

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

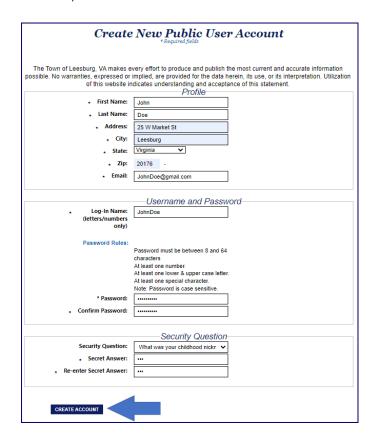
Public accounts are intended for homeowners or contractors as well as the general public.

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.



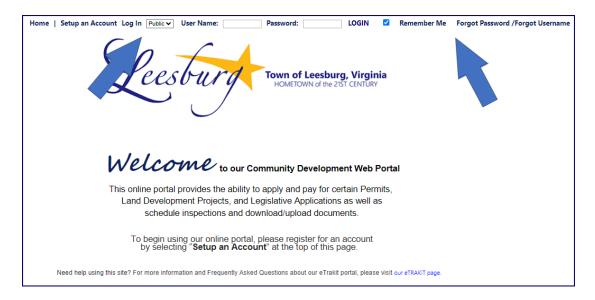
As you begin to create applications on the eTRAKiT Portal or link your new account to existing permits and projects, all linked permits will appear on the dashboard. From this dashboard you can schedule and manage inspections, pay fees, or review comments and notes from staff.



Login to an Existing Account

1. At the top of the Leesburg eTRAKiT page enter the **User Name** and **Password** you specified when setting up your account and click **LOGIN**. Note that the box next to **Log In** should contain **Public**.

If you check the **Remember Me** box prior to clicking **LOGIN**, your **User Name** will be prepopulated when you return to the eTRAKiT page using the same browser on the same computer. This option also requires the use of browser cookies, so will not work if you do not allow cookies to be saved or browser cookies are cleared.



2. If you have forgotten your Password, click Forgot Password, then click the PUBLIC REGISTERED button.



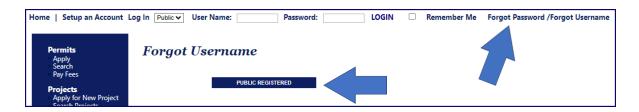
3. Specify your User Name and click RESET PASSWORD to send an email to your registered email that will allow you to reset your password. **Note:** If the User Name specified is not associated with an eTRAKiT account, an error message will display: Unable to locate credentials



4. An email will be sent to the registered email address. Click the <u>Reset Password</u> link in the email, answer the <u>Security Question</u> and specify your <u>New Password</u>. If you do not remember your <u>Secret Answer</u>, the Town can send you an email that will <u>let</u> you reset your <u>Security Question</u>. Please contact the <u>Department of Community Development</u> <u>if you need this</u>.
<u>Note</u>: Check your spam or junk folder if you do not receive the email.

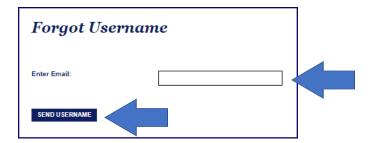
| t Log In Public ✓ User Name: | Password: LOGIN LOGIN Remember Me |
|--|--|
| Reset Password For security purposes, you | are required to change your account information. |
| Security Question | What is the middle name of your oldest child? |
| Secret Answer | |
| Password Rules: | Password must be 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. |
| New Password | |
| Confirm Password | |
| | |
| | |
| SUBMIT | |

5. If you have forgotten your **User Name**, click Forgot Username, then click the PUBLIC REGISTERED button.



6. Specify **your Email** and click SEND USERNAME to send an email that will allow you to reset your password. **Note:** If the email specified is not associated with an eTRAKIT account, an error message will display: Unable to locate email

Note: Check your spam or junk folder if you do not receive the email.



Permit Application Process

1. Log in to your account by selecting **Public** Log In. Enter your User Name and 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.

Note: As you process through the application, your progress will save. If you exit prior to completing application, it will appear as an Open Permit on your dashboard. From there you can Continue this Application or Delete it.

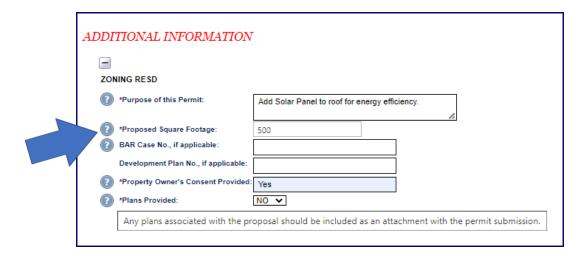


STEP 1: Permit Information

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



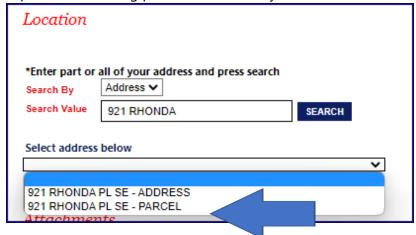
2. The following information will vary depending on permit type. (2) indicates there is a ToolTip which provides more information for this field. Either hover over or click on this symbol to read the tip.



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**.



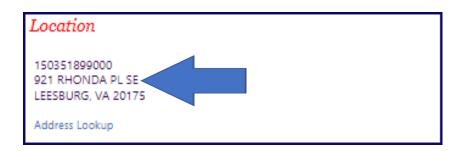
4. Expand the resulting picklist and choose your address from the list.



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 <u>Department of Community Development</u>.

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.

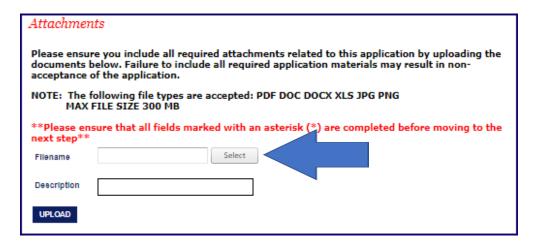


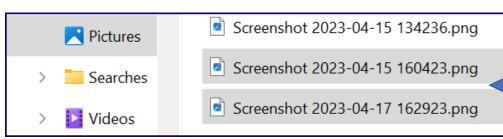
6. Upload all required documents in the **Attachments** section.

Visit https://www.leesburgva.gov/departments/community-development/applications-and-checklists/engineering 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.

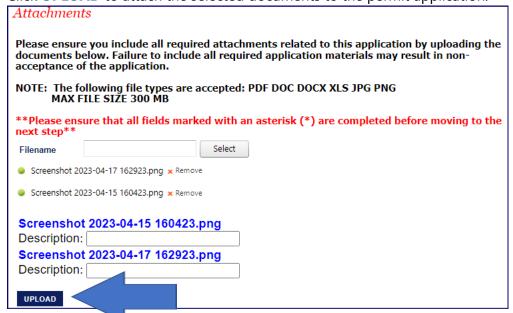
Note: The following document types are accepted: PDF, DOC, DOCX, XLS, JPG and PNG

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



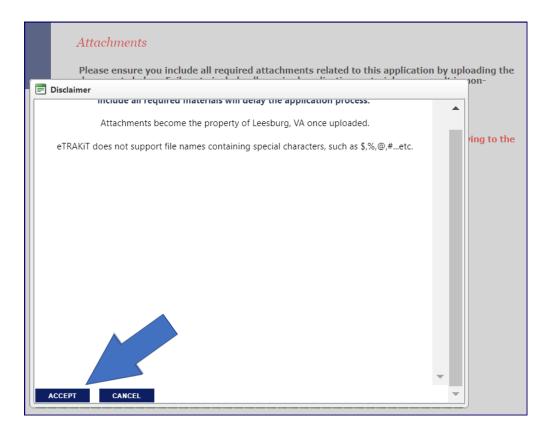


8. Click **UPLOAD** to attach the selected documents to the permit application.

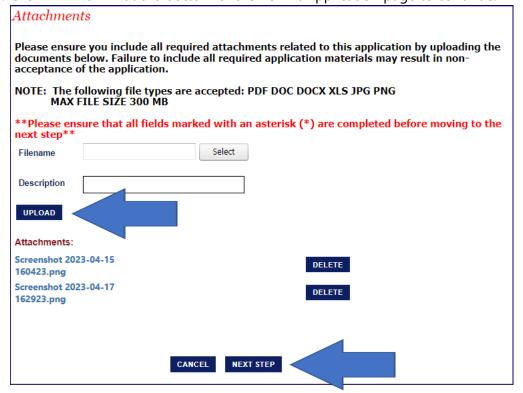


9. Read the Disclaimer and click ACCEPT.

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.



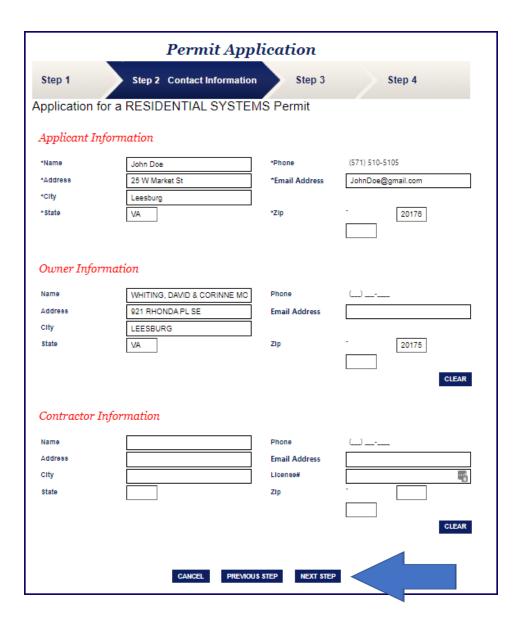
STEP 2: Contact Information

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

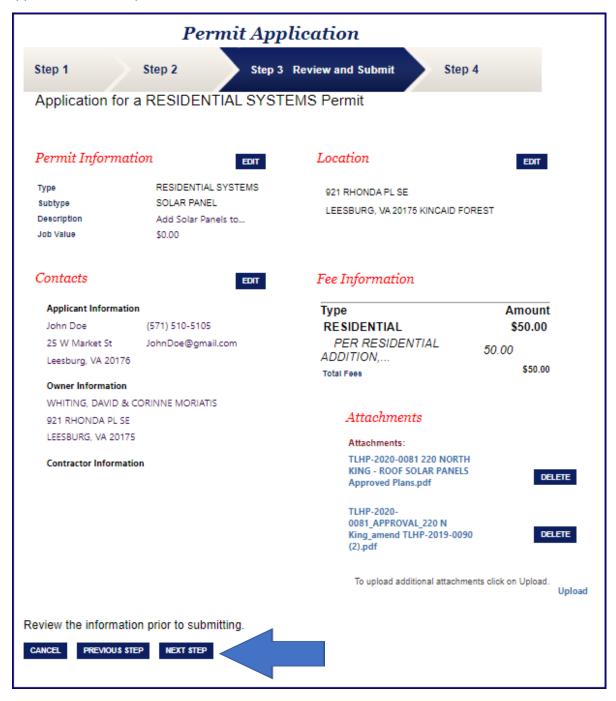
County Commissioner of the Revenue's Office. This may not reflect recent changes made in ownership.



STEP 3: Review and Submit

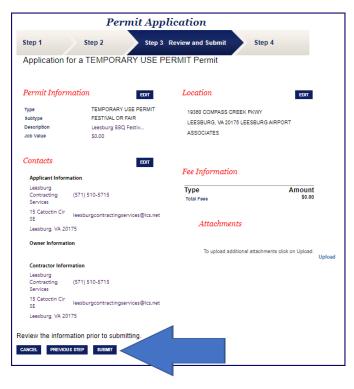
1. Review Information. You will be able to review and make edits to your application if needed. When complete with any edits needed, click **NEXT STEP** (if no fees) or **SUBMIT** (if fees need to be paid).

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.

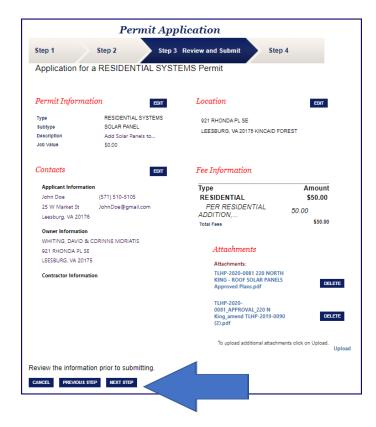


STEP 4: Checkout/Confirmation

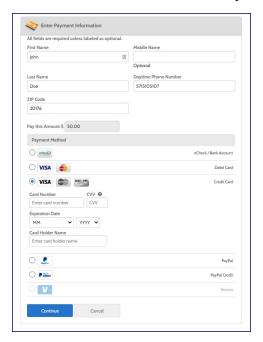
1. Payment requirement will vary by application type. If there is no payment due at the time of submission the Fee Information section will show that Total Fees are zero (\$0.00). Click **SUBMIT** to proceed.



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

1. Log in to your account by selecting **Public** Log In. Enter your User Name and your Password, and click **LOGIN**.



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



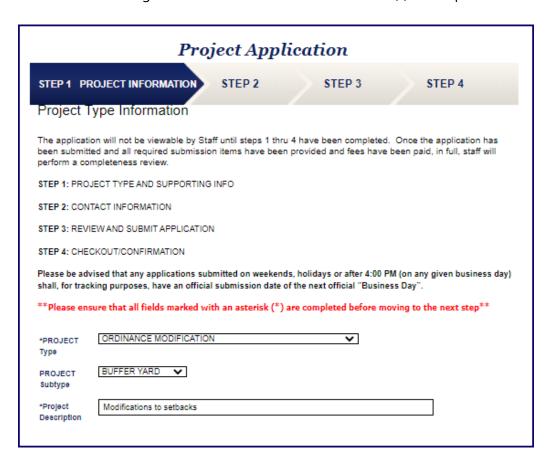
3. Read the Town certification. Choose I Agree and click **CONTINUE** to proceed. If you choose I Disagree you will be taken back to the Home page.

Note: As you process through the application, your progress will save. If you exit prior to completing application, it will appear as an Open Project on your dashboard. From there you can Continue this Application or Delete it.

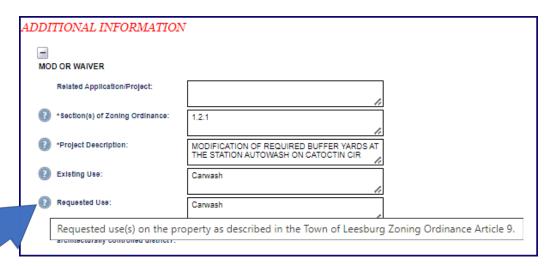


STEP 1: Project Information

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



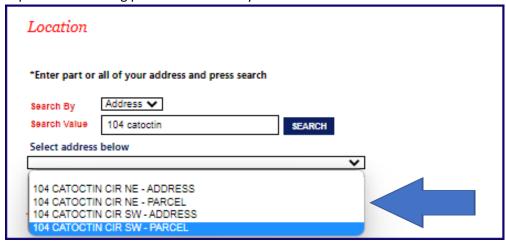
2. The following information will vary depending on permit type. indicates there is a ToolTip which provides more information for this field. Either hover over or click on this symbol to read the tip.



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.

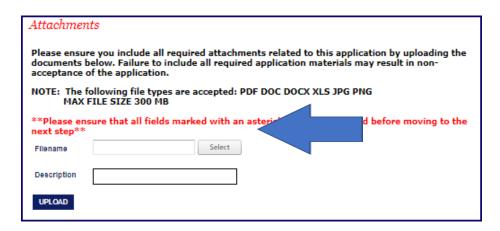
4. Once you select a result you will see the selected address in the Location as shown below:



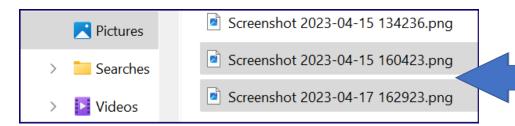
11. Upload all required documents in the **Attachments** section.

Visit https://www.leesburgva.gov/departments/community-development/applications-and-checklists/engineering 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.

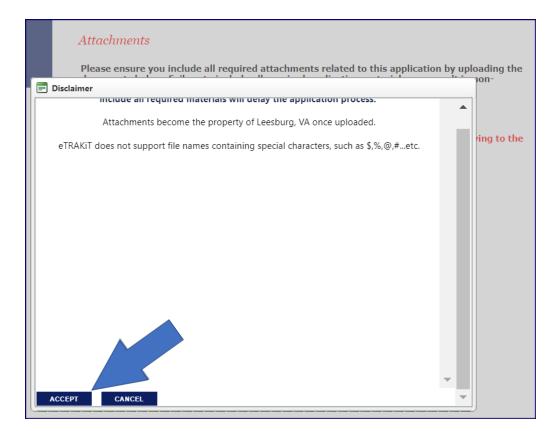


13. Click UPLOAD to attach the selected documents to the Project Application

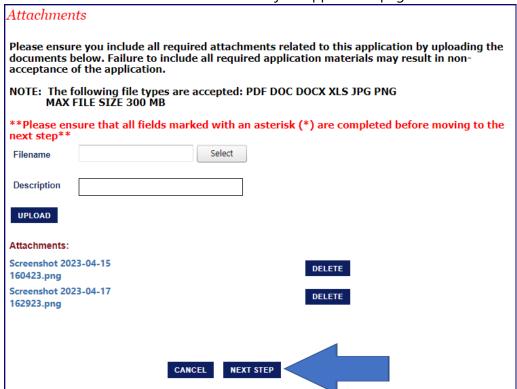


14. Read the Disclaimer and click ACCEPT.

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.

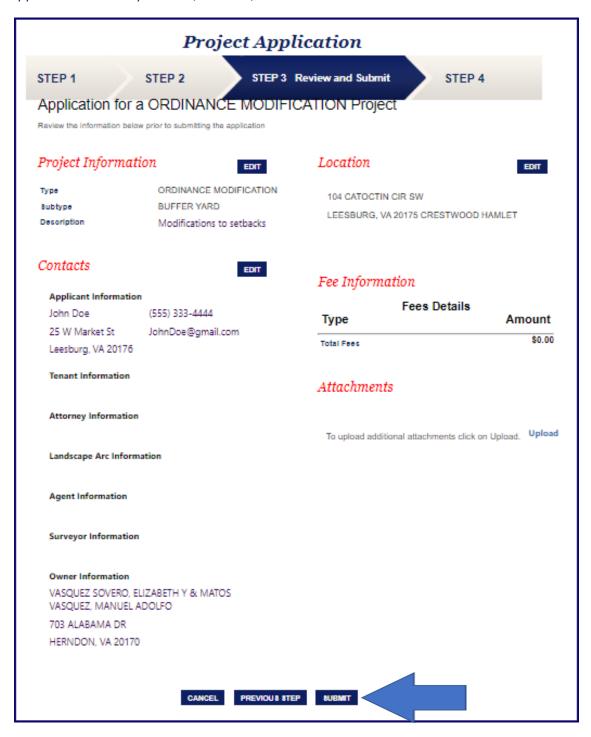
| Project Application | | | | |
|---------------------------|----------------------------|------------------------|-------------------------------------|--|
| STEP 1 Application for | STEP 2 Contact Information | STEP 3 Project | STEP 4 | |
| Applicant Information | | | | |
| *Name | John Doe 25 W Market St | *Phone *Email Address | (555) 111-2222 JohnDoe@gmail.com | |
| *City | Leesburg | *ZIp | | |
| - state | VA | -2.ip | 20176 | |
| Owner Inform Name Address | WHITE DOOR LLC PO BOX 182 | Phone Email Address | <u></u> | |
| City State | MIDDLEBURG 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**.

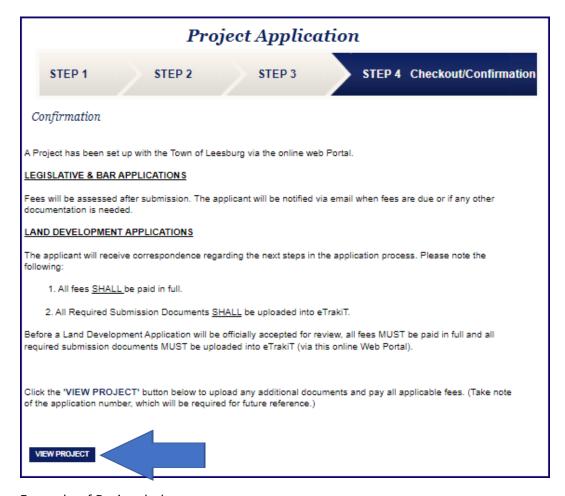
NOTES: Clicking SUBMIT only creates the application. All Fees must be paid and all supporting documents provided in order for the application to officially be accepted for review.

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.

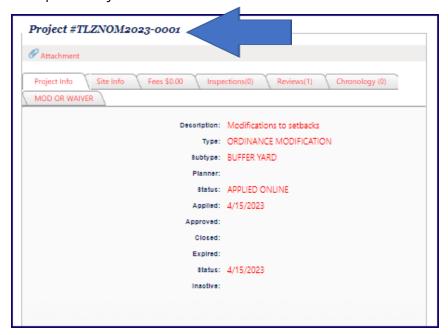


STEP 4: Checkout/Confirmation

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

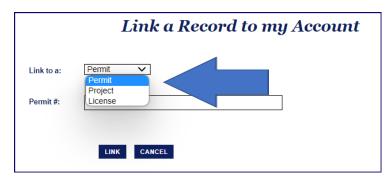
You can add other active permits and projects you did not start in eTRAKiT to your dashboard by linking to them. You will need to know the permit or project # to add these.

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

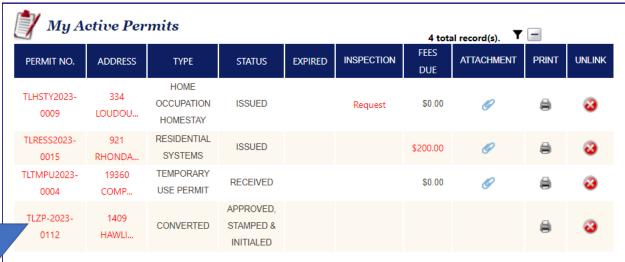


2. Choose **Permit** or **Project** and specify the number you want to link. This could be a number assigned from LMIS, our legacy system. It could also be one created in the new system by Town staff or by someone else in eTRAKIT. Click **LINK** to link the permit or project to the dashboard.

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











Note: Once a permit is finaled or a project is closed, you will not be able to link it to your dashboard. If it was already linked to your dashboard, it will go away.

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

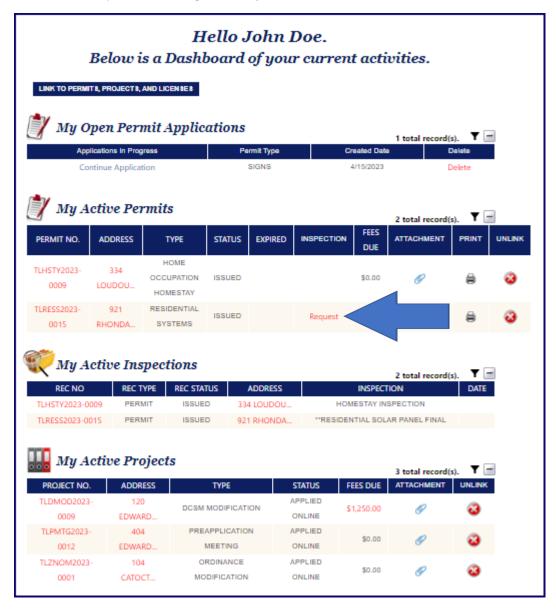
Once your permit is in an Issued status, you will be able to request inspections.

*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 <u>Department of Community Development</u>.

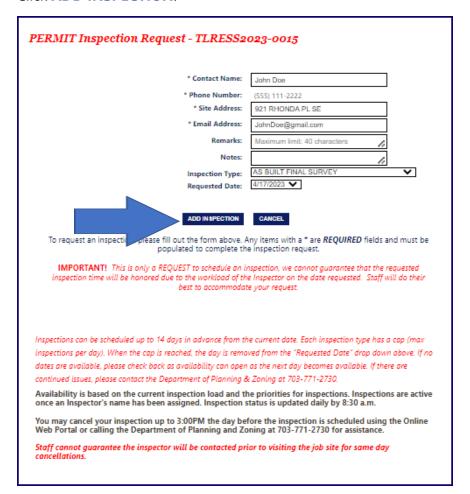
If the preferred dated is not available and the inspection request is time sensitive, you may check with the inspectors for an alternate available date. Availability is based on the current inspection load and the priorities for inspections.

Request an Inspection

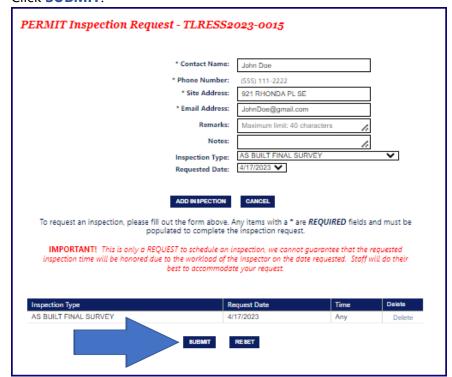
1. Click on the Request link to begin the request.



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

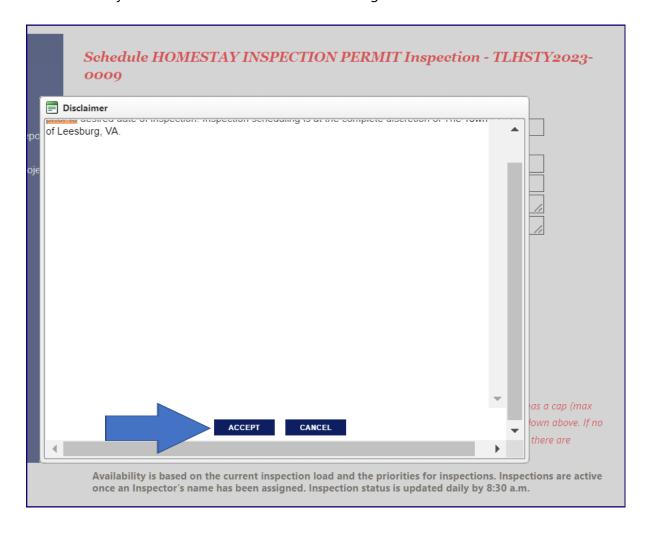


3. Click SUBMIT.

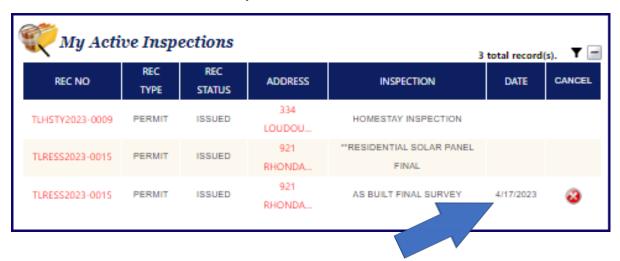


4. Review Disclaimer and click ACCEPT.

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.

