City of New York Department of Buildings

Appointments

Industry Manual

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Introduction

The Department of Buildings has launched a new online self-service appointments system called DOB Appointments. The system launched in October 2018 and replaces the previous process of calling 311 to make appointments through the Plan Examination Notification System (PENS).

Registered Users will be able to schedule, cancel, and review appointments through one convenient website. Registered users will be able to access DOB Appointments by entering the same DOB ID Number and PIN they previously used to access PENS when calling 311.

The new appointments system can only be used to schedule standard plan review for BIS job filings. Specialized plan examination appointments (audits, determinations, emergencies, and project advocate appointments) will continue to be made by submitting a PER11 Manual Appointment and Drop Off Request Form or by contacting the appropriate borough office. Standard plan review appointments for DOB NOW job filings (filings submitted DOB NOW: Build) will continue to be scheduled separately in DOB NOW.
How to Access the Appointments System

This section will guide you through how to access and navigate the Appointments system. Screenshots will direct your attention to key features and a step-by-step guide will explain how to use them.

Accessing the System

To access the system you will need to enter the following information:

- **BIS Job Number** - the nine digit job number for which the appointment will be or is scheduled for.
- **BIS Document Number** - the document number for which the appointment will be or is scheduled for.
- **DOB ID Number** – your DOB issued ID number. Please note: If you are a Class 2 Filing Representative, your DOB ID is entered as a 6 digit number. E.g., if your DOB ID is “1234”, you will have to enter “001234” when prompted by the system.
- **PIN** – previously referred to as the PENS PIN. Your PIN is a 4 digit number issued by the Licensing Unit once you have registered and been approved to schedule plan examination appointments.
Click on **BIS Job Number** to enter the BIS job that you would like to schedule an appointment for.

Click on **BIS Document Number** to enter the document number that you would like to schedule an appointment for.
Click on **DOB ID Number** to enter the six digit DOB ID of the person that is scheduling the appointment.

Click on **PIN** to enter your PIN information.
Click on **Validate** to submit your responses

**Requesting a PIN**

The Licensing Unit provides DOB ID Numbers and PINs to all eligible professionals and class 2 filing representatives as part of the initial DOB registration process.

If you are an eligible professional or a class 2 filing representative and you have never received a PIN, you can submit a [DOB Appointments Registration Form](#) via email or drop-off the form in person to the Licensing Unit located at 280 Broadway, 1st Floor to apply.

If you forgot your PIN, need to change your PIN, or need to update any of your business contact information, complete a new [DOB Appointments Registration Form](#) and submit the request using the [DOB Online Help Form](#).

Additional information on how to register for DOB Appointments can be found online at [DOB Appointments Resources](#).
Navigating the Appointments System

The Scheduler Information section, located at the top of the screen, provides information on the user that is currently signed into the system.
The **Appointments** section is where you will schedule appointments and view scheduled appointments.

The **+Appointments** button in the middle of the screen will allow you to schedule an appointment.

The **Job # Appointments** grid will display all the appointments that were schedule for the specific job filing number and document combination.
The **My Appointments** grid will display all the appointments that you have scheduled.

The **Search** button will allow you to search for an appointment on the grid.
The **View Details** link will show the meeting intent and all the email addresses that the email notification was sent to.

![Image of View Details screen](image)

The Details screen.

![Image of Details screen](image)
The **Profile Icon** will display the name of the person who is logged in.

![Profile Icon](image1)

The **Home Icon** will log you out and take you back to the log in screen.

![Home Icon](image2)
How to Schedule an Appointment

Click on +Appointment

Update the addresses that will receive email notifications about this appointment. Click Next.
Click on the **calendar icon** to select the appointment date.

The calendar will block out all past dates, holidays and dates that are currently fully booked.
After selecting the date, click on **Get Time Slots** to see the available times on the date selected.

Select a time slot from the available list.
Click Select.

The appointment date and time selected will display.
You may enter a comment or the intent of the meeting in the **Meeting Intent** section.

Click on **Schedule** to schedule the appointment.

A pop-up notification will appear. Click **OK**
The appointment will appear on your list of scheduled appointments.

How to Schedule a Manual Plan Examination Appointments

Specialized plan examination appointments (audits, determinations, emergencies, and project advocate appointments) will continue to be made by submitting a PER11 Manual Appointment and Drop Off Request Form or by contacting the appropriate borough office.

DOB NOW plan examination appointments (for filings submitted in DOB NOW: Build) will continue to be scheduled in DOB NOW.
How to View a Scheduled Appointment

To view your scheduled appointment, you will need to sign into the Appointment system for the job number and document number that you would like to see the appointments for. Once you are signed in, the information will display at the bottom of the screen.
How to Cancel an Appointment

Cancel a Plan Review Appointment
To cancel a plan review appointment, you will need to log into the Appointment system for the BIS Job number and document. When you are in the Appointments system you will need to scroll down to the Job # Appointments grid.

Enter the appointment tracking number in Search field.
In the Action column, click on **Cancel**

A pop-up screen will appear. **Please provide reason to cancel the appointment** in the space provided.
The Submit button will activate once you have entered information in the space provided. Click Submit.

A pop-up confirmation will appear. Click OK.
The appointment status will update to Cancelled on the grid.

An email notification will be sent to all email addresses that was included on the appointment request.
Cancel a Manual Plan Examination Appointment

To cancel a manual plan examination appointment, you can submit a request on the Online Help Form (www.nyc.gov/dobnowhelp). You will need to supply the full tracking number in your request.
Select **Appointments** from the Module drop down list. Complete all additional required fields then click on **Send**.

Once the appointment is canceled, the appointment status will update to Canceled on the grid.
An email notification will be sent to all email addresses that was included on the appointment request.

Completed Appointment

Once an appointment is completed, the DOB staff will update the meeting status to Completed. An email notification will be sent to all email address that was entered when the appointment was scheduled.
Glossary

**Appointments CRM** – the internal portion of the DOB Appointments system. Plan examiners and the Scheduling Coordinators have access to this system. This is where scheduling coordinators set up Plan Examiner schedules for plan reviews, training, and staff days off. Plan Examiners use the internal portion of the DOPB Appointments to disposition appointments.

**BIS Job Number** – the job number that is associated with the job filing in the BIS system. This information is required in order to access the DOB Appointments portal.

**Cancel Status** – this status indicates that a scheduled meeting has been canceled. After a registered user or scheduling coordinator cancels an appointment in the DOB Appointments Portal, the status will update to display as canceled.

**Completed Status** – this status indicates that an appointment is complete. After the Plan Examiner has dispositioned and closed an appointment, the status will display as completed.

**DOB Appointments** – an online self-service system that allow registered users and DOB staff to schedule plan review appointments for BIS job filings online.

**DOB Appointments Portal** – the external portion of the Appointments system. Registered users and scheduling coordinators use this system to schedule, cancel and view appointments.

**DOB ID** – an assigned ID number issued by the Licensing Unit at Department of Buildings.

**Document Number** – the number that is associated with the document that a customer would like to meet with the Plan Examiner about. This information is required in order to access the DOB Appointments Portal.

**Escalate** – in the DOB Appointments system, this term escalate refers to the reassign for Plan Examiners

**Online Help Form** – the online help form allows registered users to submit an online help request or question to the DOB. Users are able to access the Online Help Form at www.nyc.gov/dobnowhelp.

**Plan Examiner** – in the DOB Appointments, the term Plan Examiner is used to refer any DOB staff that has appointments to meet with the customer. Such DOB staff includes Assistant Chief Plan Examiners, Chief Plan Examiners, Project Advocate, Code and Zoning Specialist, Deputy Borough Commissioners or Borough Commissioners.

**PER11 Manual Appointment and Drop Off Request Form** – this form is used to submit an appointment request for specialized plan examination appointments (audits, determinations, emergencies, and project advocate appointments) that cannot be schedule using the DOB Appointments Portal.
PIN – previously referred to as the PENS PIN. In DOB Appointments, the PIN number is issued by the Department of Buildings Licensing Unit for the purpose of created appointments. This information is required in order to access the DOB Appointments portal.

Scheduling Coordinator – in the DOB Appointments system, Scheduling Coordinators replace the role previously held by PENS Coordinators, Borough Commissioner’s staff and anyone who scheduled appointments in the previous appointments system.

Schedule Status – this status indicates that an appointment has been scheduled. After a user or scheduling coordinator has scheduled an appointment in the DOB Appointments Portal, the status will update to display as scheduled.

Status – this is the status of the appointment. Possible appointment statuses are: schedule, cancel or complete.

Tracking Number – this is the confirmation number generated by the appointments system once an appointment has been scheduled. The tracking number includes the BIS job number, document number and appointment number. The first nine digits represent the BIS job number. The next two digits represent the document number. The last four represents the appointment number.