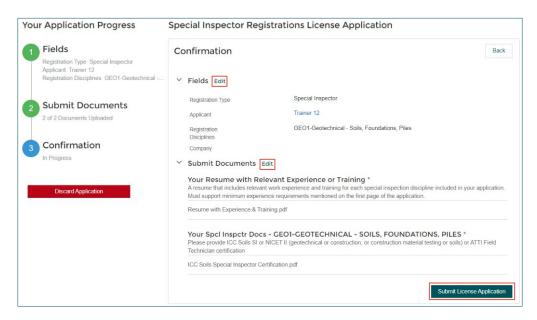


Proceed with the same process for all the required documents. Once you have uploaded the documents, click <u>Next</u> to move on to <u>Confirmation</u>.

This is an opportunity for you to review all the details in one place to be certain that all the information is accurate.



Check the information and if it needs to be updated, click the <u>Edit</u> button next to the section in which the information is located. Once all the information has been verified, click <u>Submit</u> <u>License Application</u>.



An acknowledgement box will appear, asking you to attest to the fact that the information is accurate, and you have the proper authority to act.



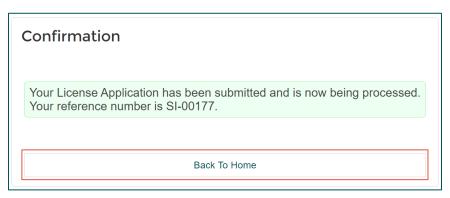
Check the box* and click on the *I Agree* button.

The Portal will give you a message asking you to wait while the application is being submitted, and then return with the confirmation that your application has been submitted and is being processed.





Your License Application number will display on the screen. In the case of our example, SI-00177.

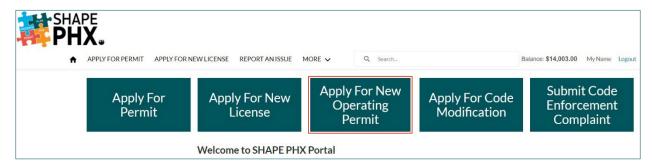


Clicking <u>Back to Home</u> will take you to the SHAPE PHX Portal home, where you can find the list of your <u>In-Progress Licenses</u> at the bottom of the page.

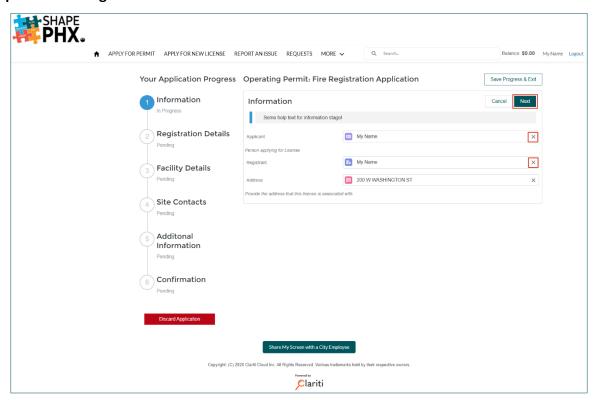




To submit an application for a Fire Department Operating Permit, click on <u>Apply for New Operating Permit</u>. Contact Fire Prevention for additional information regarding Fire Operating Permits at pfd.prevention@phoenix.gov.



The <u>Information</u> page comes pre-populated with the Registered User's name in both the **Applicant** and **Registrant** fields.



You can click on the \underline{X} next to the name to clear the field to enter a different name if you are submitting applications for someone else at your company.

Click Next to proceed to the Registration Details.

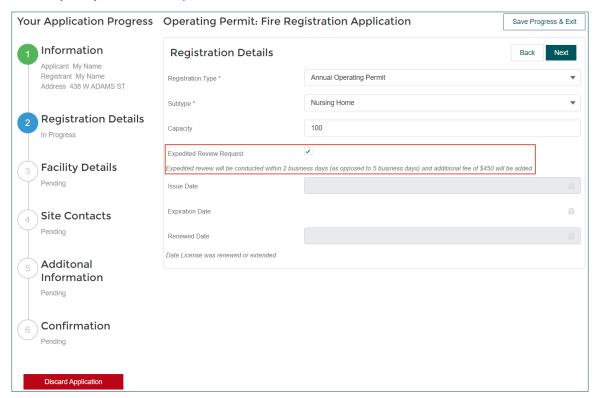
Observe that some fields have a red asterisk (*) after them. These are the required fields and must be completed before you click <u>Next</u> to move on to the next stage, <u>Facility Details</u>. For <u>Registration Details</u>, the required fields are <u>Registration Type</u>* and <u>Subtype</u>*.

Registration Type* is currently pre-populated with Annual Operating Permit.

Select one of the 11 Subtypes*:

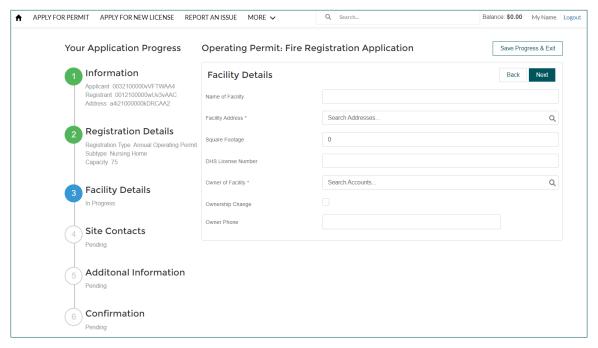
- Hospital
- Medical Facility
- Nursing Home
- Correctional Facility
- FP Day Care / Child Care
- GRP Home / Behavioral Health
- Assisted Living
- Juvenile Group Home
- Developmentally Disables Group Home
- Educational Facilities Grades K-12
- Mall

Add the **Capacity** of the facility in the next field.

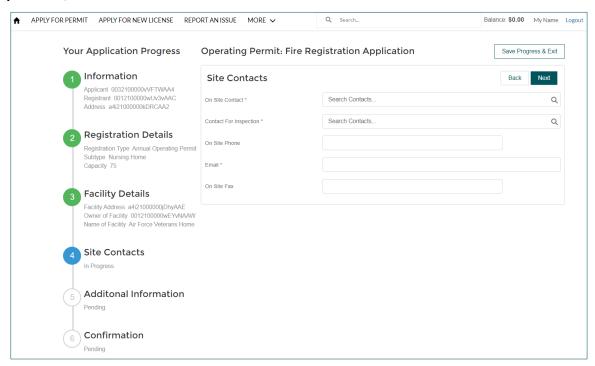


You may submit an **Expedited Review Request** by checking the **Expedited Review Request** box. Click *Next* to continue to the **Facility Details**.

Enter the Name of Facility, the Facility Address*, the Square Footage, the DHS License Number, the Owner of Facility*, check the box if this is an Ownership Change, and add the Owner Phone. Once the information has been entered, click <u>Next</u> to move on to <u>Site Contacts</u>.



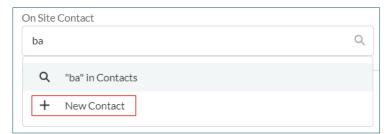
There are three required fields on <u>Site Contacts</u>. They are: **On-Site Contact***, **Contact for Inspection***, and **Email***.



Enter the **On-Site Contact*** and the **Contact for Inspection*** by searching for the name. To do a name search, enter at least two characters of the first or last name. When system offers to <u>Show All Results for</u>... the search term, click on it. If there are **Contacts** in the system that meet your search criteria, they will be displayed. If not, you will see this message:



By clicking on the search box (with the magnifying glass), you can either enter another term, or add a **New Contact.**



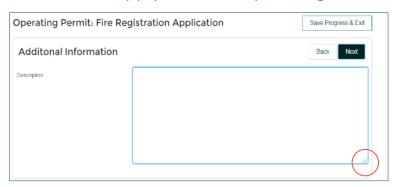
Add the **On-Site Phone** and **Email*** address and click <u>Next</u> to move on to the **Additional Information**.



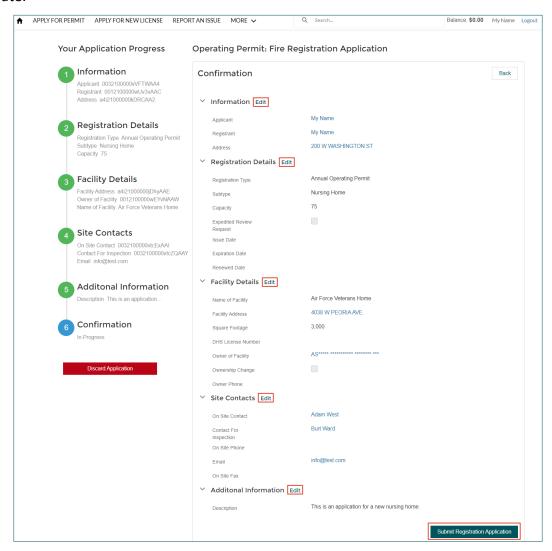
Enter any additional information in the **Description** box. This could include property access information, such as "Be certain to ring the bell," "Dog on Property," a requested time for the inspection or COVID-19 protocols for accessing the site.



To enlarge the text box, grab the two lines on the lower right-hand corner of the box with your mouse pointer and drag it. This allows you to review the full text that you input even if it exceeded the size allotted in the original box.



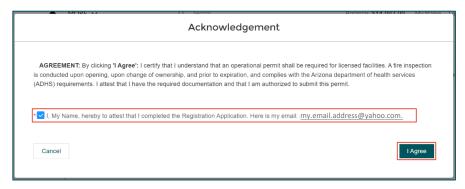
Once the information has been entered, click *Next* to move on to *Confirmation*. This is an opportunity for you to review all the details in one place to be certain that all the information is accurate.



Verify the information and if it needs to be updated, click the *Edit* button next to the section in which the information is located. Click *Submit Registration Application*.

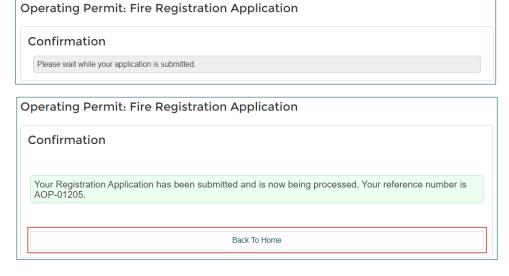


The system will ask you to attest to the requirement of the license, the inspection, and that you are authorized to submit the permit application.



Check the box* and click on the I Agree button.

The Portal will give you a message asking you to wait while the application is being submitted, and then return with the confirmation that your application has been submitted and is being processed.



Your Fire

Registration Application number will display on the screen. In the case of our example, AOY-01205.

Clicking *Back to Home* will take you to the SHAPE PHX Portal home page, where you can find the list of your *In-Progress Registrations* at the bottom of the page.

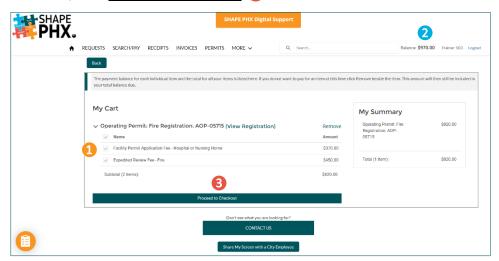


Paying Fees Online

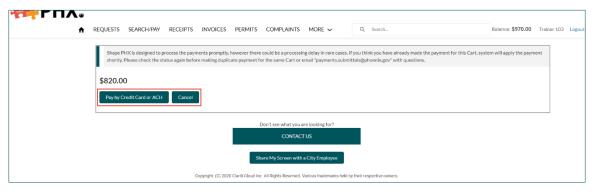
Now that you have submitted the application, you can pay for it by clicking Pay Now.



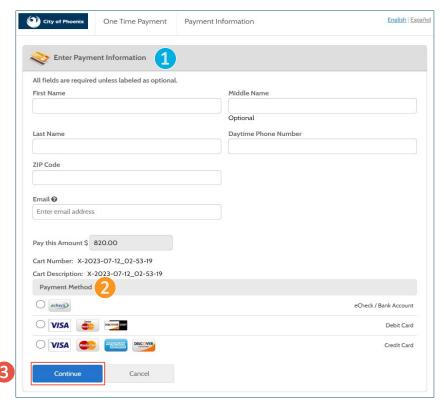
This will take you to <u>My Cart</u>. If there are multiple items in the cart, you can click on the check boxes 1 to select the ones that you want to pay. In our example here, there is only one fee to be paid. Note that the account balance shows on the upper right-hand corner of the screen 2. This will include all the outstanding fees for the account. When the fees that you wish to pay are listed in the cart, click <u>Proceed to Checkout</u> 3.



You will be taken to a screen which will give you the choice to pay the fees using <u>Credit Card or ACH Pay</u>⁴, or <u>Cancel</u> the transaction. When you click the payment button, you will be directed to the secure city of Phoenix payment site to enter your credit card or banking information.



1 <u>Enter Payment Information</u> and 2 then select the <u>Payment Method</u> for your Debit Card, Credit Card, or Bank Account and 3 click the blue <u>Continue</u> button. Follow the rest of the prompts on the site to complete your transaction.

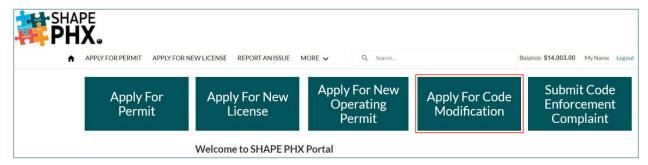


See the section, Paying Fees Online for other ways to make a payment.

⁴ An ACH payment, or Automated Clearing House payment, is an electronic money transfer between banks from a savings or checking account.



To submit a request for a Code Modification, click Apply for Code Modification.



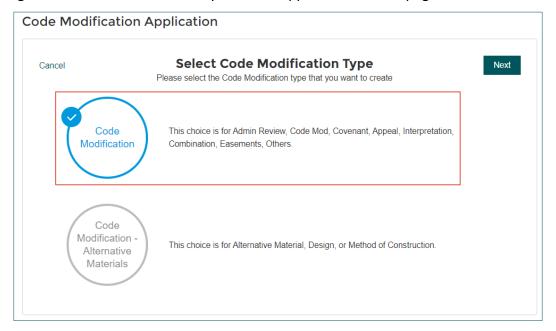
There are two options:

- **Code Modification**: This choice is for Admin Review, Code Mod, Covenant, Appeal, Interpretation, Combination, Easements, Others.
- Code Modification Alternative Materials: This choice is for Alternative Material, Design, or Method of Construction.

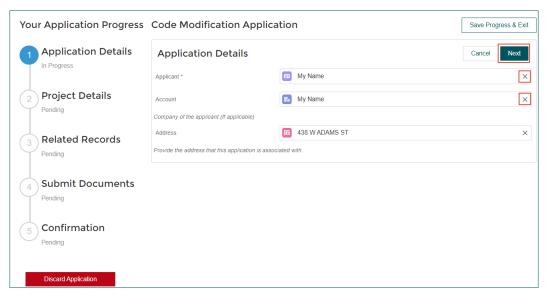
Select the appropriate type to move forward with your application.

Code Modification

Selecting Code Modification will take you to the Application Details page.



You will see that some fields have a red asterisk (*) after them. These are the required fields and must be completed before you click *Next* to move on to the next stage. On the <u>Application</u> <u>Details</u> page for the *Code Modification Application*, the <u>Applicant*</u> is the only required field. The more information that is provided, however, the better PDD staff will be able to assist you.



The **Applicant*** and **Account** fields are first and comes pre-populated with *Registered User's* details. You can click on the \underline{X} next to the name to clear the field to enter a different name if necessary.

Enter the **Address** with which the application is associated and click <u>Next</u> to move on to the **Project Details**.

On the **Project Details** page, there are several fields that require information.

Project Details

The first field on the **Project Details** page, **Application Type***, has eight options:

- Code Modification
- Administrative Review by Building Official
- Interpretation
- Lot Combination

- Building Code Covenant
- Non-Build Easement
- Utility Easement
- Appeal to Development Advisory Board

The **Applicant relationship to Project** field has the following eight options

Owner

- Contractor
- Manufacturer

- Owner's Agent
- Architect
- Other
- DeveloperEngineer

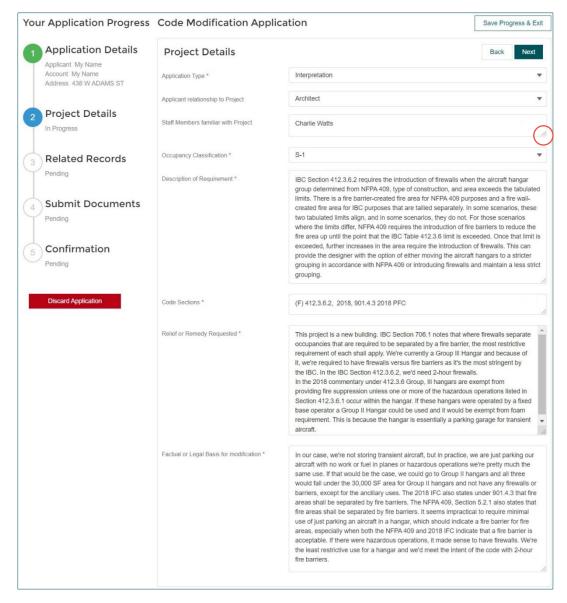
List the members of PDD staff with whom you have discussed your project under **Staff Members familiar with Project.**

The Occupancy Classification* is also a required field. The options in the drop-down menu are:

- R-3 A-2 F-2 H-4 I-3 S-1 A-3 Ε H-1 H-5 S-2 R-4 M U A-4 E-1 H-2 I-1 R-1
- U A-4 E-1 H-2 I-1 R-1 • A-1 • A-5 • F-1 • H-3 • I-2 • R-2

The next four fields are text fields, specifically: **Description of Requirement***, **Code Sections***, **Relief or Remedy Requested***, and **Factual or Legal Basis for modification***.



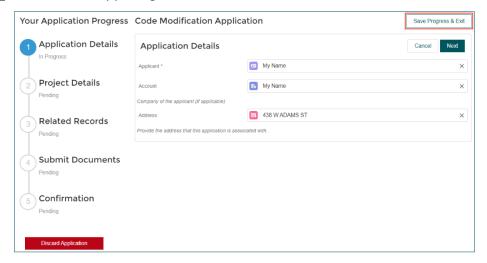


TIP: In some cases, you may need to enlarge the text box to see all the information that you have entered. To do so, grab the two lines on the lower right-hand corner of the box with your mouse pointer and drag it. This allows you to review the full text that you input even if it exceeded the size allotted in the original box.

Enter the information in the following fields:

- Description of Requirement*: Describe the requirement specified by the section indicated
- Code Sections*: List the Building Code Section(s) from which you are seeking relief.
- Relief or Remedy Requested*: State the precise relief, remedy or result requested
- Factual or Legal Basis for modification*: Enter the factual and/or legal basis for the appeal, interpretation, or modification. If a modification is requested include the reason(s) why the proposed modification of the code meets the intent of the code.

TIP: You can save your work between pages by clicking on the <u>Save Progress & Exit</u> button in the upper right-hand corner of the screen.

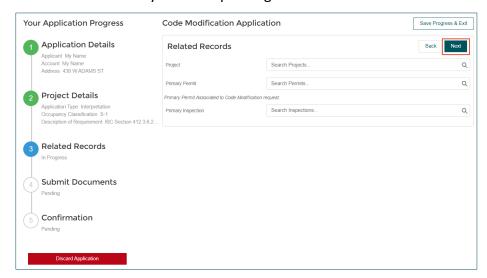


When you are ready to resume your work, go to the **Portal Home** page, scroll to the bottom where your applications are listed and click **Continue**.



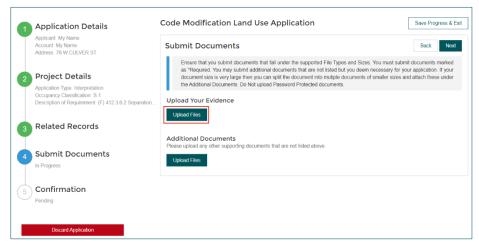
On the <u>Related Records</u> page, specify the <u>Project</u>, <u>Primary Permit</u>, or <u>Primary Inspection</u> numbers associated with the Code Modification request, if you have the information.

- Project: Project Associated to Code Modification requests
- **Primary Permit**: The number of the Primary Permit Associated to Code Modification request, (e.g., CTR-102102321).
- **Primary Inspection**: The number (e.g., INS-00027419) of the Inspection associated with the Code Modification that you are requesting.

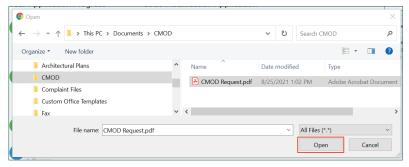


Each of these fields is a search field, so you can search based on a partial or complete number. Click *Next* after you have entered what information you have.

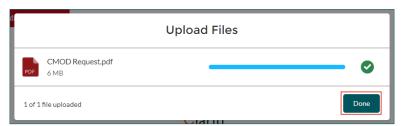
After you have completed the forms, you can **Upload Your Evidence** and **Additional Documents Documentation** on the **Submit Documents** page. Under **Upload Your Evidence**, click **Upload Files**.



A window will open on your computer so that you can navigate to the location where you have the documents stored. Select the files that you wish to upload and click *Open*.



A dialog box will appear and display the upload progress. Once the upload is complete and the green checkmark appears, click <u>Done</u>.



The process is the same for **Additional Documents**.



The name of the document will appear on the screen under **Upload Your Evidence**. If you have uploaded the wrong document, simply click the red **X** on the right-hand side of the screen to delete the document and start the process again.

Next, the **Confirmation** screen to review the information on your

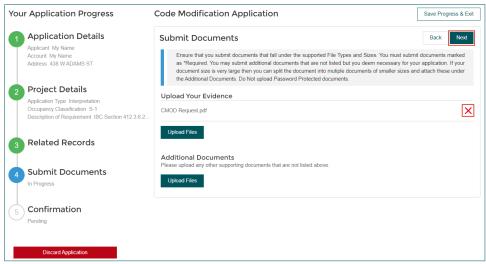
When you have upload

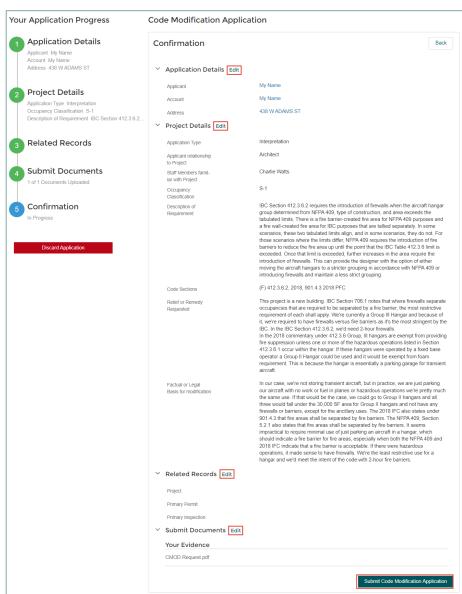
all of your documents,

click Next.

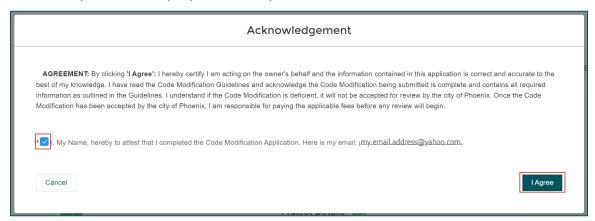
application.

If all the information is accurate, click <u>Submit</u> <u>Code Modification</u> <u>Application</u>.





An acknowledgement box will appear, asking you to attest to the fact that the information is accurate, and you have the proper authority to act.

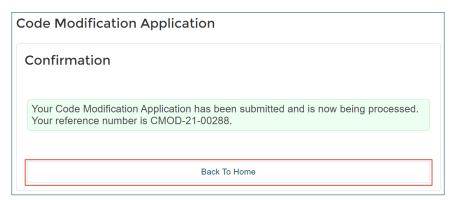


Check the box* and click on the *I Agree* button.

The Portal will give you a message asking you to wait while the application is being submitted,



and then return with the confirmation that your application has been submitted and is being processed. Your permit number will display on the screen. In the case of our example, CMOD-21-00288.



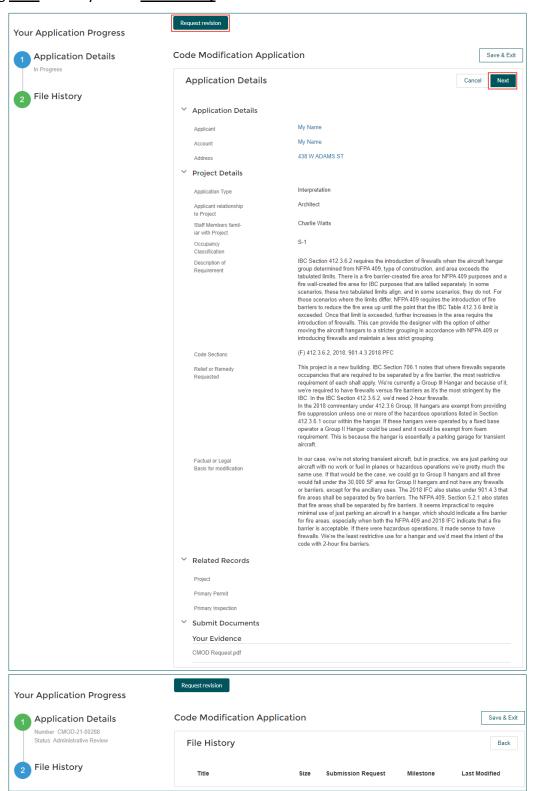
Clicking <u>Back to Home</u> will take you to the SHAPE PHX Portal home, where you can find the list of your permits at the bottom of the page.



Once you have submitted the application, no changes can be made to it until PDD Staff has completed a review and responded with comments. Click $\underline{\textit{View}}$ to see the application where you can request revisions.



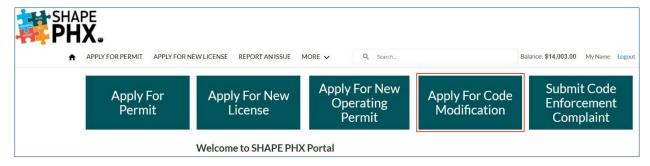
You can review the information that you submitted, or <u>Request Revision</u> by clicking on the button on the top of the screen. This will allow you to submit corrected or additional material. Clicking <u>Next</u> shows you the <u>File History</u>.



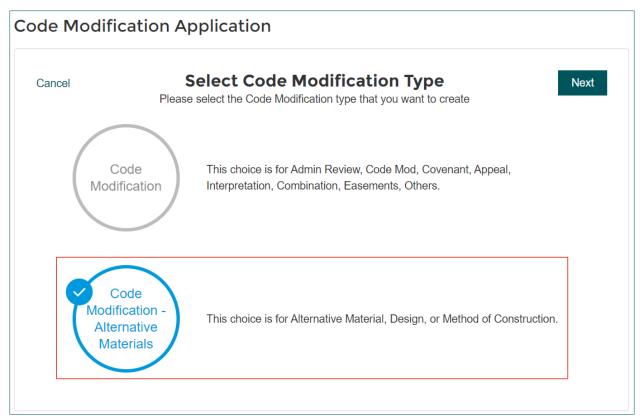


Code Modification – Alternative Materials

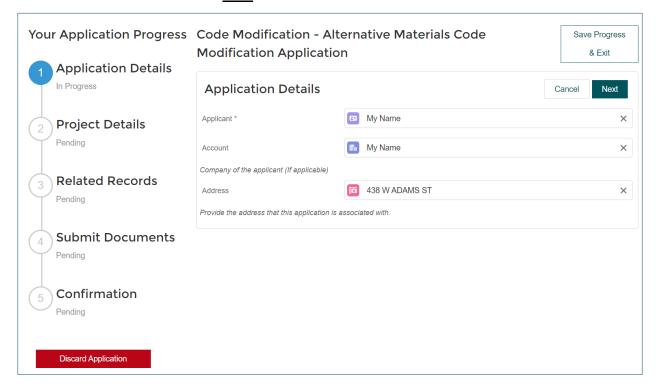
To submit a request for a Code Modification – Alternative Materials, click <u>Apply for Code</u> <u>Modification</u>.



Selecting Code Modification – Alternative Materials will take you to the **Application Details** page.



On the <u>Application Details</u> page, the <u>Applicant</u>* and <u>Account</u> fields are pre-filled with the User's name. Click on the <u>X</u> to change this information. If the <u>Address</u> for the project is known, fill in that information and click <u>Next</u>.



The **Project Details** are next.

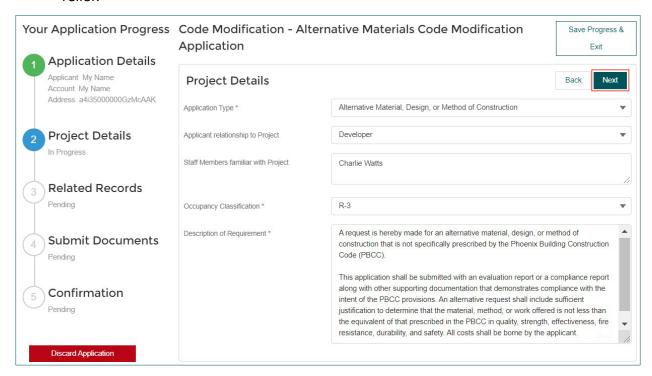
TIP: In some cases, you may need to enlarge the text box to see all the information that you have entered. To do so, grab the two lines on the lower right-hand corner of the box with your mouse pointer and drag it. This allows you to review the full text that you input even if it exceeded the size allotted in the original box.





The **Project Details** page has the following five fields, three of which are required*.

- **Application Type***: This is pre-filled with *Alternative Material, Design, or Method of Construction*.
- Applicant relationship to Project: The options are: Owner, Owner's Agent, Developer, Contractor, Architect, Engineer, Manufacturer, and Other.
- **Staff Members familiar with Project:** List the names of PDD Staff members with whom you have discussed the project prior to submittal of the Code Modification Request.
- Occupancy Classification*:
 - R-3 A-2 R-4 A-3 Ε H-1 H-5 M S-2 A-4 E-1 H-2 I-1 R-1 F-1 A-1 A-5 H-3 I-2 R-2
- **Description of Requirement*** Describe the *Requirement* from which you are requesting relief.

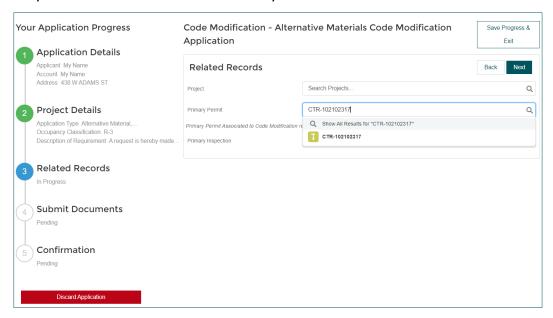


Once you have entered your information, click Next.

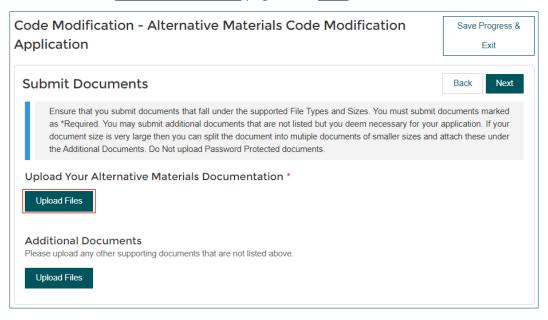
On the <u>Related Records</u> page, specify the <u>Project</u>, <u>Primary Permit</u>, or <u>Primary Inspection</u> numbers associated with the Code Modification request, if you have the information.

- **Project**: Project Associated to Code Modification requests
- **Primary Permit**: The number of the Primary Permit Associated to Code Modification request, (e.g., CTR-102102317).
- **Primary Inspection**: The number (e.g., INS-00027419) of the Inspection associated with the Code Modification that you are requesting.

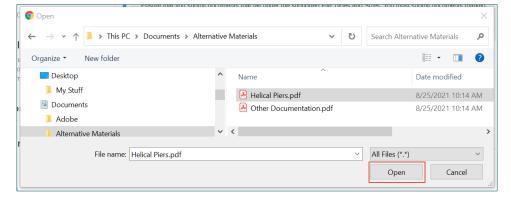
Each of these fields is a search field, so you search based on a partial or complete number. Click <u>Next</u> after you have entered what information you have.



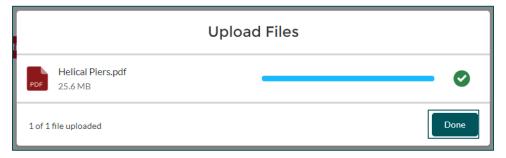
After you have completed the forms, you will need to upload the **Alternative Materials Documentation** on the **Submit Documents** page. Click **Next**.



Under **Upload Your Alternative Materials Documentation***, click <u>Upload Files</u>. A window will open on your computer so that you can navigate to the location where you have the documents stored. Select the files that you wish to upload and click <u>Open</u>.

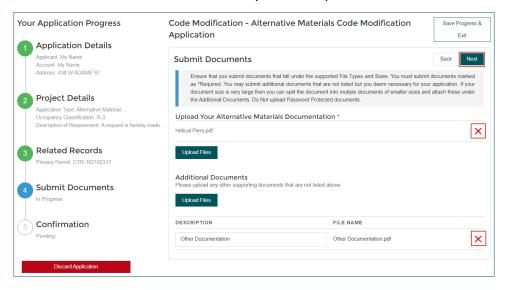


A dialog box will appear and display the upload progress. Once the upload is complete and the green checkmark appears, click *Done*.



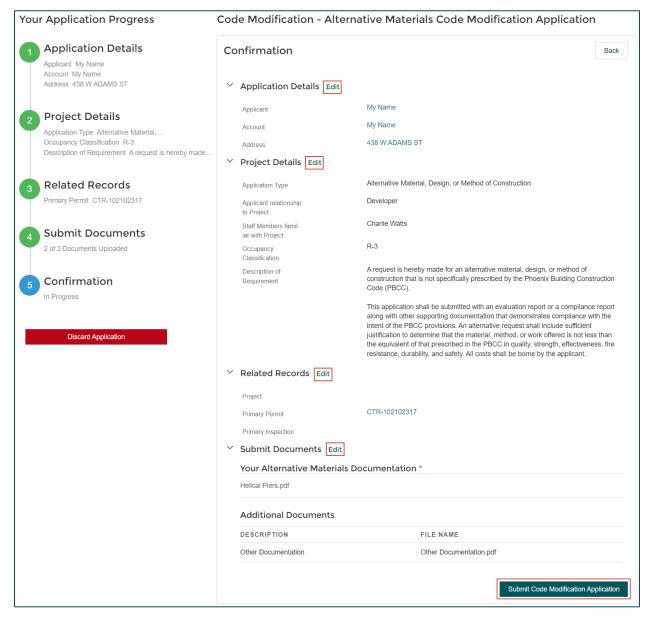
The process is the same for Additional Documents.

The name of the document will appear on the screen under <u>Upload Your Alternative Materials</u> <u>Documentation</u>*. If you have uploaded the wrong document, simply click the red <u>X</u> on the right-hand side of the screen to delete the document and start the process again. Click <u>Next</u> when you are satisfied with the documentation you have uploaded.



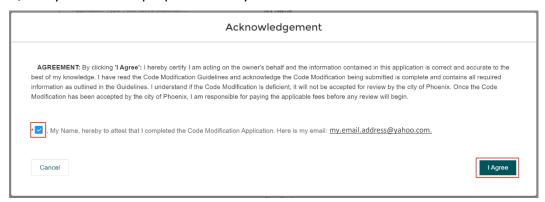


Next, the Confirmation screen to review the information on your application.



If all the information is accurate, click **Submit Code Modification Application**.

An acknowledgement box will appear, asking you to attest to the fact that the information is accurate, and you have the proper authority to act.

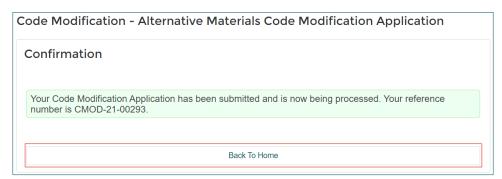


Check the box* and click on the I Agree button.

The Portal will give you a message asking you to wait while the application is being submitted,



and then return with the confirmation that your application has been submitted and is being processed. Your permit number will display on the screen. In the case of our example, CMOD-21-00293.



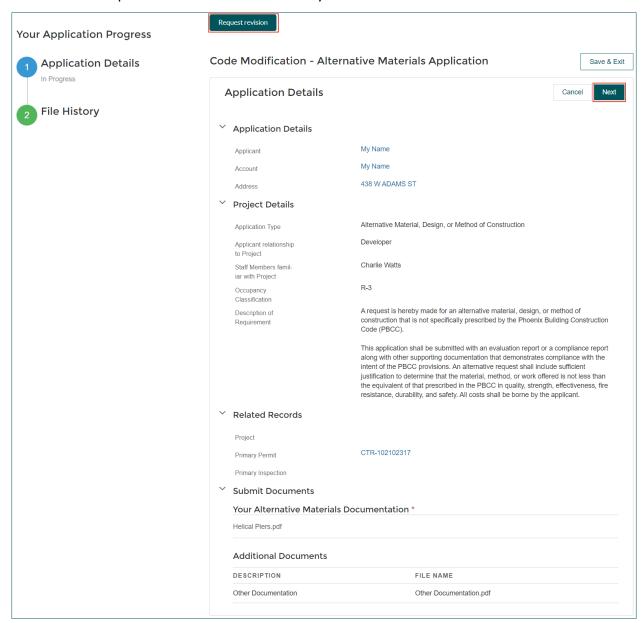
Clicking <u>Back to Home</u> will take you to the SHAPE PHX Portal home, where you can find the list of your permits at the bottom of the page.



Once you have submitted the application, no changes can be made to it until PDD Staff has completed a review and responded with comments. Click $\underline{\textit{View}}$ to see the application where you can request revisions.



You can review the information that you submitted, or <u>Request Revision</u> by clicking on the button on the top of the screen. This will allow you to submit corrected or additional material.



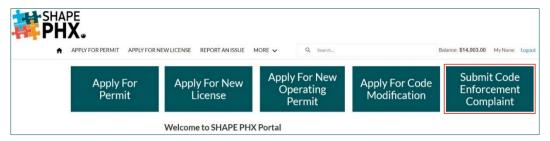
Clicking Next shows you the File History.



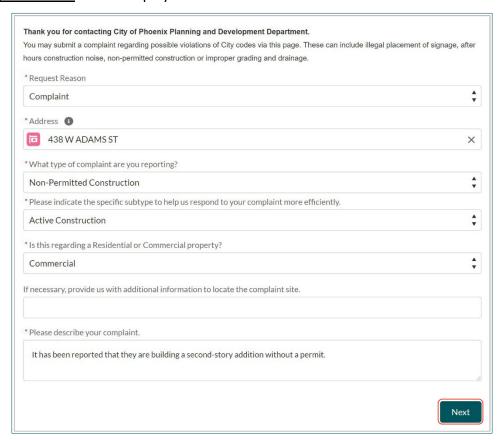


Submit Code Enforcement Complaint

All Code Enforcement Complaints require a Portal Account. To start, click <u>Submit Code</u> <u>Enforcement Complaint</u>.



The **Complaint Form** will be displayed.



There are seven fields, six of which are required*:

- Request Reason* This field is prepopulated with Complaint.
- Address* Enter the address for which you are submitting the complaint. The Portal searches for the right address as you type, starting after the first two characters have been entered. It narrows down the possibilities until the correct one displays. You also can click Show All Results for ... and select one from the list that is provided by the system.

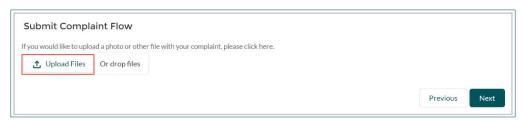


 What type of complaint are you reporting?* and Please indicate the specific subtype to help us respond to your complaint more efficiently. *

There are five complaint types, with the associated subtypes.

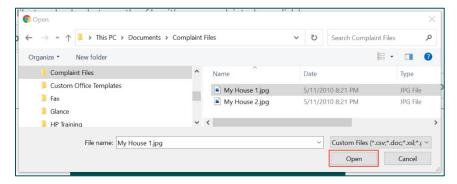
- Non-Permitted Construction
 - Active Construction
 - Non-Active Construction
 - Existing Fence
- Sign
 - Political Signs
 - Signs in the Right of Way
 - Existing Sign
- Noise
 - After Hours Construction Noise
- o Grading & Drainage
 - Flooding
- Other
 - Other
- Is this regarding a Residential or Commercial property?* There are three options: Residential, Residential Sales or Construction Office, or Commercial
- If necessary, provide us with additional information to locate the complaint site. If there is information such as where on the lot or building the work is taking place, or the suite in which the work is underway, indicate that here.
- **Please describe your complaint*.** Describe the situation about which you are reporting the complaint.

After you have completed the form, click Next. The system will ask if you would like to upload photos or other files to go along with your complaint. You can do so by dragging and dropping the files into the space or by clicking **Upload Files.**

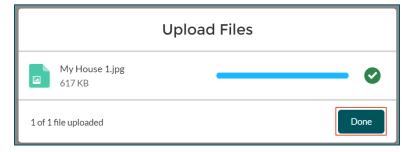


The system will take you to the files on your computer where you can select the files to upload.





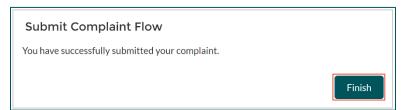
After you have selected the file and clicked *Open*, the system will display you a dialog box showing you the progress of the upload. When it is complete, you will see a green check mark. Click *Done*.



Once all the files and photos have been uploaded, click Next.

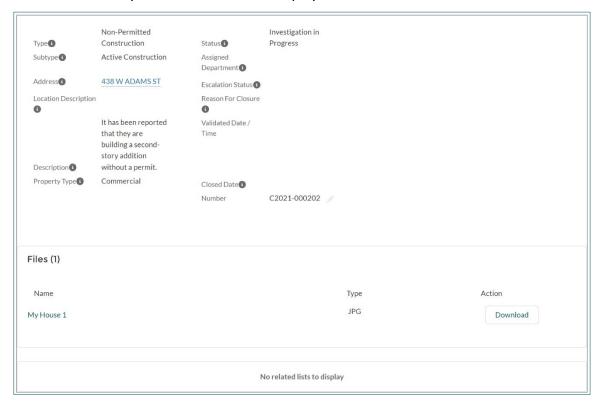


You will receive confirmation that your complaint has been successfully completed. Click <u>Finish</u> to complete the process.

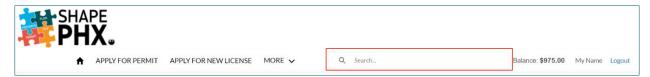




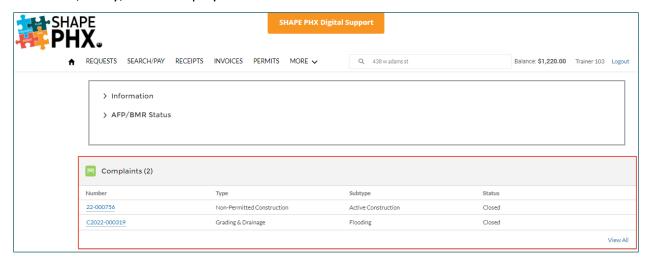
The information that you submitted will be displayed on the screen.



To track the status of complaints, use the **Search...** box at the top of the portal homepage.



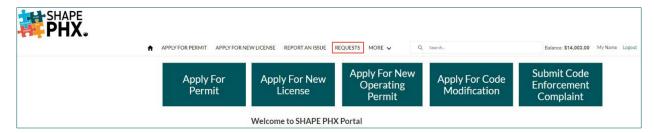
Type in the address for the property, and the property information, Complaints, Permits and Violations, if any, will be displayed on the screen.



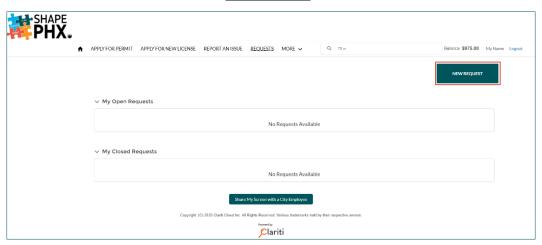


Requests

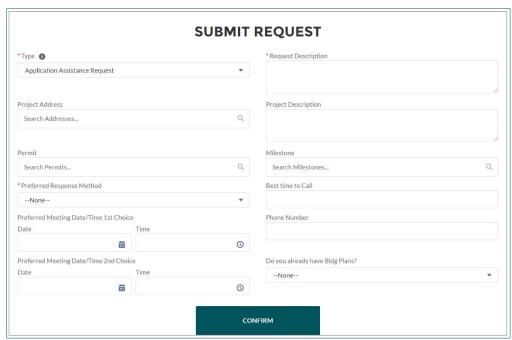
If you would like *Application Assistance* or a *Plan Review Meeting,* click on <u>Requests</u> from the Home Screen.



From the <u>Requests</u> screen, you will be able to see your *Open Requests*, your *Closed Requests*, and submit new ones. To do so, click the <u>New Request</u> button.



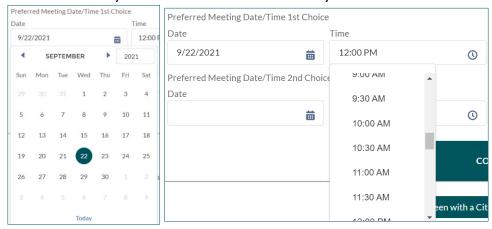
The <u>Submit</u>
<u>Request</u> form
will appear on
the screen.
There are 12
fields, two of
which are
required*.





The fields are:

- Type* Specify which type of request you are submitting:
 - Application Assistance Request
 - Plan Review Meeting
- Request Description* Describe your request.
- Project Address Enter the address for which you are submitting the complaint. The
 Portal searches for the right address as you type, starting after the first two characters
 have been entered. It narrows down the possibilities until the correct one displays. You
 also can click Show All Results for ... and select one from the list that is provided by the
 system.
- **Project Description** Describe the project that is the subject of the request.
- Permit If there is already a permit associated with this request, enter the number here. Just like with the address, the system will narrow down the options as you type the number in, starting with the prefix, e.g., CTR-102104... will show you five permit that match that information, if your permit is in the group, select it. If not, keep typing until the number is complete or the number is available for you to select.
 Since this is not a require field, if there is not a permit associated with the project at this time, the field can be left blank.
- **Milestone** Milestones are required steps in the permit process. Search for a milestone using Appendix D, SHAPE PHX Permit Milestones as a reference.
- Preferred Response Method* How would you like the consultation to take place?
 - Email
 In-person meeting
 - Phone
 Virtual Meeting
- Best time to Call If you are requesting a phone call, what is the best time to call?
- Preferred Meeting Date/Time 1st Choice (Date & Time) & Preferred Meeting Date/Time 2nd Choice (Date & Time) Provide options for the meeting that you are requesting. City staff will accommodate these times if possible based on staff availability and previously scheduled meetings. To do so, click on the Date box, and use the arrows by the month to change the month, and then click on the date to select it. The year can also be changed by click on the box and selecting the appropriate year from the selections. To select a time, click on the Time box, and scroll through the provided times and select the one that you would like. Do the same for your 2nd Choice.





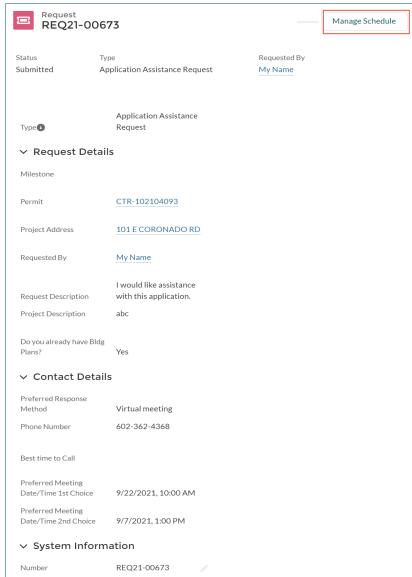
- Phone Number Enter the phone number at which you can be reached.
- **Do you already have Bldg Plans?** Have plans already been drawn up for the project, preliminary or otherwise? (Yes or No)

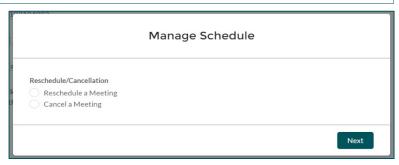
Provide as much information as you have regarding your project to better enable staff to assist you.

Once you have completed the information, click the <u>Confirm</u> button at the bottom of the form. The request will be given a number, in this case <u>REQ21-00673</u>, and the information about the request will be on displayed on the screen.

If you which to reschedule or cancel this meeting, click Manage Schedule and select the appropriate button on the dialog box that is displayed. The system will either ask you to select new Preferred Meeting Dates or verify that you are sure that you want to cancel the meeting.

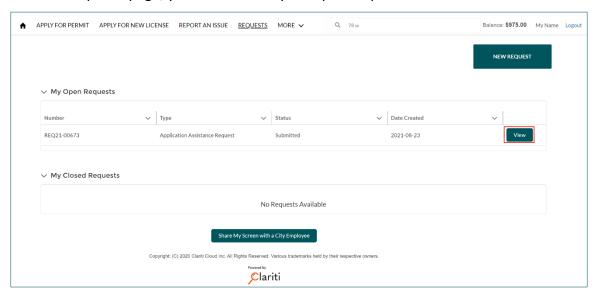
Follow the prompts to complete the task.







Back on the Requests page, you will now see your Open Request listed.



To see the information on this Request, click <u>View</u>. This will take you to the screen shown above and allow you to <u>Manage Schedule</u>.

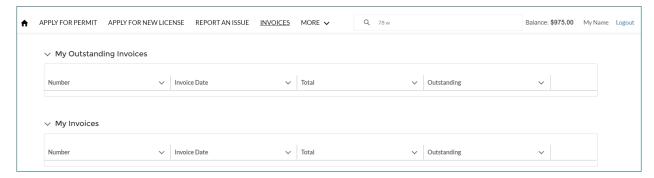


More

This drop-down list provides access to the items within your account,

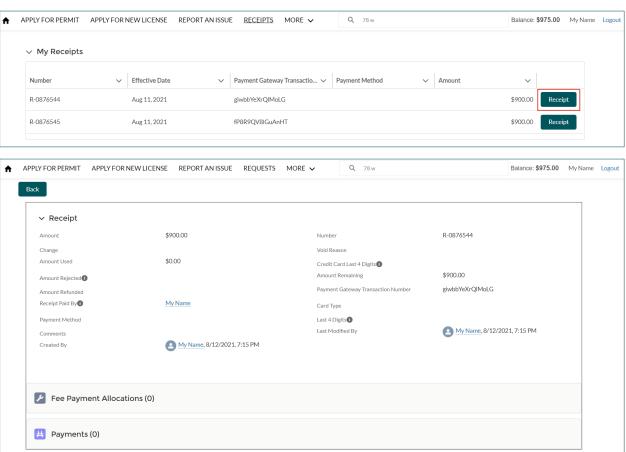
Invoices

There are two categories for invoices: My Outstanding Invoices and My Invoices. Invoices are related to Elevators, Annual Facilities Permits, and Building Maintenance Registrations.



Receipts

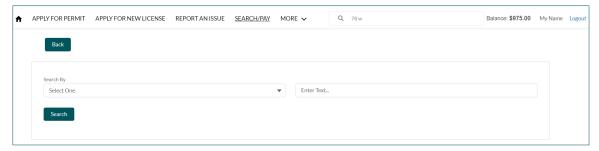
To access receipts for your projects, choose **Receipts**.





Search/Pay

There are many ways to make a payment online through the SHAPE PHX Customer Portal. The Search/Pay form is one of them.



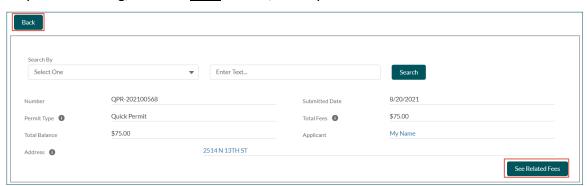
Select the information to Search by:

- Invoice #
- Permit #
- Application #
- · Registration #

Next, enter the information in the adjacent text box, e.g., *Permit #* and QPR-202100568, and click *Search*.



The information about the *Permit* will be displayed. The form will display the address of the permit, the date submitted, the total fees, and the total balance due. If this is not the permit for which you are looking, click the <u>Back</u> button, and try another search.

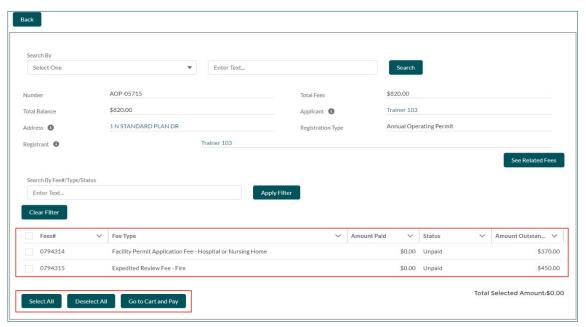


If this is the correct permit, click <u>See Related Fees</u> to begin the payment process. The form will expand to show the fees related to the permit.

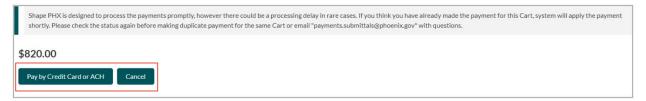


The itemized fees are now listed at the bottom of the form. You can select individual fees by clicking on the check box next to that row. If there are more than one, you can select all of them by clicking on the <u>Select All</u> button or by clicking on the check box next to Fees#.

If you select all the *Fees* by mistake, you can click <u>Deselect All</u> and then go in and select the individual rows that you wish to pay at this time.



Once the *Fees* have been selected, click <u>Go to Cart and Pay</u>. This will take you to your payment cart.

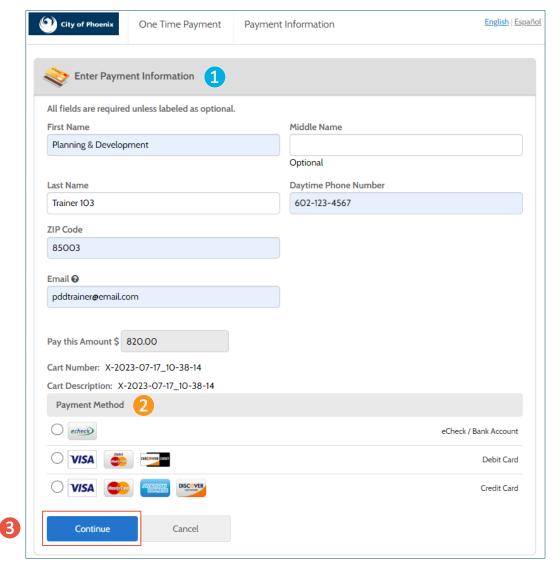


Here you will have the choice to <u>Pay by Credit Card</u> or <u>ACH</u>⁵, or <u>Cancel</u> the transaction. When you click the appropriate payment button, you will be directed to the secure city of Phoenix payment site to enter your credit card or banking information.

⁵ An ACH payment, or Automated Clearing House payment, is an electronic money transfer between banks from a savings or checking account.



1 <u>Enter Payment Information</u>, 2 select your <u>Payment Method</u>, and then 3 click the blue <u>Continue</u> button. Follow the rest of the prompts on the site to complete your transaction.



For more information about making payments online, see the section <u>Paying Fees Online</u> in this Guide.

Licenses

This will show all the licenses for your account in the following categories:

- In-Progress Licenses
- Licenses with Actions Required
- Historical Licenses
 - o Cancelled
 - Expired
- Licenses Shared with Me



Registrations

This will show all the Registrations for your account in the following categories:

- In-Progress Registrations
- Historical Registrations
 - o Cancelled
 - Expired
- Registrations with Actions Required
- Registrations Shared with Me

Permits

This will show all the Permits for your account in the following categories:

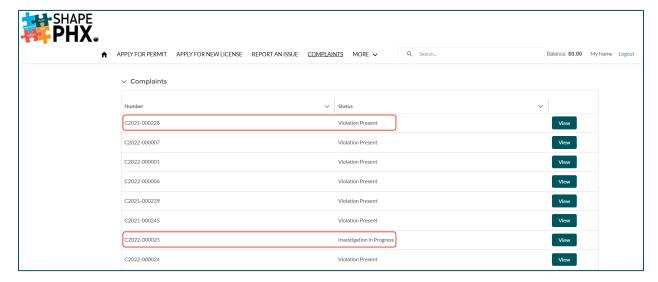
- In-Progress Permits
- Historical Permits
 - Cancelled
 - Expired
- Permits with Actions Required
- · Permits Shared with Me

Applications

This will show all the Applications for your account. Currently, that is limited to Code Modifications. For future releases, it will include other categories.

Complaints

This will show you the complaints that you have submitted, e.g., C2022-000025, as well as active complaints, e.g., C2021-000228, so that you can track the progress of the investigation.





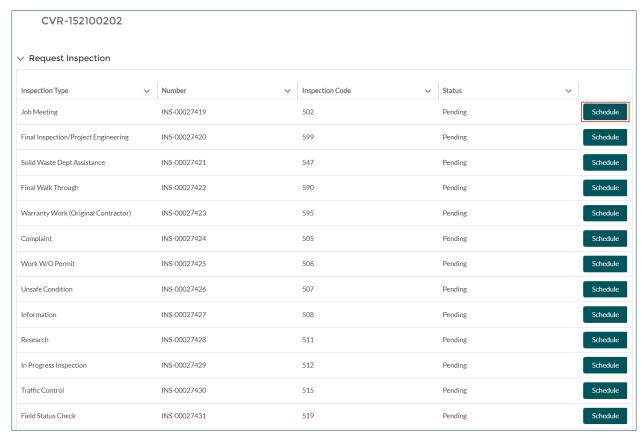
Requesting Inspections

In addition to using the IVR system to schedule inspections (602-495-0800), you will be able to request them online through your Portal account.

There are two ways to access your permits and request inspections. From the home page, scroll down to the **Permits** section.



To begin, click <u>Request Inspection</u>. The list of inspections appropriate for your <u>Permit</u> is on the screen. To request the <u>Inspection</u>, click <u>Schedule</u>.



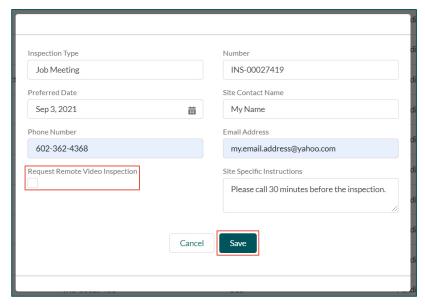


Requesting Inspections

In the pop-up window, enter the date that you <u>prefer</u> the inspection to be completed, the name of on-site contact, a phone number, email address, and any site-specific instructions.

If this is a project that is eligible for <u>Remote Video Inspection</u> and you would like to schedule one, check the *Request Remote Video Inspection* box.

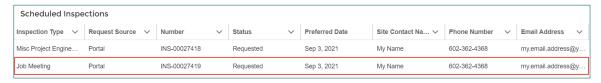
Once the information has been entered, click *Save*.



The system will confirm that your request has been received.



To view your inspections, whether they are Pending, Requested, Scheduled, or Completed, click <u>View Inspections</u>. This will take you back to the screen with which the process to request inspections began. The inspection request that was just submitted is shown below.





Electronic Plan Review

With the new SHAPE PHX portal, online users will now have the capability to:

- Upload plans and associated documents while completing the application process
- Upload plans as a single, multi-page PDF file.
- Use a simplified file naming convention
- Check plan status from the "Permits" section on the portal homepage
- Recall an application submitted in error or to upload additional information.⁶

For more additional EPR information, we recommend you view the <u>EPR Submittal</u> Requirements, Preparation and FAQ Guide.

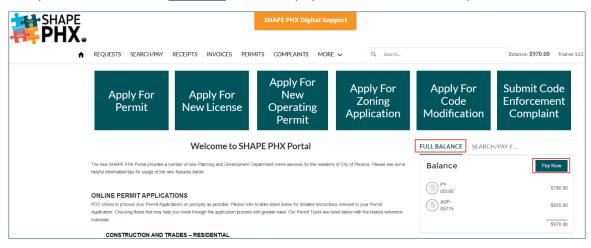
⁶ Only applicable if the application has not been processed.



Paying Fees Online

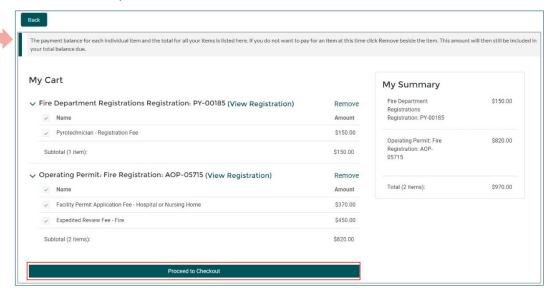
Home Screen

There are several ways to make payments for your applications on the Portal. From the Home Screen, you can click on the <u>Pay Now</u> button to pay the full balance for all permits, licenses, etc.



This will take you to **My Cart** where the fees will be itemized. The form states:

The payment balance for each individual item and the total for all your items is listed here. If you do not want to pay for an item at this time, click Remove beside the item. This amount will then still be included in your total balance due.

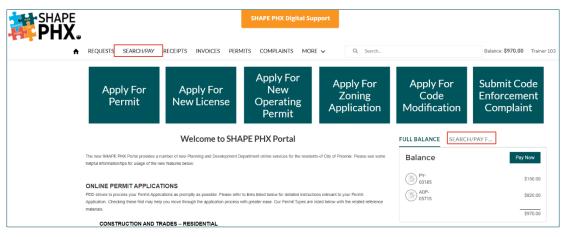




After you have made any necessary changes, click <u>Proceed to Checkout</u> to select your method of payment, and be directed to the secure city of Phoenix payment site to continue processing your payment.



To make payment for One Fee/Item click on Search/Pay F....



FULL BALANCE

Search By

Registration#

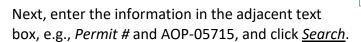
Search

SEARCH/PAY F...

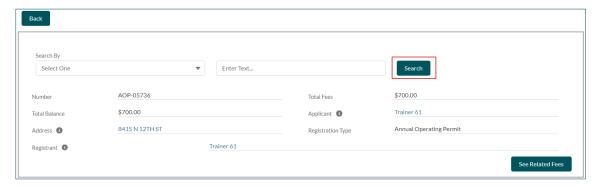
AOP-05736

Select the information to **Search by** one of the options in the drop-down menu:

- Invoice #
- Permit #
- Application #
- Registration #



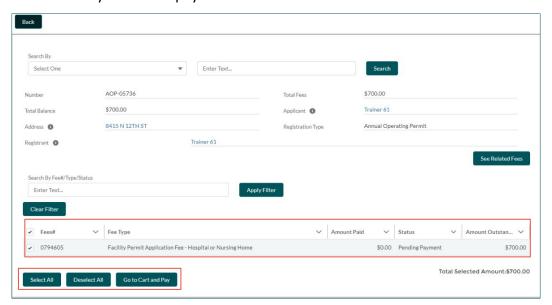
The information about the *Permit* will be displayed. The form will include the address of the permit, the date submitted, the total fees, and the total balance due. If this is not the permit for which you are looking, click the <u>Back</u> button, and try another search. If this is the correct permit, click <u>See Related Fees</u> to begin the payment process.





The form will expand to show the fees related to the permit and the itemized fees are now listed at the bottom of the form. You can select individual fees by clicking on the check box next to that row. If there are more than one, you can select all of them by clicking on the <u>Select All</u> button or by clicking on the check boxes next to each fee number.

If you select all the *Fees* by mistake, you can click <u>Deselect All</u> and then go in and select the individual rows that you wish to pay at this time.



Once the Fees have been selected, click Go to Cart and Pay.



Here you will have the choice to <u>Pay by Credit Card or ACH</u>⁷ or <u>Cancel</u> the transaction. When you click the payment button, you will be directed to the secure city of Phoenix payment site to enter your credit card or banking information.

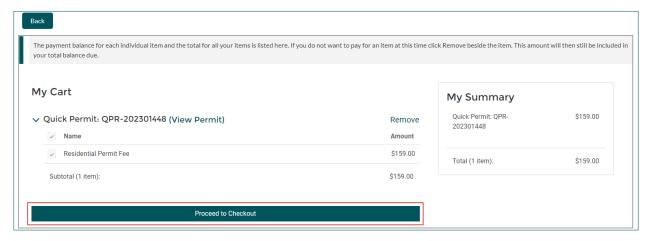
⁷ An ACH payment, or Automated Clearing House payment, is an electronic money transfer between banks from a savings or checking account.

Permits

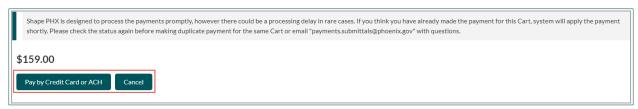
You can scroll down to the bottom of the of the Home Screen to see your Permits. Any permits that have a balance due will show Pending Payment and the <u>Pay Now</u> button.



You will be directed to **My Cart**, to review the fees. Click <u>Proceed to Checkout</u> to select your payment method.



Here you will have the choice to <u>Pay by Credit Card or ACH</u>⁸ or <u>Cancel</u> the transaction. When you click the payment button, you will be directed to the secure city of Phoenix payment site to enter your credit card or banking information.



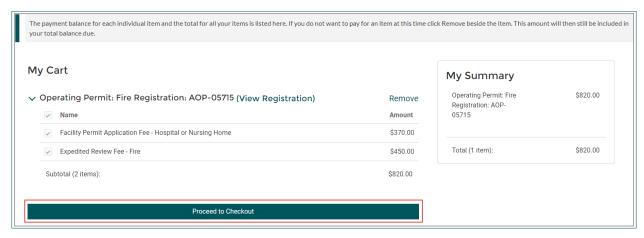
⁸ An ACH payment, or Automated Clearing House payment, is an electronic money transfer between banks from a savings or checking account.

Registrations

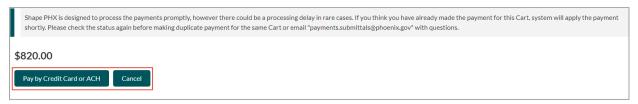
Just like with *Permits*, you can find your Registrations at the bottom of the Home Screen, and any that have a balance due will show Pending Payment and the *Pay Now* button.



You will be directed to **My Cart**, to review the fees. Click <u>Proceed to Checkout</u> to select your payment method.



The next step is to select <u>Pay by Credit Card or ACH</u>⁹ or <u>Cancel</u> the transaction.



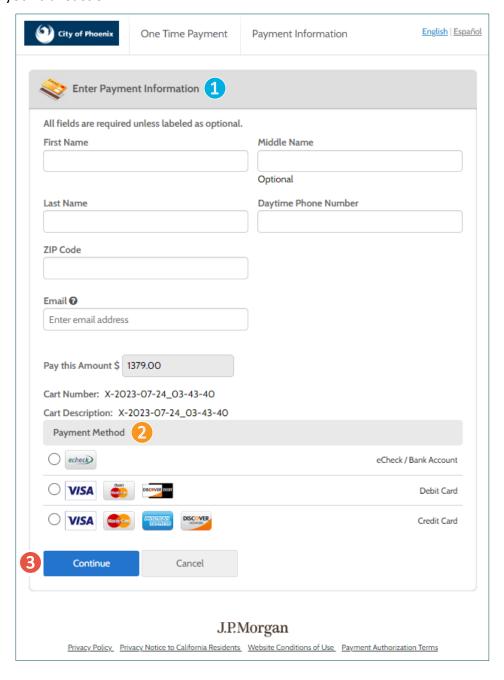
When you click the payment button, you will be directed to the secure city of Phoenix payment site to enter your credit card or banking information.

⁹ An ACH payment, or Automated Clearing House payment, is an electronic money transfer between banks from a savings or checking account.

City of Phoenix Payment Site

As you can see there are several ways to access the Cart to make payments through the Portal. Look for a <u>Pay Now</u> button or link to get started with the payment process.

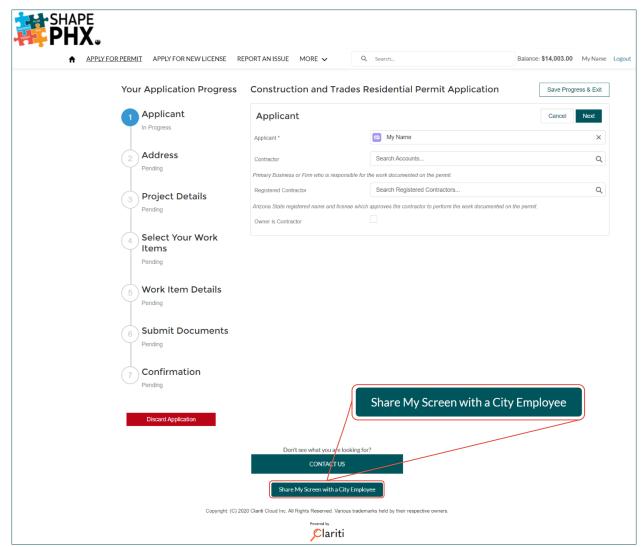
All online payments are made through the secure city of Phoenix payment site. After electing which items to pay, and selecting your method of payment, you will be directed to the secure site to 1 <u>Enter Payment Information</u>, 2 select the <u>Payment Method</u> and enter information for your eCheck/Bank Account, Debit Card, or Credit Card. After all information has been entered, 3 click the blue <u>Continue</u> button. Follow the rest of the prompts on the site to complete your transaction.



Share My Screen with a City Employee

To assist Portal Users with their applications and other interactions with the site, SHAPE PHX includes a feature that allows the user to share what they are seeing on their Portal screen with a city of Phoenix employee.

On each of the screens within the Portal, you will see a button that says <u>Share My Screen with a City Employee</u>. If you are having difficulty with SHAPE PHX or have a question regarding the process, call the Planning & Development Department (PDD) at 602-262-7811. When you have reached a member of PDD staff, describe the problem and they may ask if you would like to Share your Screen or you can request the option.



When you click on the "Share My Screen with a City Employee" button, a message will appear explaining how the system works.

The screen sharing application that the city is using is powered by Glance. It allows city staff to look at your screen with you, but not manipulate it. Sometimes it's difficult to explain to the person on the phone what you're seeing on your screen. Glance allows you to show staff



exactly what you are seeing, so that they can answer your questions or help you resolve the problem.

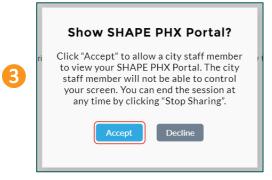
Here's how it works:

- 1) You (a registered user who is logged in to the SHAPE PHX Portal) calls PDD Communications at 602-262-7811.
- 2) PDD staff directs you to the co-browse button on their screen.
- A message appears with the terms and asks you to <u>Accept</u> or <u>Decline</u> them. (If you decline, you will not be able to share your screen with city staff.)
- 4) You provide the PDD Staff member the code number provided by the system.
- 5) A secure co-browsing session will be launched.

and resolve the matter more quickly.

- 6) PDD staff can only see the browsing session on the Portal User's screen and highlight areas of the screen but cannot control it.
- PDD staff cannot see the Portal User's screen if the user navigates away from SHAPE PHX or <u>phoenix.gov</u>.
- 8) The Portal User can end the session at any time by clicking on the <u>STOP SHOWING</u> button.

2 Share My Screen with a City Employee





Share My Screen gives you the assistance you need and helps both you and PDD staff identify

Conclusion

The city of Phoenix Planning & Development Department is very excited about the SHAPE PHX and the many ways that it will improve the way we do business. We are especially proud to present the online portal which is available 24/7, allowing users to perform the following functions 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!

Stay tuned for updates on the future releases of SHAPE PHX, which includes commercial permits, planning applications and hearings.

We hope that this guide has been helpful to you. Please don't hesitate to contact us if you have any questions about SHAPE PHX at shapephx@phoenix.gov.



SHAPE PHX Customer Portal Guide Appendices



SHAPE PHX.

SHAPE PHX Customer Portal Guide Appendices

Appendix A – SHAPE PHX Glossary of Terms

ACCOUNT: Companies or individuals registered in SHAPE PHX that do business with the Planning & Development Department (PDD), often with CONTACTS associated with them. E.g., an architectural firm with architects, technicians, and the office manager registered as CONTACTS associated with the ACCOUNT.

APN: SEE ASSESSOR PARCEL NUMBER

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

ASSESSOR PARCEL NUMBER: 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.

CONTACT: An individual REGISTERED USER of SHAPE PHX who may or may not be associated with an ACCOUNT.

CUSTOMER PORTAL: Web access point for SHAPE PHX to be used by city customers. People with accounts can accomplish the actions the portal was designed for that their security access allows. Without an account, (i.e., for UNREGISTERED USERS) it is mostly a search tool. This only provides access to PDD.

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

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

INSPECTION: 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.

IVR: Interactive Voice Response. Phone system used by customers to request INSPECTIONS.

LETTER: 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.

LICENSE: 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).

MILESTONES: Milestones are required steps in the support 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.

- **OBJECT:** 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:** 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.
- **PERMIT:** 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.
- **PERMIT CATEGORIES:** Permit Categories describe what the customer is applying for or submitting to PDD. The permit categories in SHAPE PHX are Clearance, Complaint, Equipment, Inspection, License, Permit, and Review.
- **PICKLIST:** 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:** 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.
- **PLAN SUBMISSION TYPE:** When you create a PERMIT the first action taken is to select the "plan submission type," e.g., Construction and Trades, Civil, Pool.
- **PROPERTY OWNER:** The property owner of record according to Maricopa County Records and/or the owner on the application submitted to staff.
- **QUICK PERMIT:** 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:** 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.
- **REGISTERED USER:** 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.
- **UNREGISTERED USER:** 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:** 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.



WORK ITEMS: Items available from a list of options that will define the description of the work and also assist in creating the fees for the PERMIT.

WORK TYPES: The method used to add fees to the PERMIT while at the same time describing the work the PERMIT covers.

Appendix B – SHAPE PHX Sequence Numbers

A lot of things have changed with the implementation of SHAPE PHX. The permit now includes the Plan Review, so there is no longer a separate number for that part of the process. The system also has fewer permit types than KIVA. Here is a list of the abbreviates for the Permits, Licenses, and other Objects that you may encounter in SHAPE PHX. (

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 License BM Registration		BMR-{00000}	
BN	Cash Bond	Deposit	BN-{000000}	
С	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 Permit CTC-11{yy}{C Residential; Residential Sales/Construction Office		CTC-11{yy}{00000}	
CTR-10	Construction & Trades Permit CTR-1 Residential; Residential		CTR-10{yy}{00000}	
CVC-16			CVC-16{yy}{00000}	
CVR-15	Civil; Residential	Permit	CVR-15{yy}{00000}	
DEP	Deposit	Deposit	DEP-{000000}	
DMC-31	Demolition; Residential Permit DMC-31{yy}{0000} Sales/Construction Office		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}	



PREFIX DEFINITION OBJECT TYPE	NUMBER FORMAT
ENR-45 Energy System; Residential Permit	ENR-45{yy}{00000}
EST-50 Estimate; Estimate Permit	EST-50{yy}{00000}
ESTC-52 Draft; Estimate; Residential Permit Sales/Construction Office	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	P-17{yy}{00000}
PR Peer Reviewer License	PR-{00000}
PR-12 Pool; Residential Permit	PR-12{yy}{00000}
PY Payment Payment	PY-{000000}
PY Pyrotechnician License	PY-{00000}
QPR-20 Quick Permit; Residential ¹⁰ Permit	QPR-20{yy}{00000}
R Receipt Receipt	R-{0000000}
R-17 Registration for Users License	R-17{yy}{00000}
REF Refund Request Request	REF{yy}-{000000}
REQ Request Request	REQ{yy}-{00000}
RF Bulk Refund Credit	RF-{00000}
RRF Receipt Refund Receipt Refund	RRF{yy}-{000000}
RVW Review Review	RVW{yy}-{00000}
SCP Self-Certified Professional License	SCP-{00000}
SI Special Inspector License	SI-{00000}
SPC-22 Standard Plan; Residential Permit Sales/Construction Office	SPC-22{yy}{00000}
SPR-21 Standard Plan; Residential Permit	SPR-21{yy}{00000}
T Temporary Number for Equipment Equipment	T-{000000}
T Transaction Transaction	T-{000000000}
TR Trust Account Deposit	TR-{000000}
TT Time Tracking Detail	TT-{000000}
VI Permit Violation Violation	VI-{0000000}

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 $^{^{\}rm 10}$ Quick Permits are same as the online permits in KIVA.



Appendix C – Portal Codes for Special Inspector Registrations

Portal Code	Discipline (Code Section)	Required Inspections	Required Certifications
STR1	Structural (1705.1.1)	Special Cases Wall panels, curtain walls and veneers	ICC Commercial Building Inspector or ICC Residential Building Inspector or ICC Fire Inspector
STR2	Structural (1705.2)	Steel High Strength Bolting	ICC Structural Steel and Bolting SI
STR3	Structural (1705.2.2.1)	Steel Welding	AWS, CWI or ICC Structural Welding Special Inspector
STR4	Structural (1705.2.2.1.1) (1705.2.2.2) (1705.2.4)	Structural cold-formed steel, cold-formed steel trusses spanning 60' or greater	ICC Commercial Building Inspector or ICC Residential Building Inspector
STR5	Structural (1705.3)	Reinforced Concrete	ICC Reinforced Concrete SI or ACI Concrete SI
STR6	Structural (1705.3)	Pre-stressed / Precast Concrete Construction	ICC Reinforced Concrete SI or ACI Concrete SI and ICC Pre-stressed SI or PTI Level 1&2 Un-bonded PT Inspector
STR7	Structural (1705.3)	Post-installed structural anchors in concrete	ICC Reinforced Concrete SI or ACI Concrete SI or Manufacturers approved installer
STR8	Structural (1705.4)	Masonry construction including veneer	ICC Structural Masonry SI
STR9	Structural (1705.5)	Wood Construction	ICC Commercial Building Inspector or ICC Residential Building Inspector
GEO1	Geotechnical (1705.6) (1705.7) (1705.8) (1705.9)	Soils, Driven deep foundations, Cast-in-place deep foundations, Helical piles foundations	ICC Soils SI or NICET II (geotechnical or construction, or construction material testing or soils) or ATTI Field Technician
ARC1	Architectural (1705.14)	Spray fire-resistant materials Mastic and intumescent fire-resistant coatings	ICC Spray-applied Fireproofing SI or ICC Fire Inspector
ARC2	Architectural (1705.16)	Exterior insulation and finish system (EIFS)	AWCI EIFS Inspector
ARC3	Architectural (1705.17)	Fire-resistant Penetrations and Joints	UL or FM firestop examination
ARC4	Architectural (1705.1.1 item 3)	Impervious Moisture Barriers	Validated Training Program Attendee Evaluation from a training program that is validated by SWR
MEC1	Mechanical	Smoke control	Nationally Recognized Certification in air balance, smoke control, life safety or mechanical inspections. Recognized organizations include ICC, IAPMO, AABC, NEBB, TABB, NFPA, OSHA, IFC and CSP. Other organizations will be considered.
MEC2	Mechanical (1705.18)	Duct smoke detectors	ICC or IAPMO Commercial Mechanical Inspector or SI working for AABC or



Portal Code	Discipline (Code Section)	Required Inspections	Required Certifications
			NEBB certified testing agency, TABB Life Safety Level 2 Technician
MEC3	Mechanical (1705.18)	Fire and smoke dampers	ICC or IAPMO Commercial Mechanical Inspector or SI working for AABC or NEBB certified testing agency, TABB Life Safety Level 2 Technician
MEC4	Mechanical (1705.18)	Installation of grease duct enclosure Other cases	ICC or IAPMO Commercial Mechanical or Inspector Factory trained technician Product Specific
MEC5	Mechanical (1705.20)	Medical Gas and Vacuum Systems	ANSI/ASSE Standard 6030 certified firm
ELE1	Electrical	Ground fault performance tests, Switchboards, panelboards, motor control centers and other equipment rated 1000A or more, or over 600V, Transformers rated 100 KVA or more 1-phase or 300 KVA or more 3-phase, Conductors for equipment rated 1000A or more, or over 600V, Emergency and standby power systems	ICC Electrical Commercial Inspector or IAEI Commercial Electrical Inspector or ICC Electrical Plan Review or NETA Level III or IV Certified Technician and an employee of a NETA accredited testing agency

This table is based on information in the **Special Inspector Application**.



Appendix D – SHAPE PHX Permit Milestones, Release 1

Milestone	Associated Workflow Steps
Pre-Administrative Review	EPR File Plan Check
	Flood Plain Review
	Historic Preservation Review
Administrative Review	Confirm Water Flow Test
	Site Plan Admin Review
	Civil Admin Review
	Hillside Admin Review
	Zoning Admin Review
Final Administrative Review	Residential Final Admin Review
Plan Review	Residential Plan Review
	Elevator Plan Review
	Electrical Plan Review
	Accessibility Plan Review
	Street Lighting Plan Review
	Mechanical & Plumbing Plan Review
	Design Review Plan Review
	Fire Prevention Plan Check
	Grading and Drainage Plan Review
	Structural Plan Review
	Floodplain Plan Check
	Plot Plan Review
	Residential Standard Plan
Final Review	Residential Final Review