SELF-SERVE TEAM SETTINGS - FREQUENTLY ASKED QUESTIONS (FAQ)

General Information

What is the Team Settings Feature?

A Team Settings feature is available in the Self-Serve Application Portal. It allows our customers to manage who can access and work on your projects. It provides flexibility for various team members, such as architects, constructors, business owners, and designers, to access project information, see status, City feedback, and perform tasks. Team Settings is available for new applications and in-progress projects.

Which types of applications is this available for?

- Non-residential and large scale residential projects: Major Development Permits, Commercial Building Permits and related Trade Permits
- Residential projects: Development Permits, Building Permits, Home Improvement Permits, and related Trade Permits

Team Roles and Permissions

What are the different team roles available?

- **Team Owner (Permit Holder):** The primary contact with full access. Maximum of one (1).
- **Team Administrator (Can Manage):** Helps the Team Owner manage other team members. Maximum of one (1), optional role.
- **Team Members (Can Edit):** Can edit and perform tasks on the project. Unlimited members.
- **View Only Members (Can View):** Can view project details and receive updates. Unlimited, typically the business owner or a developer.

What can a Team Owner do?

The Team Owner, also known as the 'Permit Holder,' has full access to the project. They can add or remove team members and assign their access levels. This is the only role that can assign a user to the Team Administrator role.

What are the responsibilities of a Team Administrator?

A Team Administrator helps the Team Owner manage Team Members and View Only Members. Their functions include:

- **Team Management:** Adding new Team Members, viewing current Team Members, managing permissions and email preferences, and removing access.
- **Application / Project Management:** Full access to view and modify the project, and receiving all email notifications.

What actions can Team Members perform?

Team Members have editing permissions and can perform specific actions such as:

- Viewing Details (Summary and Details tabs)
- Downloading and uploading documents
- Replying to More Information Requests (MIRs)
- Updating subcontractors and professional involvement documents for review by the Owner or Administrator to submit
- Paying fees
- Booking inspections (if granted permission)
- Requesting a revision
- Adding additional trade permits

What can View Only Members do?

View Only Members can view application and project details but have limited actions. They can:

- Pay fees
- View project information (Summary tab, Documents tab, Details tab, Inspections tab)
- Downloading documents
- Receive email notifications related to the project status.

Managing Team Members

Is there a limit to the number of Team Members?

No, the number of Team Members you can add to a project is unlimited.

How do I add a team member?

The Team Owner or Team Administrator can add new team members. In Self-Serve, go to the "Summary" tab of your project, find the "Team Settings" button, and follow the on-screen instructions to add new members using their email address and selecting their access type. Team members can also be added when applying for a permit. The team members added will receive an email notification and can create a self-serve account if they don’t already have one.

How do I remove a team member?

The Team Owner or Team Administrator can remove a team member's access. In the "Team Settings" section of your project, find the member you wish to remove and click the 'x' icon next to their name.

How do I change a team member's access?

The Team Owner or Administrator can change a Team Member's access level. When a new Team Member is added, their default access is "Can Edit." To change their access, use the drop-down menu next to their name and click "Save."

How can I be added as a team member?

Contact the Team Owner or the Team Administrator to be added as a team member.

Responding to More Information Requests (MIR)

Who can respond to a revision request from the City?

The Team Owner, Administrator, and Team Members can respond to MIRs; however, all missing items should be submitted together. These items have been requested because they are required to provide a complete review in order to issue a permit. Please see this guide for more information about how to complete a response to an MIR.

Email Notifications

Will all team roles receive the email notifications that are sent throughout application processing?

Yes, all roles within a team will receive relevant email notifications related to the application or project. Email notifications for Team Members will only begin after the application has been submitted, and the type of notifications received depends on the assigned role.

What email notifications do different roles receive?

- **Team Owner, Team Administrator, Team Member:** Receive all email notifications.
- **View Only Members:** Receives Only the Following Email Notifications as a Carbon Copy (CC) recipient:
    - For being added to a project
    - Payment Status
    - Application & Decision Status

Support

Where can I get assistance with managing Team Settings?

Please contact eservices@edmonton.ca for any technical issues.