

eTRAKiT User Guide

The Town of Leesburg's eTRAKiT online portal allows residents and contractors to apply and pay for certain types of Permits, Land Development Projects, and Legislative Applications. It also provides the ability to monitor the progress of your applications as well as schedule/cancel inspections and download/upload documents.

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Creating a Public Account (Residents / Homeowners)

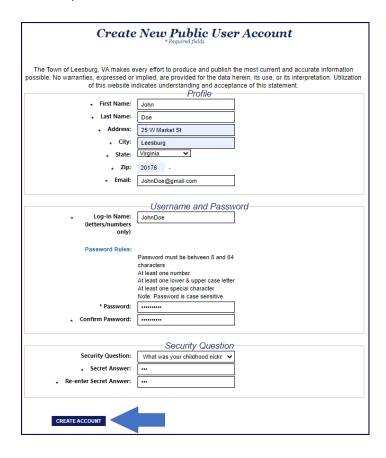
Public accounts are intended for homeowners and the general public. If you are a licensed contractor or design professional, see **Creating a Contractor Account** below for more information.

Signing Up for a Public Account

1. At the top of the Leesburg eTRAKiT page click **Setup an Account**.



2. Complete all the information on the form. Fields marked with an asterisk (*) are required. When finished, click **CREATE ACCOUNT**.

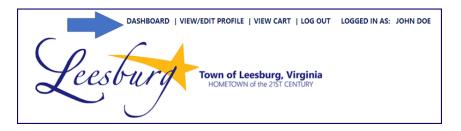


You will now be logged into your new account. Click **CONTINUE** to return to the Home page.

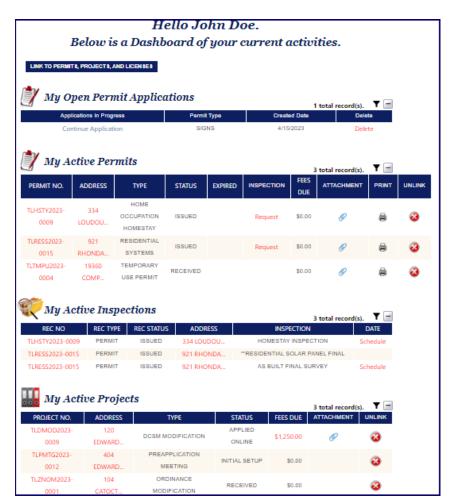


3. Continue to **Dashboard**

When you log in to your account, you will be directed to your dashboard. You can also click DASHBOARD at the top of the page at any time to return to this page.



As you begin to create applications on the eTRAKiT Portal or link your new account to existing permits and projects, all linked permits will appear on the dashboard. From this dashboard you can schedule and manage inspections, pay fees, or review comments and notes from staff.

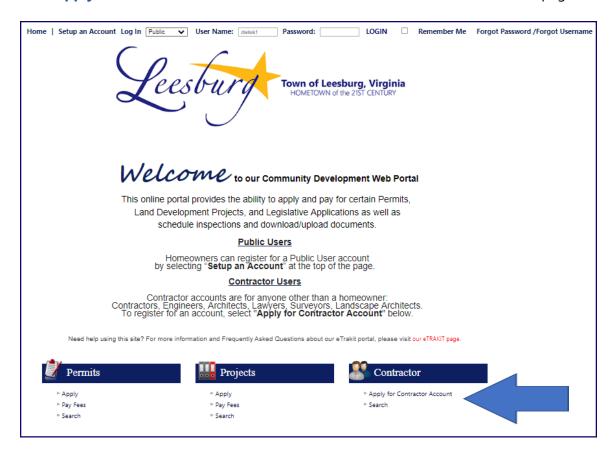


Creating a Contractor Account

All licensed contractors, engineers, or design professionals must have a **Contractor** account in eTRAKiT. **Note:** eTRAKiT refers to the module for Contractor Accounts as **AEC** (Architect, Engineer, Contractor).

Signing Up for a Contractor account

1. Click **Apply for Contractor Account** under the Contractor section on the Home page.



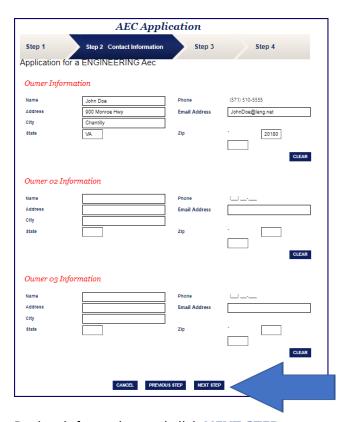
2. Read disclaimer, choose I Agree and click **CONTINUE**. If you choose I Disagree you will be taken back to the HOME page.



3. Enter company name, choose contractor/design professional type (**AEC Type**) and complete required information, upload any documentation, and click **NEXT STEP**. Fields marked with an asterisk (*) are required.

AEC Application				
Step 1 AEC IN	FORMATION Step 2 Step 3 Step 4			
AEC Registra	ation Information			
AEC Inform	mation			
*Company Name	Leesburg Engineers			
*AEC Type	APPLICANT APPLICANT			
Company l	ARCHITECT ATTORNEY CONTRACTOR DEVELOPER			
*Email	GEO TECH Ig.net LANDSCAPE ARC OTHER			
eTRAKiT L	SPECIALTY SURVEYOR TRAFFIC ENG			
*Password Rule	Password must be between 8 and 64 characters. At least one number. At least one lower & upper case letter. At least one special character. Note: Password is case sensitive.			
*Password				
*Confirm Password				
Secret Question	What was your childhood nickname?			
*Secret Answer	•			
*Re-enter Secret Answer:	•			
Attachmen	nts			
Filename	Select			
Description				
UPLOAD				
	CANCEL NEXT STEP			

4. Provide contact information and click **NEXT STEP**.



Review information and click **NEXT STEP**.
 <u>Note:</u> The Town of Leesburg does <u>not</u> charge a fee for creating a contractor account.



6. Your account will now be created with the information provided and assigned an automatic "Contractor Number", for example AEC664. You will be taken directly to your DASHBOARD where you will be able to schedule and manage inspections, pay fees, or review comments and notes from staff once you create or link a project or permit to our account.

Permit Application Process

The process for submitting permit applications will be the same for public users (residents and homeowners) and contractors/engineers/design professionals.

1. Log in to your account by selecting **Public** Log In if you are a homeowner or **Contractor** Log In. Enter your User Name (public account) or choose your User Name from the list (contractor account) depending on your account type, enter your Password, and click **LOGIN**.



2. From your DASHBOARD, select **Apply** under the **Permits** menu.



3. Read the Town certification. Choose I Agree and click **CONTINUE** to proceed. If you choose I Disagree you will be taken back to the Home page.

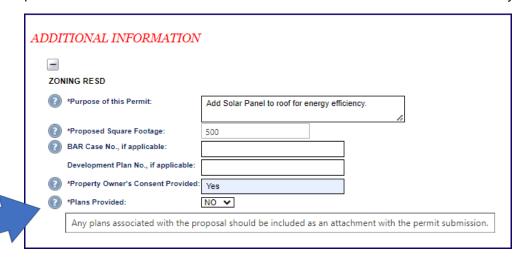


STEP 1: Permit Information

1. Fill out the following fields. Fields marked with an asterisk (*) are required.



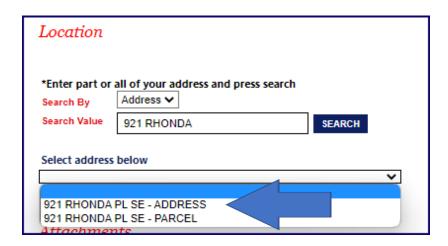
2. The following information will vary depending on permit type. ② indicates there is a ToolTip which provides more information for this field. Either hover over or click on this symbol to read the tip.



3. In the Search By box choose Address to search by address or Parcel to search by Parcel ID #. Enter all or part of the address or parcel ID in the Search Value and click **SEARCH**.



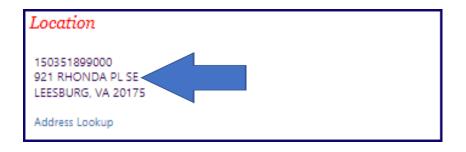
4. Expand the resulting picklist and choose your address from the list.



Permits must be linked to a valid Town of Leesburg parcel or address.

If your address or parcel number is not found, please check to make sure you are using the correct address format. Example, directional streets please use W instead of West. If the address does not populate and you have verified the address is within town limits, please contact the Department of Planning and Zoning.

5. Once you select a result you will see the selected address in the Location as shown below. If this is incorrect, click Address Lookup to search again.

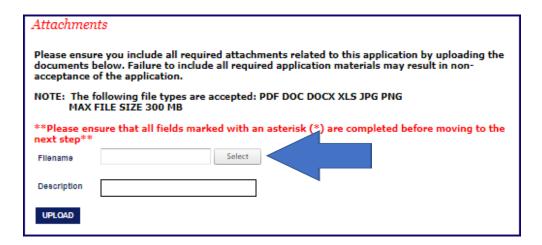


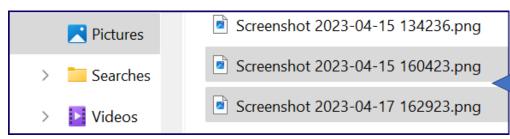
6. Upload all required documents in the **Attachments** section.

Visit this web page for information about what is required for submitting certain types of permits/projects. Please name your files in a way which describes the item submitted. Improperly named files may result in an incomplete application. If you need to submit additional documentation you will be notified upon review of your application by Town staff.

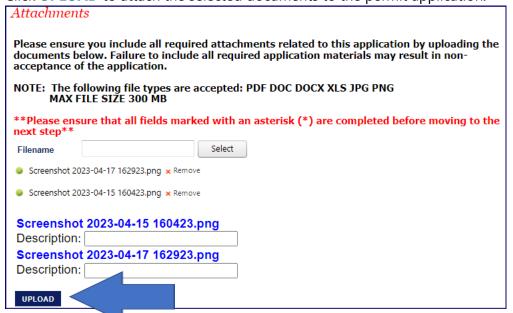
Note: The following document types are accepted: PDF, DOC, DOCX, XLS, JPG and PNG

7. Click the **Select** button to browse your files. Select one or more files.



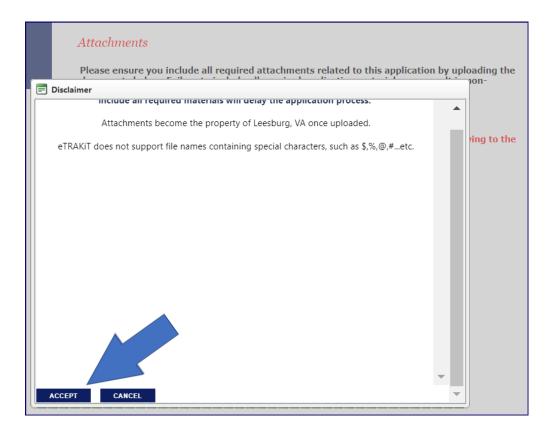


8. Click **UPLOAD** to attach the selected documents to the permit application.



9. Read the Disclaimer and click ACCEPT.

Note: You may have to scroll down in the window to get to the ACCEPT and CANCEL buttons.



10. Click **NEXT STEP** at the bottom of the Permit Application page to continue.

Attachments				
Please ensure you include all required attachments related to this application by uploading the documents below. Failure to include all required application materials may result in non-acceptance of the application.				
NOTE: The following file types are accepted: PDF DOC DOCX XLS JPG PNG MAX FILE SIZE 300 MB				
Please ensure that all fields marked with an asterisk (*) are completed before moving to the next step				
Filename Select				
Description UPLOAD				
Attachments:				
Screenshot 2023-04-15 160423.png DELETE				
Screenshot 2023-04-17 162923.png DELETE				
CANCEL NEXT STEP				

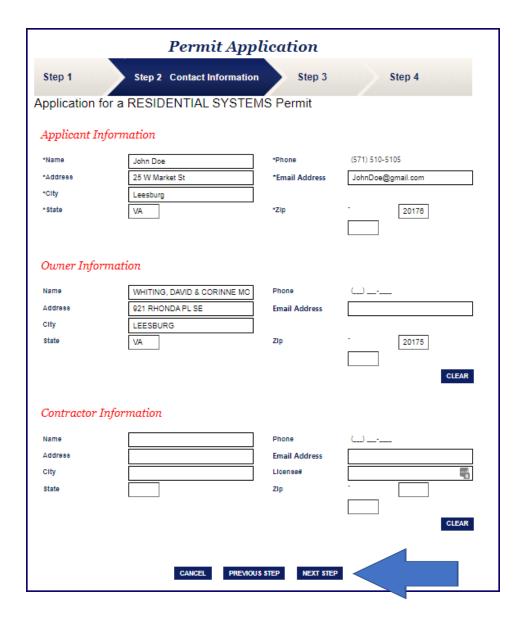
STEP 2: Contact Information

1. Fill out the following fields, fields marked with * are required fields and click **NEXT STEP**.

Most of this information will be already completed based on your profile information.

Owner information should pre-populate based on the owner of record according to the Loudoun

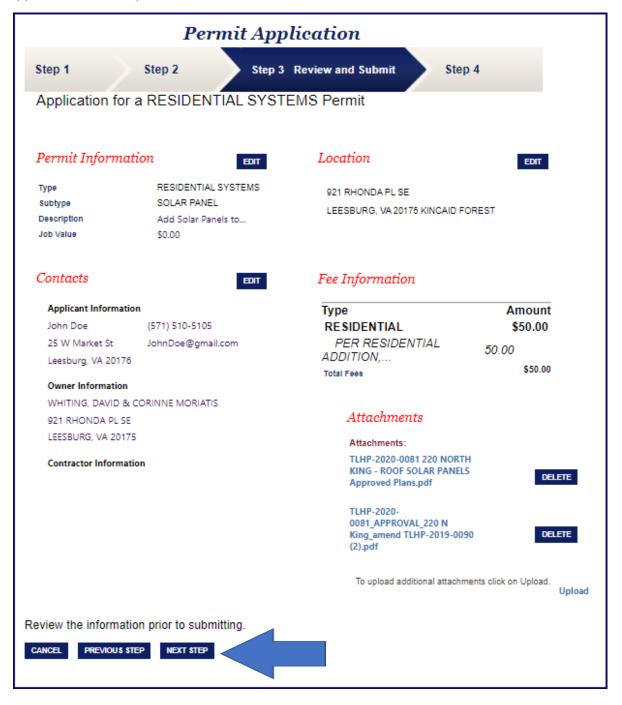
County Commissioner of the Revenue's Office. This may not reflect recent changes made in ownership.



STEP 3: Review and Submit

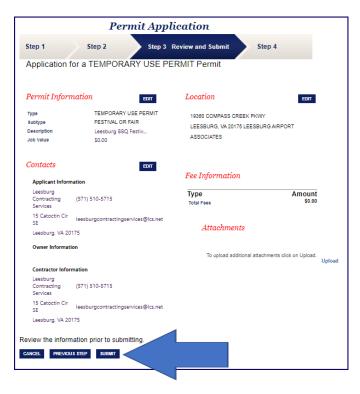
1. Review Information. You will be able to review and make edits to your application if needed. When complete with any edits needed, click **NEXT STEP** (if no fees) or **SUBMIT** (if fees need to be paid).

Upon submission of your application, Town staff will review your application and notify you if the application is incomplete or if more information is needed.

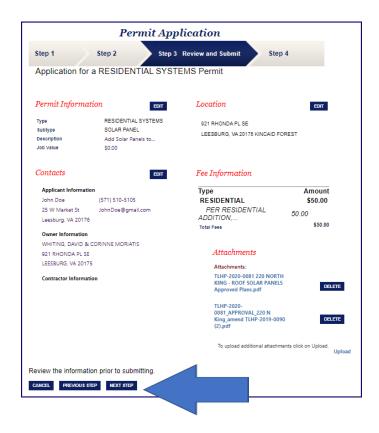


STEP 4: Checkout/Confirmation

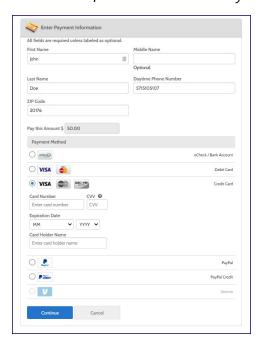
1. Payment requirement will vary by application type. If there is no payment due at the time of submission the Fee Information section will show that Total Fees are zero (\$0.00). Click **SUBMIT** to proceed.



2. If payment is due at the time of application submission the Fee Information section will show the Total Fees. Click **NEXT STEP** to view the Checkout Summary.



From the Checkout Summary, click **Pay Now** to transfer to our payment processor where you can pay the fees using a variety of payment methods. *Note that the Payment Processor charges a convenience fee which will be clearly identified before you complete the payment.*



- 3. After completing payment, a receipt will display. Click **PRINT SUMMARY** for print options.
- 4. Click **VIEW PERMIT** to view your application and obtain your permit number.



Example of a permit is shown below:



Project Application Process

The process for submitting project applications will be the same for public users (residents and homeowners) and contractors/engineers/design professionals.

 Log in to your account by selecting Public Log In if you are a homeowner or as a contractor and Contractor Log In. Enter or choose your User Name depending on your account type, enter your Password, and click LOGIN.



2. From your DASHBOARD, select **Apply for New Project** under the Projects menu.

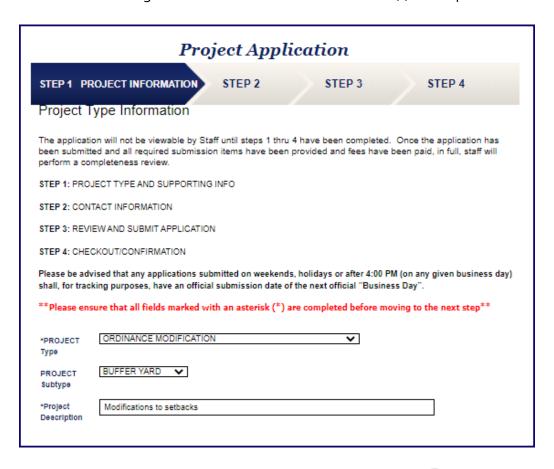


3. Read the Town certification. Choose | Agree and click **CONTINUE** to proceed. If you choose | Disagree you will be taken back to the **HOME** page.

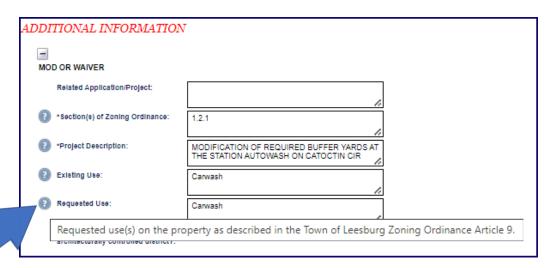


STEP 1: Project Information

1. Fill out the following fields. Fields marked with an asterisk (*) are required.



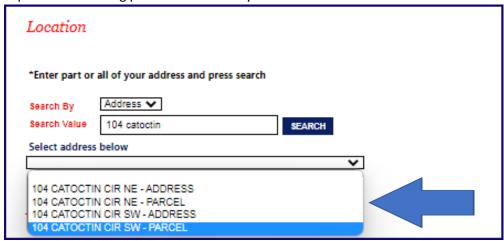
2. The following information will vary depending on permit type. indicates there is a ToolTip which provides more information for this field. Either hover over or click on this symbol to read the tip.



3. In Search By box select address or parcel and enter site address or parcel number for location and select the **SEARCH** button.



Expand the resulting picklist and choose your address from the list.



Projects must be linked to a valid Town of Leesburg parcel or address.

If your address or parcel number is not found, please make sure that you are using the correct address format. Example, directional streets please use W instead of West.

If the address does not populate and you have verified the address is within town limits, please contact the Department of Planning and Zoning.

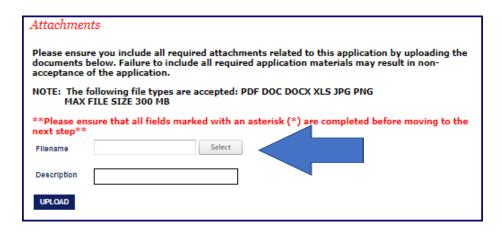
4. Once you select a result you will see the selected address in the Location as shown below:



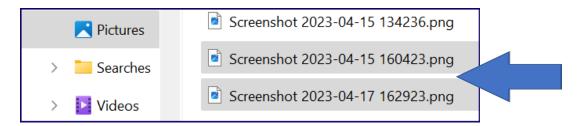
11. Upload all required documents in the **Attachments** section.

Visit <u>this web page</u> for information about what is required for submitting certain types of permits/projects. Please name your files in a way which describes the item submitted. Improperly named files may result in an incomplete application. If you need to submit additional documentation you will be notified upon review of your application by Town staff.

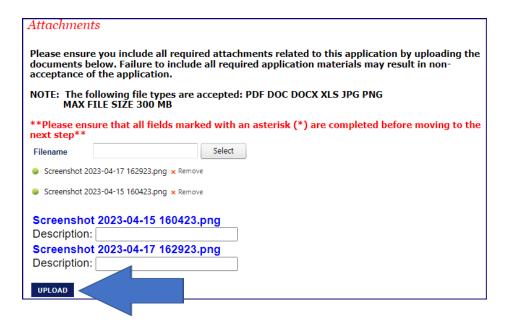
Note: The following document types are accepted: PDF, DOC, DOCX, XLS, JPG and PNG



12. Click the **Select** button to browse your files. Select one or more files.

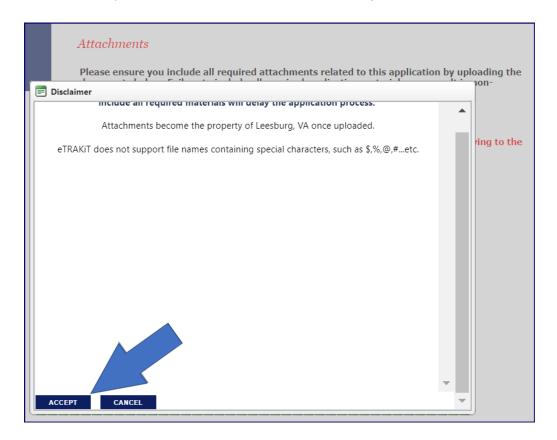


13. Click UPLOAD to attach the selected documents to the Project Application

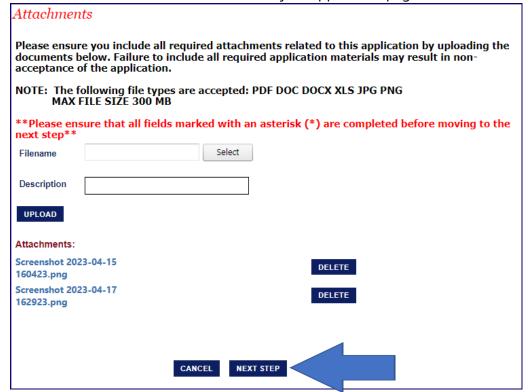


14. Read the Disclaimer and click ACCEPT.

Note: You may have to scroll down in the window to get to the ACCEPT and CANCEL buttons.



15. Click **NEXT STEP** at the bottom of the Project Application page to continue.



STEP 2: Contact Information

1. Fill out the following fields. Fields marked with an asterisk (*) are required. Click **NEXT STEP**.

Most of this information will be already completed based on your profile information. Owner information should pre-populate based on the owner of record according to the Loudoun County Commissioner of the Revenue's Office. This may not reflect recent changes made in ownership.

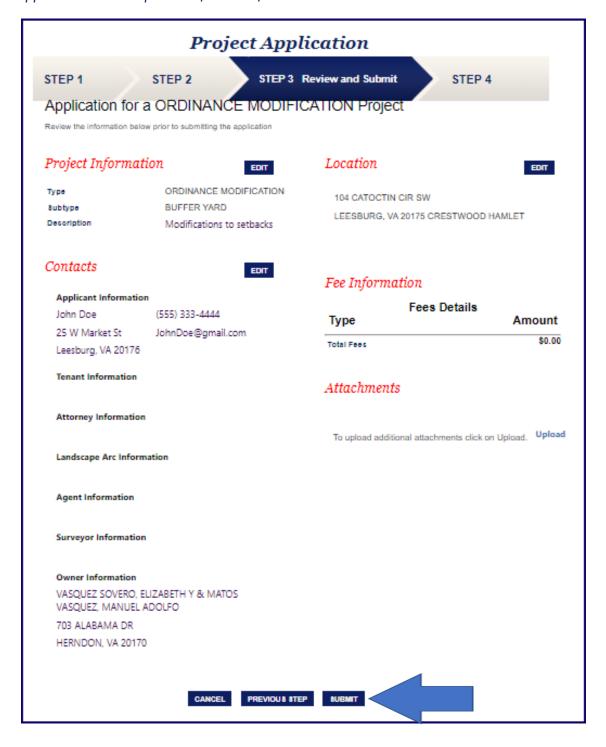
Project Application				
STEP 1	STEP 2 Contact Information	STEP 3	STEP 4	
Application for a DCSM MODIFICATION Project Applicant Information				
*Name	John Doe 25 W Market St	*Phone *Email Address	(SSS) 111-2222 JohnDoe@gmail.com	
*City *State	Leesburg	*Zip	- 20176	
Owner Informa	tion WHITE DOOR LLC	Phone		
Address City	PO BOX 182 MIDDLEBURG	Email Address		
8tate	VA	Zip	20118	
Name Address City		Phone Email Address		
State		Zip	CLEAR	
	CANCEL PRE	VIOUS STEP NEXT ST	TEP	

STEP 3: Review and Submit

1. Review Information. You will be able to review and make edits to your application if needed. When complete with any edits needed, click **SUBMIT**.

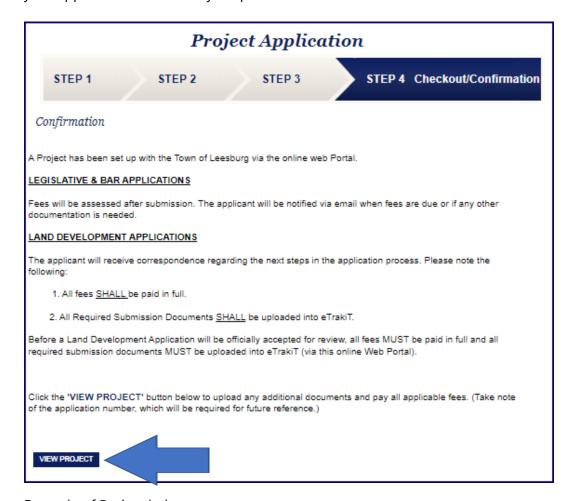
NOTES: Clicking SUBMIT only creates the application. All Fees must be paid and all supporting documents provided in order for the application to officially be accepted for review.

Upon submission of your application, Town staff will review your application and notify you if the application is incomplete or if more information is needed.

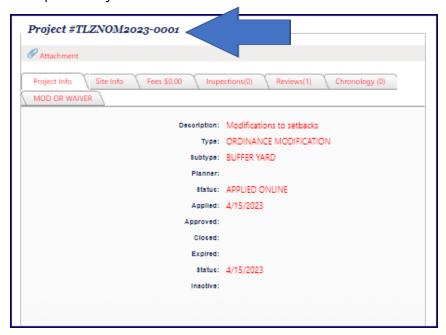


STEP 4: Checkout/Confirmation

1. Read the information displayed on the Project Confirmation page then click **VIEW PROJECT** to view your application and obtain your permit number.



Example of Project below:



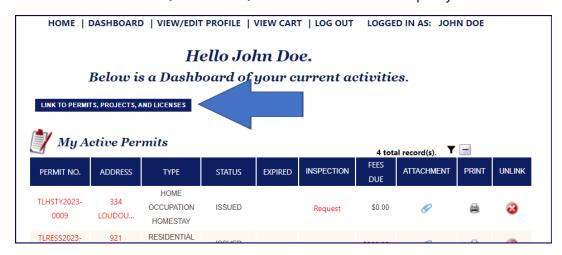
Dashboard

Your new permit and project will now be shown on the dashboard. From here you will be able to monitor overall progress, pay fees if applicable, request inspections and follow progress with reviews and inspections.

Add (Link) Existing Permits and Projects to your Dashboard

You can add other permits and projects you did not start in eTRAKiT to your dashboard by linking to them. You will need to know the permit or project # to add these.

1. Click LINK TO PERMITS, PROJECTS, AND LICENSES at the top of your Dashboard.

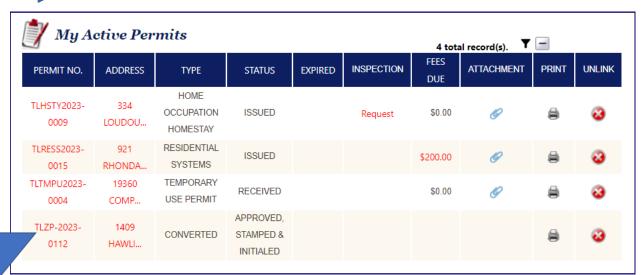


2. Choose **Permit** or **Project** and specify the number you want to link. This could be a number assigned from LMIS, our legacy system. It could also be one created in the new system by Town staff or by someone else in eTRAKIT. Click **LINK** to link the permit or project to the dashboard.

Note: The Town is not using eTRAKiT's License module so disregard this option in the "Link to a" selection box.



	Link a Record to my Account
Link to a:	Permit 🗸
Permit #:	TLZP-2023-0112
	LINK CANCEL







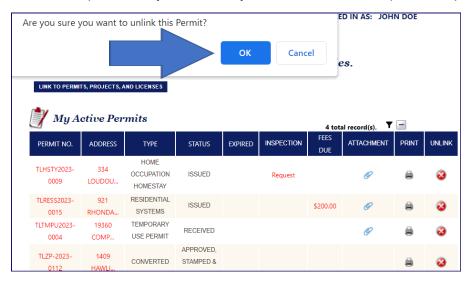
Remove (Unlink) a Permit or Project from your Dashboard

At any time, you can remove a permit or project from your dashboard by unlinking it.

1. Click on the "Red X" link application you want to remove.



2. Click **OK** to proceed if you are sure you want to unlink the permit or project. Otherwise click Cancel.



Inspections

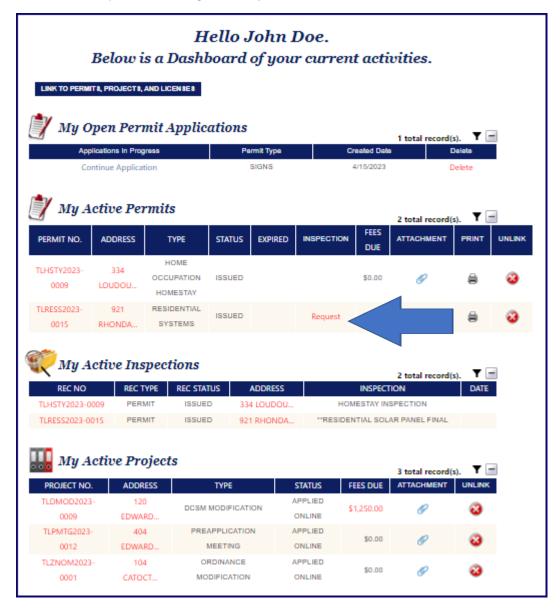
Once your permit is in an Issued status, you will be able to request inspections.

*Please note our Inspections policy: Inspections can be scheduled up to 7 days in advance from the current date. Each inspection type has a cap (max inspections per day). When the cap is reached, the day is removed from the "Requested Date" drop down menu. If the cap is reached for the entire time period, no dates would be displayed. In this situation please check back as availability can open as the next day becomes available. If there is a continued unavailability, please contact the Building Department at 800-555-1212.

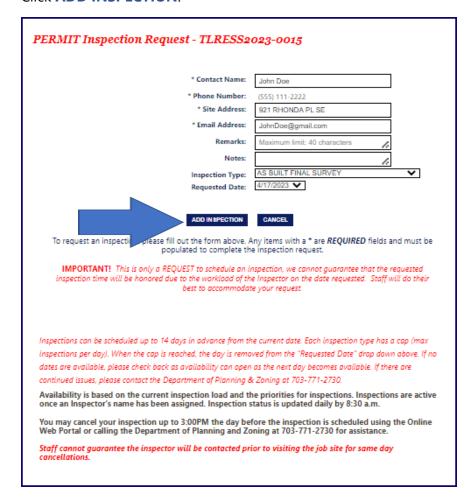
If the preferred dated is not available and the inspection request is time sensitive, you may check with the inspectors for an alternate available date. Availability is based on the current inspection load and the priorities for inspections.

Request an Inspection

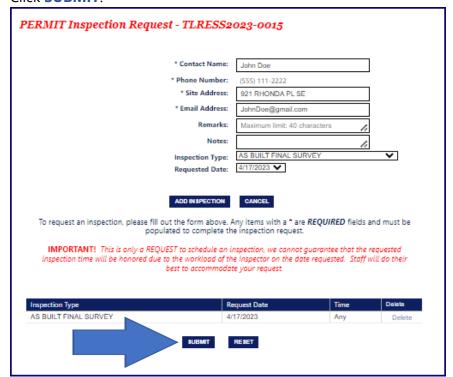
1. Click on the Request link to begin the request.



2. Fill out the following fields. Fields marked with asterisk (*) are required. Click **ADD INSPECTION**.

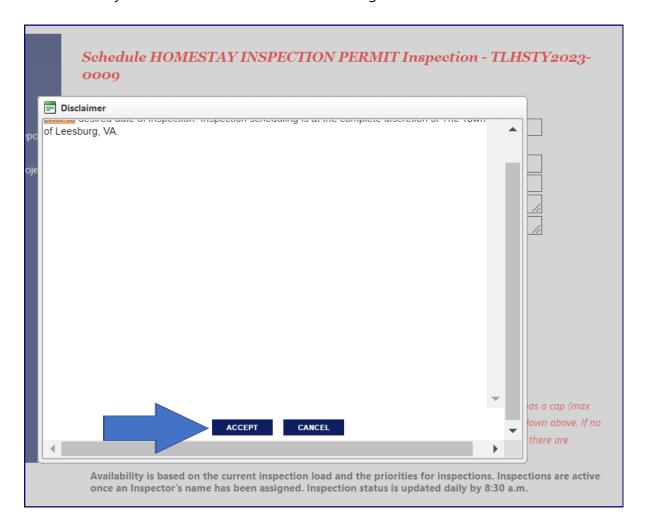


3. Click SUBMIT.

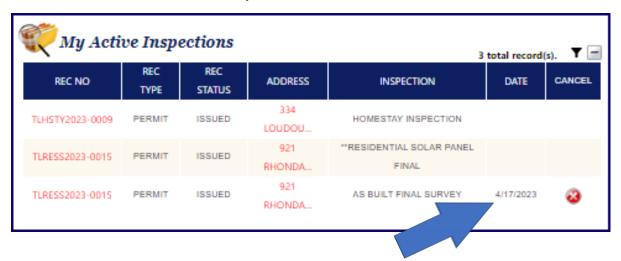


4. Review Disclaimer and click ACCEPT.

Note: You may have to scroll down in the window to get to the ACCEPT and CANCEL buttons.



5. You will now see the chosen date in your dashboard.



Cancel an Inspection

You may cancel your inspection up to **3:00 PM** the day before the inspection is scheduled.

*We cannot guarantee the inspector will be contacted prior to visiting the job site for same day cancelations

1. Click on the "Red X" link to begin the request. Click **OK** to proceed if you are sure you want to unscheduled the inspection.

