



Document Guide

Instructions for Naming
Files and Documents

County of Santa Clara
Department of Planning and Development

Version 6.0

Revised June 4, 2020

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I. Document Naming Convention and Instructions

Document Naming Instructions (County staff and the Public):

- 1) When naming documents, use the InSite Name, found in Table 1: InSite Name for Common Submittal Items (beginning on Page 4), or Table 2: List of Common Submittal Items and Supplemental Documents (beginning on Page 6).
- 2) The application form for a submittal should be uploaded as an individual document, named **App - X** where "X" stands for the version of an application being uploaded. For example, if the first and only application form is uploaded for a submittal, it would be named/identified as **App - 1**.
- 3) All plans should be uploaded as an individual document, named **Plans - X** where "X" stands for the version being uploaded. [Resubmittals are commonplace, so there is a need to correctly identify the version of the document.] For example, the second set of uploaded plans would be named/identified as **Plans - 2**.
- 4) If a plan set file must be split into multiple files because the complete plan set's file size is larger than the 100 MB file size limit, split the file into different disciplines and enter the InSite Name according to the trade/type of Plans. For example, structural plans would be named/identified as **Plans-Struc - 1**. Plans by trade/type that are part of specific submittal types can be found in Table 2, listed under the appropriate submittal item, organized alphabetically by Reviewing Office (refer to the Table of Contents on Page 2).
- 5) Supplemental documents/reports/letters: All files/documents required as part of the application submission, other than the application form and plans should be uploaded as individual documents and named according to their InSite Name in Table 1 or Table 2. If a document type cannot be found in Table 1 or Table 2, first refer to the Reviewing Office's Miscellaneous section, then to Table 3: InSite Name Lookup Table (beginning on Page 25), and if still not found, use your judgment about what the document is and give it an appropriate title using the same format described within these Document Naming Instructions.
- 6) Enter all documents using the "- X" suffix, even when there will only be one upload of a certain document. If uploading a property's current recorded grant deed, for example, it should be typed:

Deed-Current - 1

i.e., ["Deed"][hyphen button]["Current"][spacebar][hyphen button][spacebar]["1" button]

Additional Document Naming Rule (for County staff only):

- Enter a document's date after the "- X" suffix when the date the item was received (or mailed) is different than the date the document is being uploaded. Use the six-digit MoDyYr (no spaces) for date format. For example, if a Geotechnical Report was received on July 15, 2019 but not uploaded until July 17, 2019, it should be typed:

Geotech Rpt - 1 071519

Background: The InSite (Accela) platform requires County staff and the public to give each file or document (called "documents" in this guide) being uploaded a "Name" — which is not the same as the file's original name before being uploaded. The Name is used to visually identify documents in the Documents library. By using a short, standard term for each document Name, it saves keystrokes and helps staff and authorized public users more easily identify the correct document(s) in a given record's document library (called the "Documents Portlet"). Because the document Name cannot be changed once it is uploaded, it is very important to use the correct, standard Name for each document. The term this Guide uses for the standard document Name is "InSite Name." Please refer to Table 1 or Table 2.

Table 1: InSite Name for Common Submittal Items

Submittal Item	InSite Name
20 Day Memo (See <i>Mandatory 20 Day Memo</i>)	20DM
Acceptance of the Conditions of Approval	COA Accept
Acknowledgement & Agreement Form	Agreement
Addendum	Addend CEQA
Adjoiner Deeds	Deed-Adj
Adjoiner Maps	Map-Adj
Agreement for private security, first aid, emergency workers	Safety Agreement
Agricultural Income (See <i>Declaration of Agricultural Income</i>)	Ag Income Dec
Alternate Means & Methods of Construction Form	AMMC Form
Appeal Letter	Appeal Ltr
Application	App
Architectural Plans	Plans (Plans-Arch*)
Assessor's Parcel Map	APN
Attendance Details (See <i>Details on how many attendees will be present</i>)	Attendance
Average Slope Calculation	Slope Calcs
Bay Area Air Quality Management District Clearance	J Number
Best Management Practices Form (See <i>Signed Best Management Practices Form</i>)	Signed BMP Form
Calculations	Calcs
California Highway Patrol Agreement	CHP Agreement
Checklist (For Erosion Checklist, see <i>Signed Best Management Practices Form</i>)	Checklist
Closure Calculations	Closure Calcs
Color Samples (See <i>Materials and/or Color Samples</i>)	Materials
Complete Letter	Comp Ltr
Concurrent Plan Review Request	Concurrent Plan Rev
Conditions of Approval	COA
Construction Cost Estimate	Est
Construction Waste Management Form	Waste Form
Correspondence (See <i>General Correspondence</i>)	Corresp
Covenant of Easement Dedication Plat & Description	Dedication
Current Recorded Grant Deed	Deed-Current
Data	Mfg Data (Enter FMO Data for FMO's Review of Building Permit Applications; Enter AMMC Data for FMO's Review of Alternative Means & Methods of Construction)
Declaration of Agricultural Income	Ag Income Dec
Deferred Improvement Agreement	Deferred Imp Agreement
Department of Social Services Standard Form 850	STD850
Details on how many attendees will be present	Attendance
Disconnect Letter (See <i>Utility Disconnection Letter</i>)	Disconnect Ltr
Disturbed Area Certification	Dist Area Cert
Drainage Calculation	Drainage Calcs

Submittal Item	InSite Name
Drainage Plan	Plans (Plans-Drain*)
Easement Dedication Plat & Description	Dedication
Electrical Plans	Plans (Plans-Elec*)
Elevation Certificates	Elev Cert
Emergency Access Easement	EA Easement
Engineered Water System Report	Water Rpt
Engineer's Estimate of Probable Cost	Est
Environmental Information Form	EIF
Equipment Cut sheets or product documentation	Cut Sheet
Erosion Checklist (See <i>Signed Best Management Practices Form</i>)	Signed BMP Form
Erosion and Sediment Control Plan	Plans (Plans-Erosion*)
Event/Use Description and Narrative	Proj Desc
Evidence for legal creation of lot	Deed-Supp
Extension Letter	Ext Ltr
FEMA "No Adverse Impact" Certificate; or FEMA "No Rise" Certificate	FEMA Cert
Financial Statement	Financial State
Fire Development Impact Fee	Fire Fees
Fire Protection Information	Fire Info
Floor Area Calculation	FAR Calcs
Floor Plans and Elevations	Plans (Plans-FPE*)
Form 850 (See <i>Department of Social Services Standard Form 850</i>)	STD850
Form A - List of Officers	Officers
General Correspondence	Corresp
Geologic Report	Geo Rpt
Geotechnical Report (Soils Report)	Geotech Rpt
Geotechnical Review Letter (Soils Review Letter)	Geotech Review Ltr
Grading Abatement Justification	Grade Abate Just
Grading Plan	Plans (Plans-Grading*)
Grant Deed (See <i>Current Recorded Grant Deed</i>)	Deed-Current
Hazardous Site Form	Haz Form
Improvement Plan	Plans (Plans-Imp*)
Incomplete Letter	Incomp Ltr
Indemnification (See <i>Acknowledgement & Agreement Form [LDE] or Signed Indemnification Form [RDA]</i>)	Agreement
Ingress/Egress	IEE
Inspection Notice	Insp Ntc (Enter FMO Insp Ntc for FMO's Review of Building Permit Applications)
Insurance Certification	Insurance
J Number (See <i>Bay Area Air Quality Management District Clearance</i>)	J Number
Landscape Plans	Plans (Plans-Landscape*)
License	License
Lot Line Adjustment Plans	Plans
Mandatory 20 Day Memo	20DM
Map of entertainment area	Plans
Map Submittal	Map

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Submittal Item	InSite Name
Master Application Form/Acknowledgement & Agreement Form (Planning); Application (all other submittals)	App
Materials (Product Specifications) and/or Color Samples	Materials
Mechanical Plans	Plans (Plans-Mech*)
Mitigation Agreement Form	Mit Agr Form
Mitigation Monitoring and Reporting Program	MMRP
No Adverse Impact Certificate (See FEMA "No Adverse Impact" Certificate; or FEMA "No Rise" Certificate)	FEMA Cert
No Rise Certificate (See FEMA "No Adverse Impact" Certificate; or FEMA "No Rise" Certificate)	FEMA Cert
Notice of Availability of Draft Environmental Impact Report	NOA-DEIR
Notice of Availability of Final Environmental Impact Report	NOA-FEIR
Notice of Decision	NOD
Notice of Exemption	Ntc Ex
Notice of Grading Violation	Ntc Grading Vio
Notice of Intent to Adopt a Mitigated Negative Declaration	NOI-MND
Notice of Intent to Adopt a Negative Declaration	NOI-ND
Notice of Preparation	NOP
Operation and Maintenance (O&M) Agreement	O&M
Parcel Map	Map
Permit	Permit
Petition for Exemption from Environmental Assessment	CatEx Form
Petition Signature (for Block Party)	Petition
Photos	Photos
Plan Check Correction Letter	Corr Ltr
Plan Check Correction Response Letter	Corr Resp Ltr
Plan Review Comments	Comments Ltr (Enter FMO Comments Ltr for FMO's Review of Building Permit Applications)
Plans (Various plans; file size limit is 100 MB)*	Plans
Plat and Legal Description	Plat-Legal Desc
Plumbing Plans	Plans (Plans-Plumb*)
Police Agreement	Police Agreement
Pre-Application Letter	Pre-App Ltr
Preliminary Review Letter	Prelim Ltr
Preliminary Title Report	Prelim Title Rpt
Pre-Screening Letter	Pre-Scr Ltr
Private Road	Priv Road
Product Specifications (See <i>Materials and/or Color Samples</i>)	Materials
Project Description (See <i>Event/Use Description and Narrative</i>)	Proj Desc
Public Comment	Public Comment
Public Notification	Notification
Public Utilities	Pub Util
Record of Survey Map	RS Map
Recorded Grading Expungement	Rec Grading Exp
Recorded Grading Violation	Rec Grading Vio
References	Ref [#]

Submittal Item	InSite Name
Replanting/Vegetation Plan	Plans (Plans-Veg*)
Report/Analysis	AMMC Rpt
Resolution	Res
Retaining Walls - Details	Retaining Walls
Road Closure Map (for Block Party)	Road Closure Map
Roof Truss Calculations and Layout Plans	Truss Calcs
Route Map	Route Map
Safety Agreement (See <i>Agreement for private security, first aid, emergency workers</i>)	Safety Agreement
School Impact Fee	School Fees
Self-Addressed Stamped Envelope or postcard for after filing	SASE
Septic System Plans	Plans (Plans-Septic*)
Sheriff Approval Letter (for Block Party)	Sheriff Ltr
Sight Distance Analysis	SDA
Signed Best Management Practices Form	Signed BMP Form
Signed Indemnification Form	Agreement
Site Layout Map	Site Layout Map
Site Plan	Plans
Slope Calculations (See <i>Average Slope Calculation</i>)	Slope Calcs
Soils Report (See <i>Geotechnical Report</i>)	Geotech Rpt
Soils Review Letter (See <i>Geotechnical Review Letter</i>)	Geotech Review Ltr
Special Event Questionnaire	Questionnaire
Special Inspection and Testing Short Form	Special Insp Form
Stanford University Fire Marshal's Office Comments/Correspondence	SUFMO
Statement of Circumstances	Variance Just
Statement of Exemption (CEQA)	State Ex
Statement of Reasons for (Tree) Removal	Removal Just
Statement of Special Inspection	State Special Insp
Storm Drain	Storm Drain
Structural Calculation Model File (e.g., etabs, sap2000)	Calc Model
Structural Calculations	Struc Calcs
Structural Plans	Plans (Plans-Struc*)
Subdivision Guarantee	Guarantee
Subdivision Plans	Plans
Technical Report (CEQA)	Tech Rpt
Title 24 Energy Calculations	Title 24
Title Report (See <i>Preliminary Title Report</i>)	Prelim Title Rpt
Tract Map	Map
Traffic Control Plan	TCP
Traffic Impact Analysis	TIA
Traffic Report	Traffic Rpt
Turn by Turn Plan	Plans
Unrecorded Documents or Maps	Unrecorded Doc
Use of Prior CEQA	Prior CEQA
Utility Disconnection Letter	Disconnect Ltr
Variance Application	Variance App
Water Efficient Landscape Form	WELO Form

* Enter **Plans - X** for all types of plans. If the file size of the digital plan set exceeds 100 MB, split the file by trade and use the suffixes in the above table. For example, enter a plan set's septic plans as **Plans-Septic - X**.

Table 2: List of Common Submittal Items and Supplemental Documents, by Reviewing Office

Building Inspection Office

Submittal Item	InSite Name	Notes/Description
Alternate Means & Methods of Construction		
Alternate Means & Methods of Construction Form	AMMC Form	
Calculations	Calcs	
Data	AMMC Data	
Plan Review Comments	Comments Ltr	
Report/Analysis	AMMC Rpt	
Building Permit Application		A building permit must be obtained before you construct, enlarge, alter, move, replace, repair, improve, convert, or demolish any building or structure. Grading Approval is required for every Grading Permit issued by Land Development Engineering.
Title 24 Energy Calculations	Title 24	
Architectural Plans (see Plans)	Plans	Enter Plans-Arch if plan set needs to be split because file size > 100MB.
Elevation Certificates	Elev Cert	New construction and substantial improvements in Special Flood Hazard Area require elevation certificates prior to permit issuance, during construction, and after completion.
Erosion and Sediment Control Plan (see Plans)	Plans	Enter Plans-Erosion if plan set needs to be split because file size > 100MB.
Fire Development Impact Fee	Fire Fees	Clearance required prior to permit issuance using forms provided by Building Inspection Office for newly constructed buildings or additions with habitable space > 500 sq. ft.
Geologic Report	Geo Rpt	Signed and Stamped Engineering Geologic Report
Geotechnical Report (Soils Report)	Geotech Rpt	Signed and Stamped Geotechnical Engineering Report
Landscape Plans (see Plans)	Plans	Enter Plans-Landscape if plan set needs to be split because file size > 100MB. To show compliance with County Water Efficient Landscape Ordinance (WELO) "Sustainable Landscaping Ordinance" requirements.
Mechanical/Electrical/Plumbing Plans (see Plans)	Plans	Enter Plans-Mech, Plans-Elec, Plans-Plumb for document name(s) if plan set needs to be split because file size > 100MB.
Plans (Plans-Arch, Plans-Erosion, Plans-Mech, Plans-Elec, Plans-Plumb, Plans-Landscape, Plans-Struc)	Plans	
Roof Truss Calculations and Layout Plans	Truss Calcs	Typically, a deferred submittal item
School Impact Fee	School Fees	Clearance required prior to permit issuance using forms provided by Building Inspection Office for newly constructed buildings or additions with habitable space > 500 sq. ft. All school free forms shall be in one document.
Soils Report (see Geotechnical Report)		
Special Inspection and Testing Short Form	Special Insp Form	
Statement of Special Inspection	State Special Insp	Required by the California Building Code.
Structural Calculations	Struc Calcs	Structural calculations shall include Table of Contents and page numbers.
Structural Plans	Plans	Enter Plans-Struc if plan set needs to be split because file size > 100MB.

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Submittal Item	InSite Name	Notes/Description
Demolition Permit-Commercial/Industrial Application		See Building Permit Application.
Demolition Permit		
Bay Area Air Quality Management District Clearance	J Number	Clearance from Bay Area Air Quality Management District (J#)
Signed Best Management Practices Form	Signed BMP Form	Signed Best Management Practices Form
Utility Disconnection Letter	Disconnect Ltr	Letter from PG&E verifying that utilities have been disconnected
Miscellaneous – Letters and supplemental data		
Construction Cost Estimate	Est	To determine “Substantial Improvement” for structures in Special Flood Hazard Area.
Construction Waste Management Form	Waste Form	
Equipment Cut sheets or product documentation	Cut Sheet	
Plan Check Correction Letter	Corr Ltr	Correction letter from the County
Plan Check Response Letter	Corr Resp Ltr	Response to correction letter from the County
Structural Calculation Model File (e.g., etabs, sap2000)	Calc Model	
Variance Application	Variance App	For structures in Special Flood Hazard Area.

Fire Marshal's Office (FMO)

Submittal Item	InSite Name	Notes/Description
Alternate Means & Methods of Construction		
Alternate Means & Methods of Construction Form	AMMC Form	
Calculations	Calcs	
Data	AMMC Data	
Plan Review Comments	Comments Ltr	
Report/Analysis	AMMC Rpt	
Stanford University Fire Marshal's Office Comments/Correspondence	SUFMO	
Application Request for Fire Clearance		Application for fire clearance for licensed care (e.g., child, elder, treatment) facility
Application	App	
Data	Mfg Data	
Department of Social Services Standard Form 850	STD850	State Licensed Facility Fire Clearance form issued by Department of Social Services and signed by Fire Code Authority upon successful facility inspection
Inspection Notice	Insp Ntc	
Permit	Permit	
Plan Review Comments	Comments Ltr	
Plans	Plans	
FMO Review of Building Permit Application		
Data	FMO Data	
Inspection Notice	FMO Insp Ntc	
Plan Review Comments	FMO Comments Ltr	
Stanford University Fire Marshal's Office Comments/Correspondence	SUFMO	

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Submittal Item	InSite Name	Notes/Description
Fire Protection System Permit		
Application	App	
Calculations	Calcs	
Data	Mfg Data	
Inspection Notice	Insp Ntc	
Permit	Permit	
Plan Review Comments	Comments Ltr	
Plans	Plans	
Stanford University Fire Marshal's Office Comments/Correspondence	SUFMO	
Hazardous Materials System Permit		
Application	App	
Calculations	Calcs	
Data	Mfg Data	
Inspection Notice	Insp Ntc	
Permit	Permit	
Plan Review Comments	Comments Ltr	
Plans	Plans	
Stanford University Fire Marshal's Office Comments/Correspondence	SUFMO	
Minor Systems Modification Permit		
Application	App	
Calculations	Calcs	
Data	Mfg Data	
Inspection Notice	Insp Ntc	
Permit	Permit	
Plan Review Comments	Comments Ltr	
Plans	Plans	
Stanford University Fire Marshal's Office Comments/Correspondence	SUFMO	
Special Event Permit–Fire Marshal's		
Application	App	
Data	Mfg Data	
Inspection Notice	Insp Ntc	
Permit	Permit	
Plan Review Comments	Comments Ltr	
Plans	Plans	
Tent/Canopy Permit Application		
Application	App	
Data	Mfg Data	
Inspection Notice	Insp Ntc	
Permit	Permit	
Plan Review Comments	Comments Ltr	
Plans	Plans	

Land Development Engineering (LDE)

Submittal Item	InSite Name	Notes/Description
Final Subdivision Map Processing		The subdivision procedure provides for the division of land for the purpose of sale, lease, or financing.
Acceptance of the Conditions of Approval	COA Accept	Executed copy of the last page of the final conditions of approval
Acknowledgement & Agreement Form	Agreement	
Adjoiner Deeds	Deed-Adj	
Adjoiner Maps	Map-Adj	
Closure Calculations	Closure Calcs	Complete Electronic Closure Calculations
Covenant of Easement Dedication Plat & Description	Dedication	Signed and Stamped Covenant of Easement Dedication Plat & Description
Disturbed Area Certification	Dist Area Cert	
Drainage Calculation	Drainage Calcs	Signed and Stamped Engineering Drainage Calculations
Drainage Plan	Plans	Enter Plans-Drain if plan set needs to be split because file size > 100MB. Proposed Final Drainage Plan
Easement Dedication Plat & Description	Dedication	Signed and Stamped Easement Dedication Plat & Description
Engineer's Estimate of Probable Cost	Est	
FEMA "No Adverse Impact" Certificate	FEMA Cert	
FEMA "No Rise" Certificate	FEMA Cert	Signed and Stamped No Rise Calculations
Final Tract or Parcel Map Checklist	Checklist	
Geologic Report	Geo Rpt	Signed and Stamped Engineering Geologic Report
Geotechnical Report (Soils Report)	Geotech Rpt	Signed and Stamped Geotechnical Engineering Report
Geotechnical Review Letter (Soils Review Letter)	Geotech Review Ltr	Signed and Stamped Geotechnical Engineering Review Letter
Grading Plan	Plans	Enter Plans-Grading if plan set needs to be split because file size > 100MB. Proposed Final Grading Plan
Improvement Plan	Plans	Enter Plans-Imp if plan set needs to be split because file size > 100MB. Proposed Final Improvement Plan
Land Development Agreement	Land Dev Agreement	
Land Development Engineering (LDE) Submittal Checklist	Checklist	
Parcel or Tract Map	Map	
Preliminary Title Report	Prelim Title Rpt	
Soils Report (see Geotechnical Report)		
Soils Review Letter (see Geotechnical Review Letter)		
Subdivision Guarantee	Guarantee	
Unrecorded Documents or Maps	Unrecorded Doc	
Worker's Compensation Form	WC Form	

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Submittal Item	InSite Name	Notes/Description
Grading/Drainage Permit		After your project has received Grading Approval from the Planning Office, you are authorized to apply for a Grading Permit. If your project is creating more than 2,000 square feet of net new impervious area or changing an existing drainage pattern, a drainage permit is required.
Acceptance of the Conditions of Approval Acknowledgement & Agreement Form	COA Accept Agreement	Executed copy of the last page of the final conditions of approval.
Covenant of Easement Dedication Plat & Description	Dedication	Signed and Stamped Covenant of Easement Dedication Plat & Description
Disturbed Area Certification	Dist Area Cert	
Drainage Calculation	Drainage Calcs	Signed and Stamped Engineering Drainage Calculations
Easement Dedication Plat & Description	Dedication	Signed and Stamped Easement Dedication Plat & Description
Engineer's Estimate of Probable Cost	Est	
FEMA "No Adverse Impact" Certificate	FEMA Cert	
FEMA "No Rise" Certificate	FEMA Cert	Signed and Stamped No Rise Calculations
Geologic Report	Geo Rpt	Signed and Stamped Engineering Geologic Report
Geotechnical Report (Soils Report)	Geotech Rpt	Signed and Stamped Geotechnical Engineering Report
Grading Plan	Plans	Proposed Final Grading Plan
Land Development Engineering (LDE) Submittal Checklist	Checklist	
Preliminary Title Report	Prelim Title Rpt	Copy of a "Preliminary Title Report" issued by a Title Company
Soils Report (see Geotechnical Report)		
Worker's Compensation Form	WC Form	
Water System Improvements		
Engineered Water System Report	Water Rpt	Signed and Stamped Engineering Water System Report
Engineer's Estimate of Probable Cost	Est	Water System Improvements Only
Water System Checklist	Checklist	
Water System Improvement Plans	Plans	
Miscellaneous – Letters and supplemental documents		
Conditions of Approval	COA	
Concurrent Plan Review Request	Concurrent Plan Rev	
Deferred Improvement Agreement	Deferred Imp Agreement	
Operation and Maintenance Agreement	O&M	
Notice of Grading Violation	Ntc Grading Vio	
Recorded Grading Expungement	Rec Grading Exp	
Recorded Grading Violation	Rec Grading Vio	

Planning Office

Submittal Item	InSite Name	Notes/Description
Architecture and Site Approval		The architecture and site approval (ASA) procedure is a review and hearing process intended to promote quality development through consideration of site configuration and design. ASA is typically required for commercial, institutional, office, industrial and multiple-family residential uses. The procedure commonly augments the use permit process to establish detailed conditions on approved developments.
Architecture and Site Approval Checklist	Checklist	
Assessor's Parcel Map	APN	Provide a copy of the most recent Assessor's Parcel Map (Available at the Assessor's Office-5th Floor, County Government Center)
Current Recorded Grant Deed	Deed-Current	Copy of current recorded Grant Deed
Erosion and Sediment Control Plan	Plans	Enter Plans-Erosion if plan set needs to be split because file size > 100MB.
Evidence for legal creation of lot	Deed-Supp	
Floor Plans and Elevations	Plans	Enter Plans-FPE if plan set needs to be split because file size > 100MB. Otherwise, Floor Plans and Elevations (FPE) should be combined with Site Plan under the name Plans. In California FPE is a protected title act reserved to a licensed Fire Protection Engineer.
Grading Plans	Plans	Enter Plans-Grading if plan set needs to be split because file size > 100MB.
Hazardous Site Form	Haz Form	
Landscape Plans	Plans	Enter Plans-Landscape if plan set needs to be split because file size > 100MB.
Master Application Form/ Acknowledgement & Agreement Form	App	
Petition for Exemption from Environmental Assessment	CatEx Form	
Project Description	Proj Desc	Include a detailed description of the project including detailed work or operational plan, activities, number of employees/volume of people, types of material to be used or stored on-site, traffic impact and/or number of vehicle trips per day, noise information.
Site Plan	Plans	A plan to scale, showing uses and structures proposed for a parcel of land as required by the regulations. Includes lot lines, streets, building sites, reserved open space, buildings, major landscape features—both natural and manmade—and, depending on requirements, the locations of proposed utility lines. See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan. Elevations, cross-sections, and floor plans must be submitted for all proposed structures on site. Cross sections must be provided through the highest portions of the building. Provide a table detailing the amount of cut and fill (in cubic yards) associated with each individual proposed improvement (e.g., building pad, driveway, access road, accessory structures, landscaping and other improvements etc.) and the total amount of cut and fill. Landscape plans shall include any existing and all proposed on-site landscaping, including any fencing and/or screening. All trees at least 12" in diameter should be shown, indicating any which are to be removed. The maximum height and depth of cut and fill must also be included on the site plans. All plans must be legibly drawn to an appropriate scale, sheet size 18"x24" minimum to 24"x36" maximum.
Well Information Form	Well Form	

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Submittal Item	InSite Name	Notes/Description
Agricultural Exemption		The procedure to exempt certain agricultural buildings from requiring a building permit.
Fire Protection Information	Fire Info	
Floor Plans and Elevations	Plans	Enter Plans-FPE if plan set needs to be split because file size > 100MB. Otherwise, Floor Plans and Elevations (FPE) should be combined with Site Plan under the name Plans. In California FPE is a protected title act reserved to a licensed Fire Protection Engineer.
Master Application Form/ Acknowledgement & Agreement Form	App	
Septic System Plans	Plans	Enter Plans-Septic if plan set needs to be split because file size > 100MB. Septic Plans are those approved by Department of Environmental Health for "Septic Clearance."
Site Plan	Plans	A plan to scale, showing uses and structures proposed for a parcel of land as required by the regulations. Includes lot lines, streets, building sites, reserved open space, buildings, major landscape features—both natural and manmade—and, depending on requirements, the locations of proposed utility lines. See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan. Elevations, cross-sections, and floor plans must be submitted for all proposed structures on site. Cross sections must be provided through the highest portions of the building. Provide a table detailing the amount of cut and fill (in cubic yards) associated with each individual proposed improvement (e.g., building pad, driveway, access road, accessory structures, landscaping and other improvements etc.) and the total amount of cut and fill. Landscape plans shall include any existing and all proposed on-site landscaping, including any fencing and/or screening. All trees at least 12" in diameter should be shown, indicating any which are to be removed. The maximum height and depth of cut and fill must also be included on the site plans. All plans must be legibly drawn to an appropriate scale, sheet size 18"x24" minimum to 24"x36" maximum.

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Submittal Item	InSite Name	Notes/Description
Building Site Approval (B)–Slopes less than 30%		Building site approval is a procedure where an individual lot is comprehensively evaluated and conditioned for single-family residential development. It is normally required for new house construction and may be required for certain house additions.
Assessor's Parcel Map	APN	Provide a copy of the most recent Assessor's Parcel Map (Available at the Assessor's Office-5th Floor, County Government Center)
BSA Checklist-slopes less than 30%	Checklist	
Current Recorded Grant Deed	Deed-Current	Copy of current recorded Grant Deed
Evidence for legal creation of lot	Deed-Supp	
Grading Plans	Plans	Enter Plans-Grading if plan set needs to be split because file size > 100MB.
Hazardous Site Form	Haz Form	
Master Application Form/ Acknowledgement & Agreement Form	App	
Petition for Exemption from Environmental Assessment	CatEx Form	
Site Plan	Plans	A plan to scale, showing uses and structures proposed for a parcel of land as required by the regulations. Includes lot lines, streets, building sites, reserved open space, buildings, major landscape features—both natural and manmade—and, depending on requirements, the locations of proposed utility lines. See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan. Elevations, cross-sections, and floor plans must be submitted for all proposed structures on site. Cross sections must be provided through the highest portions of the building. Provide a table detailing the amount of cut and fill (in cubic yards) associated with each individual proposed improvement (e.g., building pad, driveway, access road, accessory structures, landscaping and other improvements etc.) and the total amount of cut and fill. Landscape plans shall include any existing and all proposed on-site landscaping, including any fencing and/or screening. All trees at least 12" in diameter should be shown, indicating any which are to be removed. The maximum height and depth of cut and fill must also be included on the site plans. All plans must be legibly drawn to an appropriate scale, sheet size 18"x24" minimum to 24"x36" maximum.
Well Information Form	Well Form	

InSite Document Guide

Submittal Item	InSite Name	Notes/Description
Building Site Approval (BA)–Slopes greater than 30%		Building site approval is a procedure where an individual lot is comprehensively evaluated and conditioned for single-family residential development. It is normally required for new house construction and may be required for certain house additions.
Assessor's Parcel Map	APN	Provide a copy of the most recent Assessor's Parcel Map (Available at the Assessor's Office-5th Floor, County Government Center)
Average Slope Calculation	Slope Calcs	Should be included in the Plans. Required for new house if subject parcel is zoned HS, RHS or R1E. If slope of proposed developed area exceeds 30%, additional submittal and process requirements apply (see brochure and checklist). Calculation must be shown on site plan and stamped and signed by a licensed land surveyor or registered civil engineer.
BSA Checklist-slopes greater than 30%	Checklist	
Current Recorded Grant Deed	Deed-Current	Copy of current recorded Grant Deed
Erosion Control Plans	Plans	Enter Plans-Erosion if plan set needs to be split because file size > 100MB.
Evidence for legal creation of lot	Deed-Supp	
Floor Area Calculation	FAR Calcs	Should be included in the Plans.
Floor Plans and Elevations	Plans	Enter Plans-FPE if plan set needs to be split because file size > 100MB. Otherwise, Floor Plans and Elevations (FPE) should be combined with Site Plan under the name Plans. In California FPE is a protected title act reserved to a licensed Fire Protection Engineer.
Grading Plans	Plans	Enter Plans-Grading if plan set needs to be split because file size > 100MB.
Hazardous Site Form	Haz Form	
Landscape Plans	Plans	Enter Plans-Landscape if plan set needs to be split because file size > 100MB.
Master Application Form/ Acknowledgement & Agreement Form	App	
Petition for Exemption from Environmental Assessment	CatEx Form	
Site Plan	Plans	A plan to scale, showing uses and structures proposed for a parcel of land as required by the regulations. Includes lot lines, streets, building sites, reserved open space, buildings, major landscape features—both natural and manmade—and, depending on requirements, the locations of proposed utility lines. See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan. Elevations, cross-sections, and floor plans must be submitted for all proposed structures on site. Cross sections must be provided through the highest portions of the building. Provide a table detailing the amount of cut and fill (in cubic yards) associated with each individual proposed improvement (e.g., building pad, driveway, access road, accessory structures, landscaping and other improvements etc.) and the total amount of cut and fill. Landscape plans shall include any existing and all proposed on-site landscaping, including any fencing and/or screening. All trees at least 12" in diameter should be shown, indicating any which are to be removed. The maximum height and depth of cut and fill must also be included on the site plans. All plans must be legibly drawn to an appropriate scale, sheet size 18"x24" minimum to 24"x36" maximum.
Well Information Form	Well Form	

InSite Document Guide

Submittal Item	InSite Name	Notes/Description
California Environmental Quality Act (CEQA)		Refers to any documents provided under CEQA. Upload CEQA documents individually.
Addendum (see Use of Prior CEQA)	Addend CEQA	
Mitigation Agreement Form	Mit Agr Form	
Mitigation Monitoring and Reporting Program	MMRP	
Notice of Availability of Draft Environmental Impact Report	NOA-DEIR	
Notice of Availability of Final Environmental Impact Report	NOA-FEIR	
Notice of Exemption	Ntc Ex	
Notice of Intent to Adopt a Mitigated Negative Declaration	NOI-MND	
Notice of Intent to Adopt a Negative Declaration	NOI-ND	
Notice of Preparation	NOP	
Public Comment	Public Comment	
Statement of Exemption	State Ex	
Technical Report	Tech Rpt	Provide a description
Use of Prior CEQA	Prior CEQA	
Design Review		A review procedure applicable to residential development in specified areas deemed visually sensitive
Assessor's Parcel Map	APN	
Current Recorded Grant Deed	Deed-Current	
Design Review (DR) Checklist	Checklist	
Evidence for legal creation of lot	Deed-Supp	
Floor Area Calculation	FAR Calcs	Should be included in the Plans.
Master Application Form/ Acknowledgement & Agreement Form	App	
Petition for Exemption from Environmental Assessment	CatEx Form	
Retaining Walls - Details	Retaining Walls	
Site Plan	Plans	A plan to scale, showing uses and structures proposed for a parcel of land as required by the regulations. Includes lot lines, streets, building sites, reserved open space, buildings, major landscape features—both natural and manmade—and, depending on requirements, the locations of proposed utility lines. See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan. Elevations, cross-sections, and floor plans must be submitted for all proposed structures on site. Cross sections must be provided through the highest portions of the building. Provide a table detailing the amount of cut and fill (in cubic yards) associated with each individual proposed improvement (e.g., building pad, driveway, access road, accessory structures, landscaping and other improvements etc.) and the total amount of cut and fill. Landscape plans shall include any existing and all proposed on-site landscaping, including any fencing and/or screening. All trees at least 12" in diameter should be shown, indicating any which are to be removed. The maximum height and depth of cut and fill must also be included on the site plans. All plans must be legibly drawn to an appropriate scale, sheet size 18"x24" minimum to 24"x36" maximum.
Well Information Form	Well Form	

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Submittal Item	InSite Name	Notes/Description
Grading Approval		The grading approval procedure is intended to evaluate and condition earth-moving activity in accordance with the County Grading Ordinance. It is intended to ensure that ground clearing, excavation, earthwork, and any resulting changes in drainage do not detrimentally impact people, property or the environment. If you require Grading Abatement, follow the Grading Abatement Pre-Screening Checklist.
Assessor's Parcel Map	APN	
Current Recorded Grant Deed	Deed-Current	
Evidence for legal creation of lot	Deed-Supp	
Grading Abatement Justification	Grade Abate Just	Written Statement/Justification for Proposed Grading
Grading Approval Checklist	Checklist	
Grading Plans	Plans	Preliminary grading plans must be drawn on 24"x 36" sheets only and include all items specified in Sec. C12-424 of the County Grading Ordinance. Include a table detailing the amount of cut and fill (in cubic yards) associated with each individual proposed improvement (e.g. building pad, driveway, access road, accessory structures, landscaping and other improvements etc.), the total amount of cut and fill and maximum height and depth of cut and fill must also be included on the preliminary grading plans.
Hazardous Site Form	Haz Form	
Master Application Form/ Acknowledgement & Agreement Form	App	
Petition for Exemption from Environmental Assessment	CatEx Form	
Water Efficient Landscape Form	WELO Form	
Well Information Form	Well Form	
Grading Abatement		See Grading Approval.
Lot Line Adjustment		The lot-line adjustment procedure provides for the minor alteration of property lines between two or more contiguous lots.
Assessor's Parcel Map	APN	Provide a copy of the most recent Assessor's Parcel Map (Available at the Assessor's Office-5th Floor, County Government Center)
Current Recorded Grant Deed	Deed-Current	Copy of current recorded Grant Deed
Evidence for legal creation of lot	Deed-Supp	
Lot Line Adjustment Checklist	Checklist	
Lot Line Adjustment Plans (Site Plan)	Plans	Provide all existing and proposed property lines, including dimensions; Lot areas and percentage change; All buildings, structures, septic systems, wells, driveways, & other improvements; Setback of structures and buildings to proposed property lines. All plans must be legibly drawn to a standard scale, sheet size 18"x 24" minimum to 24"x36" maximum. See sample Lot Line Adjustment site plan for further information.
Master Application Form/ Acknowledgement & Agreement Form	App	
Preliminary Title Report	Prelim Title Rpt	
Site Plan (see Lot Line Adjustment Plans)	Plans	
Well Information Form	Well Form	

InSite Document Guide

Submittal Item	InSite Name	Notes/Description
Lot Merger		The lot merger procedure is intended to provide for the merger of two or more contiguous lots.
Assessor's Parcel Map	APN	Provide a copy of the most recent Assessor's Parcel Map (Available at the Assessor's Office-5th Floor, County Government Center)
Current Recorded Grant Deed	Deed-Current	Copy of current recorded Grant Deed
Evidence for legal creation of lot	Deed-Supp	
Lot Merger Checklist	Checklist	
Lot Merger Plans (Site Plan)	Plans	Provide existing property lines, noting which are to be removed; Lot areas; All buildings, structures, septic systems, wells, driveways & other improvements; Setback of structures and buildings to proposed property lines. All plans must be legibly drawn to a standard scale, sheet size 18"x 24" minimum to 24"x36" maximum. See sample Lot Merger site plan for further information.
Master Application Form/ Acknowledgement & Agreement Form	App	
Site Plan (see Lot Merger Plans)	Plans	
Well Information Form	Well Form	
Open Space Easement-Compatible Use Determination		An evaluation whether proposed uses and development are compatible with an open space easement
Assessor's Parcel Map	APN	
Declaration of Agricultural Income	Ag Income Dec	
Master Application Form/Acknowledgement & Agreement Form	App	
Materials (Product Specifications) and/or Color Samples	Materials	
Site Plan	Plans	A plan to scale, showing uses and structures proposed for a parcel of land as required by the regulations. Includes lot lines, streets, building sites, reserved open space, buildings, major landscape features—both natural and manmade—and, depending on requirements, the locations of proposed utility lines. See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan. Elevations, cross-sections, and floor plans must be submitted for all proposed structures on site. Cross sections must be provided through the highest portions of the building. Provide a table detailing the amount of cut and fill (in cubic yards) associated with each individual proposed improvement (e.g., building pad, driveway, access road, accessory structures, landscaping and other improvements etc.) and the total amount of cut and fill. Landscape plans shall include any existing and all proposed on-site landscaping, including any fencing and/or screening. All trees at least 12" in diameter should be shown, indicating any which are to be removed. The maximum height and depth of cut and fill must also be included on the site plans. All plans must be legibly drawn to an appropriate scale, sheet size 18"x24" minimum to 24"x36" maximum.
Written Description of Existing/Proposed Use(s) of Property	Proj Desc	

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Submittal Item	InSite Name	Notes/Description
Planning Entertainment Permit		
Agreement for private security, first aid, emergency workers	Safety Agreement	
Assessor's Parcel Map	APN	
Current Recorded Grant Deed	Deed-Current	
Details on how many attendees will be present	Attendance	
Event Description and Narrative	Proj Desc	
Financial Statement	Financial State	
Form A - List of Officers	Officers	
Insurance Certification	Insurance	
License	License	
Map of entertainment area	Plans	
Master Application Form/Acknowledgement & Agreement Form	App	
Subdivision (Parcel Maps & Tract Maps)		The subdivision procedure provides for the division of land for the purposes of sale, lease, or financing.
Assessor's Parcel Map	APN	Provide a copy of the most recent Assessor's Parcel Map (Available at the Assessor's Office-5th Floor, County Government Center)
Current Recorded Grant Deed	Deed-Current	Copy of current recorded Grant Deed
Environmental Information Form	EIF	
Evidence for legal creation of lot	Deed-Supp	
Master Application Form/ Acknowledgement & Agreement Form	App	
Preliminary Title Report	Prelim Title Rpt	
Site Plan (see Subdivision Plans)	Plans	
Subdivision Checklist	Checklist	
Subdivision Plans (Site Plan)	Plans	Provide all existing and proposed property lines, including dimensions; Lot areas and percentage change; All buildings, structures, septic systems, wells, driveways, & other improvements; Setback of structures and buildings to proposed property lines. All plans must be legibly drawn to a standard scale, sheet size 18"x 24" minimum to 24"x36" maximum. See Subdivision handout for additional requirements.
Well Information Form	Well Form	
Tentative Map		See Subdivision.
Tree Removal Application		Information for the permit necessary to remove a protected tree
Master Application Form/ Acknowledgement & Agreement Form	App	
Photos	Photos	
Replanting/Revegetation Plan	Plans	
Site Plan	Plans	See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan.
Statement of Reasons for Removal	Removal Just	

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Submittal Item	InSite Name	Notes/Description
Use Permit		The use permit procedure is a discretionary review process to consider certain intensive commercial, industrial, institutional and other uses that require compliance with use-specific and use permit findings. Refer to brochure.
Assessor's Parcel Map	APN	Provide a copy of the most recent Assessor's Parcel Map (Available at the Assessor's Office-5th Floor, County Government Center)
Current Recorded Grant Deed	Deed-Current	Copy of current recorded Grant Deed
Erosion Control Plans	Plans	Enter Plans-Erosion if plan set needs to be split because file size > 100MB.
Environmental Information Form	EIF	
Evidence for legal creation of lot	Deed-Supp	
Floor Plans and Elevations	Plans	Enter Plans-FPE if plan set needs to be split because file size > 100MB. Otherwise, Floor Plans and Elevations (FPE) should be combined with Site Plan under the name Plans. In the State of California FPE is a protected title act reserved to a licensed Fire Protection Engineer.
Grading Plans	Plans	Enter Plans-Grading if plan set needs to be split because file size > 100MB.
Hazardous Site Form	Haz Form	
Landscape Plans	Plans	Enter Plans-Landscape if plan set needs to be split because file size > 100MB.
Master Application Form/ Acknowledgement & Agreement Form	App	
Project Description	Proj Desc	Include a detailed description of the project including detailed work or operational plan, activities, number of employees/volume of people, types of material to be used or stored on-site, traffic impact and/or number of vehicle trips per day, noise information.
Site Plan	Plans	See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan.
Use Permit Checklist	Checklist	
Well Information Form	Well Form	

InSite Document Guide

Submittal Item	InSite Name	Notes/Description
Variance		The variance procedure is a discretionary review process to consider requests for exceptions from certain development standards.
Assessor's Parcel Map	APN	Provide a copy of the most recent Assessor's Parcel Map (Available at the Assessor's Office-5th Floor, County Government Center)
Current Recorded Grant Deed	Deed-Current	Copy of current recorded Grant Deed
Erosion Control Plans	Plans	Enter Plans-Erosion if plan set needs to be split because file size > 100MB.
Evidence for legal creation of lot	Deed-Supp	
Floor Plans and Elevations	Plans	Enter Plans-FPE if plan set needs to be split because file size > 100MB. Otherwise, Floor Plans and Elevations (FPE) should be combined with Site Plan under the name Plans. In the State of California FPE is a protected title act reserved to a licensed Fire Protection Engineer.
Grading Plans	Plans	Enter Plans-Grading if plan set needs to be split because file size > 100MB.
Hazardous Site Form	Haz Form	
Landscape Plans	Plans	Enter Plans-Landscape if plan set needs to be split because file size > 100MB.
Master Application Form/ Acknowledgement & Agreement Form	App	
Petition for Exemption from Environmental Assessment	CatEx Form	
Site Plan	Plans	A plan to scale, showing uses and structures proposed for a parcel of land as required by the regulations. Includes lot lines, streets, building sites, reserved open space, buildings, major landscape features—both natural and manmade—and, depending on requirements, the locations of proposed utility lines. See "Sample Site Plan" and "Project Information Checklist" for items that are required to be shown on the site plan. Elevations, cross-sections, and floor plans must be submitted for all proposed structures on site. Cross sections must be provided through the highest portions of the building. Provide a table detailing the amount of cut and fill (in cubic yards) associated with each individual proposed improvement (e.g., building pad, driveway, access road, accessory structures, landscaping and other improvements etc.) and the total amount of cut and fill. Landscape plans shall include any existing and all proposed on-site landscaping, including any fencing and/or screening. All trees at least 12" in diameter should be shown, indicating any which are to be removed. The maximum height and depth of cut and fill must also be included on the site plans. All plans must be legibly drawn to an appropriate scale, sheet size 18"x24" minimum to 24"x36" maximum.
Statement of Circumstances	Variance Just	
Variance Checklist	Checklist	
Well Information Form	Well Form	
Miscellaneous – Letters and		
Acceptance of the Conditions of Approval	COA Accept	
Appeal Letter	Appeal Ltr	
Complete Letter	Comp Ltr	
Conditions of Approval	COA	
Extension Letter	Ext Ltr	
Incomplete Letter	Incomp Ltr	
Notice of Decision	NOD	
Pre-Application Letter	Pre-App Ltr	
Preliminary Review Letter	Prelim Ltr	
Pre-Screening Letter	Pre-Scr Ltr	
Resolution	Res	
General Correspondence	Corresp	

Roads and Airports Department (RDA)

Submittal Item	InSite Name	Notes/Description
Encroachment Permit		An Encroachment Permit is required for any and all work located within the County road right-of-way (ROW). Examples include utility services work, driveway installation, tree removal or major pruning, roadway restoration, or temporary construction activities.
Application	App	
Improvement Plan	Plans	Enter Plans-Imp if plan set needs to be split because file size > 100MB.
Erosion and Sediment Control Plan	Plans	Enter Plans-Erosion if plan set needs to be split because file size > 100MB.
Traffic Control Plan	TCP	
Signed Best Management Practices Form	Signed BMP Form	Stormwater pollution control best management practices checklist for all activities within the County road right-of-way (ROW).
Worker's Compensation Form	WC Form	
Grading & Drainage Plans (if applicable)	Plans	
Drainage Calculation (if applicable)	Drainage Calcs	
Sight Distance Analysis (if applicable)	SDA	
Traffic Impact Analysis (if applicable)	TIA	
Traffic Report (if applicable)	Traffic Rpt	
Police Agreement (if applicable)	Police Agreement	
Special Event Permit–Roads and Airports Department		A Special Event Permit is required for events that use the County road right-of-way (ROW). Examples include parades, street fairs, block parties, organized athletic events, and community celebrations and observances.
Application	App	
Insurance Certification (Proof of Insurance)	Insurance	
Route Map	Route Map	A route map shows parades, runs, walks, and races on County roads or sidewalks. Proposed route, start and finish points, direction of movement and proposed road closure(s), including the specific lane(s) requiring closure(s).
Turn by Turn Plan	Plans	Moving route associated with the proposed event, plan must include a turn by turn plan with narrative and diagram that incorporates the names of all proposed street/lane closures, detours, etc.
Site Layout Map	Site Layout Map	Map that shows the proposed event location within County road right-of-way (ROW). The map should show the County ROW lines, existing features and dimensions of any proposed structures that would be placed on the event site.
Signed Best Management Practices Form	Signed BMP Form	Stormwater pollution control best management practices checklist for all activities within the County road right-of-way (ROW).
Special Event Questionnaire	Questionnaire	To provide detailed information such as name of organization, date, time, location, and details of the event, etc.
Signed Indemnification Form	Agreement	
Public Notification	Notification	Advanced notification to impacted residents and businesses
Traffic Control Plan	TCP	
California Highway Patrol Agreement (if applicable)	CHP Agreement	
Sheriff Approval Letter (for Block Party)	Sheriff Ltr	
Road Closure Map (for Block Party)	Road Closure Map	
Petition Signature (for Block Party)	Petition	Signatures for residents to approve and agree the blocking off of their residential street for the purpose of the neighborhood block party on the day(s) of the event.

Surveyor's Office

Submittal Item	InSite Name	Notes/Description
Annexation		
Closure Calculations	Closure Calcs	
Plat and Legal Description	Plat-Legal Desc	
References	Ref [#]	Use a separate number (#) for each subsequent reference
Survey-Certificate of Correction		
References	Ref [#]	Use a separate number (#) for each subsequent reference
Corner Record		
Closure Calculations	Closure Calcs	
Corner Record Checklist	Checklist	
Mandatory 20 Day Memo	20DM	
References	Ref [#]	Use a separate number (#) for each subsequent reference
Dedications/Easement Review		
Ingress/Egress	IEE	Private Ingress/Egress
Plat and Legal Description	Plat-Legal Desc	
Private Road	Priv Road	
Public Utilities	Pub Util	
References	Ref [#]	Use a separate number (#) for each subsequent reference
Storm Drain	Storm Drain	
Emergency Access Easement	EA Easement	
Parcel Map		
Adjoiner deeds, and senior conveyances/deeds called for	Deed-Adj	
Closure Calculations	Closure Calcs	
Current Recorded Grant Deed	Deed-Current	
Map Submittal	Map	Map - 1 [Date] for first submittal, Map - 2 [Date] for second submittal, etc.
Parcel Map Checklist	Checklist	
Preliminary Title Report	Prelim Title Rpt	
References	Ref [#]	Use a separate number (#) for each subsequent reference

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Submittal Item	InSite Name	Notes/Description
Record of Survey		
Adjoiner deeds, and senior conveyances/deeds called for	Deed-Adj	
Assessor's Parcel Map	APN	
Closure Calculations	Closure Calcs	
Current Recorded Grant Deed	Deed-Current	
Mandatory 20 Day Memo	20DM	
Record of Survey Checklist	Checklist	
Record of Survey Map	RS Map	
References	Ref [#]	Use a separate number (#) for each subsequent reference
Self-Addressed Stamped Envelope or postcard for after filing	SASE	
Street Name Change		
Application	App	
References	Ref [#]	Use a separate number (#) for each subsequent reference
Tract Map		
Adjoiner deeds, and senior conveyances/deeds called for	Deed-Adj	
Closure Calculations	Closure Calcs	
Current Recorded Grant Deed	Deed-Current	
Map Submittal	Map	Map - 1 [Date] for first submittal, Map - 2 [Date] for second submittal, etc.
Preliminary Title Report	Prelim Title Rpt	
References	Ref [#]	Use a separate number (#) for each subsequent reference
Tract Map Checklist	Checklist	
Williamson Act Review		
References	Ref [#]	Use a separate number (#) for each subsequent reference

Table 3: InSite Name Lookup Table

InSite Name	Submittal Item
20DM	Mandatory 20 Day Memo
Addend CEQA	Addendum
Ag Income Dec	Declaration of Agricultural Income
Agreement	Acknowledgement & Agreement Form (LDE); Signed Indemnification Form (RDA)
Safety Agreement	Agreement for private security, first aid, emergency workers
AMMC Data	Data
AMMC Form	Alternate Means & Methods of Construction Form
AMMC Rpt	Report/Analysis
APN	Assessor's Parcel Map
App	Master Application Form/Acknowledgement & Agreement Form (Planning); Application (all other submittals)
Appeal Ltr	Appeal Letter
Attendance	Details on how many attendees will be present
Calc Model	Structural Calculation Model File (e.g., etabs, sap2000)
Calcs	Calculations
CatEx	Petition for Exemption from Environmental Assessment
Checklist	Checklist (Various)
CHP Agreement	California Highway Patrol Agreement
Closure Calcs	Closure Calculations
COA	Conditions of Approval
COA Accept	Acceptance of the Conditions of Approval
Comments Ltr	Plan Review Comments
Comp Ltr	Complete Letter
Concurrent Plan Rev	Concurrent Plan Review Request
Corr Ltr	Plan Check Correction Letter
Corr Resp Ltr	Plan Check Correction Response Letter
Corresp	General Correspondence
Cut Sheet	Equipment Cut sheets or product documentation
Dedication	Covenant of Easement Dedication Plat & Description; or Easement Dedication Plat & Description
Deed-Adj	Adjoiner Deeds (Final Subdivision Map Processing); Adjoiner deeds, and senior conveyances/deeds called for (Surveyor's Parcel Map, Record of Survey, Tract Map)
Deed-Current	Current Recorded Grant Deed
Deed-Supp	Evidence for legal creation of lot
Deferred Imp Agreement	Deferred Improvement Agreement
Disconnect Ltr	Utility Disconnection Letter
Dist Area Cert	Disturbed Area Certification
Drainage Calcs	Drainage Calculation
EA Easement	Emergency Access Easement
Elev Cert	Elevation Certificates
EIF	Environmental Information Form
Erosion Checklist	Signed Best Management Practices Form
Est	Construction Cost Estimate (Building Inspection Office); Engineer's Estimate of Probable Cost (LDE)
Ext Ltr	Extension Letter
FAR Calcs	Floor Area Calculation

InSite Name	Submittal Item
FEMA Cert	FEMA "No Adverse Impact" Certificate; or FEMA "No Rise" Certificate
Financial State	Financial Statement
Fire Fees	Fire Development Impact Fee
Fire Info	Fire Protection Information
FMO Comments Ltr	Plan Review Comments
FMO Data	Data
FMO Insp Ntc	Inspection Notice
FMO SUFMO	Stanford University Fire Marshal's Office Comments/Correspondence
Geo Rpt	Geologic Report
Geotech Rpt	Geotechnical Report (Soils Report)
Geotech Review Ltr	Geotechnical Review Letter (Soils Review Letter)
Grade Abate Just	Grading Abatement Justification
Guarantee	Subdivision Guarantee
Haz Form	Hazardous Site Form
IEE	Ingress/Egress
Incomp Ltr	Incomplete Letter
Insp Ntc	Inspection Notice
Insurance	Insurance Certification
J Number	Bay Area Air Quality Management District Clearance
Land Dev Agreement	Land Development Agreement
License	License
Map	Map Submittal (Surveyor); Parcel or Tract Map (Final Subdivision Map Processing)
Map-Adj	Adjoiner Maps
Materials	Materials (Product Specifications) and/or Color Samples
Mfg Data	Data
Mlt Agr Form	Mitigation Agreement Form
MMRP	Mitigation Monitoring and Reporting Program
NOA-DEIR	Notice of Availability of Draft Environmental Impact Report
NOA-FEIR	Notice of Availability of Final Environmental Impact Report
NOD	Notice of Decision
NOI-MND	Notice of Intent to Adopt a Mitigated Negative Declaration
NOI-ND	Notice of Intent to Adopt a Negative Declaration
NOP	Notice of Preparation
Notification	Public Notification
Ntc Ex	Notice of Exemption
Ntc Grading Vio	Notice of Grading Violation
Officers	Form A - List of Officers
O&M	Operation and Maintenance Agreement
Permit	Permit
Petition	Petition Signature (for Block Party)
Photos	Photos
Plans	Plans (Various)
Plat-Legal Desc	Plat and Legal Description
Police Agreement	Police Agreement
Pre-App Ltr	Pre-Application Letter
Prelim Ltr	Preliminary Review Letter

InSite Name	Submittal Item
Prelim Title Rpt	Preliminary Title Report
Pre-Scr Ltr	Pre-Screening Letter
Prior CEQA	Use of Prior CEQA
Priv Road	Private Road
Proj Desc	Event/Use Description and Narrative
Pub Util	Public Utilities
Public Comment	Public Comment
Questionnaire	Special Event Questionnaire
Rec Grading Exp	Recorded Grading Expungement
Rec Grading Vio	Recorded Grading Violation
Ref [#]	References
Removal Just	Statement of Reasons for (Tree) Removal
Res	Resolution
Retaining Walls	Retaining Walls - Details
Road Closure Map	Road Closure Map (for Block Party)
Route Map	Route Map
RS Map	Record of Survey Map
SASE	Self-Addressed Stamped Envelope or postcard for after filing
School Fees	School Impact Fee
SDA	Sight Distance Analysis
Sheriff Ltr	Sheriff Approval Letter (for Block Party)
Signed BMP Form	Signed Best Management Practices Form
Site Layout Map	Site Layout Map
Slope Calcs	Average Slope Calculation
Special Insp Form	Special Inspection and Testing Form
State Ex	Statement of Exemption
State Special Insp	Statement of Special Inspection
STD850	Department of Social Services Standard Form 850
Storm Drain	Storm Drain
Struc Calcs	Structural Calculations
SUFMO	Stanford University Fire Marshal's Office Comments/Correspondence
TCP	Traffic Control Plan
Tech Rpt	Technical Report
TIA	Traffic Impact Analysis
Title 24	<i>Title 24</i> Energy Calculations
Traffic Rpt	Traffic Report
Truss Calcs	Roof Truss Calculations and Layout Plans
Unrecorded Doc	Unrecorded Documents or Maps
Variance App	Variance Application
Variance Just	Statement of Circumstances
Waste Form	Construction Waste Management Form
Water Rpt	Engineered Water System Report
WC Form	Worker's Compensation Form
Well Form	Well Information Form
WELO Form	Water Efficient Landscape Form

II. Planning Label Naming Convention (Instructions for County Planning staff only)

Purpose: InSite requires users to give each condition or comment a name (Field Name=Label), which functions as the title of the condition or comment in the list view for all conditions and comments associated with a record, as well as the hyperlink the user can click on to view more information about the condition or comment. The Planning Division has determined that users should assign each Label an abbreviated name that corresponds to the review group or outside reviewing agency providing the condition or comment. Enter the appropriate review group abbreviation for the Label field according to the below table.

Business Rule: County Permit Center and Fiscal staff use the Conditions and Comments Portlet to place a Hold or Lock on a Record if there is a payment problem. For the Label name, Permit Center and Fiscal staff will enter the name of the problem (e.g., Fees Due, Bounced Check) rather than the name of their office.

Review Group Full Name	Review Group Abbreviation
Department of Environmental Health	DEH
Development Services - Building Inspection Office (includes Plan Check Engineers)	BIO
Fire Marshal's Office	FMO
Land Development Engineering	LDE
Surveyor's Office	SUR
Planning (general)	PLN
Planning - Airport and Land Use Commission	ALUC
Planning - California Environmental Quality Act	CEQA
Planning - Geology	GEO
Planning - Habitat Conservation Plan	HCP
Planning - Historic Heritage Commission	HHC
Planning - Stanford University	SU
Planning - Surface Mining and Reclamation Act	SMARA
Planning - Williamson Act	WA
Roads and Airports Department	RAD

Other Review Agency (ORA) Review Group Full Name	Review Group Abbreviation
ORA - CalFire	CALFIRE
ORA - California Department of Fish and Wildlife	CDFW
ORA - CalTrans	CALTRANS
ORA - Santa Clara Valley Water District	SCVWD
ORA - Sonoma State University, Northwest Information Center	NWIC
ORA - U.S. Fish and Wildlife Service	USFW
ORA - Valley Transportation Agency	VTA
ORA - Campbell	CAMPBELL
ORA - Cupertino	CUPERTINO
ORA - Gilroy	GILROY
ORA - Los Altos	LOS ALTOS
ORA - Los Altos Hills	LOS ALTOS HILLS
ORA - Los Gatos	LOS GATOS
ORA - Milpitas	MILPITAS
ORA - Monte Sereno	MONTE SERENO
ORA - Morgan Hill	MORGAN HILL
ORA - Mountain View	MOUNTAIN VIEW
ORA - Palo Alto	PALO ALTO
ORA - San Jose	SAN JOSE
ORA - Santa Clara	SANTA CLARA
ORA - Saratoga	SARATOGA
ORA - Sunnyvale	SUNNYVALE