



# User Guide

## Self Serve Public Tree Permits

Version 3.00

Date: 10-06-2022

Edmonton

Self Service Sign In

Email / Username

Password

**Sign In**

[Forgot username and/or password?](#)

Need an account?



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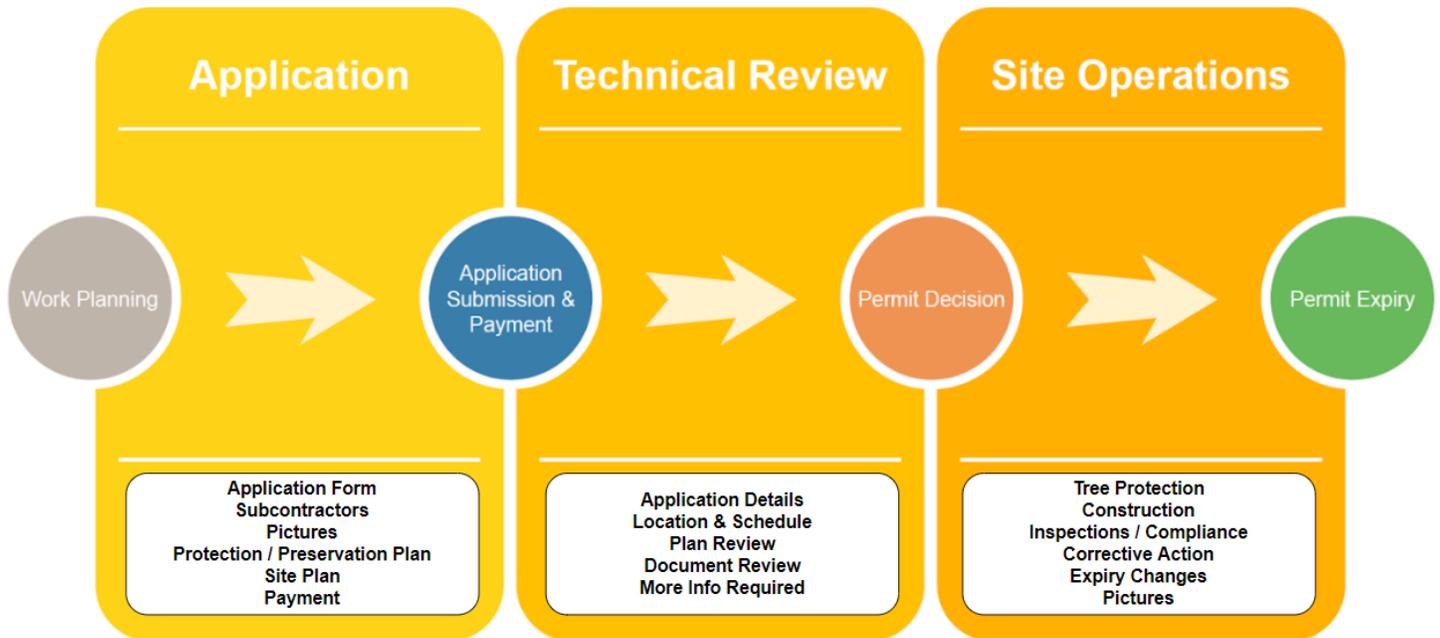
# Summary

This User Guide provides the public with details on how to apply for and manage Public Tree Permit applications and active permits in the Self Serve system.

## The CoE POSSE System

The City of Edmonton’s (CoE) automated permit management system, POSSE, includes the CoE’s public “Self Serve” portal that provides functionality for public users to apply for and manage their municipal permits, and “Winchester”, the CoE’s internal permit management system. Permit applications are submitted by the public through the Self Serve website and those applications and any issued permits are managed through the Winchester system.

## The POSSE Public Tree Permit Workflow





# Self Serve Dashboard

Upon signing in to the Self Serve portal, you will be presented with a dashboard including two tabs available to manage your applications and permits, these lists include the status of each application or permit.

- A search bar is available to search for any of your existing applications or permits.
- The ACTION REQUIRED tab lists all of your applications that require action to proceed to submission or application decisions.
- The RECENT tab lists all applications that have been submitted and are being processed.

## Application Steps

### Application Options (Integrated or Stand-alone permits)

Applicants can now apply for a public tree permit within most of the permit tile options under the House, Home Improvement, and Commercial tabs in Self Serve. For instance, within the “Single Detached” house permit, there is an option to add a public tree permit within the development and building permit applications.

The option to create a stand-alone public tree permit is also available if required and you can link it with an existing permit.

### Sign Up for A Self Serve Account

*All Public Tree Permit applications must be made through the “Authenticated” Self Serve portal (requires an account to be set up).*

1. Navigate to: <https://selfserve.edmonton.ca>
2. Click **Sign Up**
3. Select your Account Type (“Business” or “Personal” Account) and click **Next**
4. Choose the types of services you’ll need for your account and click **Next**
5. Enter your business licence and profile information, agree to the terms and conditions and click **Create Account**

### How to Fill Out an Application Form

These instructions apply to Business Account users and are very similar for Personal Account users, other than the New Project tabs provided at the top of the screen.

1. Click the **New Project** button





## Details Tab

2. Select the **Public Tree Permit** tile under the “House”, “Home Improvement ” or “Commercial” tabs

**New Project** [X]

HOUSE HOME IMPROVEMENT COMMERCIAL

**Single Detached**  
Single Detached Dwelling House, may contain a secondary suite

**Semi-Detached**  
Semi-detached or Duplex House with 2 Dwellings, may contain secondary suites

**Row House (3/4 units)**  
Row House with 3 or 4 Dwellings, may contain secondary suites

**Row House (5+ units)**  
Row House with 5 or more primary Dwellings, may contain secondary suites

**Garden Suite**  
Garden Suite on a Residential lot

**Demolition of House**  
Residential demolition of houses (accessory buildings can also be included)

**Demolition of Accessory Building**  
Residential demolition of accessory buildings

**Public Tree Permit**  
Apply for a permit to preserve and protect City-owned trees when working in close proximity.

a.

3. If the public tree permit is related to an existing permit, provide the city file number, (Optional).

a. This related permit number can be any city file number associated with:

- i. Project (Major/Minor Development, Building, Home Improvement, Demolition, Commercial Final)
- ii. OSCAM
- iii. Utility Approvals & Installations
- iv. Tree Permits

b. Notes:

- i. *Relating a project-related city file number is only permitted for the same applicant that applied for that project, while there are no permission requirements for the other applicable city file numbers.*
- ii. *Once a relationship has been established, the address of the related permit will be automatically added to your Public Tree Permit application.*

### ← Public Tree Permit [X]

If the public tree permit is related to an existing permit, provide the city file number.

City File Number: (optional)

123456789-001

Search

APPLY

c.

4. Enter your project information under the “Details” tab

a. Project Type

- i. Commercial/Residential Construction
- ii. Utility Line Assignment
- iii. On Street Construction & Maintenance
- iv. Utility Infrastructure Maintenance
- v. Special Event
- vi. Neighbourhood Renewal
- vii. Capital Project
- viii. Other (Provide free text option for this)

Project Type:

(None) | ▾

ix.

b. Property Address for Application (Not applicable if a related permit has been added)

**Property Address for Application**

Find by:

Address

OR

Legal Description

i.  I am unable to find the address using the above search.

ii. For Utility Line Assignments (ULA) and On Street Construction & Maintenance (OSCAM) projects the option to submit an application for a blanket permit is available

Are you a utility company applying for a blanket permit?

Yes

No

Blanket Permit Location:

1.

[Blanket Permit Location input field]

iii. For Neighbourhood Renewal projects, the “Neighbourhood” location selector is available

**Neighbourhood for Application**

Find by:

Neighbourhood

1.

c. Permit Start & End Dates

Permit Start Date:

[Permit Start Date input field]

Permit Expiry Date:

[Permit Expiry Date input field]

i.

ii. *Public Tree Permit expiry dates can be changed by sending a request to [treepreservation@edmonton.ca](mailto:treepreservation@edmonton.ca). Expiry dates can be extended if protection is required beyond the planned expiry date and, as a best practice, expiry dates should be reduced if work has been completed early. Blanket permit expiry dates shall be set to the end of the calendar year, and can be renewed annually.*

d. Project Name

Project Name:

[Project Name input field]

i.

ii. *The Applicant Project Name from a related project will be auto-populated here, if applicable.*

e. Work Type

Work Type:

- Above-ground Work Only (Construction, demolition, laydown activities, hoarding, vehicular access)
- Below-ground Work (Excavation and/or other grade changes)
- Above Ground & Below Ground Work

i.

f. Are You Working Within

Are you working within:

- 5 metres of a boulevard/open-space tree
- 10 metres of a natural stand
- 5 metres of a blvd/open-space tree & 10 metres of a natural stand

i.

g. Natural Stan Work Location (If working around natural stands)

Natural Stand Work Location:

- Outside Natural Stand
- Inside Natural Stand
- Outside & Inside Natural Stand

i.

h. Tree Protection/Preservation Plan Upload(s), (Requirements determined by answering the “Work Type” and “Are You Working Within” answers.

i. Site Plan Upload

**Site Plan**

Site plans must include:

- Address, Property lines, Roadways, Sidewalks, Building, Boulevard.
- Tree / Stand IDs within 5m (tree) / 10m (stand) of project boundaries, access or laydown.
- Actual Fencing Distances from trunk's / stand's edge (m).
- Proposed Access Location and Width (m).
- Proposed Access Anticompaction Measures.

Drag and drop your files here or browse your computer using the button below.

Browse for Files

i.

j. Site Picture Upload (Optional and recommended to identify any existing tree damage)

**Site Pictures (optional)**

Photos of trees being impacted are strongly encouraged.

Drag and drop your files here or browse your computer using the button below.

Browse for Files

i.

k. Permit Application Notes (Optional)



5. Enter any Site Details (Optional)

**Site Details**

Location of Work: (please be as detailed as possible) (optional)

Site Contact Name: (optional)

Site Contact Email: (optional)

Site Contact Number: (optional)

a.

6. Click the **Next** button

## Protection Plan Tab

Protection plans can be created and submitted using the digital form included in the Protection PPlan tab. This tab only appears if you are only working above ground within proximity to city trees. The available options under this tab align with the “Work Type”, “Are You Working Within”, and “Natural Stand Work Location” questions under the Details/Additional tab(s) within your application.

7. Boulevard / Open Space Tree (If applicable)

- a. Click the **Add Tree** button. A new window will open to be completed.

### Boulevard / Open Space Tree

**i** Complete this page for each [boulevard and open space tree](#) within 5 m of work being done (project boundaries, access or laydown areas). Existing infrastructure acts as an anticompaction measure, so tree protections do not need to cover existing hardscape (walkways, sidewalks, roadways) or block other infrastructure like hydrants. Show how wide and where the proposed vehicular access will be (if applicable) so Urban Forestry can approve shorter fencing if required.

Tree ID: (Tree ID's must match ID in site plan)

Tree Circumference (Centimetres): (For detailed information on determining which tree to measure in a natural stand, refer to the [Tree Protection Plan Template](#))

Tree Diameter (Centimetres): (For detailed information on determining which tree to measure in a natural stand, refer to the [Tree Protection Plan Template](#))

Standard Minimum Protection Distance (Metres):

Planned Fencing Width - Both Sides (Metres):

Planned Fencing Length A (Metres):

Planned Fencing Length B (Metres):

Is a shorter Minimum Protection Distance required for the Actual Tree Protection Fencing Length?

Is a shorter Minimum Protection Distance required for the Actual Tree Protection Fencing Width? If yes, Why?

Is Tree Canopy expected to interfere with equipment, construction, or the proposed building?

[Save](#)

- b.

- c. Add as many trees as required for your work, (added trees will appear in a table at the bottom of this section).

8. Outside Natural Stand

- a. Click the **Add Tree** button, a new window will open to be completed

**Outside Natural Stand:**

**i** Complete the following for a natural stand within 10 m of work being done (project boundaries, access or laydown areas). This should be based on the largest tree in closest proximity to the project boundaries, or the edge of the stand, whichever provides more protection distance (the protection boundaries may only be on one or two sides). Know how wide and where the proposed site access will be (if applicable) to have shorter fencing approved, if required. Existing infrastructure acts as an anticompaction measure, so tree protections do not need to cover existing hardscape (multi-use paths, maintained trails, roadways) or block other infrastructure like hydrants.

Tree ID: (Tree ID's must match ID in site plan)

Tree Circumference (Centimetres): (For detailed information on determining which tree to measure in a natural stand, refer to the [Tree Protection Plan Template](#))

Tree Diameter (Centimetres): (For detailed information on determining which tree to measure in a natural stand, refer to the [Tree Protection Plan Template](#))

Standard Minimum Protection Distance (Metres):

**TYPICAL OUTSIDE NATURAL STAND TREE PROTECTION**

Planned Protection Distance A (Metres):

Planned Protection Distance B (Metres):

Is a shorter Minimum Protection Distance required for the Actual Tree Protection Fencing?

Is the canopy of this tree expected to interfere with equipment, construction or the proposed building?

**Save**

- b.
- c. Add as many trees as required for your work, (added trees will appear in a table at the bottom of this section).

9. Inside Natural Stand

- a. Click the **Add Tree** button, a new window will open to be completed

**Inside Natural Stand:** ✕

**i** Complete the following for a natural stand within 10 m of work being done (project boundaries, access or laydown areas). This should be based on the largest tree in closest proximity to the project boundaries (the protection boundaries may only be on one, two or three sides). Know how wide and where the proposed site access will be (if applicable) to have shorter fencing approved, if required. Existing infrastructure acts as an anticompaction measure, so tree protections do not need to cover existing hardscape (multi-use paths, maintained trails, roadways) or block other infrastructure like hydrants.

Tree ID: (Tree ID's must match ID in site plan)

Tree Circumference (Centimetres): (For detailed information on determining which tree to measure in a natural stand, refer to the [Tree Protection Plan Template](#))

Tree Diameter (Centimetres): (For detailed information on determining which tree to measure in a natural stand, refer to the [Tree Protection Plan Template](#))

Standard Minimum Protection Distance (Metres):

TYPICAL INSIDE NATURAL STAND TREE PROTECTION

Planned Protection Distance A (Metres):

Planned Protection Distance B (Metres):

Planned Protection Distance C (Metres):

Is a shorter Minimum Protection Distance required for the Actual Tree Protection Fencing?

Is the canopy of this tree expected to interfere with equipment, construction or the proposed building?

**Save**

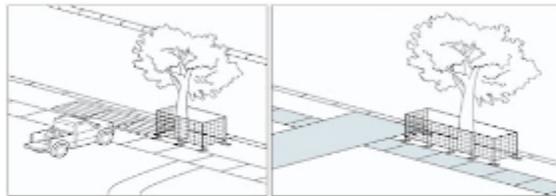
- b.
- c. Add as many trees as required for your work, (added trees will appear in a table at the bottom of this section).

## 10. Anti Compaction Measures

### Anti Compaction Measures



This section is for sites with a temporary crossing or vehicular access location within the standard minimum protection distance. If your vehicular access is on existing hardscape (driveway, roadway, maintained trail) or if no vehicles will be passing within five metres of a City tree, anticompaaction measures are not required.



Width of Proposed Access (Metres):

3

Type of Anticompaaction Measures Required: (If access is within 5 m of the tree and outside of Standard Minimum Protection Distance (Appendix 1))

Not Applicable

If access is within the Standard Minimum Protection Distance (Appendix 1) resulting in shorter tree protection fencing, what is your protection approach:

Rig Mats



If an access location is 5-10 m from a natural stand: No anticompaaction measures are required.

a.

## 11. Upload Tree / Natural Stand Protection Plan (Optional)

### Upload a Tree / Natural Stand Protection Plan (optional)

For more information about public tree protection plans and access to templates: [edmonton.ca/TreePermit](http://edmonton.ca/TreePermit)

Drag and drop your files here or browse your computer using the button below.

Browse for Files

< Previous

Next >

a.



## Applicant Tab

### 12. Enter Applicant Information

- These fields are prepopulated with your account information
- You must confirm your email address

#### Applicant Information

Applicant / Company Name: <input type="text"/>	Applicant Address: <input type="text"/>
Contact Name: <input type="text"/>	City: <input type="text"/>
Contact Phone Number: <input type="text"/>	Province: ALBERTA   <input type="button" value="v"/>
Contact Email Address: <input type="text"/>	Postal Code: <input type="text"/>
Confirm Email Address: <input type="text"/>	Fee Email Address: (optional) <input type="text"/>

c.

### 13. Complete the Application Declaration by selection one of the options

#### Applicant Declaration

By typing my name, I confirm that:

- I am individually responsible for the permit associated with this application
- I am an authorized representative of the organization applying for the permit

I am aware that NO WORK on this project is authorized before the appropriate permit is issued.

The information provided with this permit application, such as plans and specifications, supporting documents, details, professional schedule letters, etc., pertains to the project that is the subject of this application and to the best of my knowledge is true and complete.

Type name to sign:  Date:

a.

### 14. Click the **Proceed to Payment** button

- Once you click this button, the system will conduct a validation to ensure that all required fields are filled out and documents uploaded, items with red text identify any missing information.

## Payment Tab

15. Note that application fees for Public Tree Permit applications are waived for 2022 and will commence in 2023

16. Payment options will allow for the following types:

- Credit card payments
- Cashier payments
- PO or charge code payments (Reserved for parallel municipal organizations and City of Edmonton departments only)
- Note: Payment methods other than credit card or in-person are reserved for organizations approved to do so by the City of Edmonton. If you select this option and do not have approval to do so, your application will be rejected.

# Changing Permit Expiry Dates

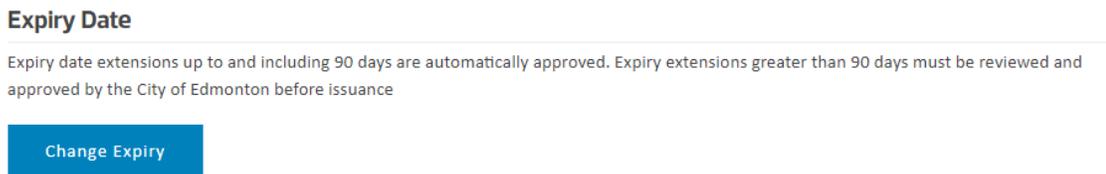
Standard public tree permit holders (non-blanket permits) can now change expiry dates after submission within Self Serve, under the permit's summary tab. Expiry dates can be extended if protection is required beyond the planned expiry date and, as a best practice, expiry dates should be updated if work has been completed early.

Blanket permit expiry dates cannot be extended, shall be set to the end of the calendar year in the initial application, and can be renewed annually.

Expiry date extensions up to and including 90 days are automatically approved. Expiry extensions greater than 90 days must be reviewed and approved by the City of Edmonton before issuance.

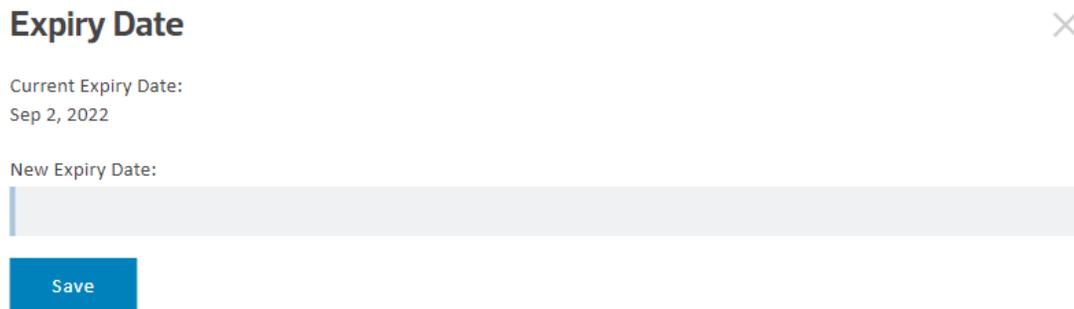
## Steps to Change Expiry Dates

1. Click the **Change Expiry** button



a.

2. Select your new expiry date



a.

3. Click the **Save** button

## Adding Subcontractors

Adding a subcontractor to your tree permit enables them to manage the permit after submission and includes them in all permit specific system notifications. Subcontractors can update sites (for blanket permits), add site pictures, upload files, change expiry dates, and provide information during the More Info Required or Corrective Actions Required processes. Adding a contractor does not remove an applicant's liability associated with public tree permit requirements. Multiple contractors can be added to a public tree permit.

## How to Add Subcontractors

1. Go to the Details page within a draft application or Summary page of a submitted application or issued permit and click the **Add Subcontractor** button

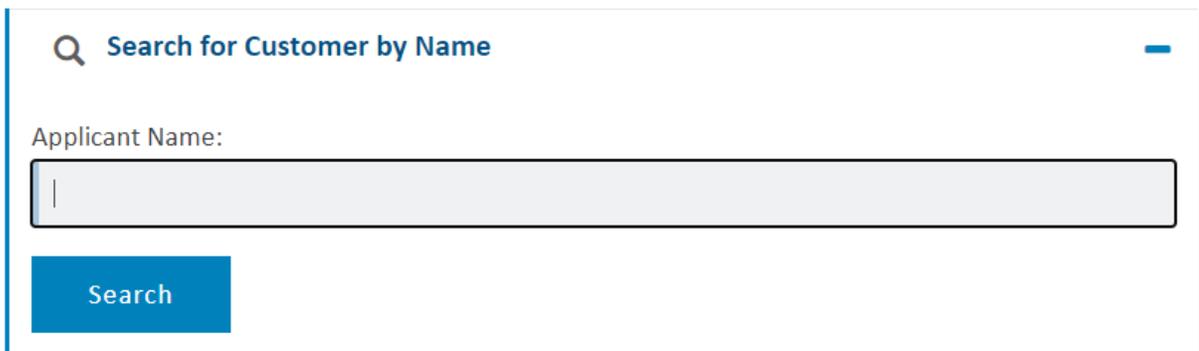
### Subcontractors (optional)

Adding a subcontractor to your tree permit enables them to manage the permit after submission and adds them to all permit specific system notifications. Subcontractors can update sites (for blanket permits), add site pictures, upload files, and provide information during the More Info Required or Corrective Actions Required processes. Adding a subcontractor does not remove an applicant's liability associated with public tree permit requirements.



a.

2. In the new window that opens, search for the name associated with your subcontractor and check the appropriate account in the list of results



The image shows a search interface with a magnifying glass icon and the text "Search for Customer by Name". Below this is a label "Applicant Name:" followed by a large, empty text input field. At the bottom of the form is a blue button labeled "Search".

a.

3. Click the **Select** button
4. Repeat steps to add another subcontractor

## Adding Blanket Permit Sites

Utility companies have the option to apply for annual blanket permits that cover multiple sites across the city by selecting the project types of ULA or OSCAM and requesting a blanket permit. During the application technical review process, if an applicant has requested a blanket permit the Urban Forester will review the application and make a decision if a blanket permit is allowed and can be approved. If applicable, once a Blanket Permit has been issued, the blanket permit applicant will be provided permission in Self Serve to add multiple sites to the permit.

## How to Add Multiple Sites to a Blanket Permit

1. From your Self Serve dashboard, go to your "Recent" tab or use the search box to locate your Blanket Permit. Click on your issued Blanket Permit then click the **Add Site** button.



### Public Tree Permit – 418950678–001

To conduct Above Ground & Below Ground Work work within 5 metres of a boulevard/open-space tree, at the location specified in this permit, and according to the associated Tree Preservation Plan(s).

#### Issued

Your Public Tree Permit has been issued and will be active within your permit start and expiry dates. Please ensure that you read and comply [READ MORE](#)

#### Sites

Blanket permit holders must maintain a current list of sites for the issuance period of the blanket permit. Please review the Tree Permit webpage for additional details: <http://edmonton.ca/TreePermit>



a.

## 2. Add you site information

### Site

Property Address for Application

Find by:  OR

I am unable to find the address using the above search.

Location of Work: (please be as detailed as possible) (optional)

Start Date:  End Date:  Status: Active

Work Type:  ▼

Working Within:  ▼

Site Contact Name:

Site Contact Number:  Site Contact Email:

a.

3. Click the **Save** button
4. Blanket sites will be displayed within a grid in Self Serve.



# Public Tree Permit Statuses

Permit Status	Description
<b>Application Screening</b>	Your Public Tree Permit has been submitted and is undergoing an initial intake review. Once the application passes the intake review, it will be assigned for technical review by a City of Edmonton Urban Forester.
<b>Cancelled</b>	Your Public Tree Permit has been cancelled. If you have not completed your work around City trees, a new Public Tree Permit is required.
<b>Corrective Action Required</b>	Your Public Tree Permit requires corrective action to maintain its issued status. Within 48 hours of this notice, you must complete the required corrective action, and update the required files associated with the corrective action request under the "Corrective Action" tab within the permit status page in your Self Serve Account.  Additional information may be required upon review of your submission. Failure to complete the requirements in Self Serve, per this notice, may result in enforcement action.
<b>Draft</b>	Your Public Tree Permit application has been initiated in Self Serve and has not yet been submitted.
<b>Expired</b>	Your Public Tree Permit has expired. All tree protection must be removed, if applicable. It is recommended that you submit photos of the protected trees within Self Serve immediately after protection removal.  Once a permit has expired, an expiry date change can no longer be made. If you have not completed your work around City trees, a new permit is required.
<b>Expiry Change Review</b>	Your Public Tree Permit expiry change request is under review by a City of Edmonton Urban Forester. You will receive an email notification with the review decision. If approved, the email will include an updated permit attachment outlining the new expiry date.
<b>Issued</b>	Your Public Tree Permit has been approved and issued.  A copy of the Public Tree Permit or the permit number must be produced upon request when work on site is occurring.  Public Tree Permit expiry dates can be changed within Self Serve under your permit's summary tab. Expiry dates can be extended if protection is required beyond the planned expiry date and, as a best practice, expiry dates should be updated if work has been completed early.
<b>More Information Required</b>	Your Public Tree Permit application is being reviewed and additional information is required to fully process your request. The application has been placed on hold until we receive the requested information. Please submit the information as requested under the "Provide Requested Info" tab within the permit status page in your Self Serve Account.  Additional information may be required upon review of your submission. Failure to complete the requirements in Self Serve, per this notice, may result in refusal of your permit application.
<b>Payment Required</b>	Payment of your Public Tree Permit application fee is outstanding. Please submit application fee payment to have your application reviewed by the City of Edmonton. Failure to have your application fees paid in a reasonable timeframe may result in cancellation of your application.
<b>Refused</b>	Your Public Tree Permit application has been rejected and a permit will not be issued. Refusals may be due to a submitted application not meeting City tree protection/preservation requirements and/or additional information not being submitted when requested during an application review.  Obtaining a Public Tree Permit for this site will require a new application.
<b>Suspended</b>	Your Public Tree Permit has been suspended. All work under this permit must cease immediately.  Permit conditions as set by forestry must be met for the suspension to be lifted. Failure to do so may lead to a full cancellation of the permit.
<b>Under Review</b>	Your Public Tree Permit application is under technical review by a City of Edmonton Urban Forester. Please ensure to respond to any information requests so that your application can be processed in a timely fashion.



## Public Tree Permit PDF Reports

Public Tree Permit Reports are automatically generated by POSSE through various processes in the system. These reports are provided to permit applicants and permit holders via email as a record of decision making and subsequent statuses throughout the application and permit lifecycles. Permit reports are generated for the following status changes:

- Issued
- Refused
- Suspended
- Cancelled

An updated Public Tree Permit PDF report can also be requested or provided when permit suspensions are lifted or permit expiry dates are extended.

## POSSE Email Communications with Public Users

Emails are automated outputs of specific POSSE processes; these email notifications include standard text and may include attachments generated within specific processes. Within the Tree Permit solution, automated notification emails have been implemented for processes. The system sends emails to applicants and permit holders from either a Do Not Reply email address or from a Forestry Group email address, see below. Any emails that come from a Forestry Group email address can be replied to.

## Public Tree Permit Support

Public Tree Permit support requests can be made by emailing the Urban Forestry group associated with your construction site location or by emailing [treepreservation@edmonton.ca](mailto:treepreservation@edmonton.ca)

## Forestry Email Addresses Used for Public Tree Permit Applications

Forestry Group	Email Address
Urban Forestry North West	treepermitnw@edmonton.ca
Urban Forest North East	treepermitne@edmonton.ca
Urban Forest South West	treepermitsw@edmonton.ca
Urban Forest South East	treepermitse@edmonton.ca
Natural Areas (City wide natural tree stands)	naturalareaoperations@edmonton.ca