Creating A Mechanical Permit Application

Abstract
This document will cover the procedure for creating an application for a Mechanical Permit in ACA (https://eportal.cityofgalveston.org)

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Summary:
Creating a Mechanical Permit Application through our EPortal website is a fairly simple process that can be completed with just a few clicks. This document aims to teach you, the user, how to successfully navigate your way through submitting your application.

Procedure:
To begin the procedure, open Internet Explorer and navigate to https://eportal.cityofgalveston.org:

We will start with registering a new user. If you already have an account on our EPortal website, you can skip this step and proceed to Page 7

Registering as a New User –
If you are new to using our E-Permitting system, you will need to register a new account using the steps outlined below:

1) Click the Register For An Account link at the top-right corner of the website:
2) Review the Disclaimer and check the box below it. Afterwards, click Continue Registration to proceed:

![Disclaimer Image]

3) Select Mechanical for the License Type and enter your city Contractor Number in the second box. Click Find License when you are done:

![License Information Image]
4) On the next screen, click the Contractor Number to associate it to your account:

   ![License Information](image1)

   4 results found matching lookup criteria
   Search a license number to continue.
   Showing 1-1 of 1
   Contractor Registration Number | Type   | Name
   --------------------------------|--------|--------
   CONT2011-9998                  | Mechanical | ACA Test

   [Search Again]

5) Click OK in the confirmation box that pops up:

   ![Message from webpage](image2)
   Do you want to associate this license to your account?
   [OK] [Cancel]

6) Click Continue Registration on the next screen to proceed:

   ![Confirm License](image3)
   Your search returned the following licensed professionals. If the information is incorrect, click the “Remove” button and if necessary search again below. If all information is correct choose either “Continue Registration” or “Add to My Licenses” to proceed.
   License Look-up Results
   License
   OFirst OLast | TX Owner/Builder | TX - CONT2003-6
   Address
   Galveston TX 77570
   Tel: 555-5555
   Fax:

   Once you locate the correct license, click the “Add to My Licenses” button.
   Once you have added all licenses to your list, click the “Continue Registration” button. You will have another chance to review all your licenses at the end of the registration process.

   [Continue Registration] [Add to My Licenses]
7) On the next screen, you will need to enter in your account details as follows:
   a. **User Name** – This will be the name you login with. Must be unique.
   b. **E-Mail** – This is the e-mail address any notices will be sent to. Must be unique.
   c. **Password** – Must be 8-20 characters long.
   d. **Type Password Again** – To prevent typo errors, please type the password again.
   e. **Select A Security Question** – Will be asked if you need to reset your password.
   f. **Answer** – Answer to the previously selected Security Question.

### Account Registration Step 2: Enter Account Information

#### Login Information

- **User Name:**
  - johndoe

- **E-mail Address:**
  - john.doe@e-mail.com

- **Password:**
  - *******

- **Type Password Again:**
  - *******

- **Select a Security Question:**
  - What is the name of your first pet?

- **Answer:**
  - Fido

- **Answer:**
  - X
8) The bottom portion of the screen is for your contact information. The following fields are required -
   a. **First** – Your first name
   b. **Last** – Your last name
   c. **Name of Business** – If you are an Owner, just enter ‘Owner’. Otherwise, enter the name of your business
   d. **Address Line 1** – Your mailing address
   e. **City** – Mailing address city
   f. **State** – Mailing address state
   g. **Zip** – Mailing address zip code. Must be in Zip+4 format. If you do not know the additional 4 digits, use ‘9999’
   h. **Cell Phone** – Cell phone number you can be contacted at. If you do not have a cell phone, enter another number you can be contacted at.
   i. **Preferred Method of Contact** – Select one

After you are finished filling out the information, click Continue Registration to proceed.
9) At this point you are completed with the registration process.

Your account has been successfully created.
Congratulations. You have successfully created an account with the Agency. An e-mail has been sent to you with instructions for verifying your information. If you have registered as a licensed professional, additional activation by the Agency may be required. If activation is necessary, another e-mail will be sent notifying you when activation is complete.

Account Information

User Name: testuser5
John Doe
Owner
823 25th
alexander dav@cityofgalveston.org
Preferred Method of Contact: E-mail

Home Phone:
Work Phone: 555-555-5555
Mobile Phone:
Fax:
To begin, you will first need to make sure that you have all of the required documents available for uploading. If you already have your documents on a thumbdrive, you can skip the following steps. However, if you only have physical copies of the documents, please follow the steps below to scan them. Refer to the following table to determine which documents are required for your permit:

| Heat Load Calculations | New installations or complete replacements of air handlers and condensers |

1) To start scanning, first place the Plans into the scanner and press the Scan button:
2) After the scan is complete, you may see the following window appear on the screen. Click OK before proceeding to the next document:
Creating a Permit Application -

1) **After creating an account and logging in**, you can start the process of creating an Mechanical Permit application by either clicking the Building tab or by clicking “Create an application” under the Building section of the website:
2) You will first be brought to a Disclaimer page. After reading the disclaimer, please check the box below and click Continue Application to proceed:

![Disclaimer Image]

Online Application

Welcome to City’s Online Permitting System. Using this system you can submit and update information, pay fees, schedule inspections, track the status of your application, and print your final record all from the convenience of your home or office, 24 hours a day.

Please "Allow Pop-ups from This Site" before proceeding. You must accept the General Disclaimer below before beginning your application.

Contact Us

If you find incorrect information or seek permissions that fall outside of the guidelines above, you can contact the Department of Planning and Community Development at (409) 797-3660 or planningcounter@cityofgalveston.org. The City of Galveston always appreciates a note telling us of new links, information, how we are doing etc. Thank you for utilizing the City of Galveston E permitting website.

I have read and accepted the above terms.

Continue Application »

3) The next screen will ask which license you wish to use for this application. You MUST have a registered mechanical license with the city before you can apply for a Mechanical Permit:

![License Selection Image]

Select a License

Select a license for this record from the list below. The available permit record type(s) is determined by the type of the license associated with your account.

*If you associated one or more licenses to your registered account and it does not appear in the dropdown, please contact a permit clerk 409-797-3633 to update your information. Thank you.

---Select---
- Electrical CONT2011-9999
- Plumbing CONT2011-9998
- Mechanical CONT2011-9998
- Door/Window CONT2003-96
- None Applicable

Home Phone: 555-555-5555
Mobile Phone: 
Fax: 
Mechanical
CONT2011-9998

Continue Application »
4) On the next screen, you will be asked what type of permit you wish to create. Select the one labelled “Mechanical Permit” and click Continue Application:

5) The next screen will confirm your selection for the Contractor number. Nothing to be done on this page. Just click Continue Application:
6) On the next screen you will be asked for contact information. If you wish, you can check ‘Auto-Fill with’ to have the website use the information you registered with to automatically fill in the requested fields. Otherwise, enter the information requested (fields marked with a red * are required). Once finished, click Continue Application to proceed:

![Application Form]

- **Name of Business:** ACA TEST
- **Country:** [Select]
- **Address Line 1:** 123 Over There
- **City:** Galveston
- **State:** TX
- **Zip:** 77551-9999
- **Home Phone:** 555-555-5555
- **Work Phone:** 555-555-5555
- **Mobile Phone:**
- **Fax:**
- **E-mail:** test@cityofgalveston.org

[Continue Application]
7) The next section will ask information about the address the work will be performed at. You do not have to fill out all of the information. Instead, this page acts like a search form. You will need to enter some basic criteria, and then select from a list of addresses that meet that criteria:

a) Enter search criteria -

```
Step 2 : APO > APO

* indicates a required field.

Address

This program DOES NOT use street names such as Church, Postoffice, Market, Mechanic, etc. These streets are listed by their original name such as Ave C, Ave D, Ave E, Ave F, etc.

* Street No.: 999 * Street Name: * Street Type: Select

City: State: Zip:

Search Clear
```

b) If there is only one address that meets that criteria, it will automatically select it and fill out the rest of the fields. If not, you will need to select the appropriate one from a list –

```
Step 2 : APO > APO

* indicates a required field.

Address

This program DOES NOT use street names such as Church, Postoffice, Market, Mechanic, etc. These streets are listed by their original name such as Ave C, Ave D, Ave E, Ave F, etc.

* Street No.: 2 * Street Name: * Street Type: Select

City: State: Zip:

Search Clear
```

3 search results returned matching your address
Click any of the results below to view more details.
Showing 1-3 of 3

```
<table>
<thead>
<tr>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>Parcel</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>223 32nd Street, City Hall</td>
<td>Galveston</td>
<td>TX</td>
<td>77550</td>
<td>3505-0205-0060-000</td>
<td>CITY OF GALVESTON</td>
</tr>
<tr>
<td>223 32nd Street, Park Lot</td>
<td>Galveston</td>
<td>TX</td>
<td>77550</td>
<td>3505-0206-0065-000</td>
<td>CITY OF GALVESTON TRUSTEE</td>
</tr>
<tr>
<td>223 32nd Street, Galveston</td>
<td>TX</td>
<td>77550</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

After selecting the address, the information for Parcel and Owner will automatically fill out from our records. If any of this information is incorrect, or you cannot find the address you are looking for, please contact our Building department for assistance. Click Continue Application to proceed.
8) The next screen will be the last screen you are required to enter information on. This screen will ask you for all of the details concerning the permit, such as a Description of Work and Work Type. You will also be required to upload any relevant documents on this page. Again, any fields marked with a red * are required.

a) The first section is for a detailed description of the work being done. This section is optional:

b) The next section, Job Information, covers the following information:
   a. **Hurricane Ike Related**: Answer Yes to this if your work is part of reconstruction from Hurricane Ike
   b. **Occupancy Type**: Commercial or Residential
   c. **Work Type**: New or Retrofit
   d. **Complete System**: If you are performing a new installation or complete replacement of the air handler and condenser, select Yes.
c) The next section is information regarding what items you are installing. Follow the instructions below to add each type of item (repeat as needed):
   a. Click Add A Row:

   ![Add A Row Button]

   b. Select the installation type, enter a size (in tons, if applicable) and quantity, and specify whether it is a new installation or a replacement. Click Submit when you are done:

   ![Select Installation Type]

   c. Click Submit:

   ![Select Installation Type]

   d. Repeat process for each Installation Type you are installing.

d) The last section is used to attach required documents. The documents required for an Electrical Permit are:
   a. **Heat Load Calculations** (if installing or replacing a complete system)
To start uploading documents, be sure to have either scanned them using the procedures outlined earlier in the document, or have them available on a USB thumbdrive. After that, follow the steps listed below:

a. Click the Browse button

b. Click the Select Files button

c. Select the document(s) you wish to upload. If there are more than one, you can select multiple files by holding CTRL on the keyboard while clicking the files. When you are done, click Open to begin the upload:
d. Once all of the files show Finished, click the Finish button to proceed:
e. Finally, you will be asked what type of document it is, as well as a description. As you enter these, click Save to save the changes. Once you are finished with all of them, click Continue Application to proceed:
9) Once all of the information is entered, you will be taken to a Review screen where you can review all of the information you entered and edit it if needed:

![Residential Building Permit](image)

**Step 4 : Review**

Please review all information below. Click the "Edit" buttons to make changes to sections or "Continue Application" to move on.

**Residential Building Permit**

**Licensed Professional**

- **First Name**
- **Last Name**
- **Home Phone: 555-5555**
- **Owner/Builder Owner/Builder - CONT2003-6**
- **Address**
  - Galveston, 77550

**Agent for Applicant**

- **ACA Test**
- **ACA TEST**
- **Home Phone: 555-555-5555**
- **Work Phone: 555-555-5555**
- **123 Over There**
- **alexander.dav@cityofgalveston.org**

If all of the information is correct, click Continue Application to proceed.

10) The next page is a review of the fees. After looking these over, click Continue Application to proceed to the payment screen:

![Step 5 : Pay Fees](image)

**Step 5 : Pay Fees**

Listed below are preliminary fees based upon the information you’ve entered. Some fees are based on the quantity of work items installed or repaired. Enter quantities where applicable. The following screen will display your total fees.

**Please note: There is a $20 minimum for an Electrical Permit and $25 set fee for Contractor Renewal.**

**Application Fees**

<table>
<thead>
<tr>
<th>Fees</th>
<th>Qty.</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ceiling Fans</td>
<td>1</td>
<td>$3.00</td>
</tr>
<tr>
<td>Minimum Fee</td>
<td>1</td>
<td>$17.00</td>
</tr>
</tbody>
</table>

**TOTAL FEES**

Note: This does not include additional inspection fees which may be assessed later.

$20.00

[Continue Application]
The Payment screen is where you will enter your credit card information in order to make a payment. For the Billing Information, if the information you used to register for EPortal is the same as your credit card billing information, you can check the box next to Billing Information in order to auto-fill the information. Once all of the information is entered, click Submit Payment to submit your payment.
12) The last page is Record Issuance. You can print your permit now by clicking ‘Print/View Record’. **Write down the Record Number on this page for your records.**

13) Logout of ACA and close the browser:
Finding and Printing A Permit That Was Previously Completed

Follow the steps below to locate and print a permit you have previously completed:

1) After logging into our EPortal website, click Search Applications under Building:

<table>
<thead>
<tr>
<th>General Information</th>
<th>Building</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lookup Property Information</td>
<td>Create an Application</td>
</tr>
<tr>
<td>Search for a Licensee</td>
<td>Search Applications</td>
</tr>
<tr>
<td></td>
<td>Schedule an Inspection</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Request</th>
<th>Enforcement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create an Application</td>
<td>Create an Application</td>
</tr>
<tr>
<td>Search Applications</td>
<td>Search Applications</td>
</tr>
</tbody>
</table>

Plumbing
2) Scroll down the webpage a bit until you see the General Search area, and enter the permit number you were assigned in the Record Number box. Hit Enter or click Search to continue:

3) Below the Search button, you will see the results of your search. Click the Record Number of your permit to open the Record Details:
4) On the Record Details page, you will see a Print/View Record button. Click that button to open your permit in a new window:

Record ELE2011-00345:
Electrical Permit

Work Location

5623 Menard Ave
Galveston TX 77551

Record Details

Detail Description: General Wiring

Owner:
TOMAS AGUILAR
5623 MENARD AVENUE
GALVESTON TX 77551-5060

Trade permit/Electrical Permit

Print/View Record

5) Once the new window has loaded, you can hit the Printer icon on the screen to print the permit:

Legal Description: ABST 628 PAGE91 LOT 13 BLK 3 STANDARD DREDGING RESUB

Owner
Name: Tomas Aguilar
Phone:

Contractor E & M Electric
State Lic.: EC21540
Local Lic.: CONT2002-200

Project Description:
General Wiring

I hereby certify that I have read and signed this application and know the same to be true and correct. This statement will be combined with whether specified here in or not. The granting of a permit does