# How Applicants May Add Contacts to Projects

In the Online Permit Center, multiple users have the ability to access projects using Portal accounts. For the most part, the high-level of access is the same no matter what 'contact type' or role an entity plays. The one exception to this is the ability to Add or Remove Contacts on a project.

Applicant – the user(s) listed as Applicant contact type. This is visible from the Application Status Page (navigate there from My Items) under the Contacts section. The Applicant has the ability to add or remove contacts on a project.

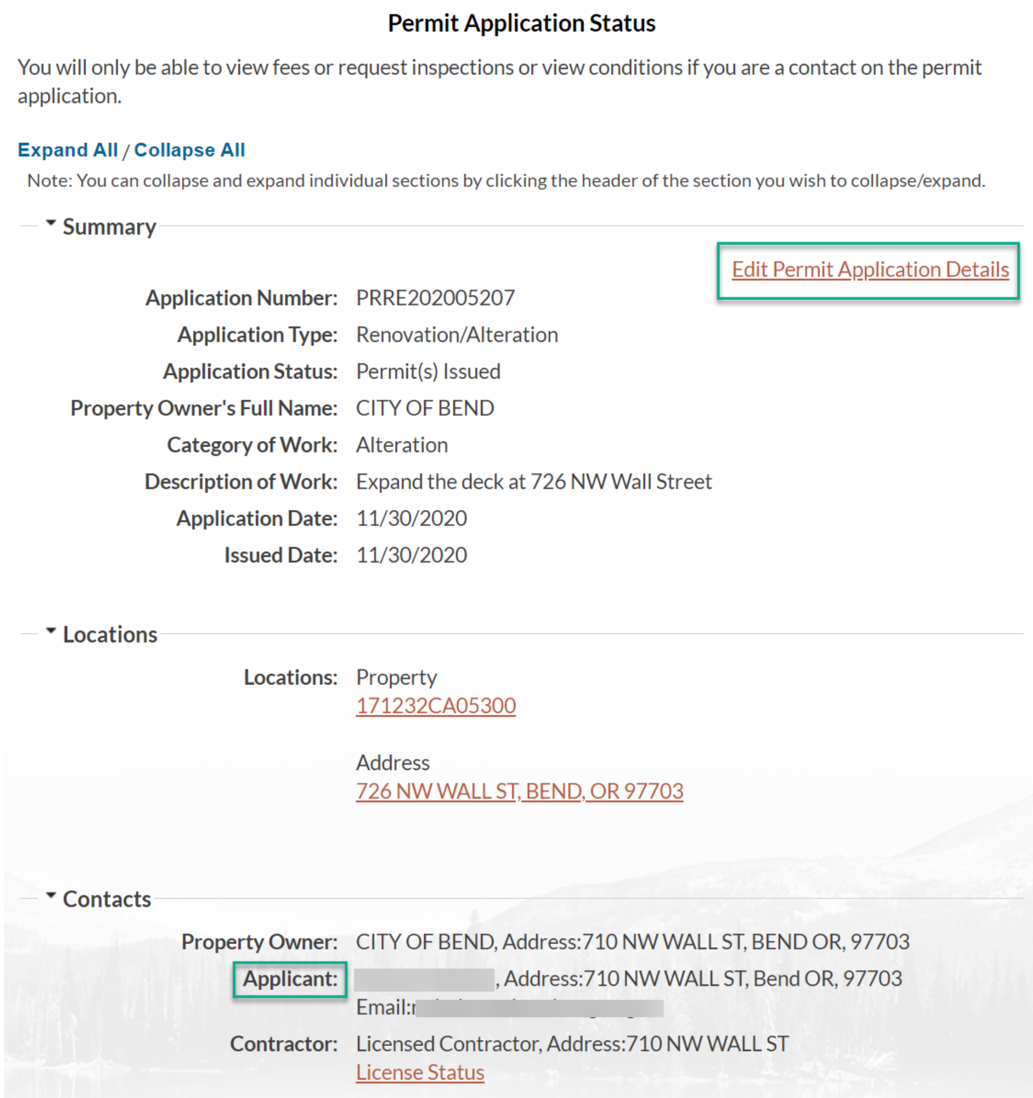
All contacts have the ability to see application details, view items in the Documents & Images section, view and pay fees, request inspections, and upload documents. All contacts DO NOT have the ability to add or remove contacts on a project.

Applicants who submit new applications via the Online Permit Center Portal can expect to have full Applicant access from the beginning.

***Important note for legacy projects brought over in data migration:** At launch, the syncing script attaches new Portal registrations to existing legacy projects based on a matching email. When new Portal accounts are added, they pull in as an 'Interested Party' contact type. This contact type is not able to add or remove contacts.

Best courses of action for remedying Applicant contact-type for Legacy projects:

1. Ask City staff to change your Portal account-linked 'Interested Party' contact type to an 'Applicant' contact type to allow you to add business contacts listed in the Address Book.
    a. This will be the best option for projects that are still in early stages where additional changes to project contacts is expected.
    b. Email permitcenter@bendoregon.gov with Change to Applicant Contact Type in the subject line.
2. Ask City staff to add the necessary contacts for you.
    a. This will always be necessary for individual Portal accounts that are not a business listed in the Address Book.
    b. This may also be a suitable option for projects that are in final stages and no further changes to project contacts are expected.
    c. Email permitcenter@bendoregon.gov with Add Individual Contacts to Projects in the subject line.



**Permit Application Status**

You will only be able to view fees or request inspections or view conditions if you are a contact on the permit application.

Expand All / Collapse All

Note: You can collapse and expand individual sections by clicking the header of the section you wish to collapse/expand.

Summary

Edit Permit Application Details

| | |
|---|---|
| Application Number: | PRRE202005207 |
| Application Type: | Renovation/Alteration |
| Application Status: | Permit(s) Issued |
| Property Owner's Full Name: | CITY OF BEND |
| Category of Work: | Alteration |
| Description of Work: | Expand the deck at 726 NW Wall Street |
| Application Date: | 11/30/2020 |
| Issued Date: | 11/30/2020 |

Locations

| | |
|---|---|
| Locations: | Property<br>171232CA05300<br><br>Address<br>726 NW WALL ST, BEND, OR 97703 |

Contacts

| | |
|---|---|
| Property Owner: | CITY OF BEND, Address:710 NW WALL ST, BEND OR, 97703 |
| Applicant: | [redacted], Address:710 NW WALL ST, Bend OR, 97703<br>Email:[redacted] |
| Contractor: | Licensed Contractor, Address:710 NW WALL ST<br>License Status |

## The Business Address Book vs the People Address Book

There are two databases of records in the Online Permit Center:

- Business Address Book - The public and customers have access to view records in the Business Address Book, and have the ability to add contacts directly to their project from the Business Address Book.
- People Address Book – The public and customers do not have access to the People Address Book. Customers may request that individuals from the People Address Book be added to projects, but this must be completed by City staff.

<u>How do records get added to the Business Address Book?</u>

A couple ways:

- Active business registrations
- Active contractor registrations
- Active qualified contractor licenses

- Active specialty business operating licenses (for example, Short Term Rentals, Marijuana operations, etc)

How do contacts in the Business Address Book get added to projects?

Applicants are able to add partners to have access to their project easily using the Business Address Book. This can be done on the Contacts step during initial application submission, or at any time later using the 'Edit Details' button on the Application Status page.

How to records get added to the People Address Book?

A couple ways:

- When individuals create new Portal accounts, new records are added.
- Property owner records are also in the People Address Book, but would not have a Portal account associated with them.

How do contacts in the People Address Book get added to projects?

Applicants may request that City staff add People contacts to their projects. This opportunity is available during initial application submission ('Other Parties Access' or 'Additional Contacts' fields) on Step 1, or can be requested later via email.

**How to Add Contacts During Initial Application Submission**

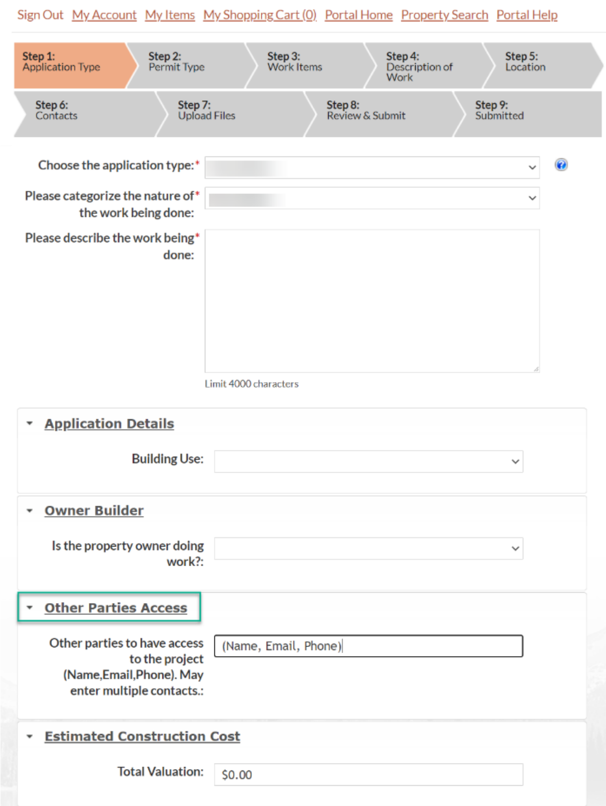
Contacts from the Business Address Book may be added to a project during initial application submission. People contacts may also be requested during initial application submission.

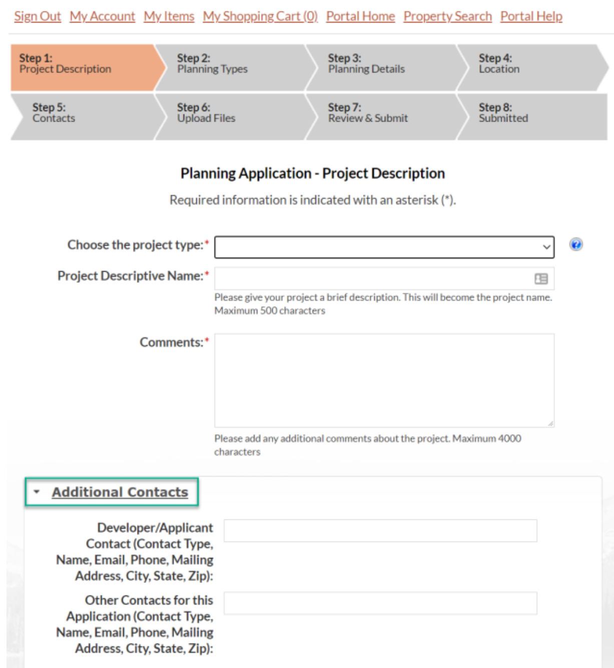
To request an individual be added as a contact:

1. Sign in to your Portal account, and begin a new application in one of the service areas on the Portal Home page.

2. Usually on Step 1 of the application will appear 'Other Parties Access' or 'Additional Contacts' fields. Add the role, name, email, and other contact information for the individual you wish to add to your project. If they already have a Portal account set up, staff will be able to locate them in the People Address Book and add them to your project as a contact.

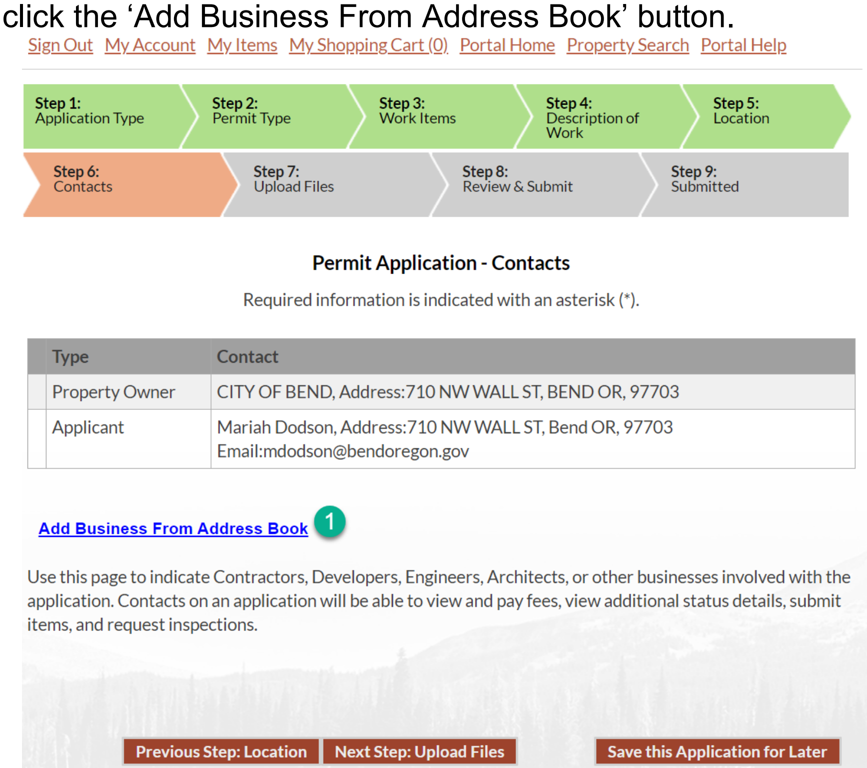
Examples:



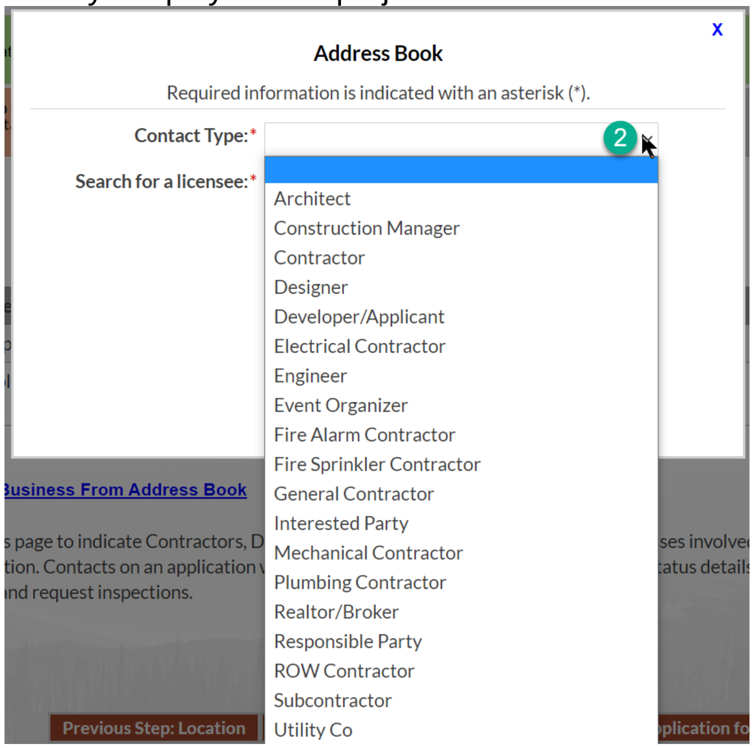




## To add a contact from the Business Address Book:

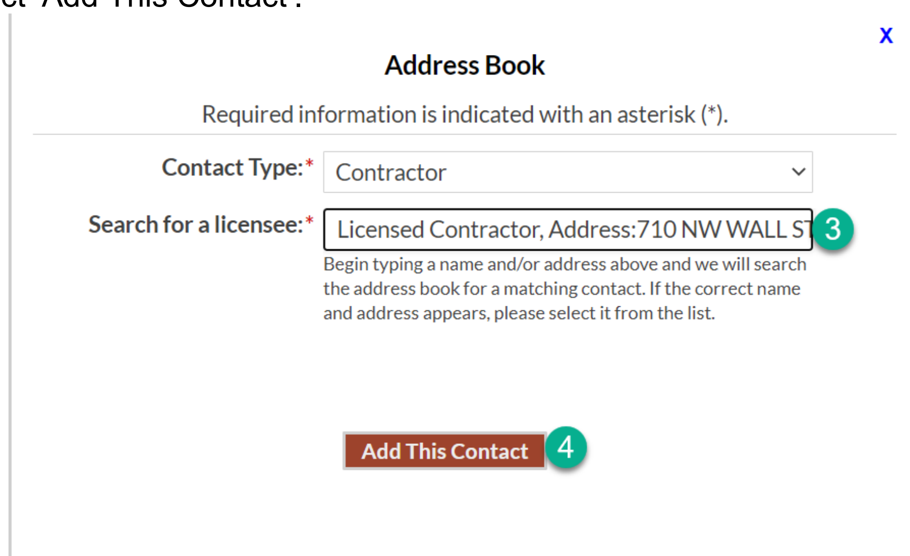
1. The number of the step may vary based on application type, but applicants may always add contacts from the Business Address Book on the Contacts step. To start, click the 'Add Business From Address Book' button.



2. In the first field, use the drop down menu to select the ‘Contact Type’—this is the role that the entity will play on this project.




3. Next begin typing in the search field to find the business you’d like to add as a contact, and select it from the list of results.
4. Select ‘Add This Contact’.



## How to Add or Remove Contacts After Application Submission

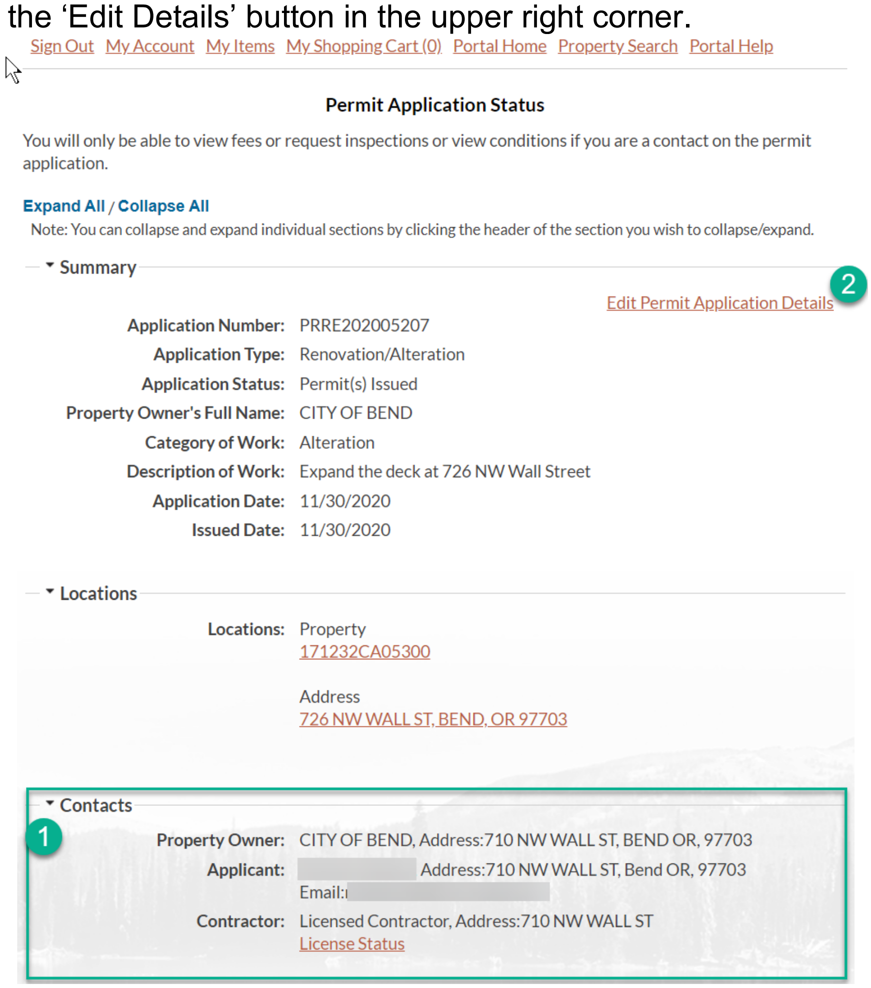
Contacts from the Business Address Book may be added or removed from a project at any time by the Applicant. Applicants may request people contacts be added to a project by City staff at any time.

<u>To request an individual be added as a contact:</u>

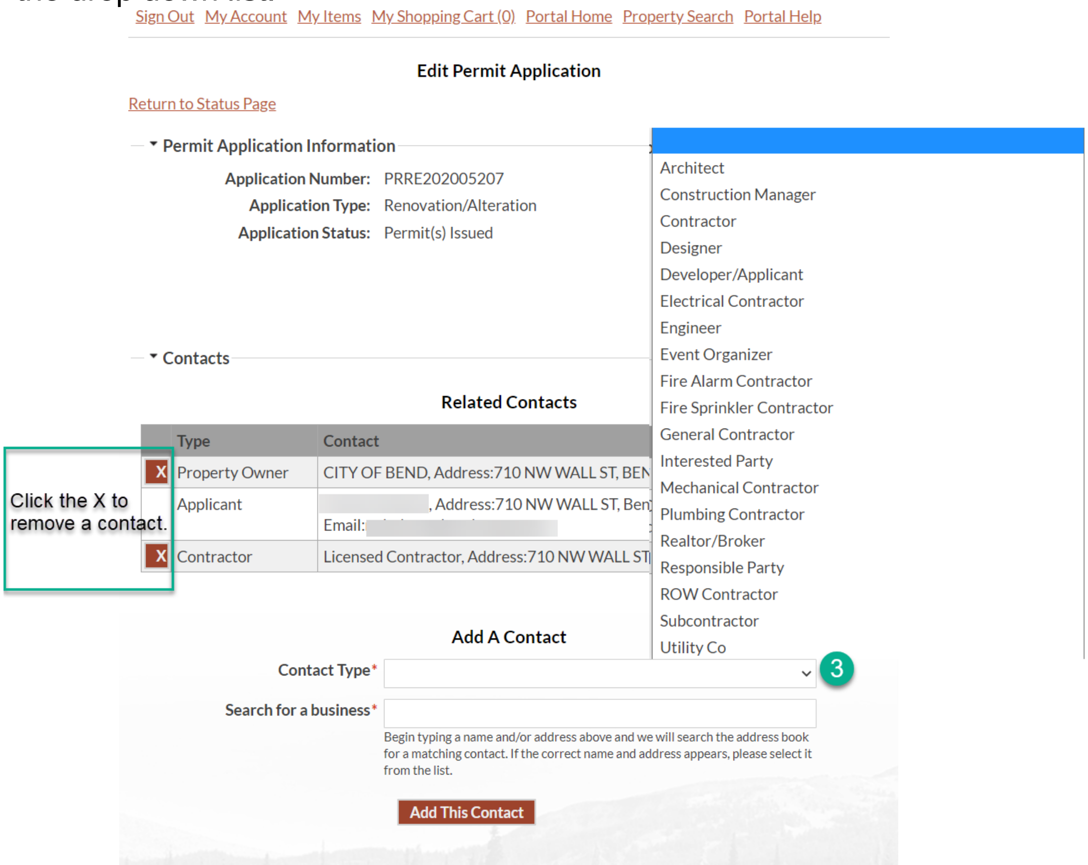
1. Sign in to Portal and navigate to your My Items page. Find the project you wish to view and click the project number to open the Application Status page. Here you may view the contacts on your project.
2. Email City staff with a request to add an individual as a contact to your project. Include information such as their role, name, email address, and other contact information. If the individual already has a Portal account set up, staff will be able to locate them in the People Address Book and add them to your project as a contact.

<u>To add or remove a contact from the Business Address Book:</u>

1. Sign in to Portal and navigate to your My Items page. Find the project you wish to view and click the project number to open the Application Status page. Here you may view the contacts on your project.
2. Select the 'Edit Details' button in the upper right corner.



3. To remove a contact, click the X button next to it.
   To add a contact, select Contact Type and choose the most appropriate role from the drop down list.




4. Begin typing in the search field to find the business you'd like to add as a contact, and select it from the list of results.
5. Select 'Add This Contact'.