



## Cloudpermit Guide and FAQs

The Town of Innisfil uses a cloud-based e-permitting software called **Cloudpermit** to manage all planning-related procedures and applications. This system digitizes the planning and development process and will eventually help us go completely paperless. With Cloudpermit, we can:

- Accept, review, and approve planning applications
- Keep communication in one place
- Circulate planning applications internally and externally

### Frequently Asked Questions (FAQs) in this Guide

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## How do I know in Cloudpermit if I need a pre-consultation for my application?

In Cloudpermit, when you select the project category for the application during the application creation process, you will be notified whether the planning application requires pre-consultation.

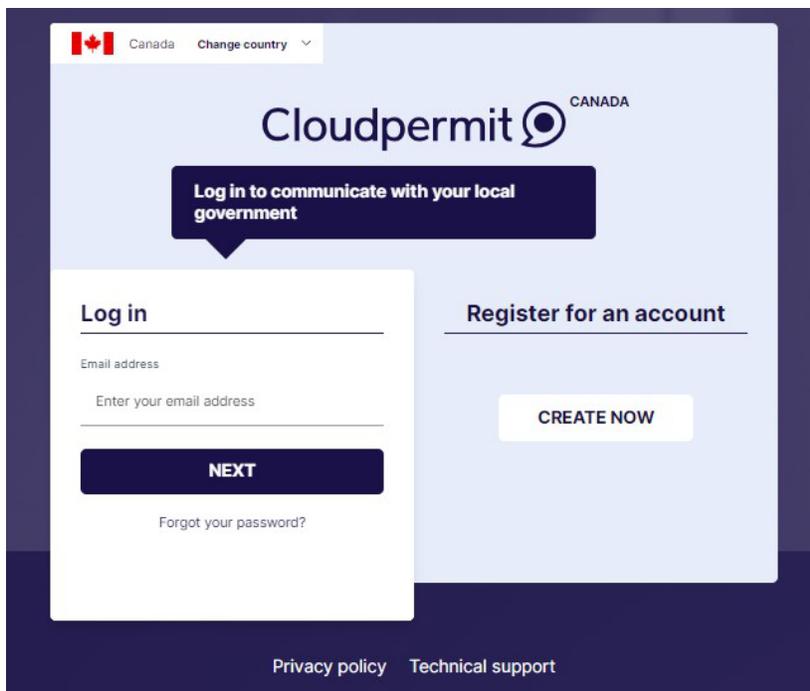
Cloudpermit takes you to the pre-consultation request workspace and guides you through filling out the pre-consultation data and uploading the necessary attachments.

## How do I create a pre-consultation request in Cloudpermit?

The creation of the pre-consultation request in Cloudpermit is a step-by-step process that allows you to add the property location using the interactive map, fill out project information, upload attachments such as draft plans and drawings, invite people to participate in your pre-consultation workspace, and send your complete request to Town staff via Cloudpermit.

This is your opportunity to provide municipal planning staff with more information about your development plans.

**Step 1:** Create a Cloudpermit account or log in.



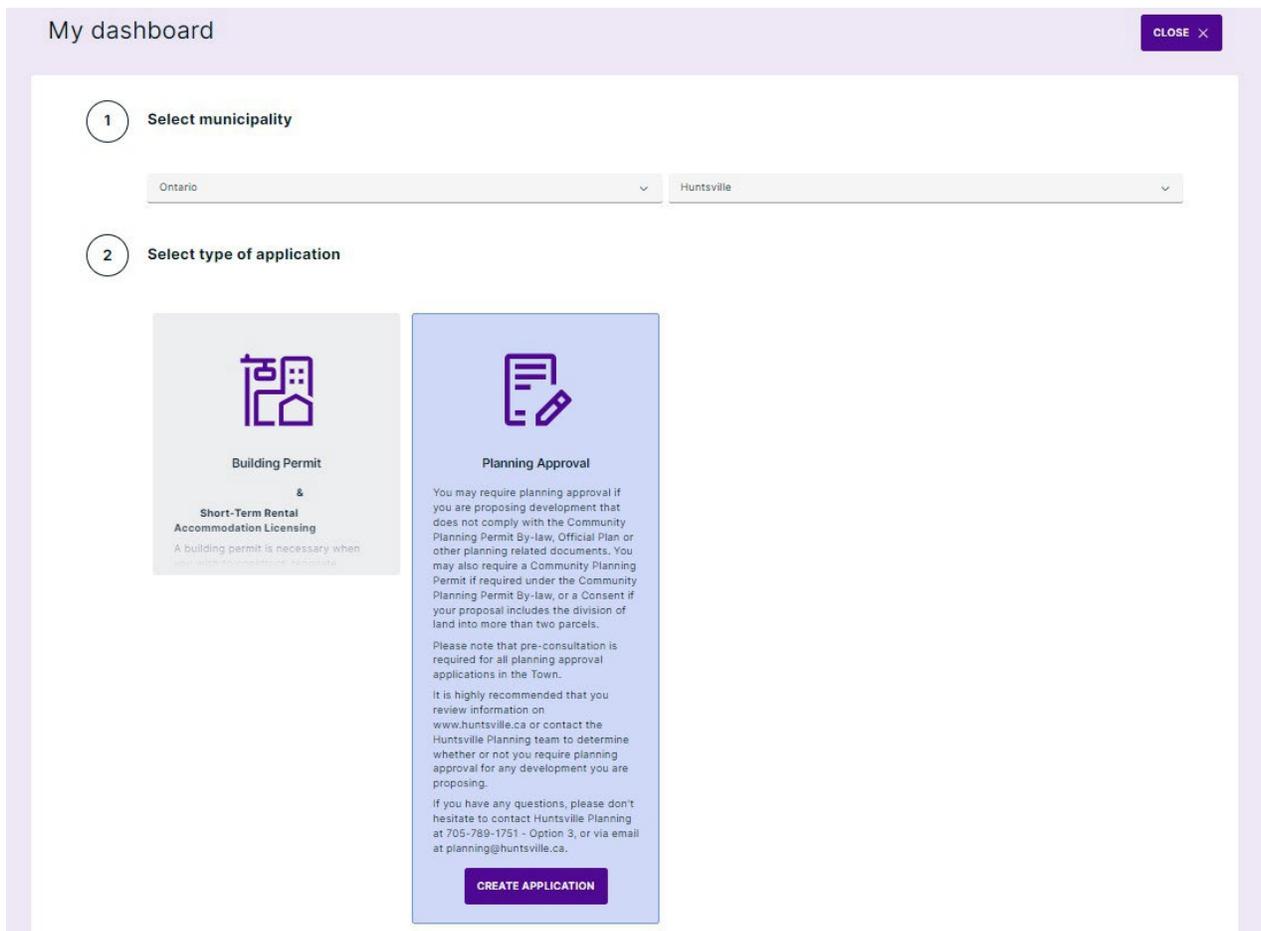
The screenshot shows the Cloudpermit Canada login and registration interface. At the top left, there is a Canadian flag icon, the text "Canada", and a "Change country" dropdown menu. The main header features the "Cloudpermit CANADA" logo. A dark blue callout box with white text says "Log in to communicate with your local government". Below this, there are two main sections: "Log in" and "Register for an account". The "Log in" section includes a text input field for "Email address" with the placeholder "Enter your email address", a dark blue "NEXT" button, and a link for "Forgot your password?". The "Register for an account" section features a white "CREATE NOW" button. At the bottom of the page, there are links for "Privacy policy" and "Technical support".

**Step 2:** Click "Create a New Application" in your dashboard.



**Step 3:** Select "Ontario" as your province and "Innisfil" as the municipality to which you will submit the request.

**Step 4:** Select "Planning Approval" for the application type and click "Create Application".



**Step 5:** Select a category. This is the type of application you are hoping to submit. Once selected, each of the categories will provide a brief description of what they entail so you can ensure you are selecting the correct one.

**Category**

- Consent
- Fence Variance
- Minor Variance
- Official Plan Amendment
- Part Lot Control
- Plan of Subdivision
- Sign Variance
- Site Plan Control
- Validation of Title
- Zoning By Law Amendment

**Good to know**

An Official plan amendment is a formal document that changes a municipality's official plan. If your plans do not conform to the in-force official plan, you may be required to apply for an Official plan amendment. It is highly recommended that you confirm with your municipal authority that an OPA is required before you apply.

Note: This application type requires a pre-consultation before permit application can be submitted. A pre-consultation request will be created automatically in the next phase.

**Step 6:** If you are creating a new project, you can provide a title for the project. We recommend using the property address and description of the project. For example, "2101 Innisfil Beach Road – Minor Variance (Addition)".

You can also select an existing project if one has been previously submitted. This option can be used when submitting a concurrent application involving a Community Planning Permit Amendment application and a Consent application, for example.

Create a new application

Category Project Location Summary

**Project selection**

All applications are part of a project which can contain multiple applications. You can select an existing one or create a new project.

**SELECT EXISTING PROJECT** CREATE A NEW PROJECT

Name of the project

CANCEL BACK NEXT →

**Step 7:** Select the property location by entering the address or roll number into the search bar or by zooming in and selecting the corresponding property.

### Location for the application

Select a property for the application. Search by address or roll number or point to a location on the map. If the subject land consists of more than one property, additional properties are added later.

Innisfil, Ontario



**Step 8:** Check the data you have filled out in the "Summary" view. Click "Back" to return to the previous view if you need to change the data. When you're finished, click "Finish & Create."

### Summary

Below is a summary of your selections. Check that the information is correct before selecting 'Finish & Create'.

#### APPLICATION LOCATION

Address	Roll number	Secondary ID	Municipal ID	Property code
7315 YONGE ST	431601002114200000	403	26408291	LGE MED/DENT > 7500 S.F.

#### APPLICATION TYPE & CATEGORY

#### APPROVAL AUTHORITY

#### PROPERTY OWNER

CANCEL

BACK

FINISH & CREATE →

**Step 9:** Cloudpermit will take you to the pre-consultation request workspace once you have created a draft application.

In this workspace, you can take the following actions:

- You can communicate with the application's parties and the municipal department using the workspace header's in-built messaging feature. The messaging workspace will be opened when you click the "Show message" link.
- You can configure your application's email notifications by enabling or disabling them in the workspace header. Cloudpermit recommends allowing them so that you can better follow up on the actions in your application workspace.
- You can invite parties to participate in your workspace, such as planning consultants, property owners, and other planning professionals.
- Attachments such as site plans and other documents can be added to the pre-consultation request to help planning authorities better understand your land development plans.

**Step 10:** Fill out the pre-consultation request form and upload the required attachments. Forms will be visible in the "Project Data" section. Click on the form to be taken to the form view, which allows you to fill out the required fields. Cloudpermit automatically saves your changes to the form.

The screenshot displays two panels from the Cloudpermit workspace. The top panel, titled 'PROJECT DATA', contains a section for 'Application data' with a link to the 'Pre-Consultation Form' and a 'MISSING MANDATORY FIELDS' button. The bottom panel, titled 'ATTACHMENTS', shows 'Required attachments' with a 'Site Plan' item and a '0' count. Below this is a large dashed box with instructions for file uploads, including a 'click here' link and a list of allowed file types (PDF, image, Microsoft Office, OpenOffice, and ZIP).

**Step 11:** Once you've entered all the needed data and uploaded all the required attachments, click "Request Pre-Consultation" at the top of the workspace.

The screenshot shows a workspace for a 'Planning Approval' application. The address is '37 MAIN ST E, Huntsville'. The category is 'Consent'. There are buttons for 'SHOW MAP' and 'HIDE FULL DATA'. Below this, there are fields for 'Roll number' (4442010010002000000), 'Application number' (-), 'Municipal ID' (4442010010002000000), and 'Legal description' (PLAN 1 PT LOT A RP 35R10625 PARTS 1 TO 4). At the bottom, there is a 'PRE-CONSULTATION' section with a progress bar showing 'CURRENT STEP: DRAFT 1/4 NEXT STEP: REQUESTED'. A 'REQUEST PRE-CONSULTATION' button is visible in the top right corner.

**Step 12:** Your pre-consultation request has been submitted to Innisfil's Planning Services. The status of the request is "Submitted". Once staff begin the pre-consultation process, its status will change to "In Process".

**Step 13:** Once staff receive your request, an invoice will be generated for the pre-consultation fee in Cloudpermit. An email will be sent to you with the corresponding amount and payment instructions. Payment for planning applications can be made digitally within CloudPermit (up to a maximum of \$5,000), in person at Town Hall, or by mailing a cheque.

## How do I know the pre-consultation is over, and what happens after the pre-consultation phase?

When the pre-consultation process is finished, Planning staff will mark the pre-consultation request step as "completed" and prepare a draft planning application in Cloudpermit's "application" tab, which is located next to the "pre-consultation" tab at the top of the workspace. The completion and outcome of the pre-consultation will be communicated via email to all parties involved in the pre-consultation request, along with a link to the pre-consultation workspace.

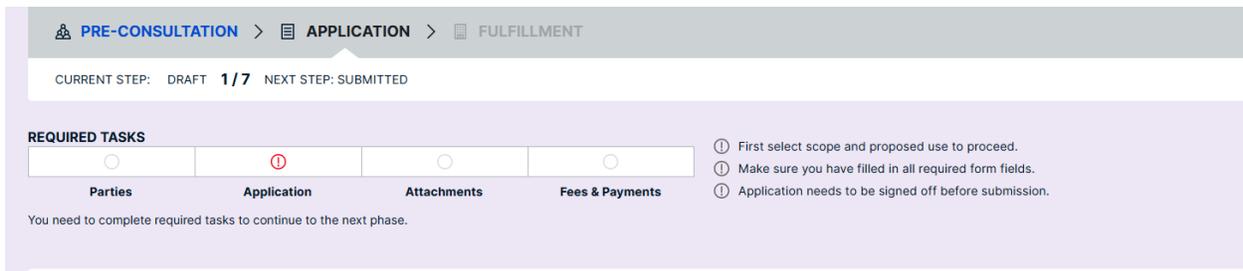
You can review the draft application so that you can move forward with preparing the required documents for your application submission.

When you have all the required documents prepared, you can work toward filling out the application and uploading all required attachments. The "Required Tasks" progress bar in the planning application workspace shows you what you need to do in the application workspace before you can send it to the Planning department for approval.

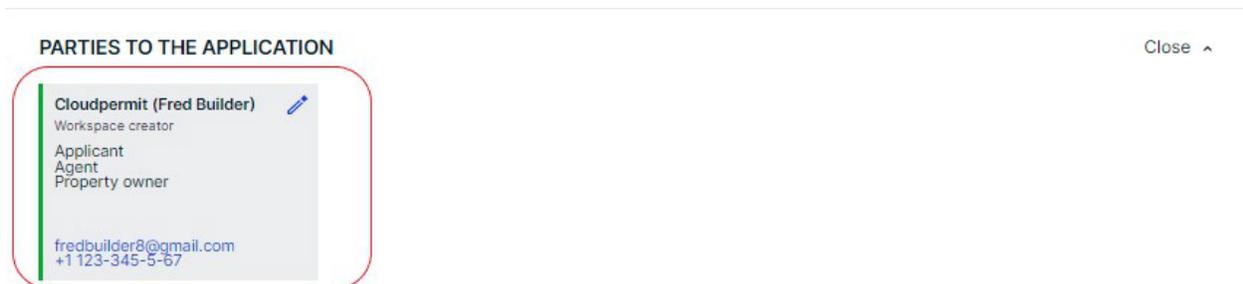
## How do I complete and submit an application (Party Roles, Application Data, and Attachments)?

Before sending an approval application to the municipal Planning department through Cloudpermit, applicants usually have to fill out the missing party roles, application data, and upload required attachments.

The "Required Tasks" progress bar at the top of the application workspace will display required actions from applicants before proceeding to the next step. These required actions appear as red dots next to the action in the progress bar. When the action is complete, the red spot turns green. Once all spots are green, the approval application is ready for the next step.



Go to the "Parties to the Application" section to add the required parties to the application. *Note that you must always add an Agent and a Property Owner role to your approval application. You will automatically become an applicant for the application once you begin the approval application.*



From the drop-down menus, choose "Scope" and "Proposed Use". These options are determined by the type of your application. Cloudpermit automatically saves changes to the form.

To enter the form workspace, click on the form. Fill out the form with the required data denoted by an asterisk (\*).

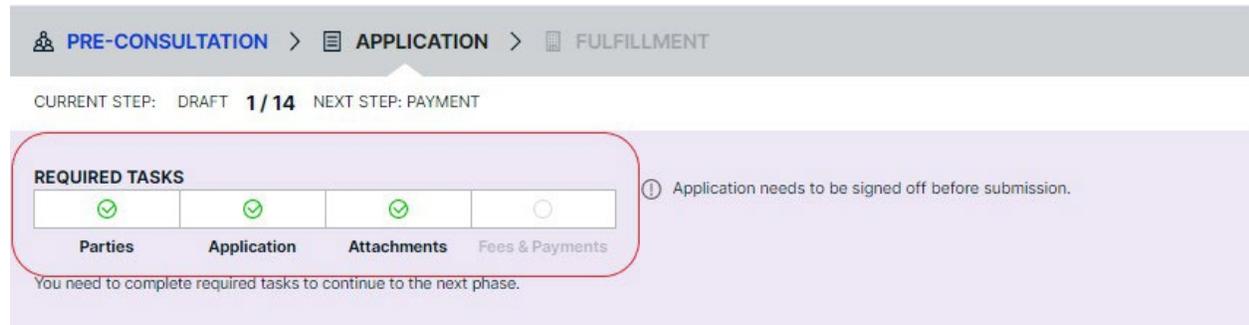
Scroll down to "Attachments". The required attachments are listed in this view. For assistance with uploading attachments, please review the FAQ titled "*How to upload attachments to the application workspace*".

Your approval application is ready to be signed off and submitted once you have added the required party roles, completed the application data, and uploaded the required attachments. The next step will be to digitally sign off on the approval application. For assistance with signing off your application, please review the FAQ titled "*How to sign off, upload and download an affidavit and submit the planning approval application*".

# How do I sign off, upload and download an affidavit and submit the planning approval application?

After filling out the application information, the applicant must sign it and send it to the municipality. All planning applications require an affidavit to be filled out on the sign-off form. All PDFs are downloadable in the "Sign-Off" workspace of the application.

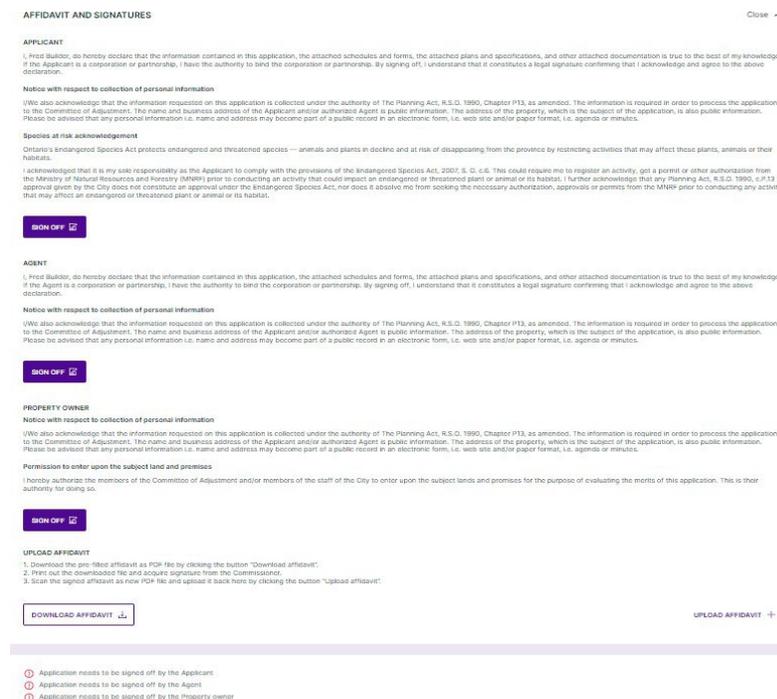
**Step 1:** In your Cloudpermit workspace, once you have filled out the application form and uploaded all required attachments, you will need to sign off the application. The "Required Tasks" progress bar shows that all requirements are met in your approval application.



**Step 2:** Click "Sign Off Application" in the top right-hand corner of the workspace.



**Step 3:** In the Sign-Off view, scroll down to the "Affidavit and Signatures" section. At the bottom of the section, you will find a list of roles that must sign off on the application. The declaration may require the signature of an Agent or a Property Owner, depending on the scope of your application and proposed use



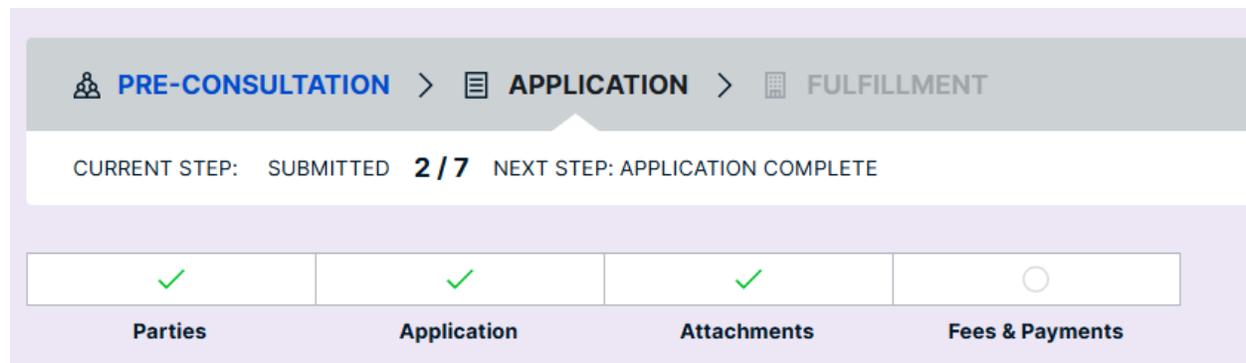
**Step 4:** If you have given yourself the required roles in the "Parties to the Application" section, click "Sign Off" on each section. Applicants may give themselves multiple roles in the application. If you are acting, for example, as a property owner, payer, or agent in your application, you can designate yourself in those roles in the "Parties to the Application" section. The number of assigned roles is not limited.

**Step 5:** Download, sign and upload the affidavit. You must provide the affidavit if the sign-off form requires it (note it must be completed by the Applicant under a Commissioner of Oaths at the municipal office or by the applicant's solicitor). Click "Download Affidavit", fill out the form, and click "Upload Affidavit".



**Step 6:** Click "Submit Application" at the top of the Sign-Off workspace.

**Step 7:** The approval application has been submitted to your municipal Planning department and is waiting for review.



## How do I upload attachments to the application workspace?

The municipality sets the required attachments for each application type to ensure only valid applications with the right attachments are submitted. When you upload attachments to your application, you can choose whether to show the attachments to everyone in the workspace or just to yourself and the authorities in the municipality.

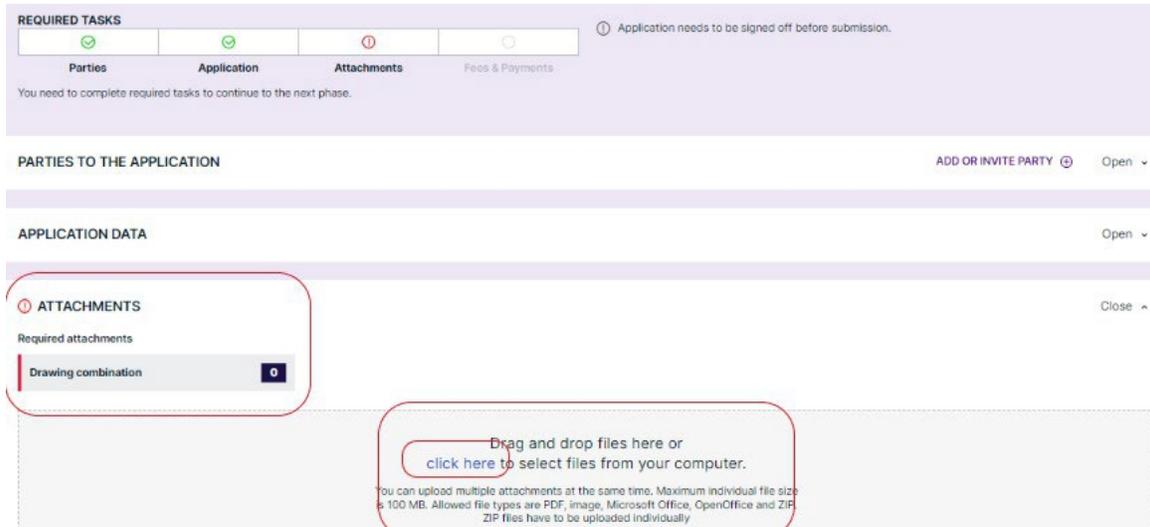
Even if you attach a file to your application, you may still have to meet other requirements before you can submit it. In the application workspace, the progress bar shows the steps you need to take before submitting the application.

You may remove an uploaded file from your draft application before submitting it. Once you have uploaded a file and submitted your application, you cannot remove the file from the application.

In the application workspace, scroll down to "Attachments". The required attachments have been listed under the "Required attachments" section. The red colour symbol beside the application type denotes that the attachment is required and has not been uploaded yet.

You have two options to upload the required attachments:

1. Selecting files from your computer
2. Dragging and dropping files from your local folders to the drag-and-drop zone in the "Attachments" section.



If you are selecting files from your computer, click "Click here" and select the file from your computer's folders.

If you are dragging and dropping the file, select the file from your local folder. Drag and drop the file to the drag-and-drop zone in the "Attachments" section.

#### ATTACHMENTS

Close ^



No attachments

Select the attachment type from the "Type" drop-down list. In order to satisfy the attachment requirement, the identical attachment type must be selected. Include a "drawing number" as well as a description. These are optional but recommended if you plan to upload multiple files of the same type.

Select your file visibility. If you select "Everyone", all users in the workspace can view your attachment. If you select "Restricted", your attachment is visible only to yourself and municipal authority users.

***Failure to upload your files using the naming convention as specified under the Application Form Section may delay your application process. Please review the instructions before uploading any files or documents to Cloudpermit.***

### **Submitting Digital Files in 4 easy steps**

Naming your uploads using the following naming convention:

**[Date] [Site Plan Number] [Address] [Description of Document]**

#### **Definitions:**

##### **Date**

- The date of the drawing/report/Survey etc. in Year/Month/Day Format
  - Example: 2020.03.24

##### **Site Plan Number**

- If not known, the Site Plan number will appear in the link sent by the Development Coordinator.
  - Ex. SP-2020-123

##### **Address**

- The Address of the property for the application
  - Ex. 2101 Innisfil Beach Road

##### **Description**

- The description should identify which type of Document you are uploading
  - Ex. Insurance Documents or Topographical Plan

#### **Examples:**

2020.01.01 SP-2020-XXX 2101 Innisfil Beach Road Survey  
2020.02.23 SP-2020-XXX 2101 Innisfil Beach Road Landscaping Plan  
2020.03.13 SP-2020-XXX 2101 Innisfil Beach Road Hydrogeological Study  
2020.02.02 SP-2020-XXX 2101 Innisfil Beach Road Architectural Drawings  
2020.05.17 SP-2020-XXX 2101 Innisfil Beach Road Legal Correspondence  
2020.05.31 SP-2020-XXX 2101 Innisfil Beach Road Grading Plan & Sedimentation Plan  
2020.01.11 SP-2020-XXX 2101 Innisfil Beach Road Elevation Drawings

Click "Done."

Your attachment has been uploaded successfully. Cloudpermit converts all attachments to the archivable PDF format.