THE HUB
ONLINE PORTAL

CIVIC ACCESS User Guide

La Quinta
GEM of the DESERT

tyler technologies

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Overview

Citizen online access is a crucial part of community development. The purpose of Tyler Technologies' Civic Access application is to provide public-facing tools for citizens to use to interact with land management and permitting processes administered by local government municipalities.

Civic Access Home Page and Main Menu Bar

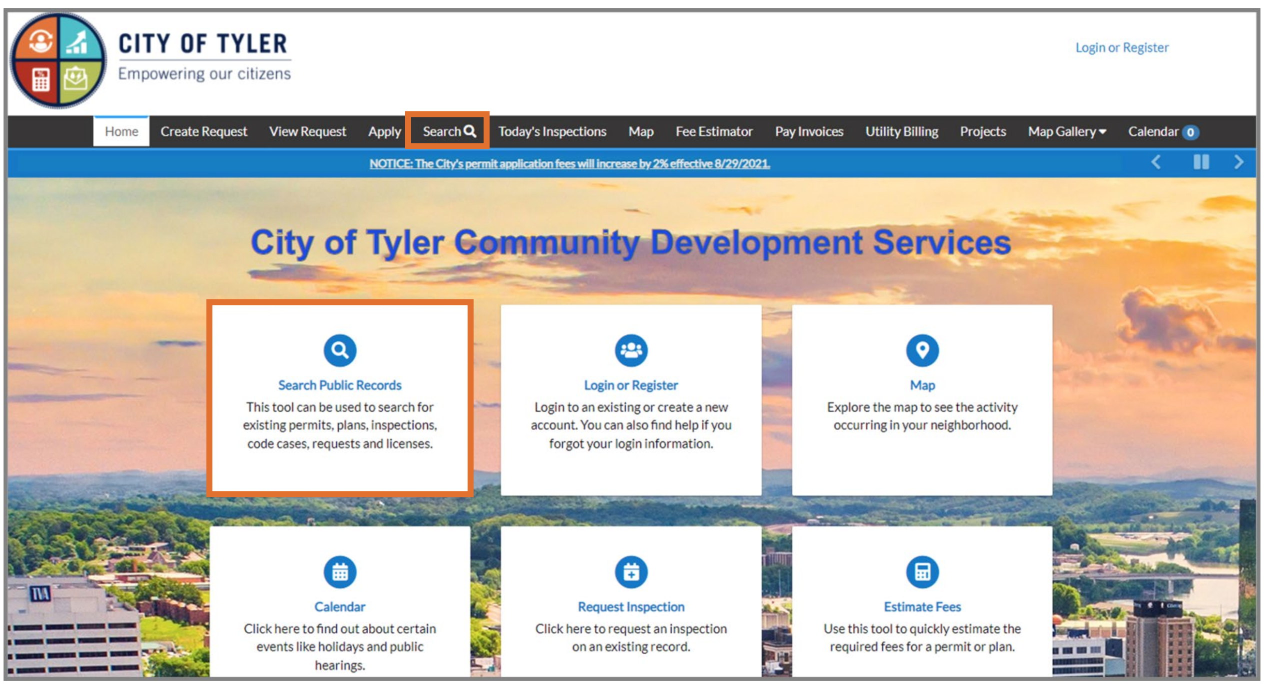
Since municipalities administer and configure their own Civic Access Home page and main menu bar, the menus and cards vary. The menu bar may display Apply, Map, Report, Fee Estimator, Pay Invoices, Search, Calendar, and/or Help. Citizens may see Search Public Records, Apply, Login or Register, Pay Invoices, Map, Calendar, Request Inspection, and/or Estimate Fees menu cards. Administrators also can create a custom menu cards.

NOTE The Home page, Welcome page, and Dashboard may be configured differently than shown in the User Guide. To configure the pages, please refer to the Civic Access Administration Guide.

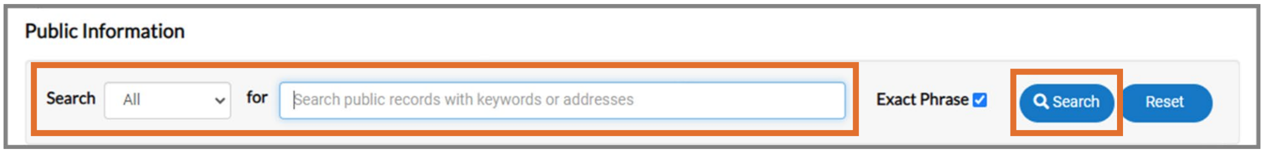
Search Public Records without Logging In

Users can access public information without logging in.

1. Click **Search** on the main menu bar or click the **Search Public Records** card.



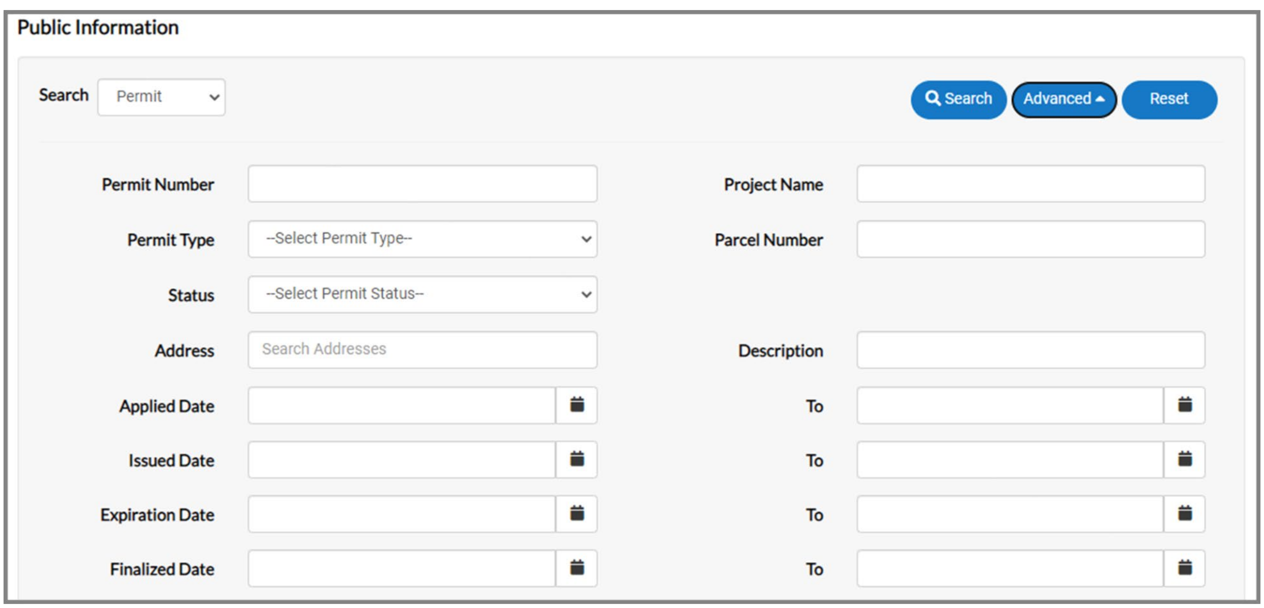
2. To search through all records, leave the word **All** in the Search dropdown.
3. Type **search terms** in the for field.
4. Click **Search**.



5. To display additional fields to use as search criteria, select another option in the Search dropdown.
6. Click **Advanced.**

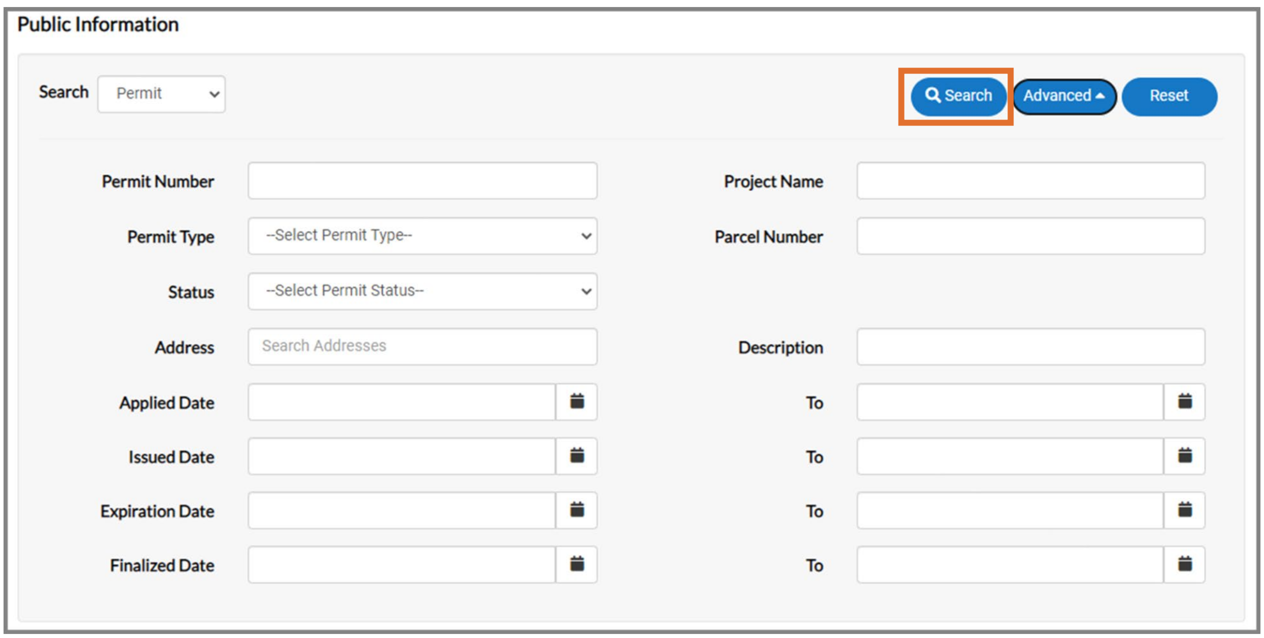
Permits

1. Type a partial or complete **permit number** in the Permit Number field.
2. Type a partial or complete **project name** associated with the permit in the Project Name field.
3. Select the **type of permit** in Permit Type dropdown.
4. Select a permit **Status** from the dropdown.



NOTE Users do not have to enter data in all fields and may use any combination of criteria.

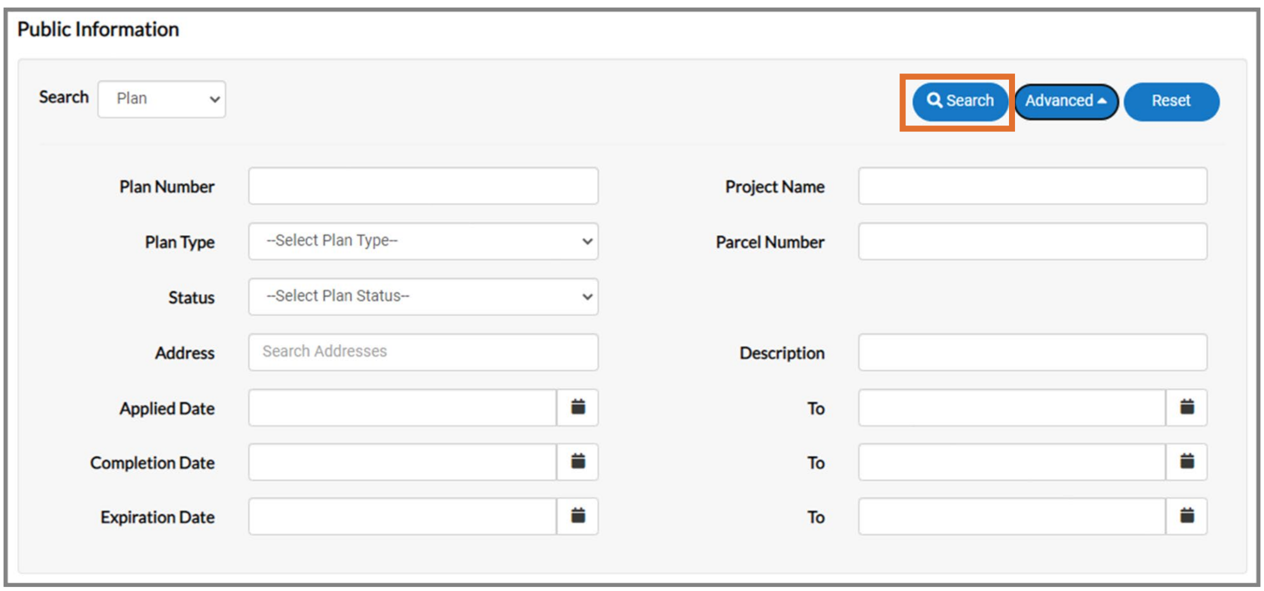
5. Type a partial or complete **parcel number** associated with the permit in the Parcel Number field.
6. Type a partial or complete **address** associated with the permit in the Address field.
7. Type any words that might appear in the description of the permit in the **Description** field.
8. Enter application dates in the **Applied Date** and **To** fields or click the calendar to select dates Enter issued dates in the **Issued Date** and **To** fields or click the calendar to select dates.
9. Enter expiration dates in the **Expiration Date** and **To** fields or click the calendar to select dates.
10. Enter finalization dates in the **Finalized Date** and **To** fields or click the calendar to select dates.
11. Click **Search** to display results.
12. Click **Reset** to clear the search criteria.
13. Click **Advanced** to hide the search criteria.
14. Click **Export** to export the results into a specified document. The Export option displays after the results display.



NOTE Users do not have to enter data in all fields and may use any combination of criteria.

Plans

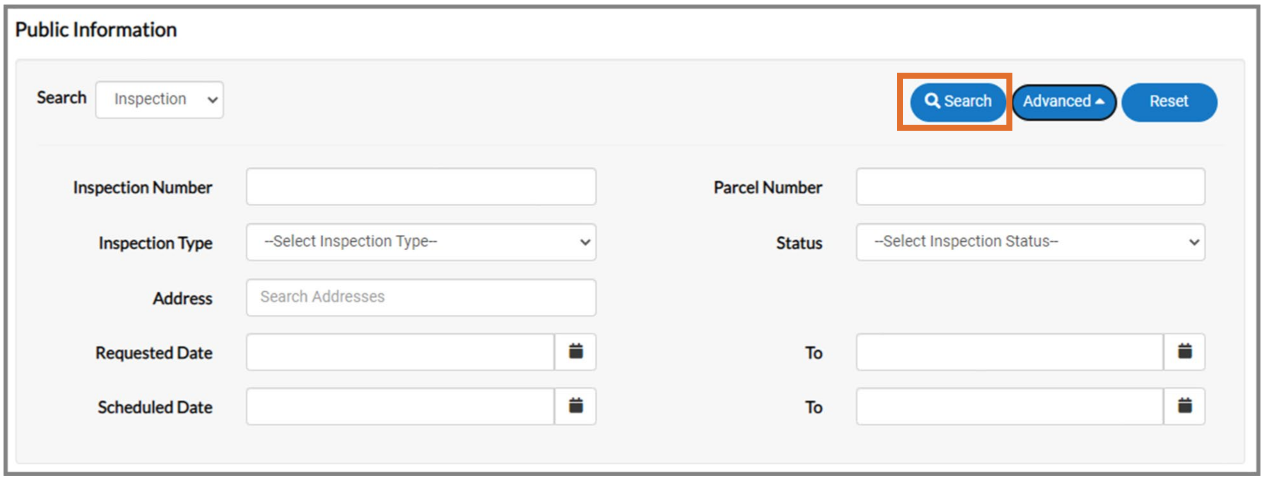
1. Type a partial or complete **plan number** in the Plan Number field.
2. Type a partial or complete **project name** associated with the plan the Project Name field.
3. Select the type of **plan** in the Plan Type dropdown.
4. Type a partial or complete **parcel number** associated with the plan in the Parcel Number field.
5. Select a plan **Status** from the dropdown.
6. Type a partial or complete **address** associated with the plan in the Address field.
7. Type any words that might appear in the description of the permit in the **Description** field.
8. Enter application dates in the **Applied Date** and **To** fields or click the calendar to select dates.
9. Enter completion dates in the **Completion Date** and **To** fields or click the calendar to select dates.
10. Enter expiration dates in the **Expiration Date** and **To** fields or click the calendar to select dates.
11. Complete Steps 12-15 on Page 8.



NOTE Users do not have to enter data in all fields and may use any combination of criteria.

Inspections

1. Type a partial or complete **inspection number** in the Inspection Number field.
2. Type a partial or complete **parcel number** associated with the inspection in the Parcel Number field.
3. Select an **Inspection Type** from the dropdown.
4. Select an inspection **Status** from the dropdown.
5. Type a partial or complete **address** associated with the inspection in the Address field.
6. Enter requested dates in the **Requested Date** and **To** fields or click the calendar to select dates.
7. Enter scheduled dates in the **Scheduled Date** and **To** fields or click the calendar to select dates.
8. Complete Steps 12-15 on Page 8.



NOTE Users do not have to enter data in all fields and may use any combination of criteria.

Code Case, Request, License

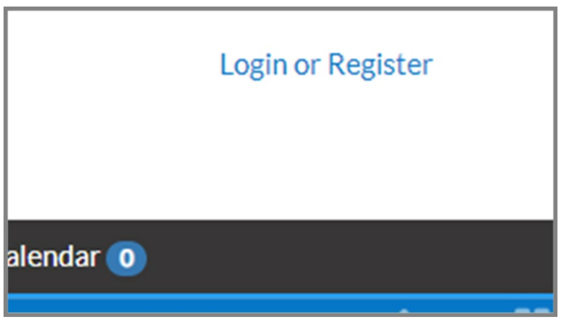
To search for other types of records such as a Code Case, Request, or License:

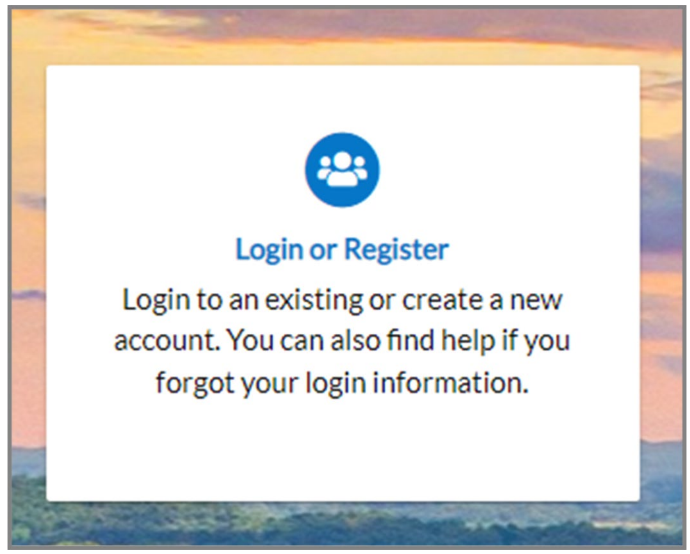
1. Select the desired **record type** from the Search dropdown.
2. Click **Advanced**.
3. Enter the information.
4. Click **Search**.

Register

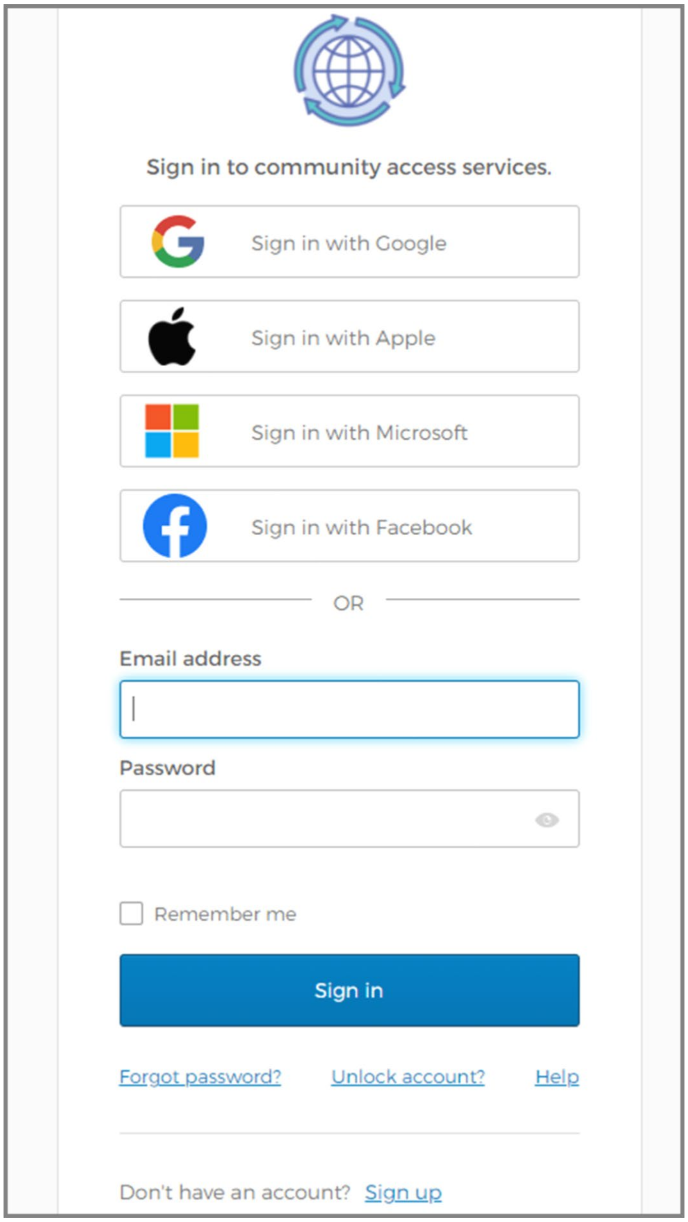
To register for Civic Access:

1. Navigate to the municipality’s Civic Access site.
2. Click **Login or Register** in the top right corner of the page.
3. Or click the **Login or Register** card on the page.





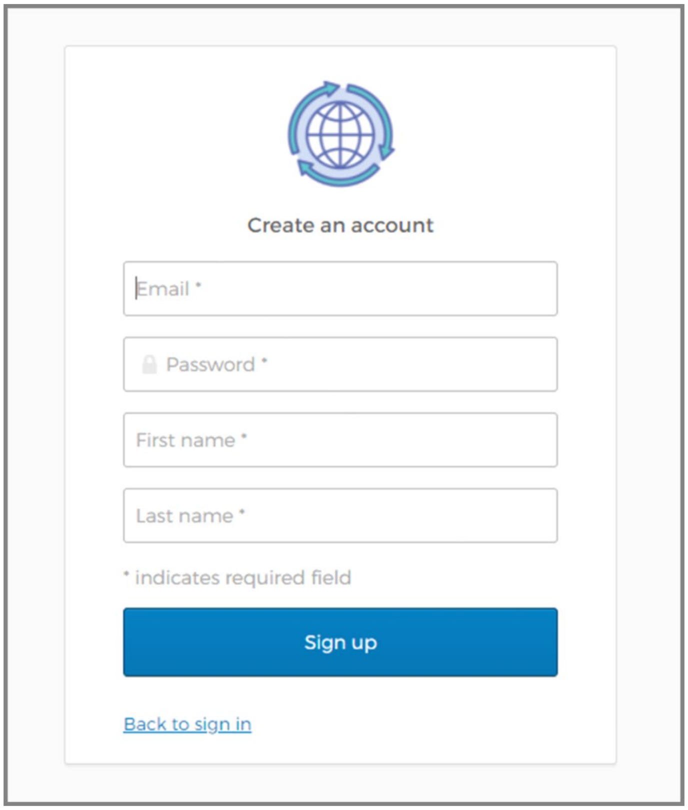
4. Click a sign-in option:
    a. **Sign in with Google**
    b. **Sign in with Apple**
    c. **Sign in with Microsoft**
    d. **Sign in with Facebook.**
5. Or if previously registered, type an **Email address** and **Password**.
    a. Click **Sign in.**
6. If not registered, click **Sign up**.



Create an Account

The application displays the **Create an account page**.

1. Type:
    a. **Email**
    b. **Password**
    c. **First name**
    d. **Last name**
2. Click **Sign up**.

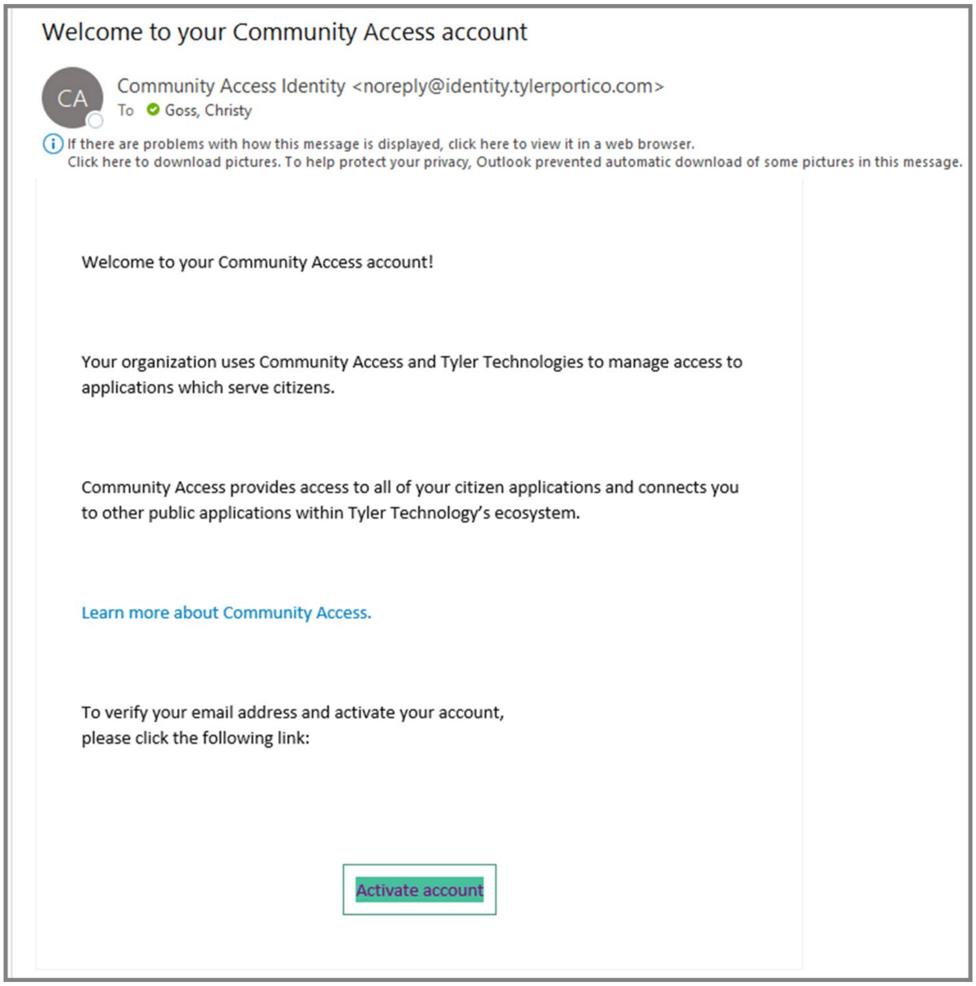


NOTE Required the fields are noted with an asterisk.

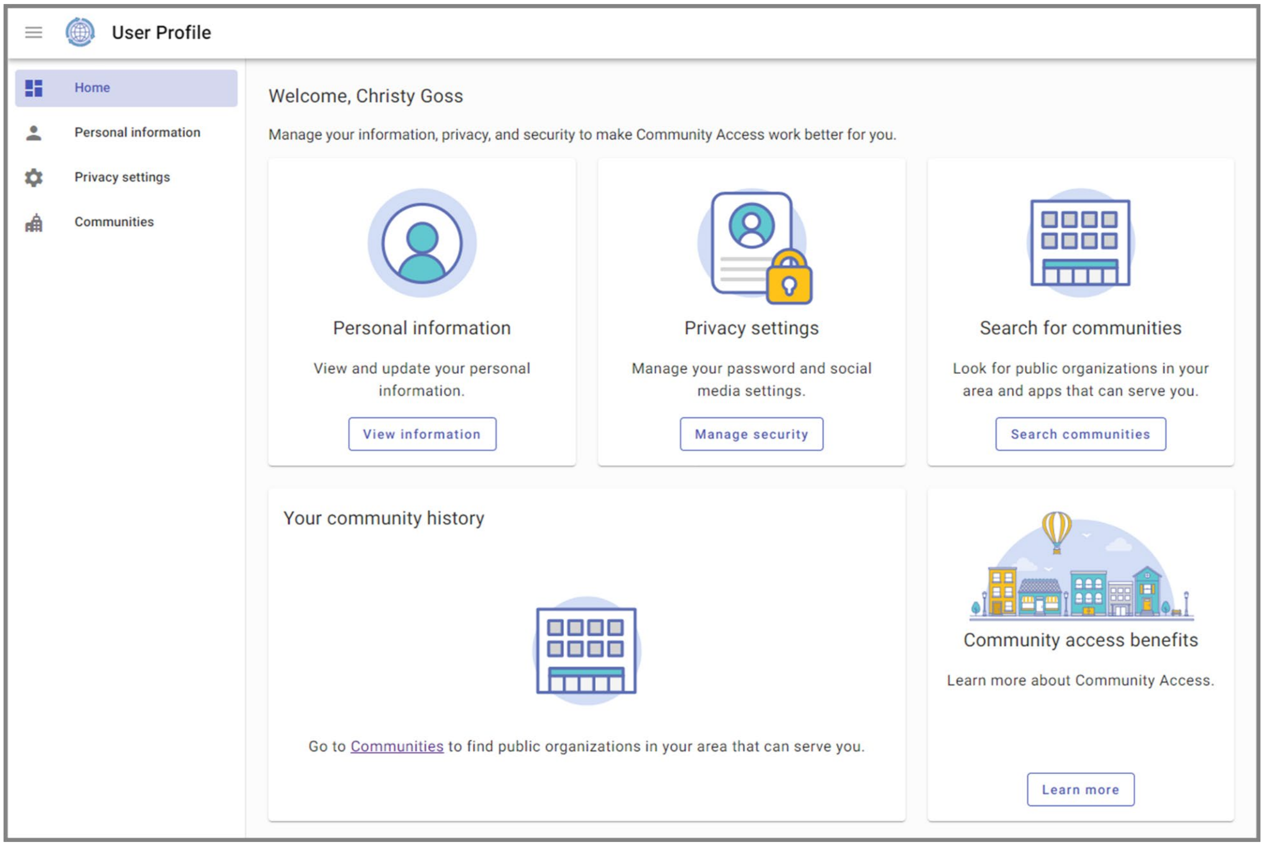
Activate the Account

The user receives an email.

1. Click **Activate account**.



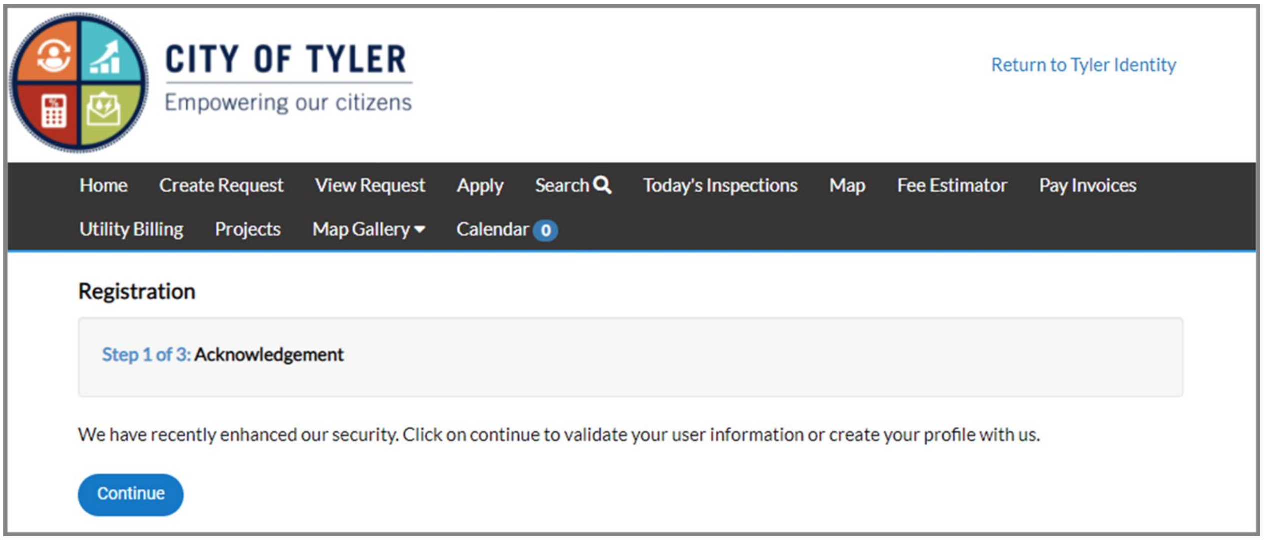
The application displays the User Profile page.



2. Navigate back to the municipality's Civic Access site.

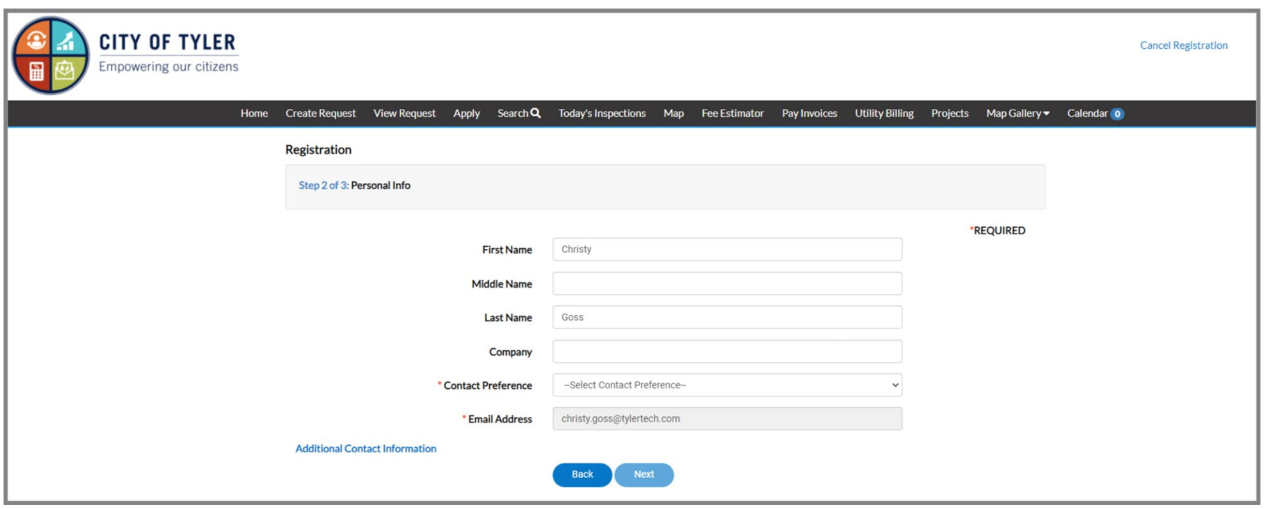
Acknowledgment

1. Type the **email address** and **password** used during registration.
2. Click **Continue**.



Personal Info

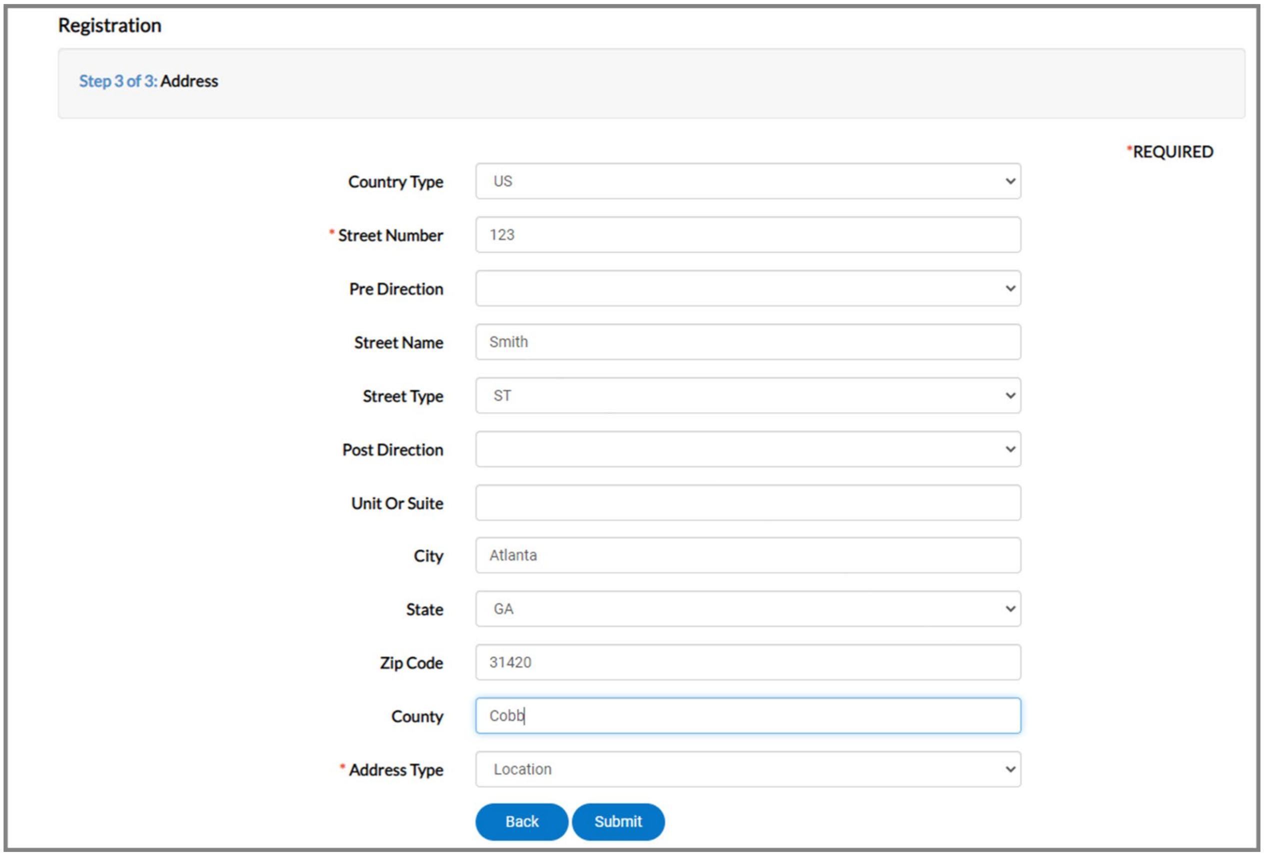
1. Select a **Contact Preference** from the dropdown.
2. Click **Next.**



NOTE Required the fields are noted with an asterisk.

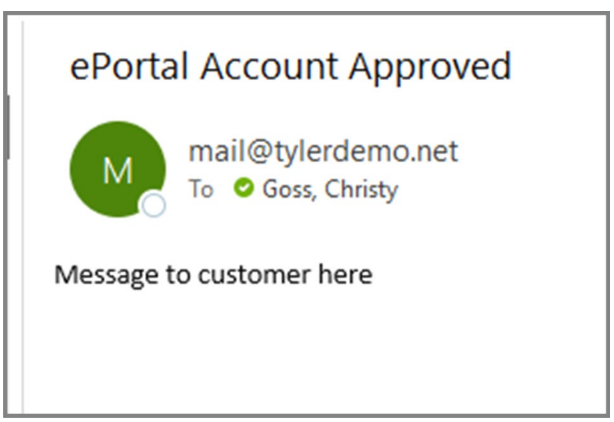
Address

1. Type **Address** information.
2. Click **Submit**.



NOTE Required the fields are noted with an asterisk.

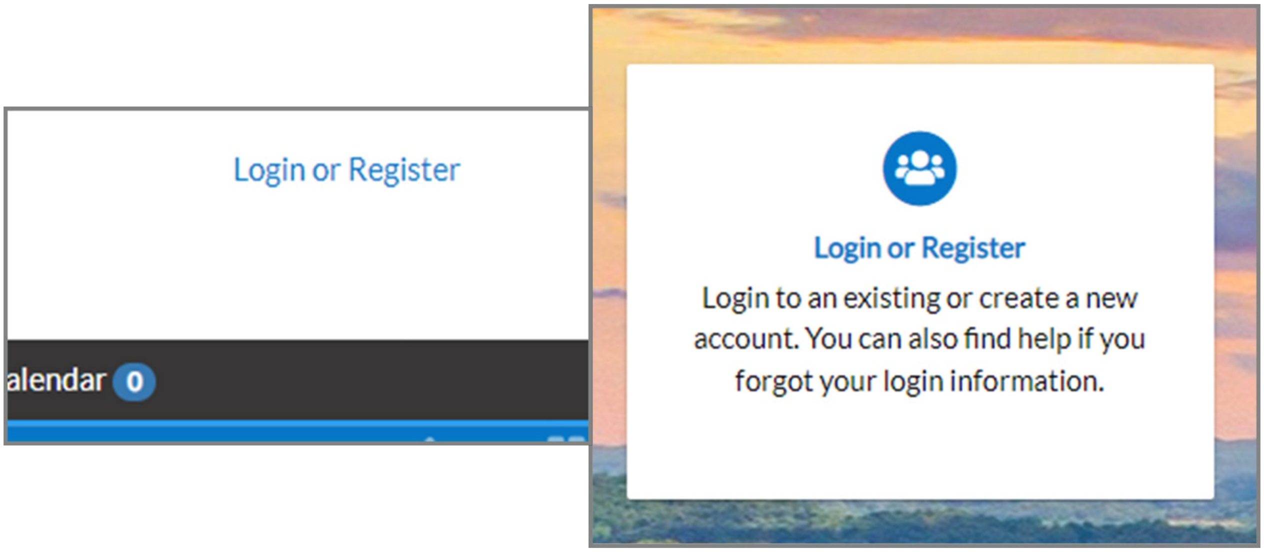
The user receives an email to confirm the ePortal Account Approval.



Log in

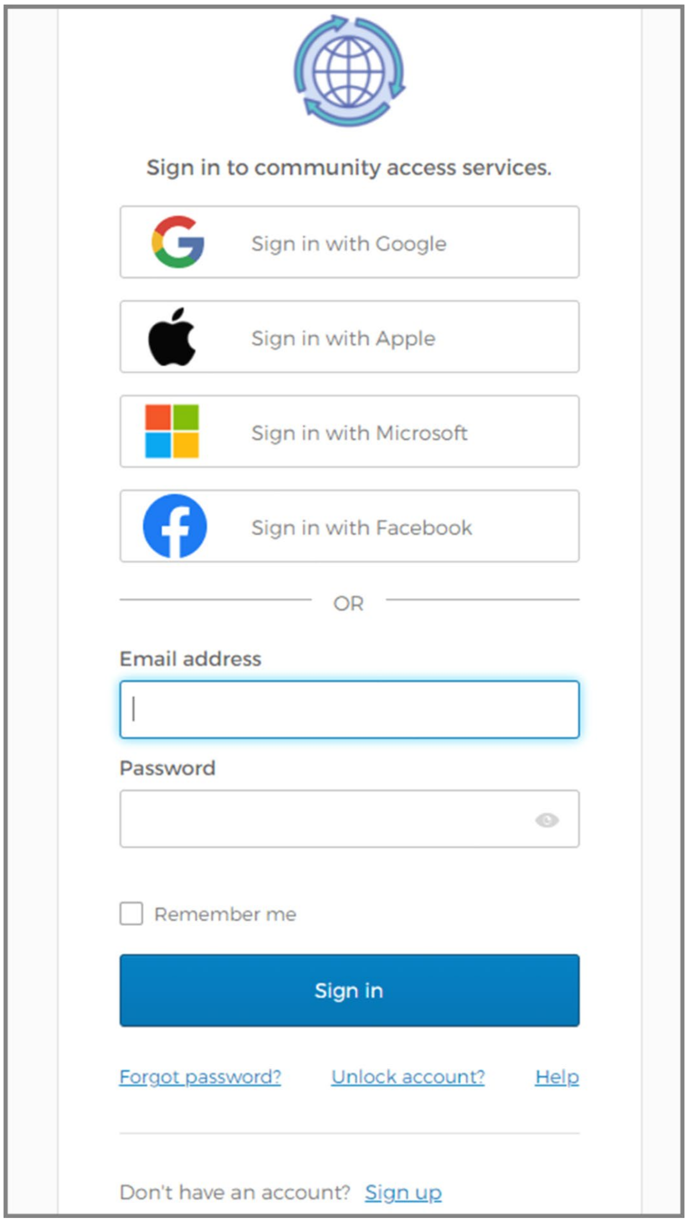
To log in to Civic Access:

1. Navigate to the municipality's Civic Access site.
2. Click **Login or Register** on the Home page.



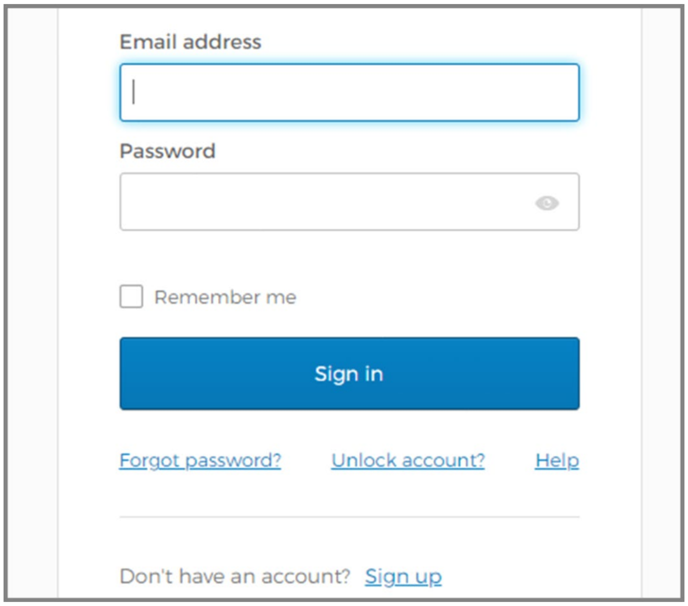
3. Click a sign-in option:
    a. **Sign in with Google**
    b. **Sign in with Apple**
    c. **Sign in with Microsoft**
    d. **Sign in with Facebook.**

3. Or type an **Email address** and **Password**.
    a. Click **Remember me**.
    b. Click **Sign in.**

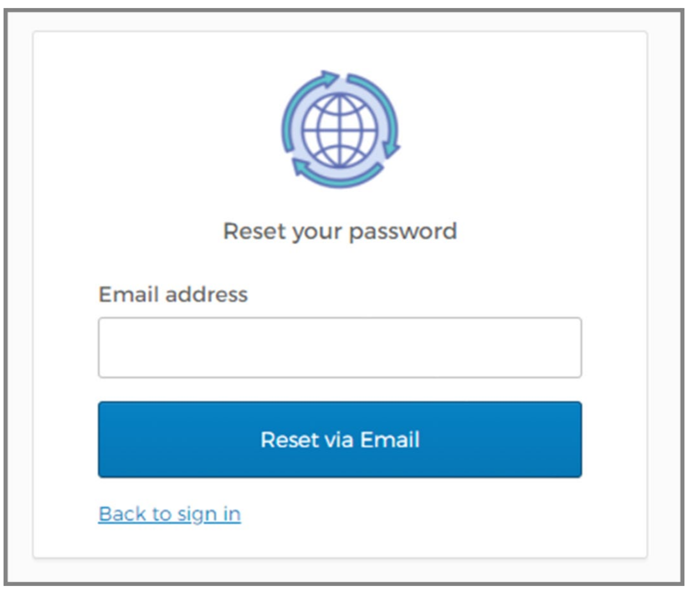


Forgotten Password

1. To reset a forgotten password, click **Forgot password**.

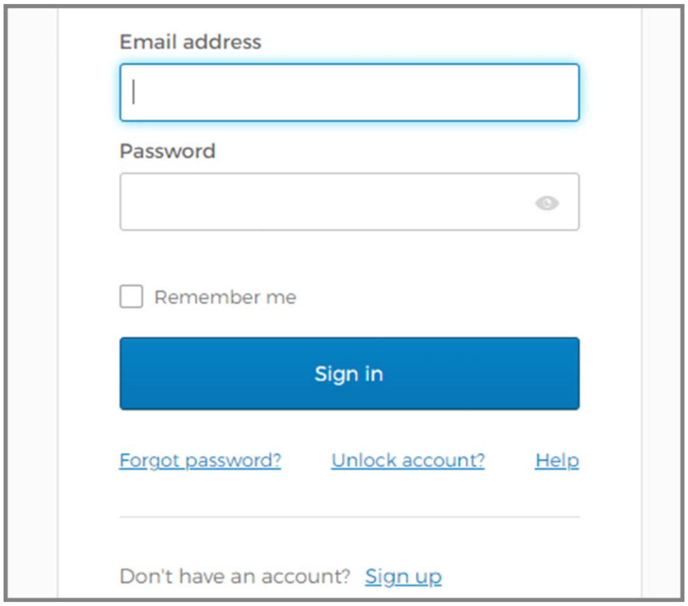


2. Type the **Email address**.
3. Click **Reset via Email**.

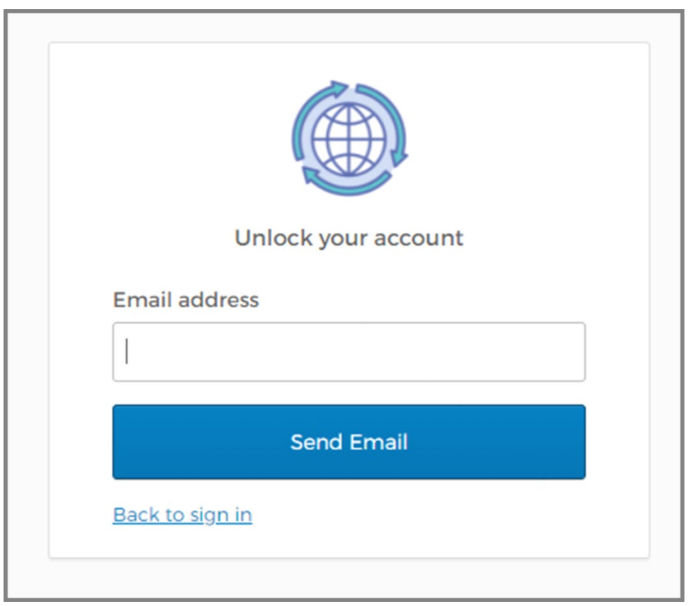


Unlock Account

1. To unlock an account, click **Unlock account**.



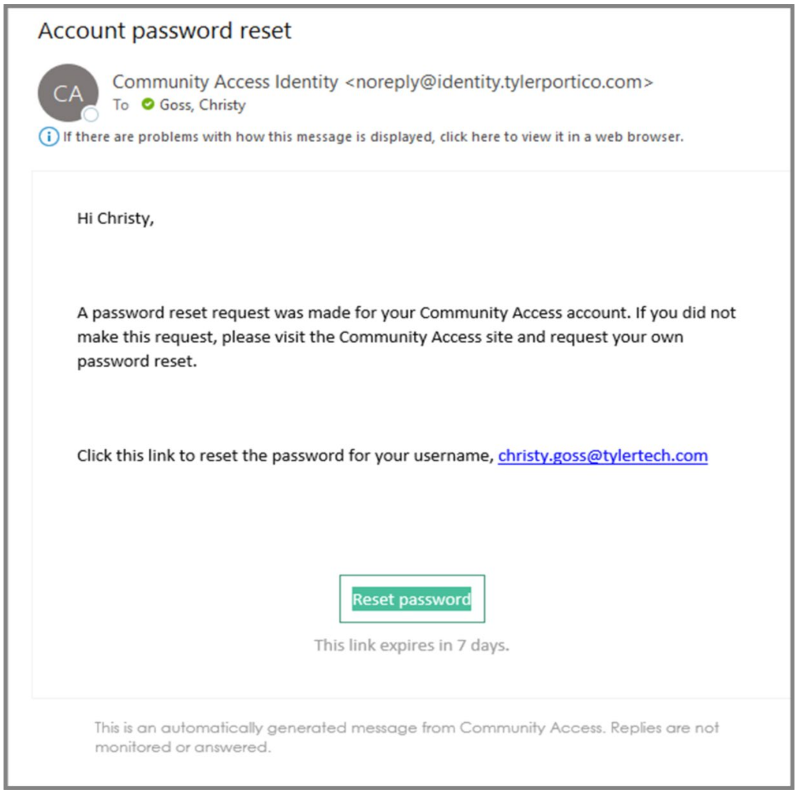
2. Type the **Email address**.
3. Click **Send Email**.



Email Instructions

The user receives an email.

a. Follow the instructions in the email to reset the password or unlock the account.



Account password reset

CA Community Access Identity <noreply@identity.tylerportico.com>
To Goss, Christy

If there are problems with how this message is displayed, click here to view it in a web browser.

Hi Christy,

A password reset request was made for your Community Access account. If you did not make this request, please visit the Community Access site and request your own password reset.

Click this link to reset the password for your username, christy.goss@tylertech.com

Reset password

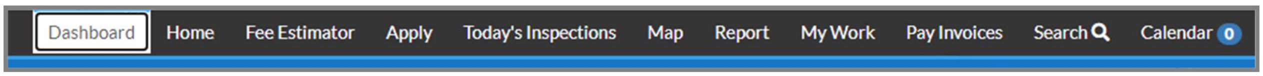
This link expires in 7 days.

This is an automatically generated message from Community Access. Replies are not monitored or answered.

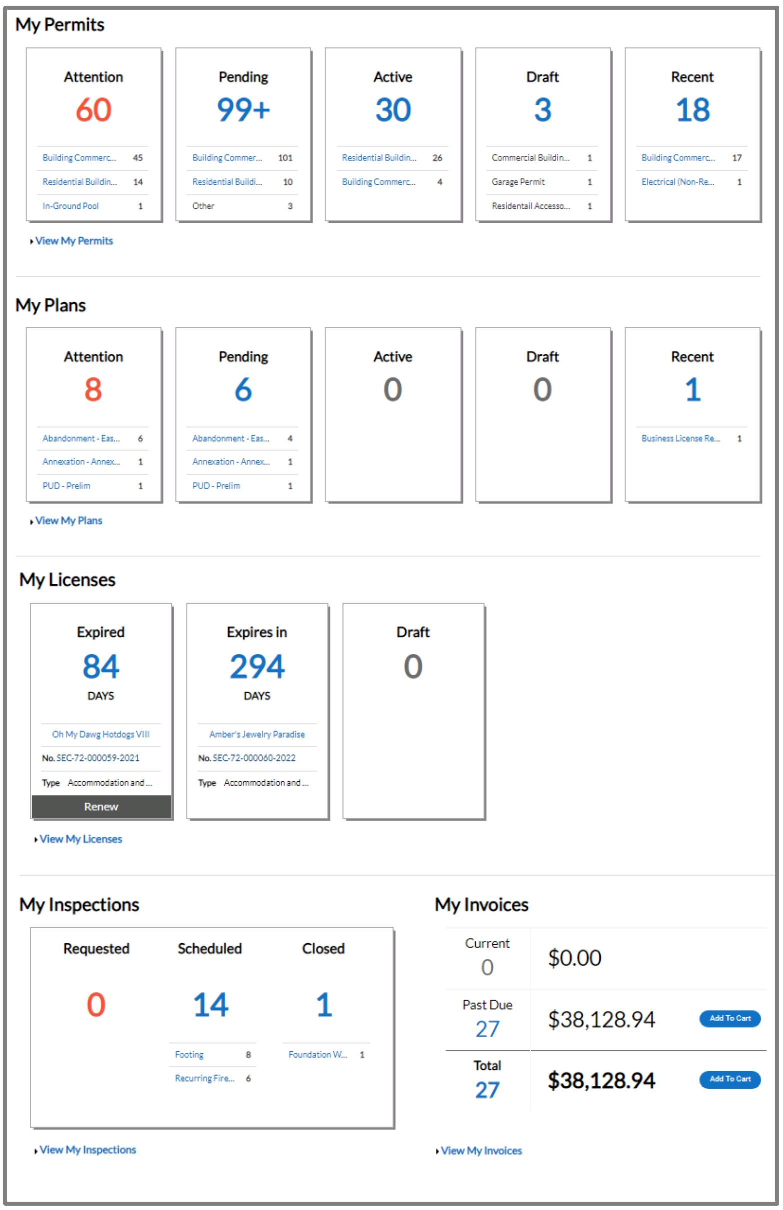
Dashboard

The Civic Access Dashboard provides the ability for users to see a visual representation of aggregated data. It displays data about permits, plans, inspections, and invoices. Users can access saved drafts of submissions and add unpaid invoices directly to the shopping cart. The dashboard displays data that is contextual to the registered user.

1. To access the Dashboard, click **Dashboard** in the menu on the Home page.



The Dashboard displays.

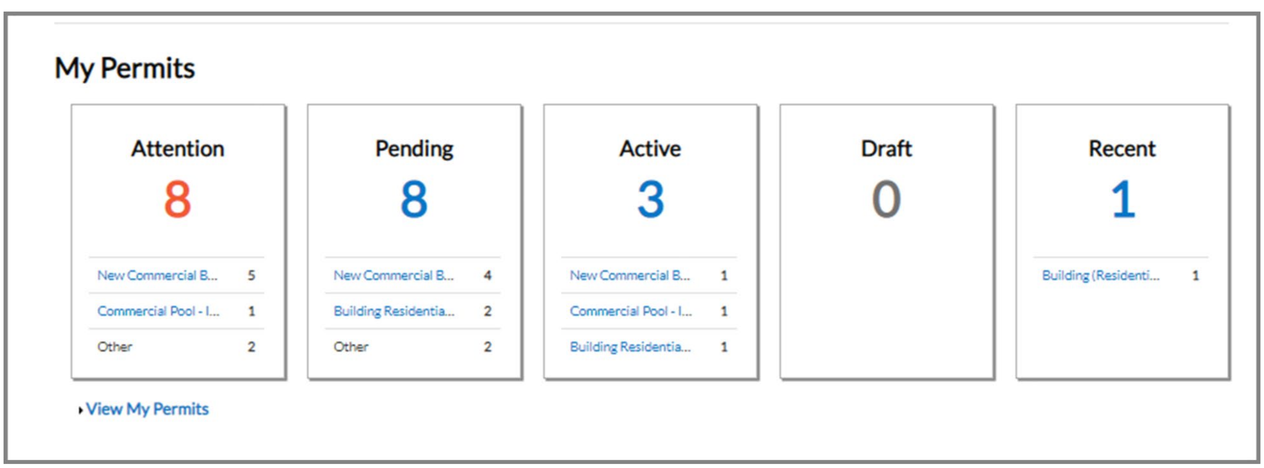


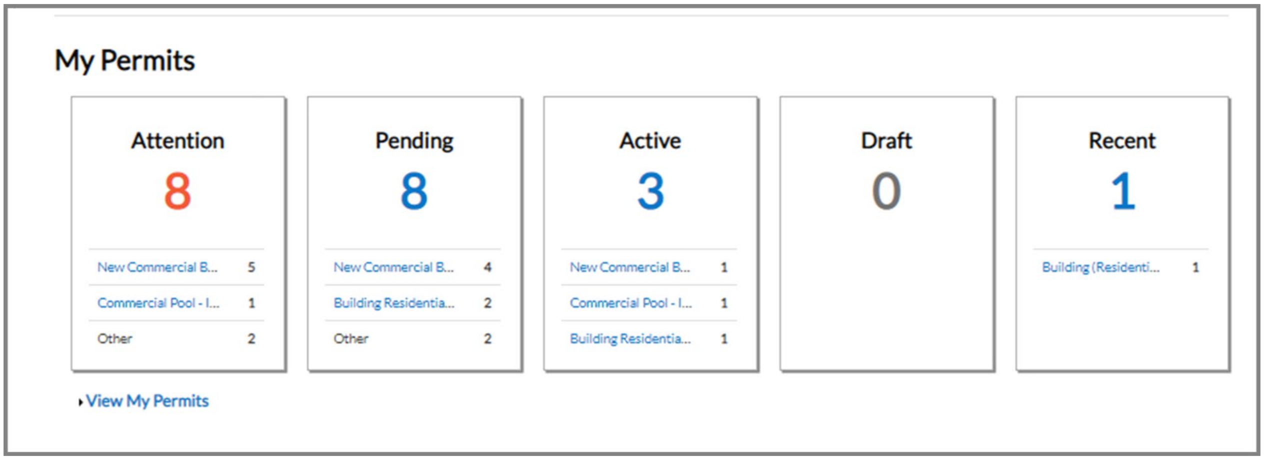
To use the Dashboard:

1. Click **Draft** in the **Permits** or **Plans** section to view saved Permit or Plan application drafts.
2. Click the appropriate **status card** in the **Permits** section to view a list of the corresponding Permits. Beneath each status is a breakdown of the Permit Types. Click **View My Permits** to view all Permits.
3. Click the appropriate **status card** in the **Plans** section to view a list of the corresponding Plans. Beneath each status circle is a breakdown of the Plan Types. Click **View My Plans** to view all Plans.
4. Click the appropriate **status** in the **Inspections** section to view a list of the corresponding Inspections. Beneath each status is a breakdown of the Inspection Types. Click **View My Inspections** to view all Inspections.
5. Click **Add to Cart** next to **Current**, **Past Due**, or **Total** in the **My Invoices** section to add the corresponding Invoices to the Shopping Cart. Click **View My Invoices** to view all Invoices.

Permits

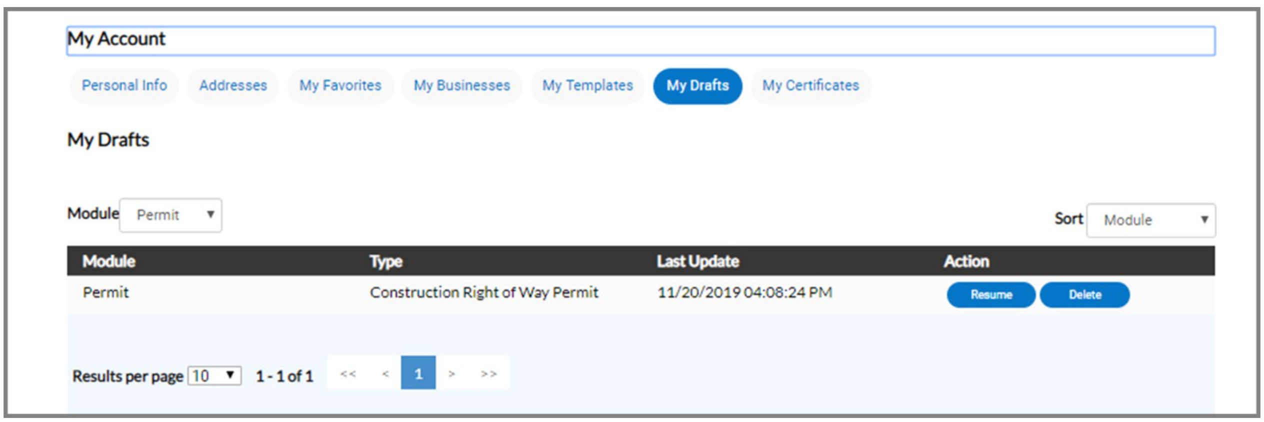
1. **Attention:** By clicking the **Attention** status from the **Dashboard**, the user be given a list of all Permit Numbers that have been applied for that have a status of Attention, Project name, Address attached to the Permit, Type, Status, and the Reason that the Permit needs the citizen's attention. Criteria for the Attention status is: Active holds, unpaid fees, failed reviews (submittals), failed inspections, eReview file resubmissions, and does not have a completed status.
2. **Pending:** By clicking the **Pending** status from the **Dashboard**, the user be given the list of all permit numbers that have been applied for that have a status of Pending, Project name, Address attached to the Permit, Type, Status, and Reason. Criteria for the Pending status is no issue date, final date, nor an expire date.





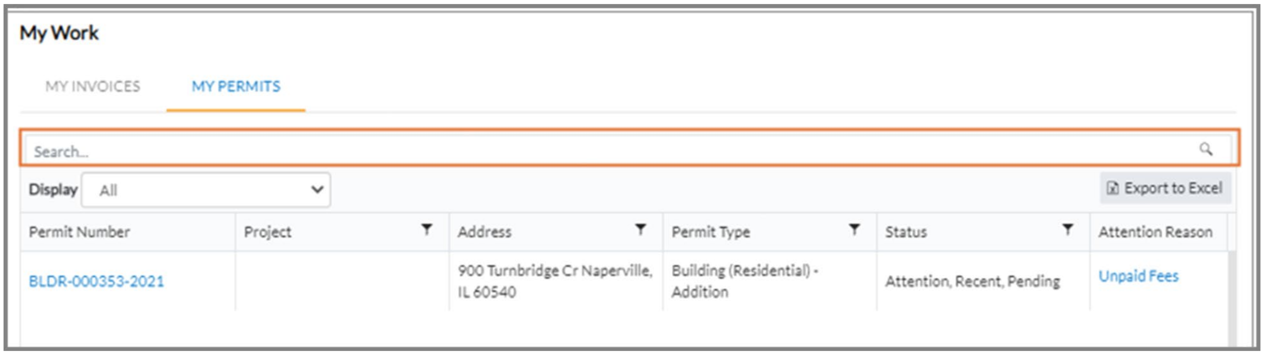
3. **Active:** By clicking the **Active** status from the **Dashboard**, the user be given the list of all permit numbers that have been applied for that have a status of Active, Project name, Address attached to the Permit, Type, Status and Reason. Criteria for the Active status: either has a status of issued or has an issued date and does not have a completed status.

4. **Draft:** By clicking the **Draft** status from the **Dashboard**, the user be given the list of all Permits and Plans that have been saved, but not submitted for review. These drafts may be incomplete, and action may resume at any point in time. They may also be deleted from this page if they are no longer needed.



5. **Recent:** By clicking the **Recent** status from the **Dashboard**, the user be taken to the **My Work** Tab. The user can select from a list of all Permits for which they have applied that have a status of Recent, Project name, Address attached to the Permit, Type, Status, and Reason. Criteria for the Recent status is has been applied for in the last 30 days.

NOTE Success, failure, issued, on hold, or cancelled statuses deal with how a status is flagged in setup pages. This does not mean that the status on a case is called Success, Failure, Issued, On Hold, or Cancelled.



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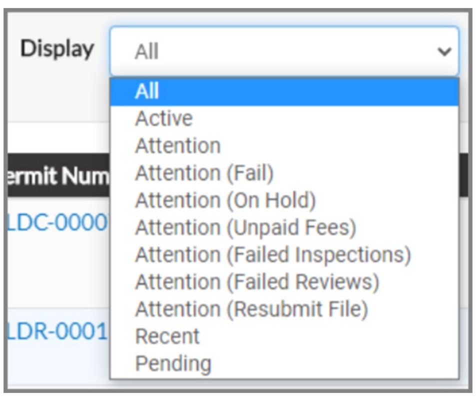
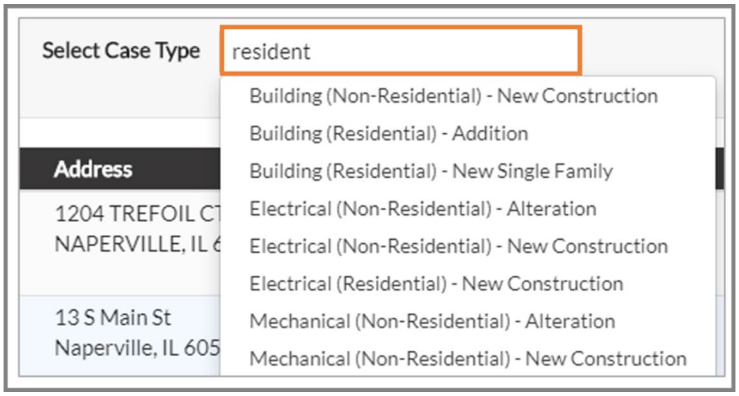
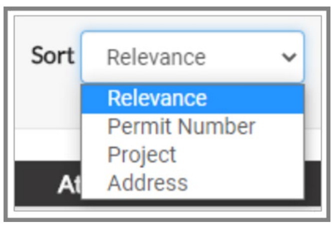
6. **Display**: This dropdown allows the citizen a way to organize and select one **Status** to view.



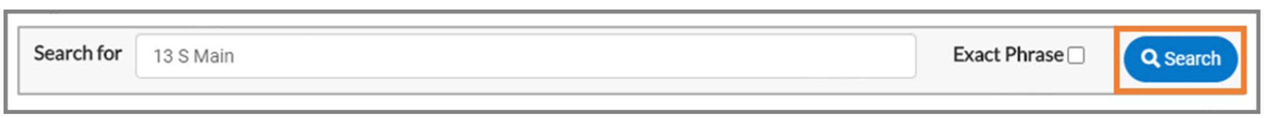
7. **Select Case Type**: This field allow the citizen to type in a specific Case Type. As the case type name is typed in the field common results display to select.



8. **Sort:** This dropdown allows the citizen a way to sort by **Relevance, Permit Number, Project, or Address**.

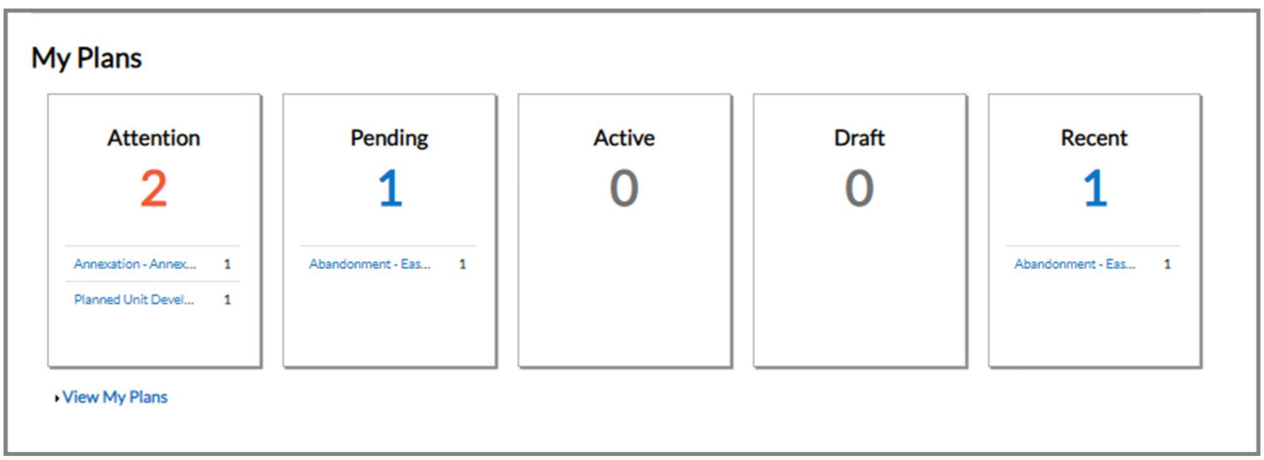


9. **Search Box:** This box allows the citizen a way to search by **Permit Number, Project name, or Address** by typing in the information in the box and clicking ***Enter*** on the keyboard or by clicking the ***Search*** button.



Plans

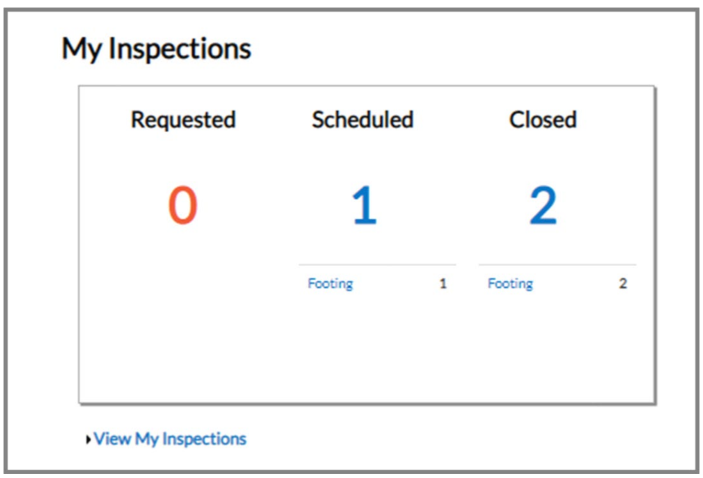
1. **Attention:** By clicking on the **Attention** status from the **Dashboard**, the user be given a list of all Plan numbers that have been applied for that have a status of Attention, Project name, Address attached to the Plan, Type, Status, and the Reason that the Plan needs the citizen's attention. Criteria for the Attention status is: Active holds, unpaid fees, failed reviews (submittals), failed inspections, eReview file resubmissions, and does not have a successful status.
2. **Pending:** By clicking on the **Pending** status from the **Dashboard**, the user be given the list of all Plan Numbers that have been applied for that have a status of Pending, Project name, Address attached to the Plan, Type, Status and Reason. Criteria for the Pending status is statuses for the case are not success, failures, on hold or cancelled.
3. **Active:** By clicking on the **Active** status from the **Dashboard**, the user be given the list of all plan numbers that have been applied for that have a status of Active, Project name, Address attached to the Plan, Type, Status and Reason. Criteria for the Active status is the status is successful.
4. **Draft:** By clicking on the **Draft** status from the **Dashboard**, the user be given the list of all Permits and Plans that have been saved, but not submitted for review. These drafts may be incomplete, and action may resume at any point in time. They may also be deleted from this page if they are no longer needed.
5. **Recent:** By clicking on the **Recent** status from the **Dashboard**, the user be given the list of all Plan Numbers that have been applied for that have a status of Recent, Project name, Address attached to the Plan, Type, Status and Reason. A Recent status indicates that a citizen applied for the Plan within the last 30 days.



NOTE Success, failure, on hold, or cancelled status deal with how a status is flagged in setup pages. This does not mean that the status on a case is called Success, Failure, On Hold or Cancelled.

Inspections

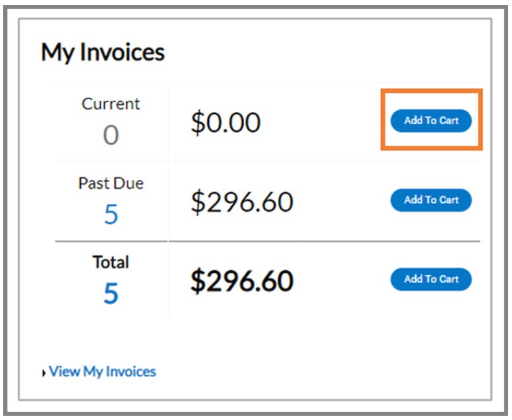
1. **Requested:** By clicking on the **Requested** status from the **Dashboard**, the user be taken to the **My Work** tab to view **My Existing Inspections**. The user be given a list of all Inspection Case Numbers that have a status of Requested, Address attached to the Inspection, Inspection Type and Requested Date.
2. **Scheduled:** By clicking on the **Scheduled** status from the **Dashboard**, the user be taken to the **My Work** tab to view **My Existing Inspections**. The user be given a list of all Inspection Case Numbers that have a status of Scheduled, Address attached to the Inspection, Inspection Type, Requested Date and Scheduled Date.
3. **Closed:** By clicking on the **Closed** status from the **Dashboard**, the user be taken to the **My Work** tab to view **My Existing Inspections**. The user be given a list of all Inspection Case Numbers that have a status of Closed, Address attached to the Inspection, Inspection Type, Requested Date and Scheduled Date.

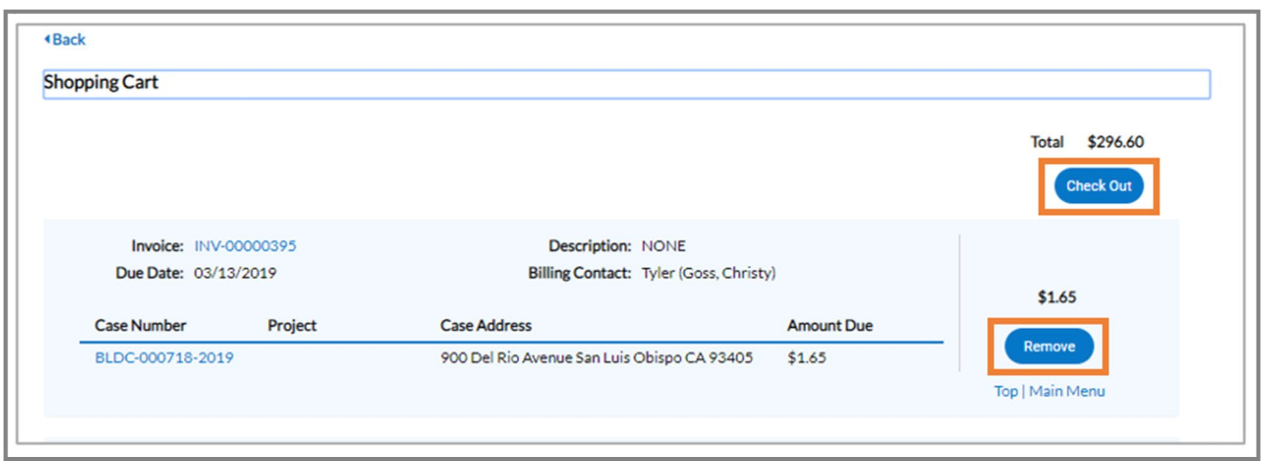


Invoices

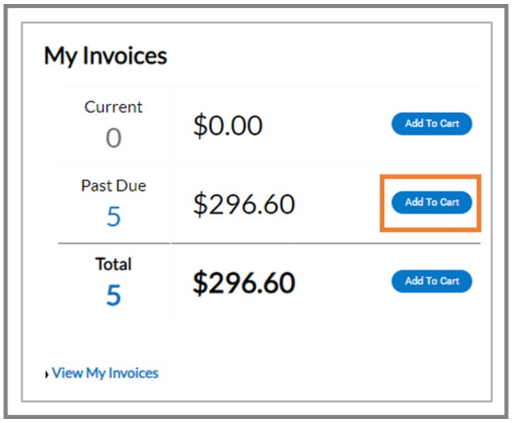
Civic Access users can access invoices that are paid, voided, or unpaid. Invoices are accessible from the **Dashboard** and the menu system and can be added to the electronic shopping cart. Civic Access's integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single or multiple cases associated with each invoice.

1. **Current:** By clicking **Add To Cart**, the citizen be able to access the Shopping Cart page where all current invoices are listed. The citizen may access the Invoice by clicking the Invoice Number or they may access the case by clicking the Case Number. To remove an Invoice from the Shopping Cart, the citizen may click **Remove** to the right of the invoice. To checkout, the user may click the **Check Out** oval to the right of the page. This takes the user to a payment page to complete the payment for the invoice(s).

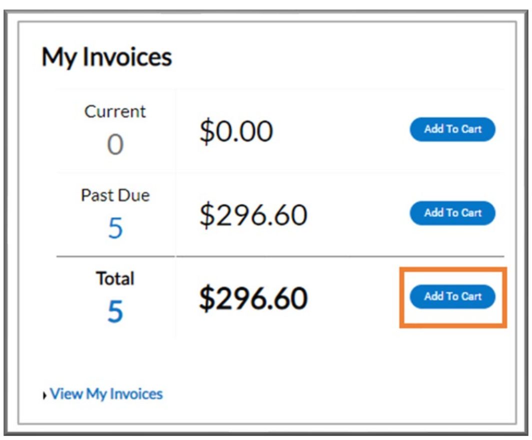




2. **Past Due:** By clicking **Add To Cart** oval to the right of Past Due invoices, the citizen be able to access the Shopping Cart page where all past due invoices are listed. The citizen may access the Invoice by clicking the **Invoice Number** or they may access the Case by clicking the **Case Number**. To remove an Invoice from the Shopping Cart, the citizen may click **Remove** to the right of the invoice. To checkout, click the **Check Out** oval to the right of the page. The payment page displays through which the citizen can complete the payment for the invoice(s).



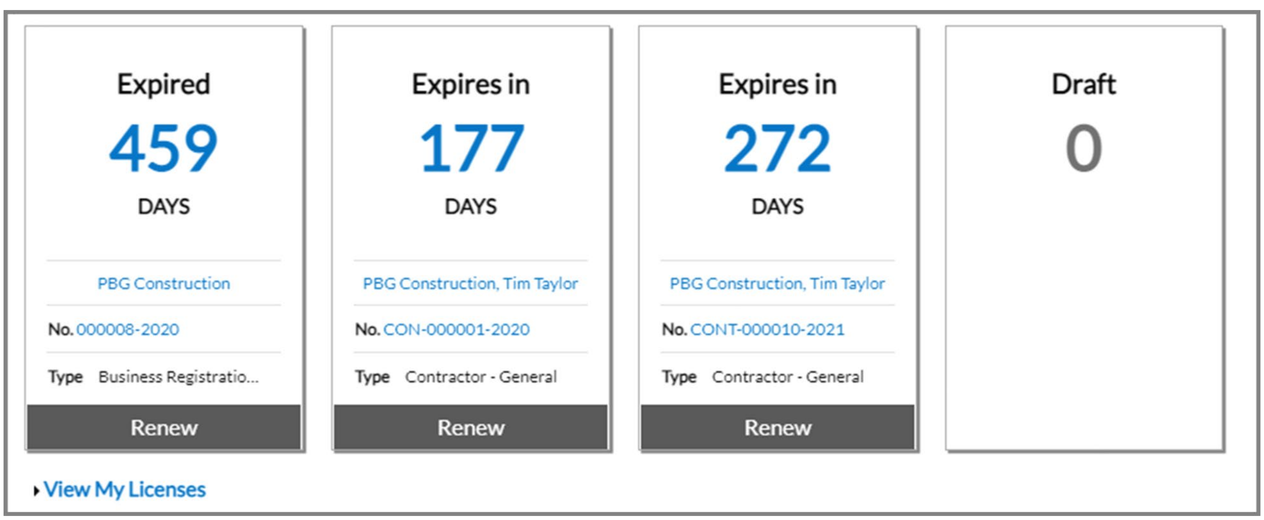
3. **Total:** By clicking **Add To Cart**, the citizen be able to access the Shopping Cart page where all invoices are listed. The citizen may access the Invoice by clicking the **Invoice Number** or they may access the Case by clicking the **Case Number**. To remove an Invoice from the Shopping Cart, the citizen may click **Remove** to the right of the invoice. To checkout, click the **Check Out** oval to the right of the page. This takes the citizen to a payment page to complete the payment for the invoice(s).



My Licenses

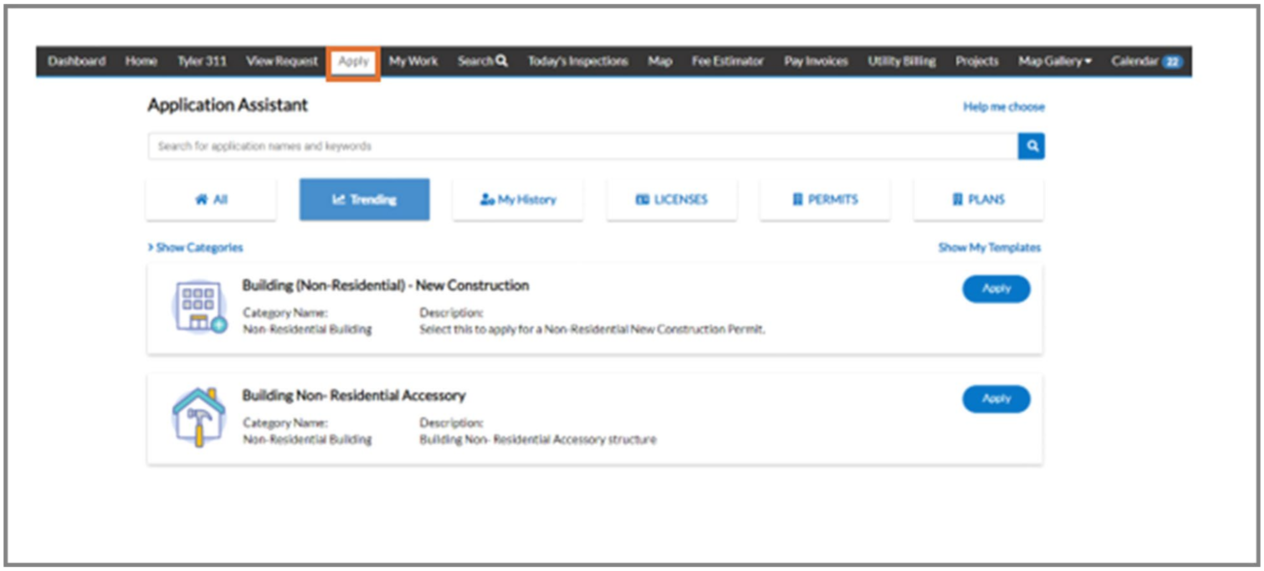
Civic Access users can access Licenses. The Dashboard view of Licenses displays licenses that are close to expiration. These include licenses that are up for renewal. To view all Licenses, either click **View My Licenses** at the bottom of the **My Licenses** page. Citizens may also click the **Renew** button on the Dashboard view. Once on the My Licenses page, Civic Access users can access all their Licenses.

1. **License Number:** By clicking the **License Number**, license holders be taken to a license details page where they may have access to information regarding location, fees, inspections, attachments, contacts, holds, and additional information.
2. **Renew:** Click the **Renew** button to be taken to the License Renewal page. If the Renew button is not present, the license may not be renewed at that time.
3. **Name:** Company name. This may be different from the DBA.
4. **DBA:** Doing Business As – This column lists the name that the Business License may be doing business as. These names may differ from the name on the actual Business in Enterprise Permitting & Licensing.
5. **Address:** The address of where the license is held.
6. **Status:** Status of the license. This may be different for each municipality. Some statuses may include Expired, Issued, In Review, Submitted.
7. **License Type:** The type of license that was applied for within the municipality.
8. **Applied Date:** When the license was applied for.

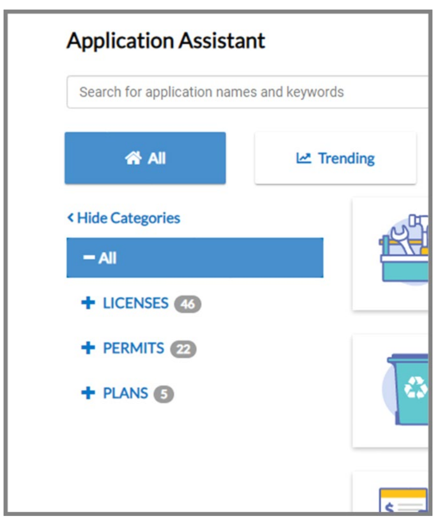


Apply with Application Assistant

Users are presented with several options on the Application Assistant page: All, Trending, My History (when logged in), Licenses, Permits and Plans.



1. Click **All** to choose from all types of Permits, Plans, and Licenses available.
2. Click **Show Categories** to help determine which category type to choose from. Click **Hide Categories** to remove category list.



3. Click **Trending** to choose from application types that are currently being applied for the most within the municipality.
4. Click **My History** to choose from application types that have been applied for by the registered user. This tab only displays when a registered user is logged in.

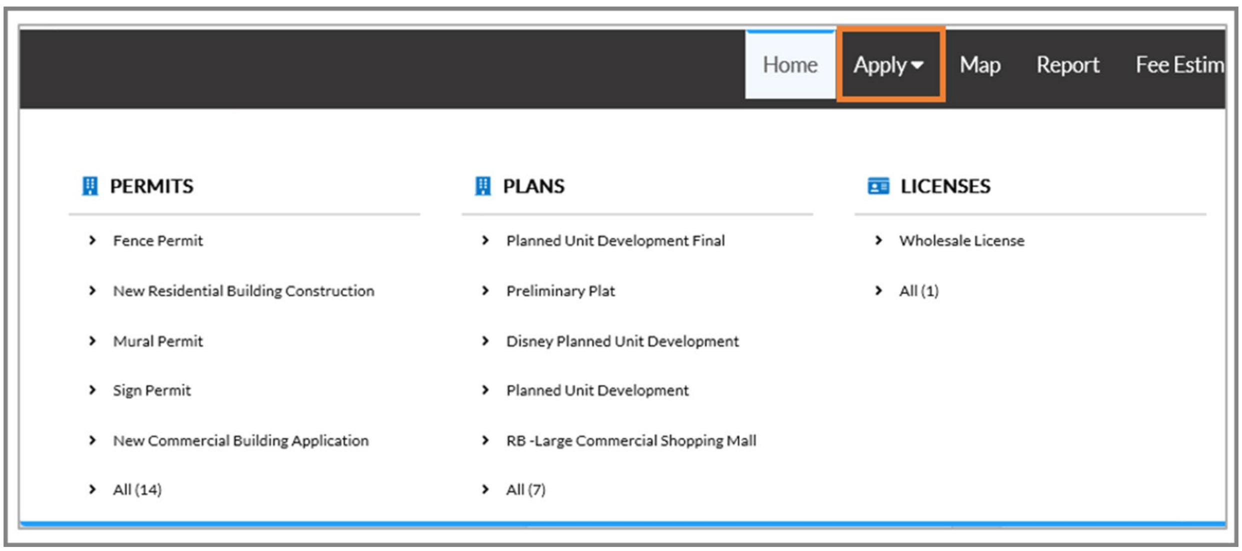
5. Click **Licenses** to choose from application types for licenses. This can be for Professional Licenses or Business Licenses.
6. Click **Permits** to choose from application types for Permits.
7. Click **Plans** to choose from application types for Plans.
8. Type in key words in the field under the heading of Application Assistant to search for application types. As the user types, common results display. Select the correct result in the list or Click **Enter** on the keyboard or click the **Magnifying Glass** at the end on the search field to search.

Apply without Application Assistant

If Application Assistant is turned off, click **Apply** on the ribbon at the top of the page. Under the Apply tab the top 5 case types are configured on the Civic Access Administration website, and they are displayed in the order in which the jurisdiction decides to display them. If the user does not see the case type they want to apply for, then the user can click **All** at the bottom of the list to access the Application Assistant; this tool helps guide the user into choosing the correct permit type to apply for all. It is a Civic Access Best Practice to use the Application Assistant rather than the Apply dropdown. See previous instructions on Application Assistant.

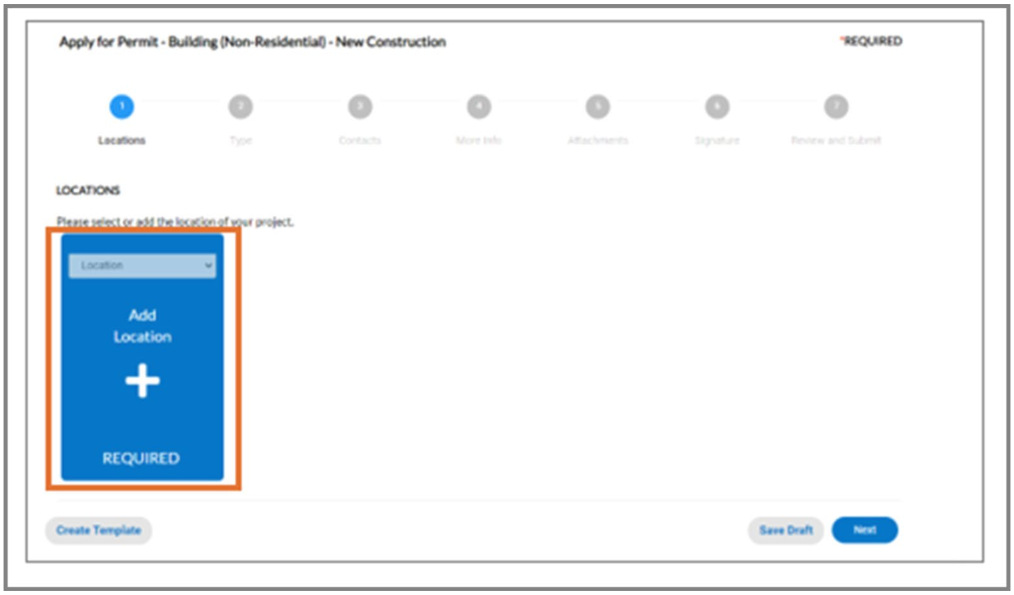
Civic Access users can begin applying for cases and resume the application process later. The application be saved under Draft. This is helpful when users want to save completed work and then continue when they're ready.

1. Click **Apply** and choose from the application types listed or choose from the Application Assistant page.
2. The **Apply for** page open and the steps to the application process be listed along the top of the page.



Step 1: Location

1. **Locations:** Click the Location card to add the location for the application. Select from the dropdown what type of address is being added.

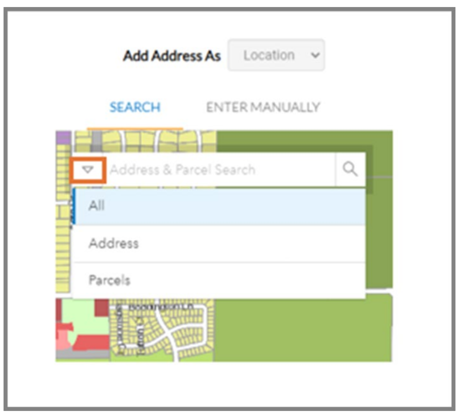


2. Click the **Plus Sign** in the center of the **Add Address** card.

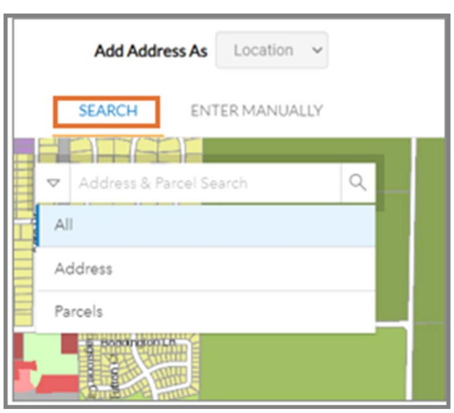
The user be directed to the Map page. Here the user may: search for an address, manually enter an address, or draw a spatial collection to be used as an address.

Search for an Address

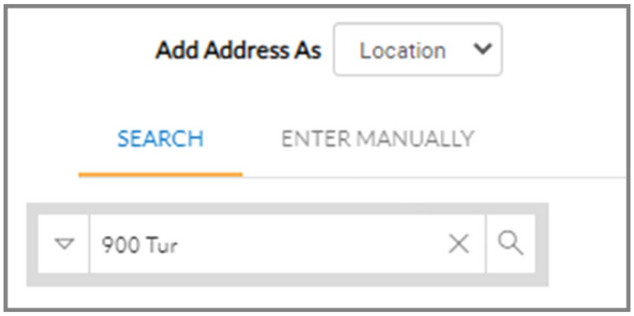
1. Choose from the drop down to Add Address As: Location, Billing, Shipping, Home, or Mailing.
2. The user may click the **drop-down** arrow on the left to choose to search by: **All, Address or Parcels.**



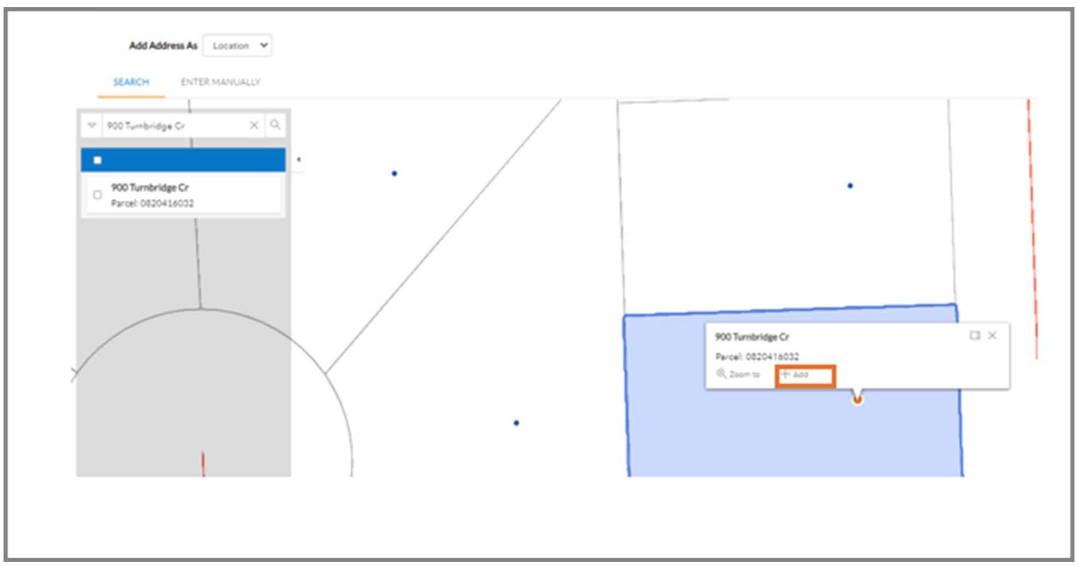
3. Click **Search** under **Add Address As** and enter in an address in the **Address & Parcel Search** field. The user may also select: Use current location. This appears once the user clicks in the field. This field also allow partial information of the address.
4. Type the address or parcel in the search field. The system list common results specific to the information the user types below the search field.



5. Once an Address or Parcel has been entered, click **Enter** on the keyboard or click the **Magnifying Glass** to conduct the search.
6. The information render on the left of the page and drop a pin on the map with a popup showing Parcel, Owner and allowing the user to Zoom To or Add.



7. Once an Address or Parcel has been found, mark the **Address,** and click **Apply** or click **Add** in the popup on the map.
8. Once the address has been added to the Locations page, click **Next.**



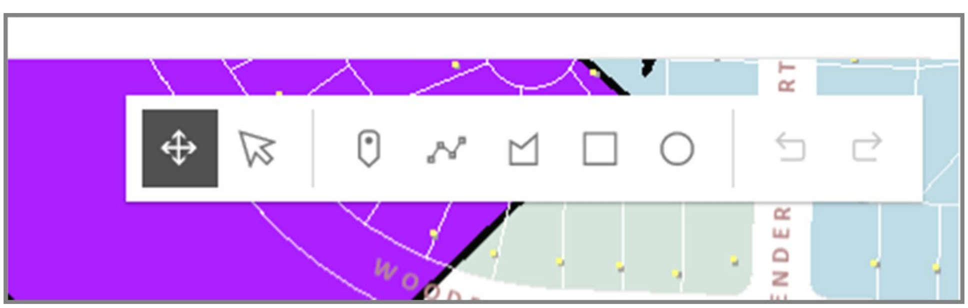
Manually Enter an Address:

1. Select the **Enter Manually** tab.

2. Enter in all information required for the page and for the application of the case.
3. Click **Save**.
4. Once the address has been added to the Locations page, click **Next.**

Add a Spatial Collection:

1. Navigate to the area of the map that the spatial collection needs to be drawn.
2. The tools to draw the spatial collection are to the right of the page.
3. The user may draw a point, line, polygon, rectangle, or a circle on the map.
4. Select the desired feature button and draw the shape on the map. Each single click allows a turn of a line in the shape and a double click allow the user to finish drawing the desired feature.



5. To transform the feature, click the **Transform** button.
6. A box displays around the feature and allow the user to transform the original by moving the smaller white squares into the desired positions.

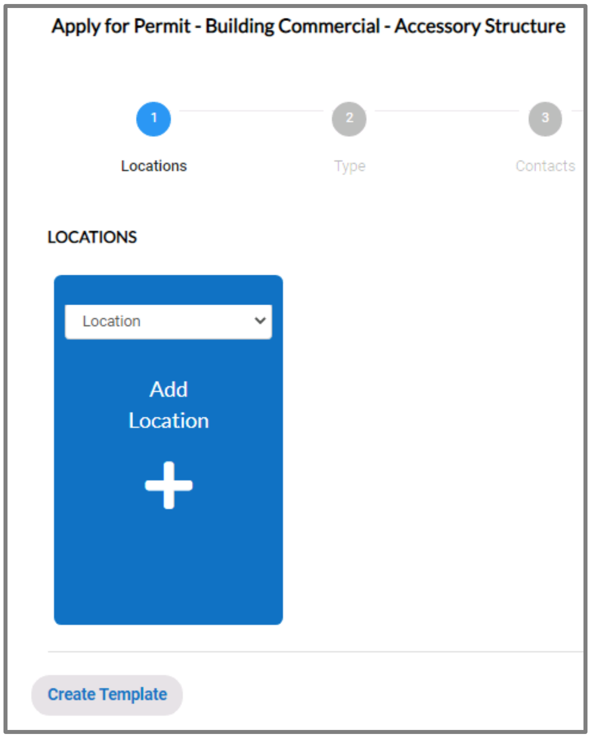
7. To Reshape the feature, click the **Reshape** button.
8. Small circles display on the feature and allow the user to reshape the original by moving the circles into the desired positions.

9. Once done drawing and editing the feature, click the desired spatial collection and click **Add this shape**.
10. Once the feature has been added to the Locations page, click **Next.**

Application Templates

Application Templates are drafts that the citizen may reuse when applying for the same Case Type and Workclass.

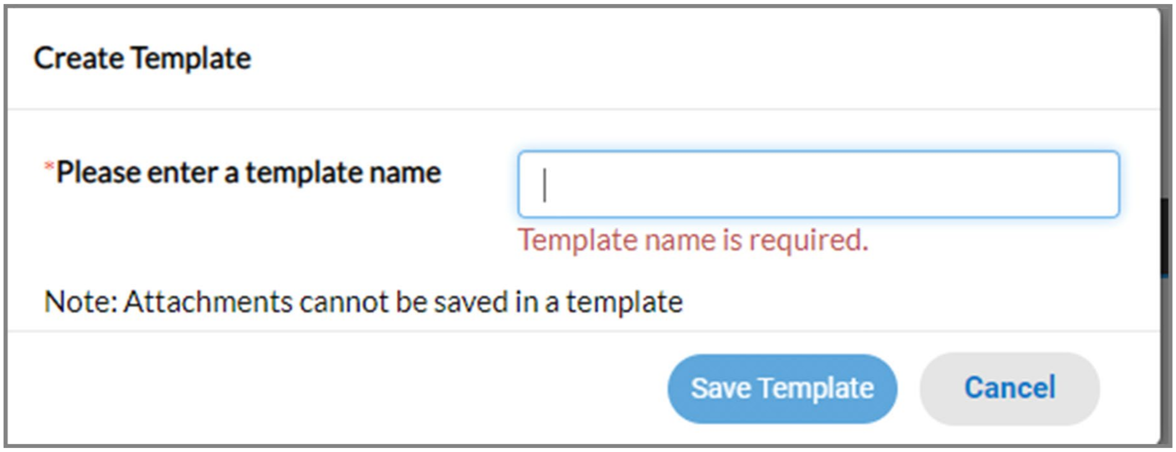
1. Click **Create Template**.



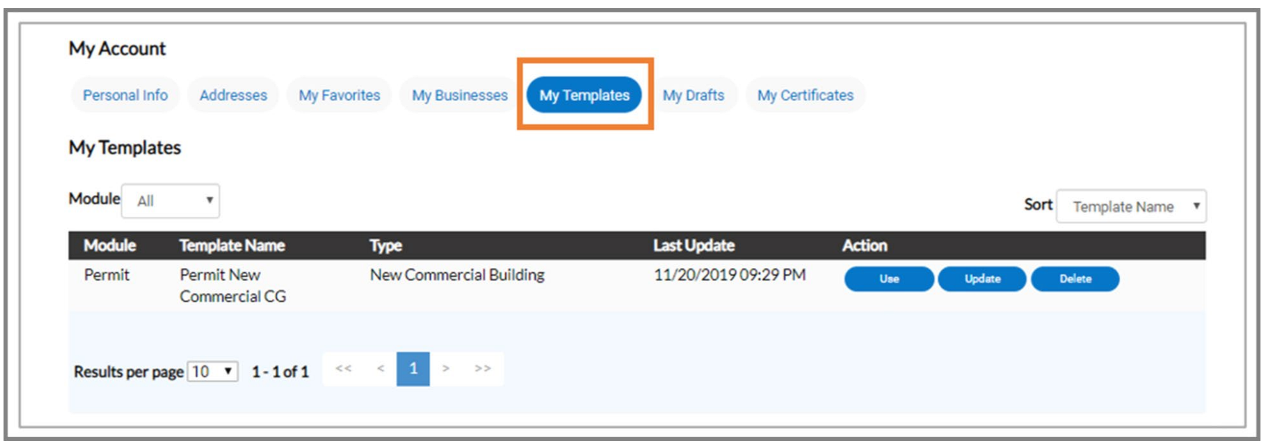
NOTE The Add Location card may be disabled when creating a Template.

NOTE By default, the Template does not allow saving of Attachments

2. Enter in the name of the template and click **Save Template.**

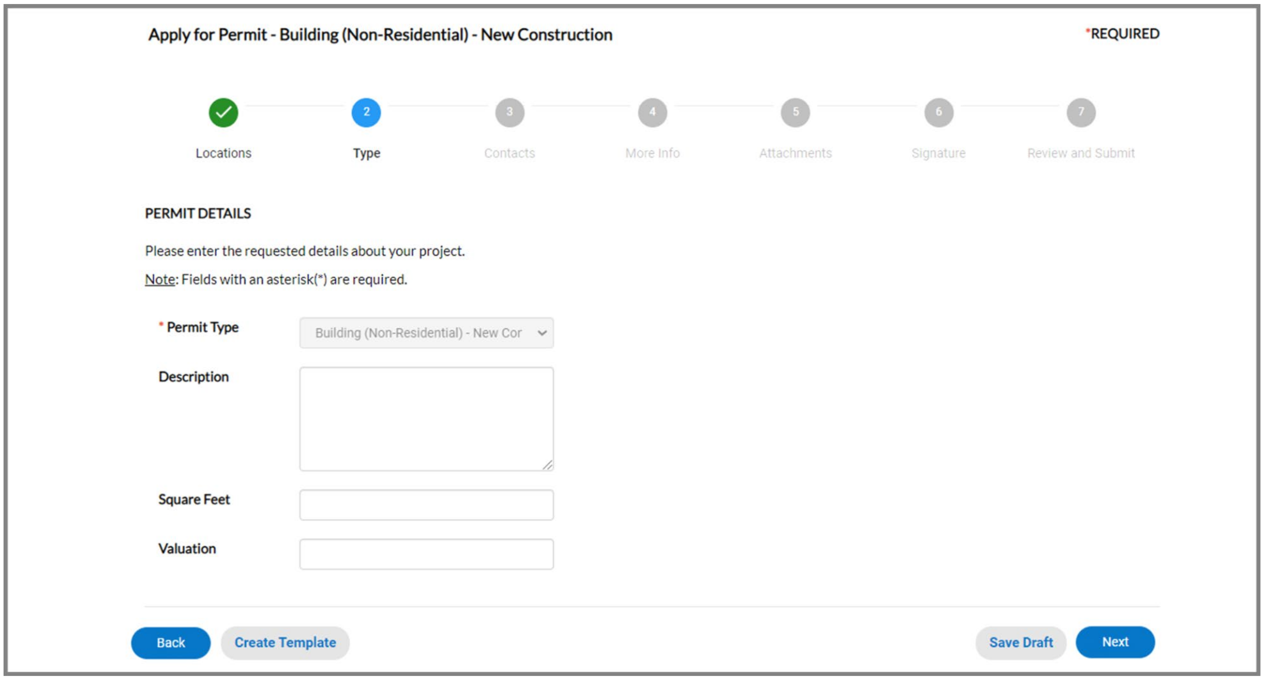


3. Once the Template has been saved, a popup displays to navigate to the template, or the template may be found under **My Account**. To access the templates, click the **My Templates** button.
4. The citizen can **Use, Update or Delete** the template by clicking the applicable button.



Step 2: Type

The application type that was initially selected default in the Type field.

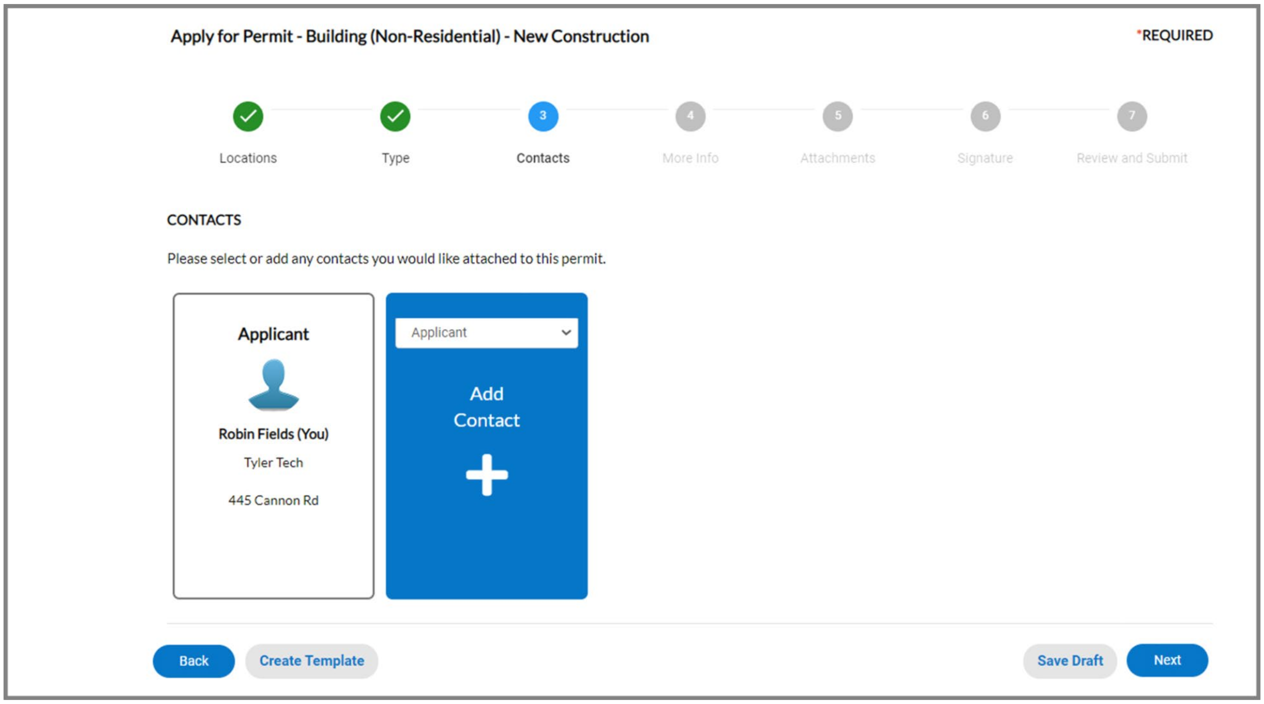


1. A description to support the details of the application type can be added in the **Description** memo box.
2. Enter **Square Feet and/or Valuation** if applicable.
3. Click **Next**.

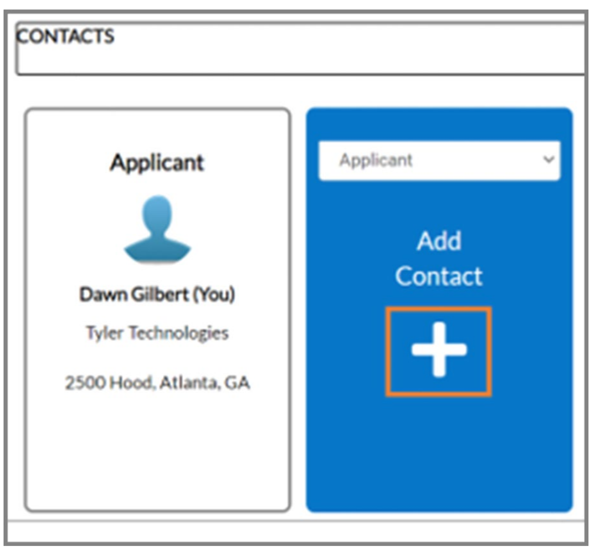
NOTE Required the fields are noted with an asterisk.

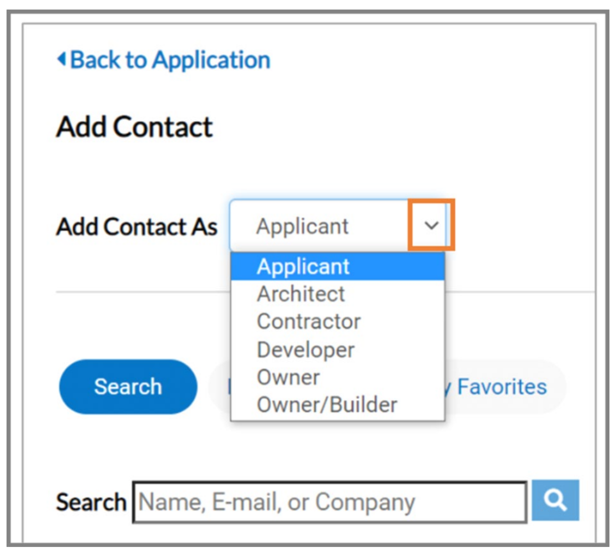
Step 3: Contacts

The registrants contact information default to the first Contact card listed. Additional contacts can be added if applicable.

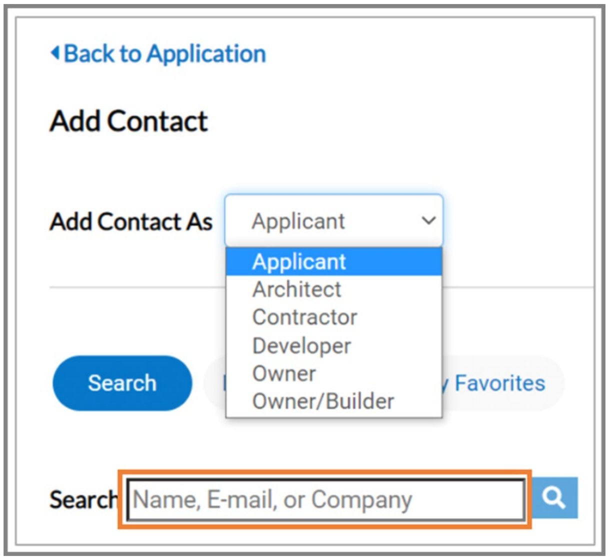


1. To add additional contacts, click the **Plus Sign** located on the Contact Card.
2. Click the dropdown arrow to select the **Contact Type** applicable to the contact.

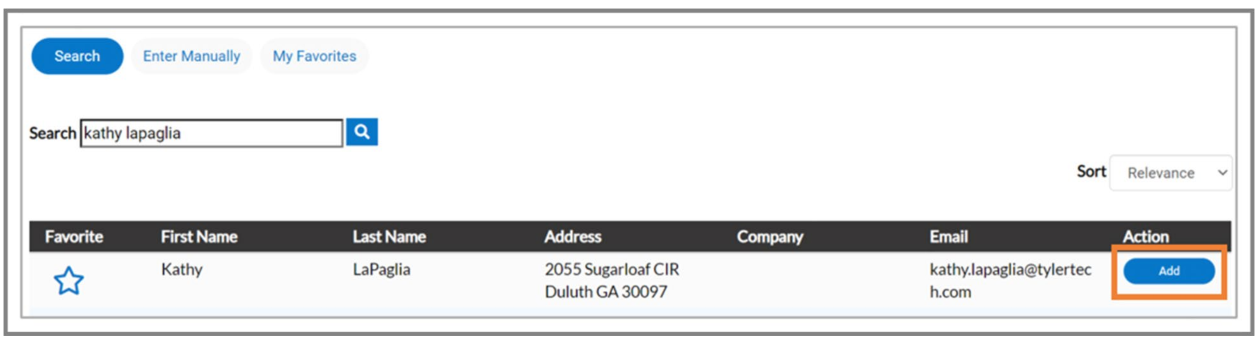




3. In the search box, type in Name, Email, or Company name and click Search to search Global Contacts in Enterprise Permitting and Licensing for an existing contact.

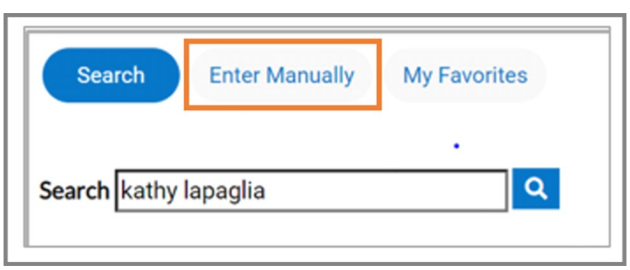


4. If the person, email, or company is an existing contact click **Add** to add the contact to the application.



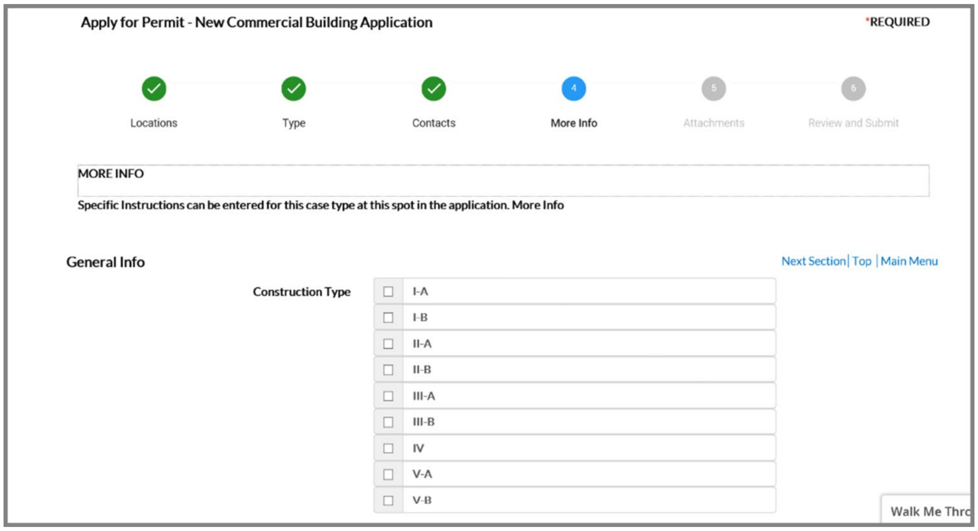
5. If the contact does not exist in Global Contacts, click **Enter Manually,** and fill in the required fields.

6. Click **Next**.



Step 4: More Info

The More Info fields reflects the Additional Information fields that are exposed to the citizen from Enterprise Permitting & Licensing. The citizen may fill in the information needed, and some fields may be required. Any information given in these fields be shown in the Enterprise Permitting and Licensing suite. Once this information is submitted by the citizen, the citizen is not able to edit the information. The end user may edit the information in Enterprise Permitting & Licensing.



1. Enter information as needed or required.
2. Click **Next.**

Step 5: Attachments

Attachments gives the citizen the ability to upload files or documents needed or required for the application process.

1. Click the **Add Attachment** card to open Windows Explorer.
2. Click to insert or drag files into the Add Attachment card.

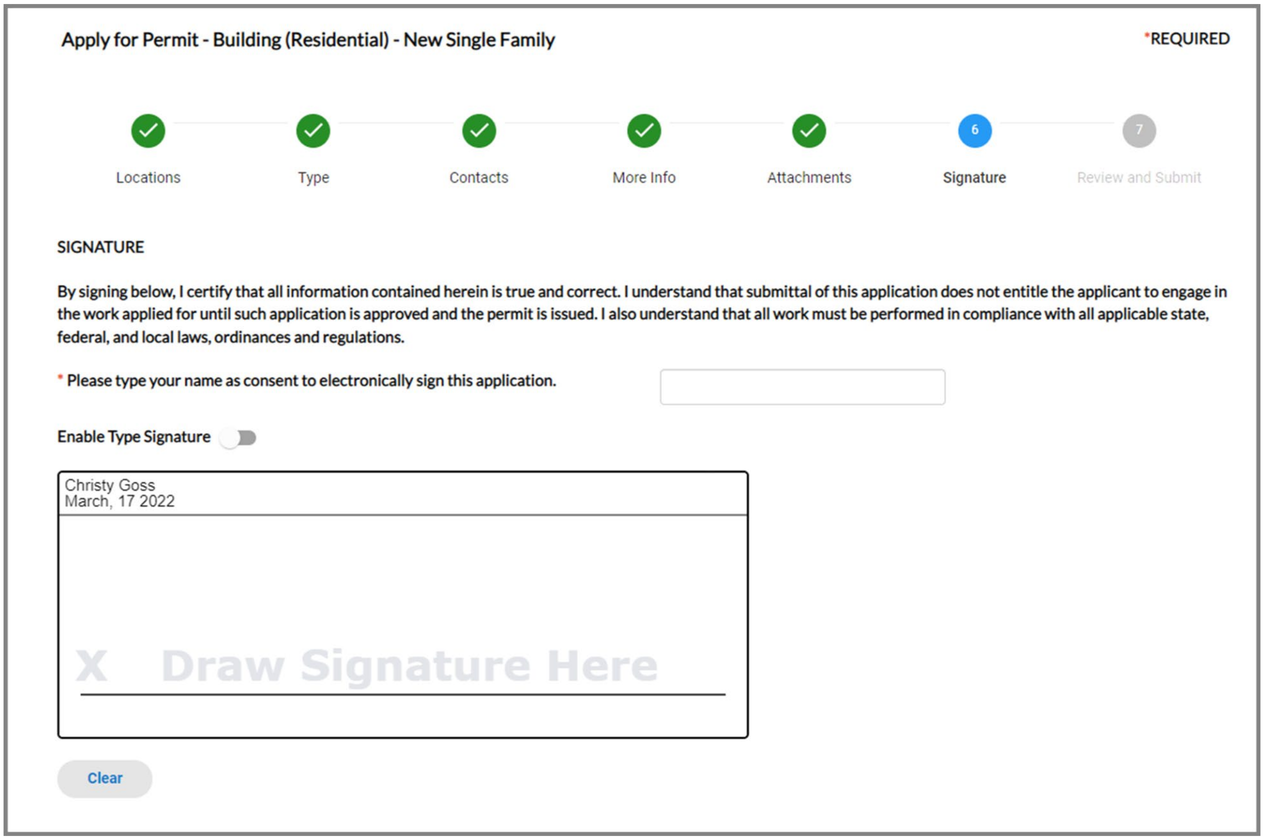
NOTE Certain application types may have required documents that must be attached to save. eReviews used in conjunction with Bluebeam require a PDF. Bluebeam only allow PDF file type.

3. Click **Next**.

Step 6: Signature (If configured)

The Signature step allows the user to consent electronically for the application. If configured for the Civic Access site:

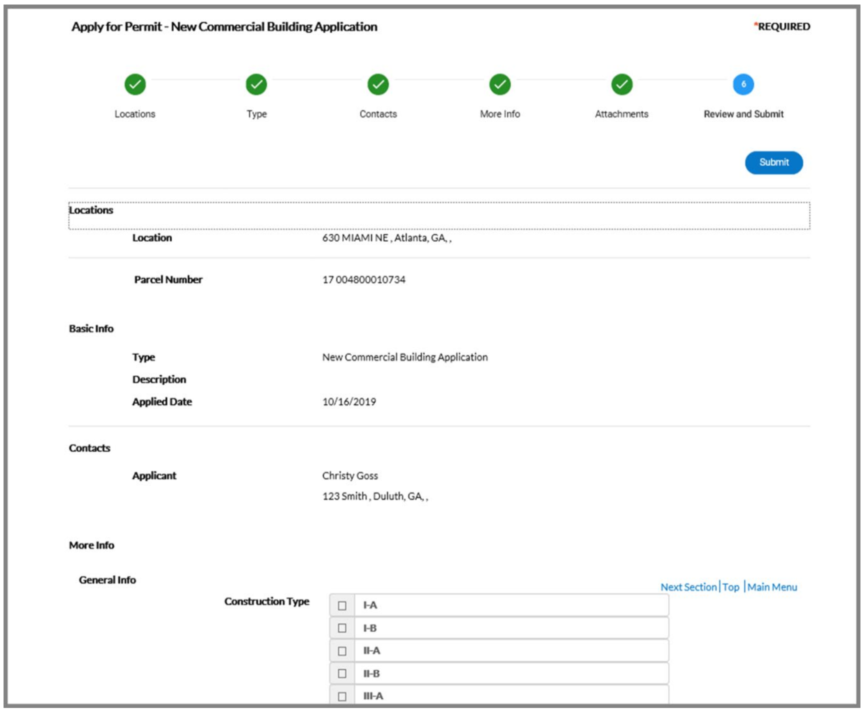
1. Type the user's name in the first field
2. Toggle the Enable Type Signature to the right, type name again and the signature fill in the final field or
3. Leve the Enable Type Signature toggled to the left and draw the signature in the signature field.



Step 7: Review and Submit

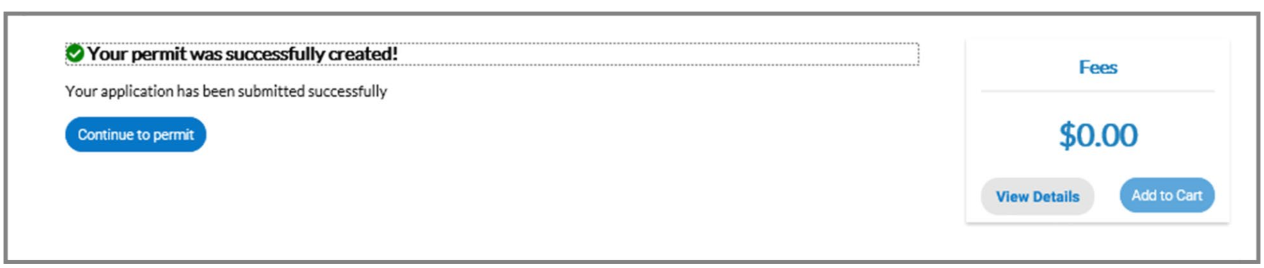
Review and Submit gives the citizen the ability to review all information entered in the application to include attachments uploaded, estimated fees, and additional information fields that were populated.

1. Click **Save Draft** if the information is incomplete and needs to be finished later. The citizen may click the Draft status circle on the Dashboard to resume their application.
2. If the application is complete and accurate click Submit at the bottom of the page.



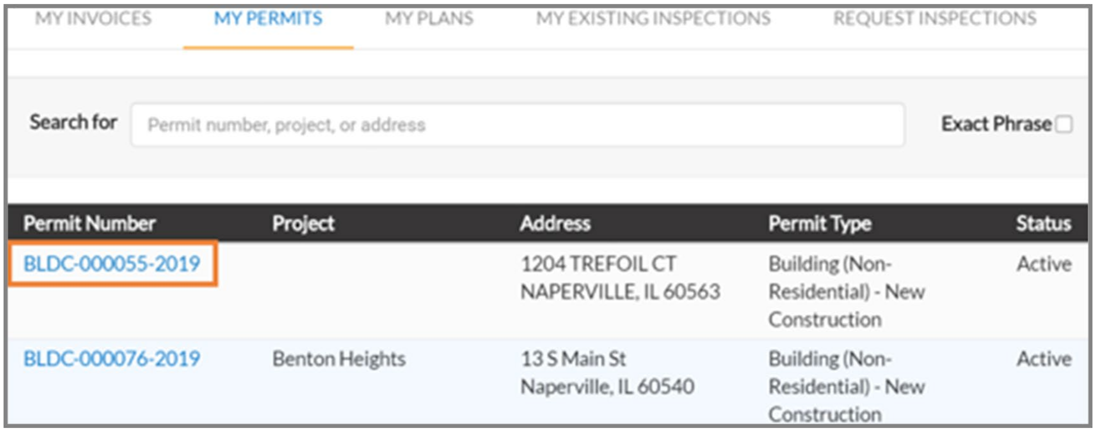
Success Page

Once an application has been submitted, a Success page displays. The citizen may click the **Continue To** button or add any fees that have been invoiced to their shopping cart to proceed to payment.

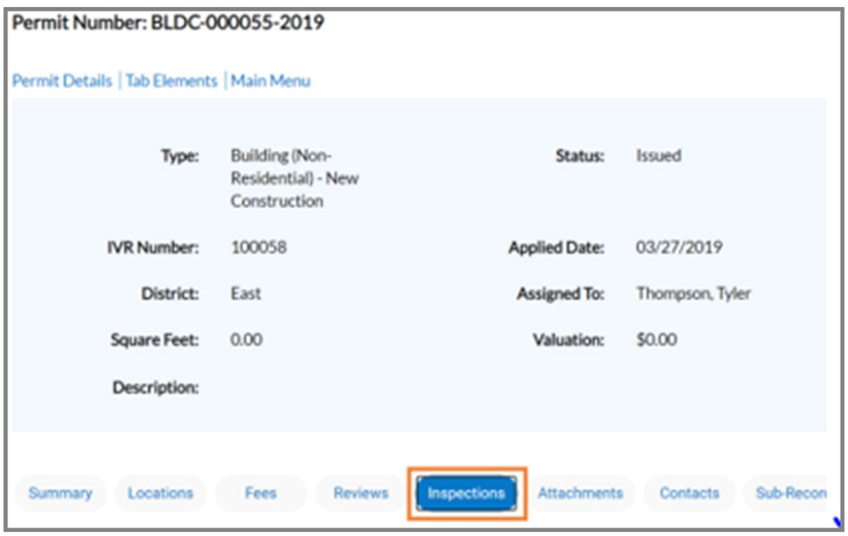


Request Inspection after Permit is Issued

1. Click the **Permit Number** of the Permit the user would like to request an inspection.

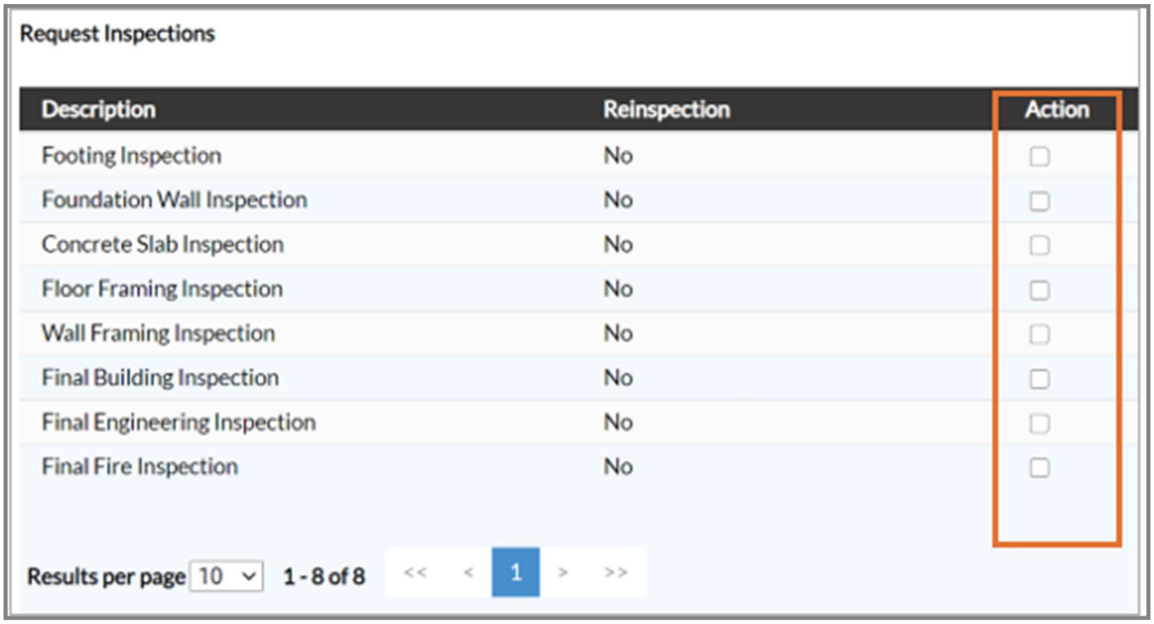


2. The Permit case opens.
3. Click the **Inspections** tab.

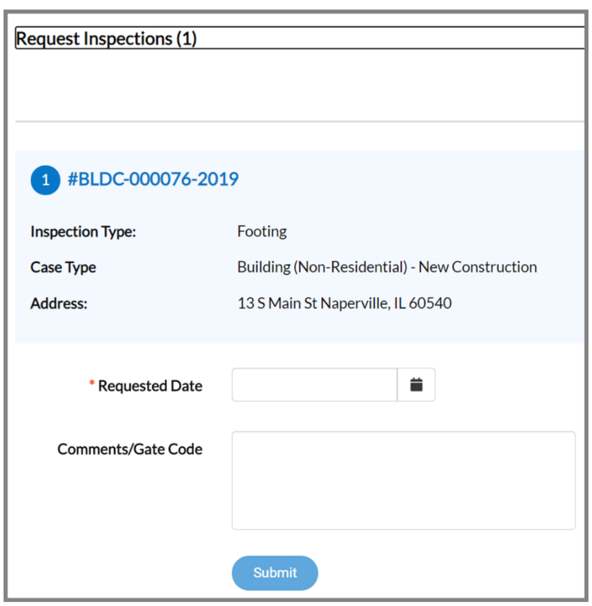


4. A list of **Request Inspections** displays at the bottom of the page.
5. Click in the **checkbox** under **Action** for the inspection the user would like to request.

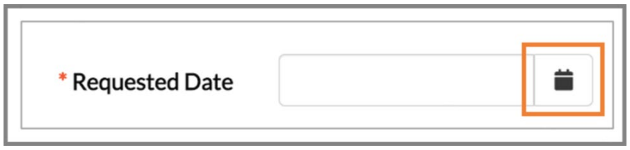
NOTE If the workflow of the case has not been completed up to the inspection step (based on a priority set), the Action boxes are not visible.



6. Click **Request Inspection** at the bottom right of the page.
7. The **Request Inspections** page open.

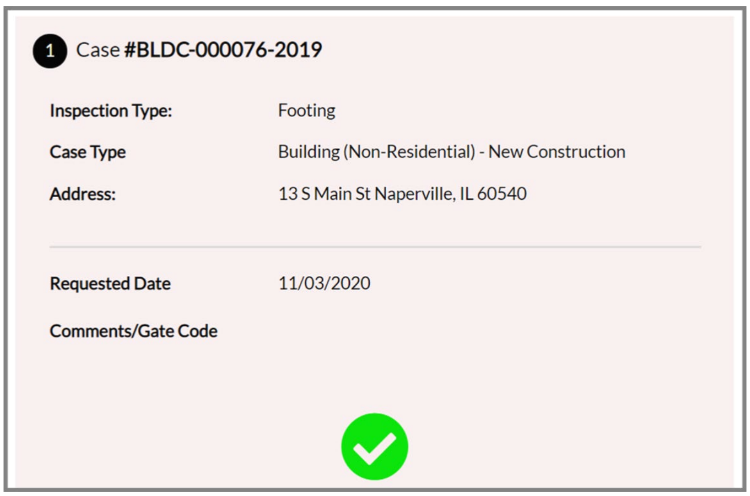


8. Click the **Calendar** to choose a requested date for the inspection.

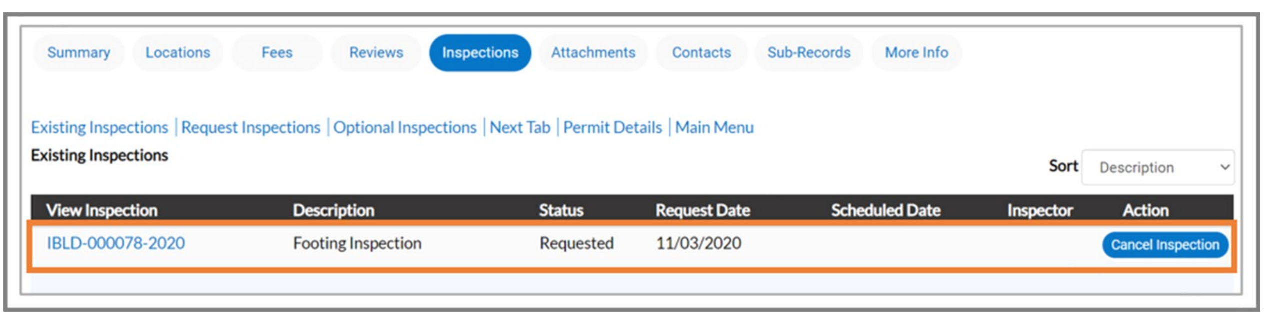


9. Fill in comments about the requested inspection in the **Comments/Gate Code** box.

10. Click **Submit**.
11. The inspection information and a green checkmark pop up in a **Requested Inspections** page if it is successfully requested.



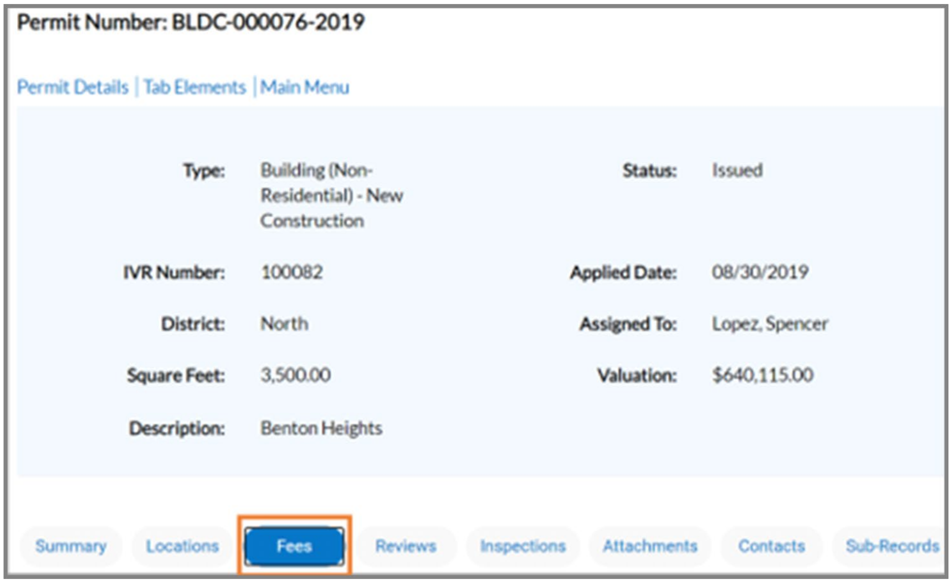
12. Navigate back to the Details page. The inspection now be listed under **Existing Inspections**.
13. The citizen may cancel the inspection by clicking **Cancel Inspection**. Once the inspection has been scheduled the **Cancel Inspection** button disappear.



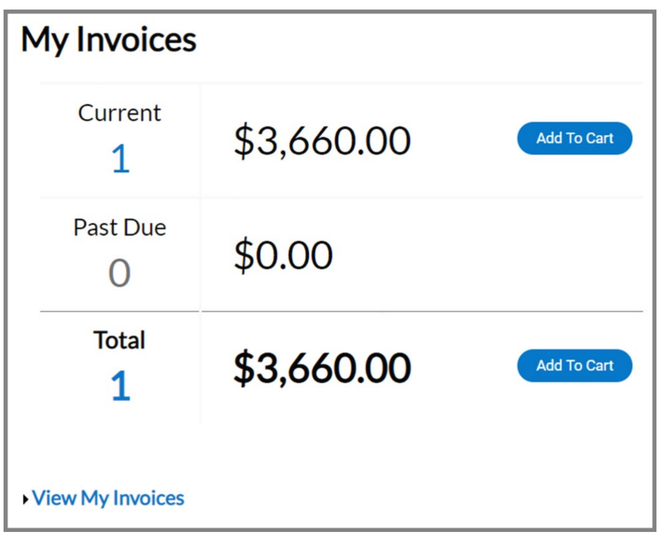
Pay Fees

For the citizen to view or pay fees, the fees must first be invoiced.

1. Navigate into the Plan/Permit of the user's choice.
2. Click the **Fees** tab.



3. Click **Dashboard**.
4. Navigate to **Invoices** at the bottom of the page.

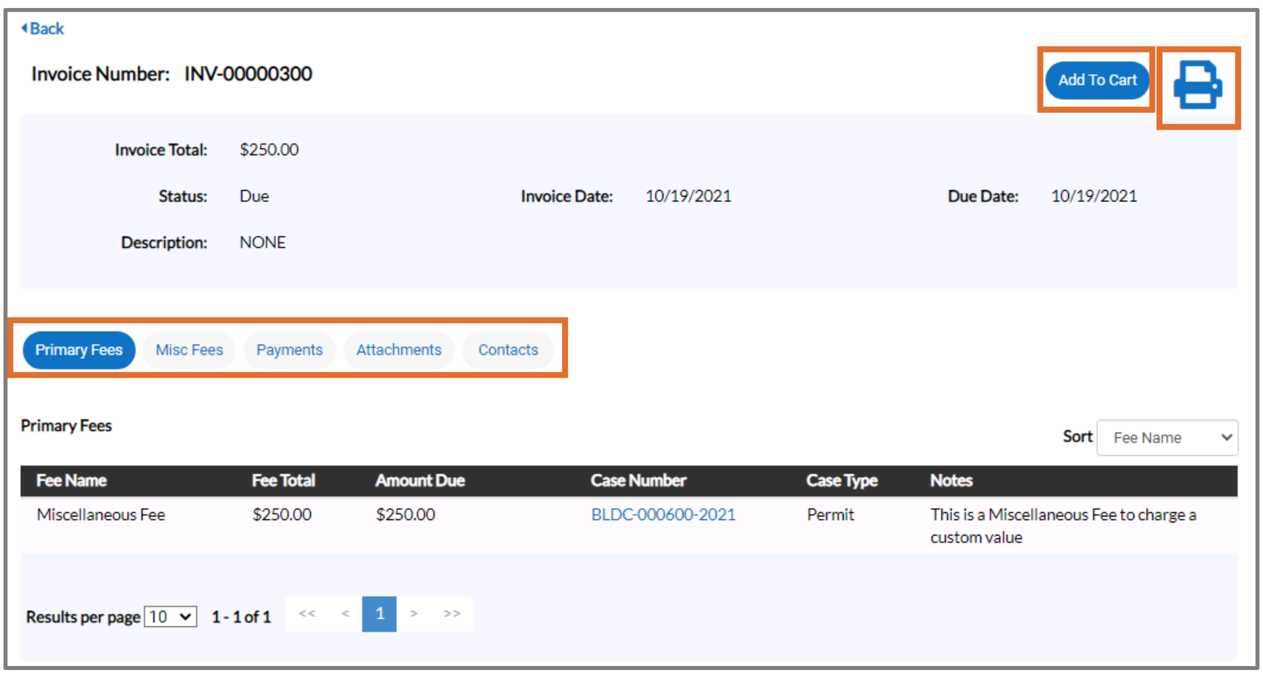


Invoices

Civic Access users can access invoices that are paid, voided, or unpaid. Invoices are accessible from the **Dashboard** and the menu system and can be added to the electronic **Shopping Cart**.

To view invoice information:

1. Click the **Printer** button to print or save the invoice as a PDF.
2. Click **Primary Fees** to view the Fee Name, Fee Total, Amount Due, Case Number, Case Type, and Notes for all fees associated with the invoice.
3. Click **Misc Fees** to view the Fee Name, Fee Total, Paid Amount, and Amount Due for all miscellaneous fees associated with the invoice.
4. Click **Payments** to view the Receipt Number, Status, Transaction Type, Payment Type, Payment Amount, and Payment Date for all payments associated with the invoice.
5. Click **Attachments** to view the File Name and Added Date for all files attached to the invoice.
6. Click **Contacts** to view the Company, First Name, Last Name, Title, and Email for all contacts associated with the invoice.
7. Click **Add to Cart** to add the invoice to the **Shopping Cart**.



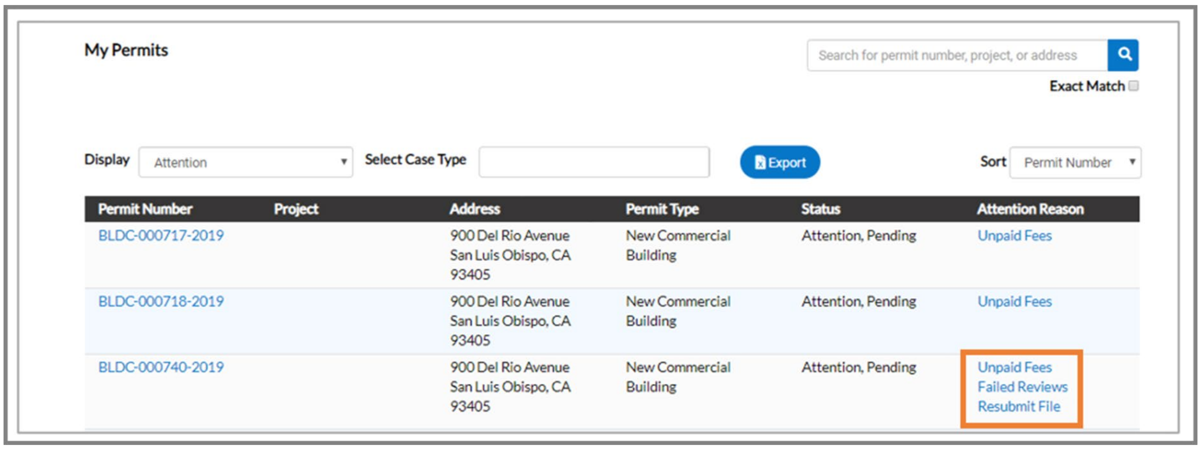
Manage a Review

Citizens may submit electronic plans via Civic Access to be reviewed by the municipality. Once an application has been submitted and plans reviewed, the citizen may be notified by email or logging back into Civic Access to review Failed or Approved Reviews.

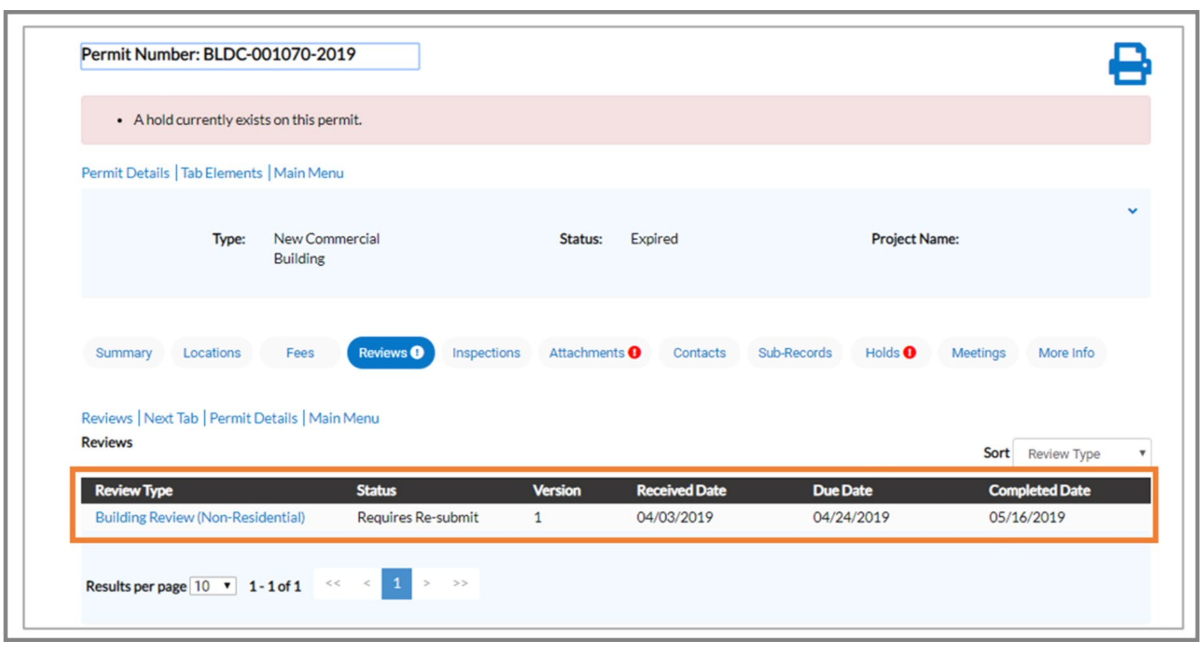
1. Navigate to the Dashboard and click the **Attention** card.

The application displays a list of the cases needing attention in the specific module be listed.

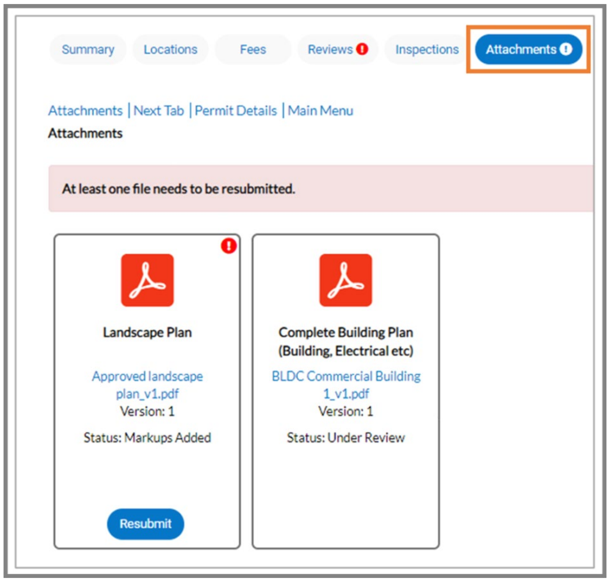
2. Click the **Failed Reviews** link under the Attention Reason column.



The application displays the Review Type, Status, Version, Received Date, Due Date and Completed Date.

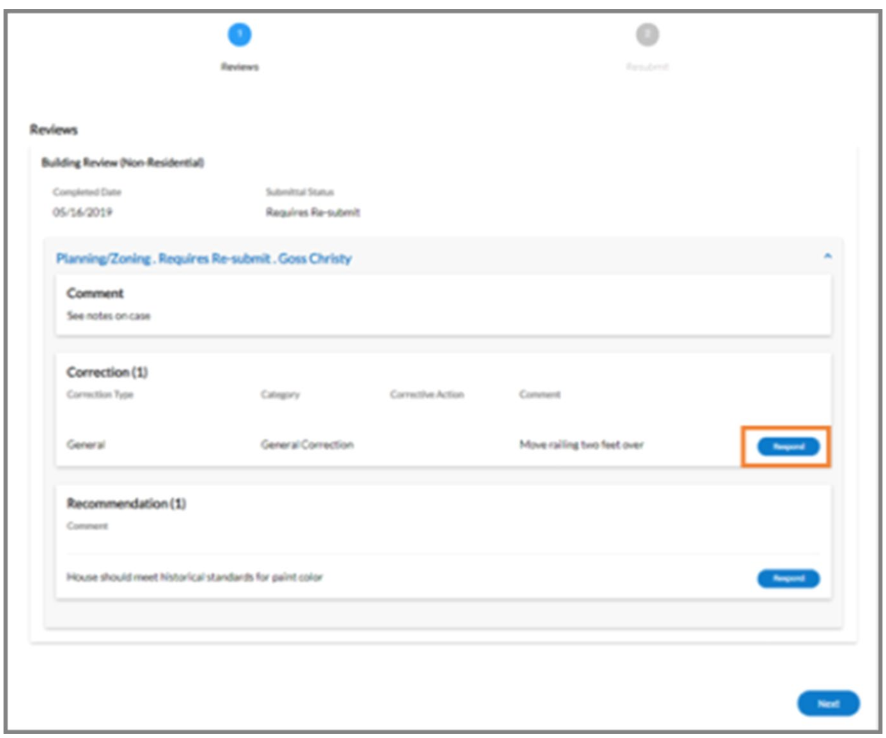


3. Civic Access displays an alert on the Attachments tab. This indicate which electronic file was failed and requires resubmission. Click **Attachments**.

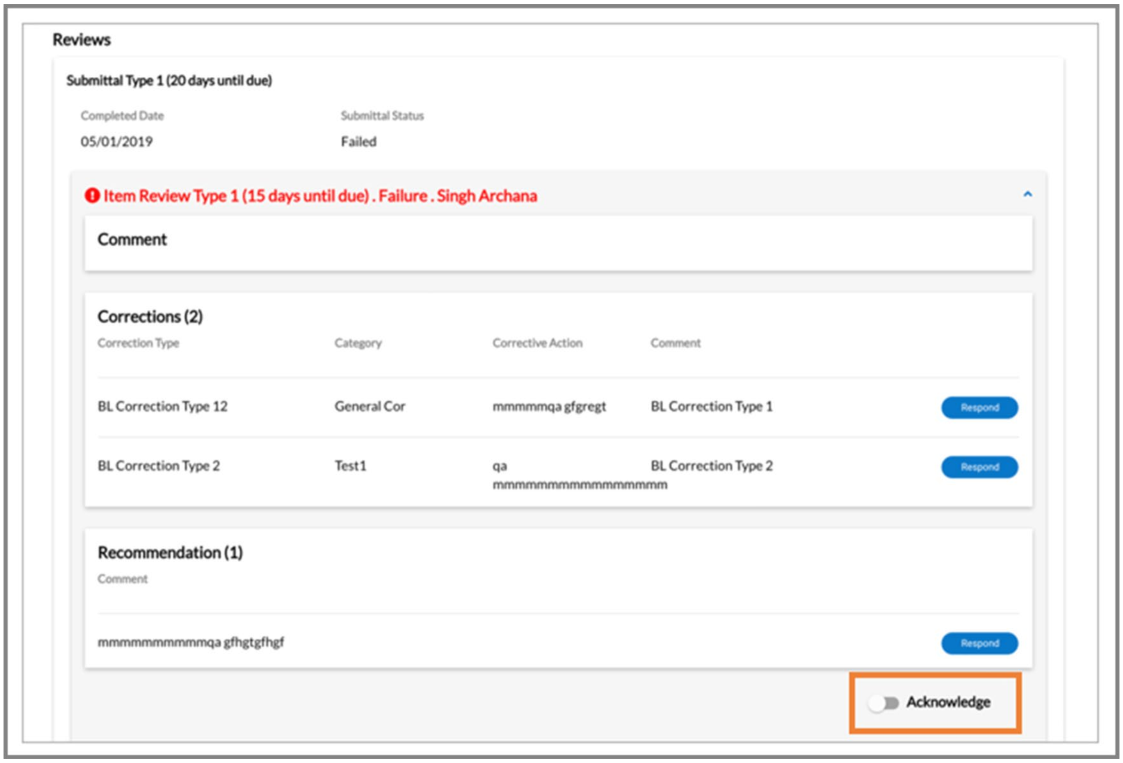


4. Click **Resubmit** on the specific file(s) that need to be resubmitted.

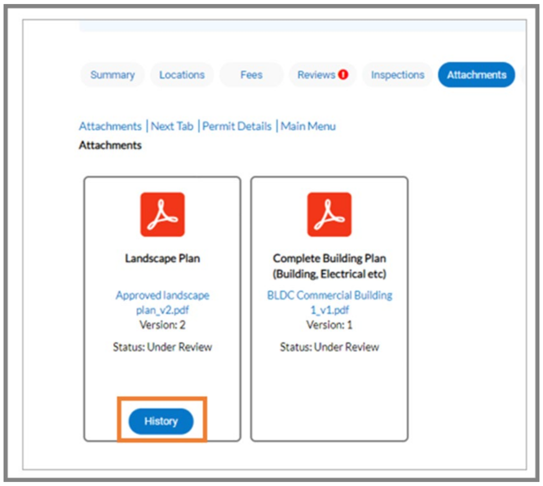
The citizen may drill down on each item review from the submittal to view Corrections, Recommendations, and Comments.



5. Citizens may click **Respond** to respond to the Reviewer.
6. Once a response is given, the citizen may click **Hide Response**.
7. The citizen must toggle on **Acknowledge** if providing any Comments, Corrections, or Recommendations.

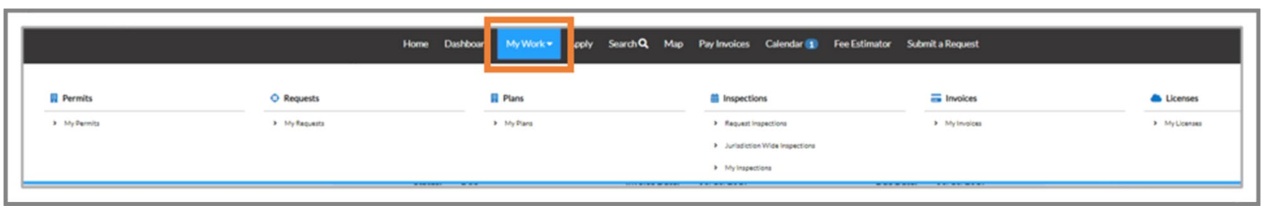


8. To navigate to the next step of the Review, click **Next**.
9. To Resubmit a file click **Select File**, choose the second version of the file to be resubmitted.
10. Click **Submit.**
11. On the Attachments tab, the citizen may view the History of the submitted attachments by clicking **History**.



My Work

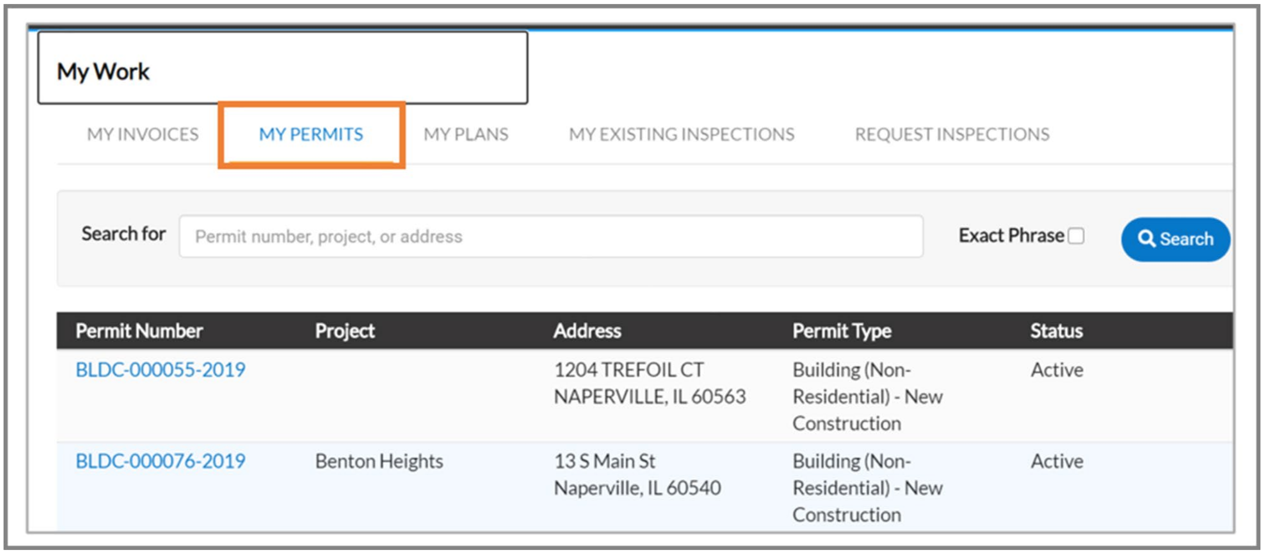
1. Click the **My Work** tab at the top of the **Dashboard** page to access the following: Invoices, Permits, Plans, and Inspections.



My Permits

To view details of a permit:

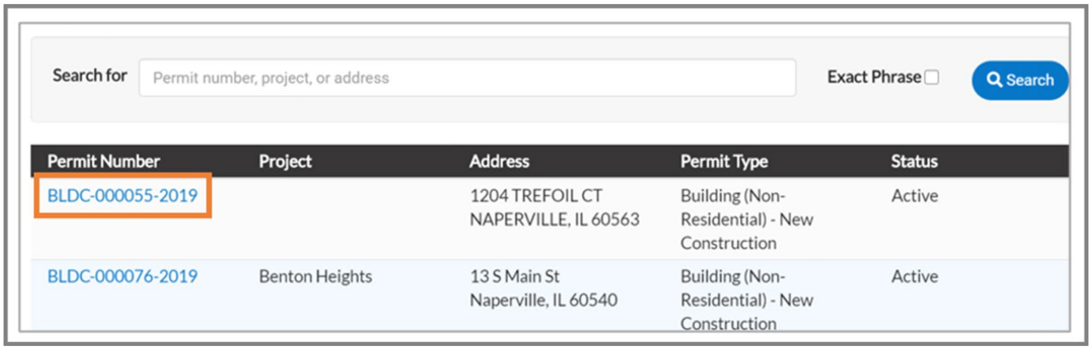
1. Click **MY PERMITS**.
2. Type a **permit number, project**, or **address** in the Search for field.
3. Click **Search**.



NOTE: Not all permit data is available to all users.

4. Click **Filter** to expand the search criteria.
5. Click the **Display** dropdown to select and search by status.
6. Click in the **Case Type** field to search by a specific case type. The results display in a dropdown.
7. Click **Sort** to sort the cases.

8. Click a **permit number** to open the associated permit record.

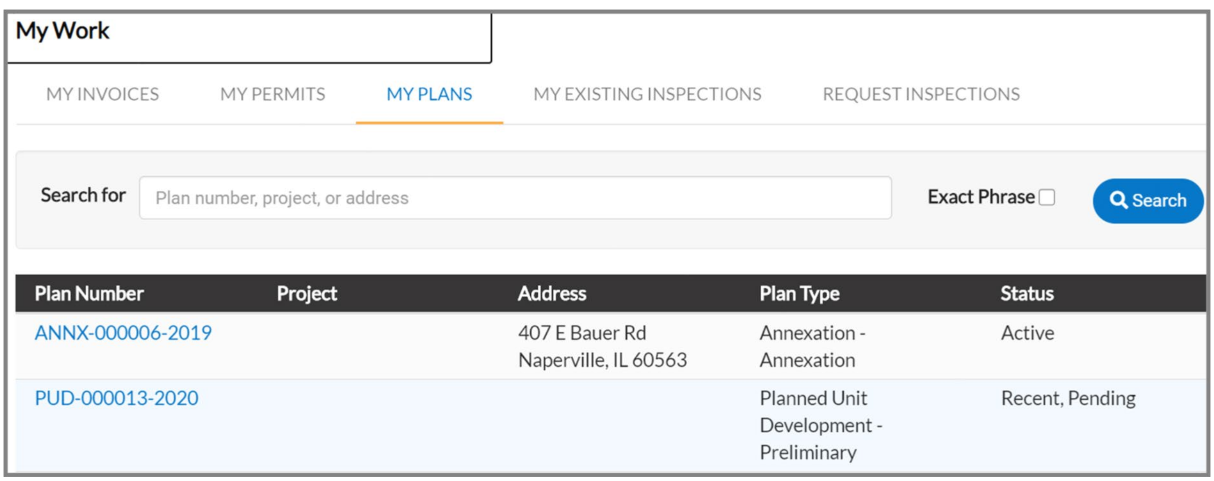


9. Select the **number of records** to display on each page from the Results per page dropdown.
10. Click the page navigation **arrows** to move between pages of records.

My Plans

To view details of a plan:

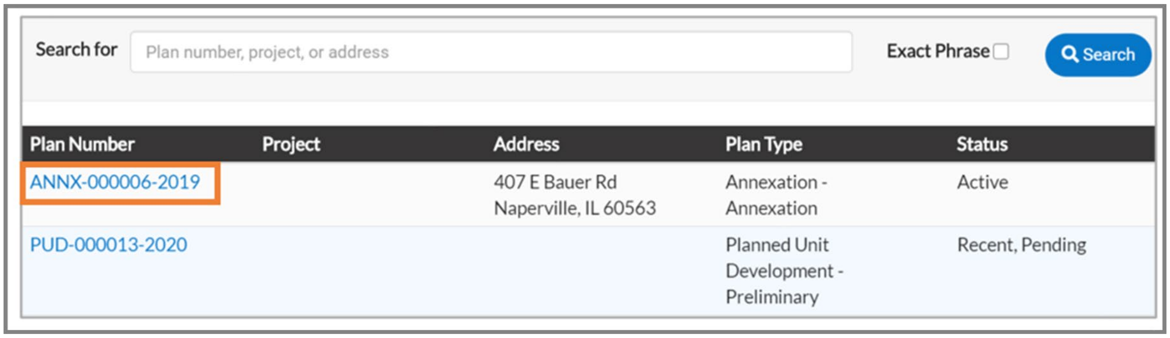
1. Click **MY PLANS**.
2. Type a **plan number, project**, or **address** in the Search for field.
3. Click **Search**.



NOTE: Not all plan data is available to all users.

4. To use the **Filter**, **Display**, **Case Type**, and **Sort** functions, please refer to Steps 4-7 on Page 56.

5. Click a **Plan Number** to open the associated plan record.

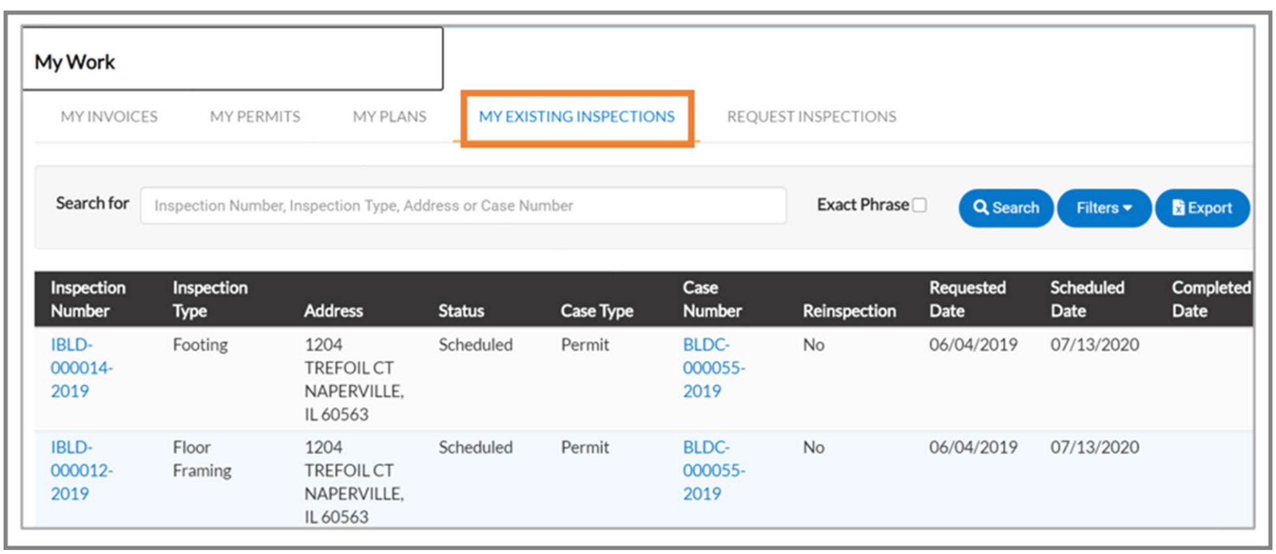


6. To use the page navigation, please refer to Steps 9-10 on Page 57.

My Existing Inspections

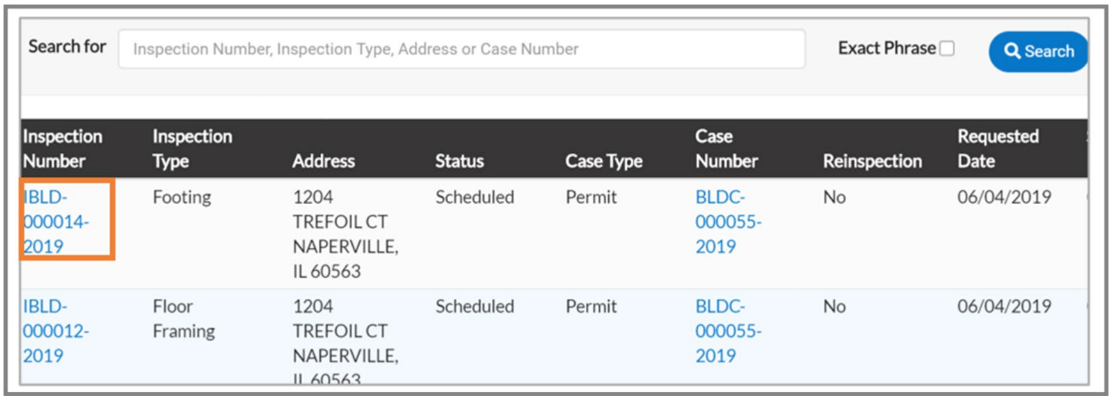
To view details of an inspection:

1. Click **MY EXISTING INSPECTIONS**.
2. Type an **inspection number, inspection type, address**, or **case number** in the Search for field.
3. Click **Search**.



4. To use the **Filter**, **Display**, **Case Type**, and **Sort** functions, please refer to Steps 4-7 on Page 56.

5. Click an **Inspection Number** to open the associated Inspection record.



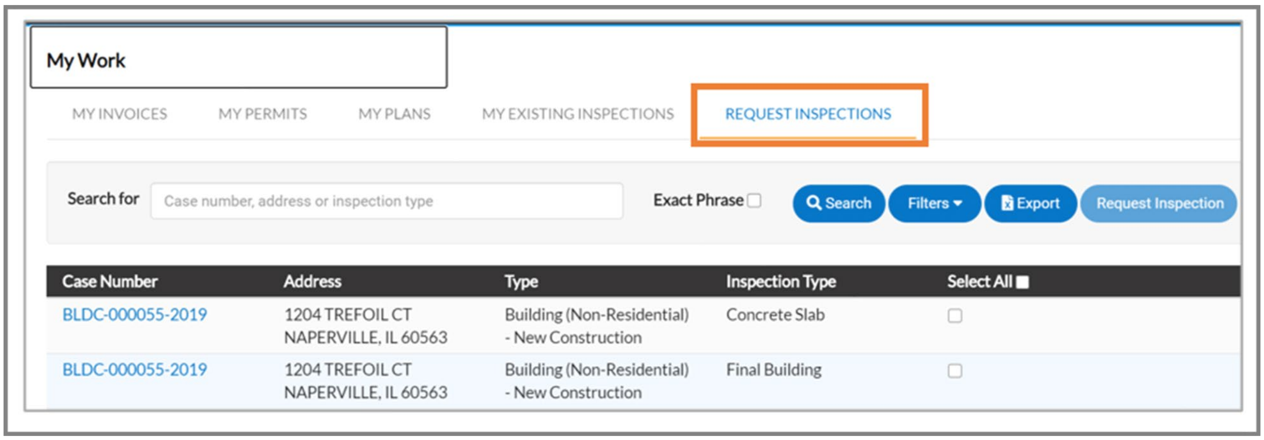
6. To use the page navigation, please refer to Steps 9-10 on Page 57.

Request Inspections

Citizens can request inspections through Civic Access. Users must be registered and be a contact associated with the case. Multiple related/unrelated inspections can be requested simultaneously. Inspection requests interact with the inspection-related data on the dashboard.

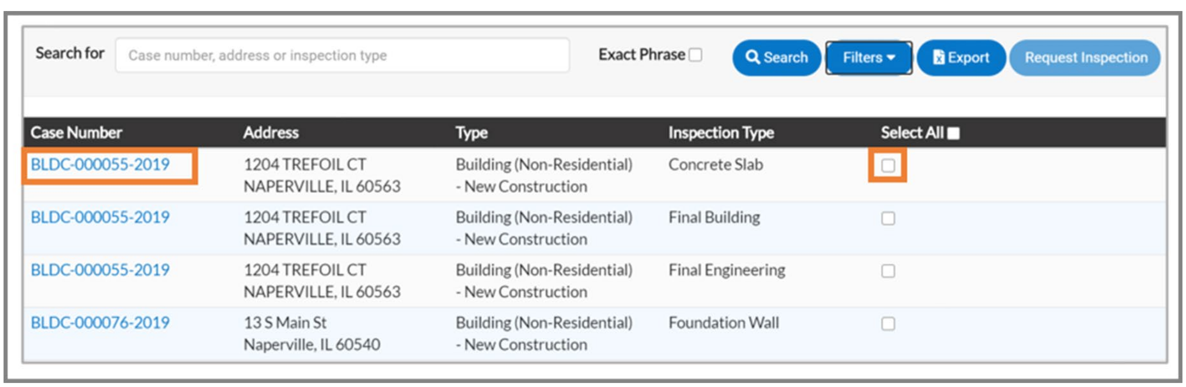
To view details of an inspection:

1. Click **REQUEST INSPECTIONS**.
2. Type a **case number, address**, or **inspection type** in the Search for field.
3. Click **Search**.

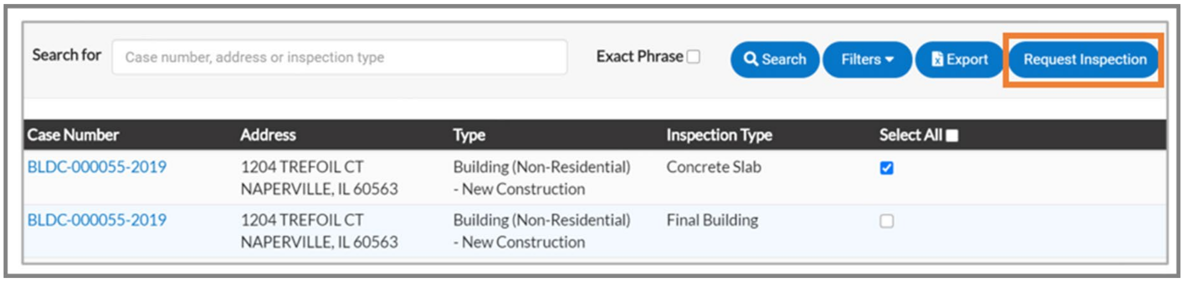


4. To use the **Filter** and **Sort** functions, please refer to Steps 4-7 on Page 56.

5. Click a **Case Number** to open the associated record or click the **checkbox(es)** next to the case(s) for which inspections are needed.



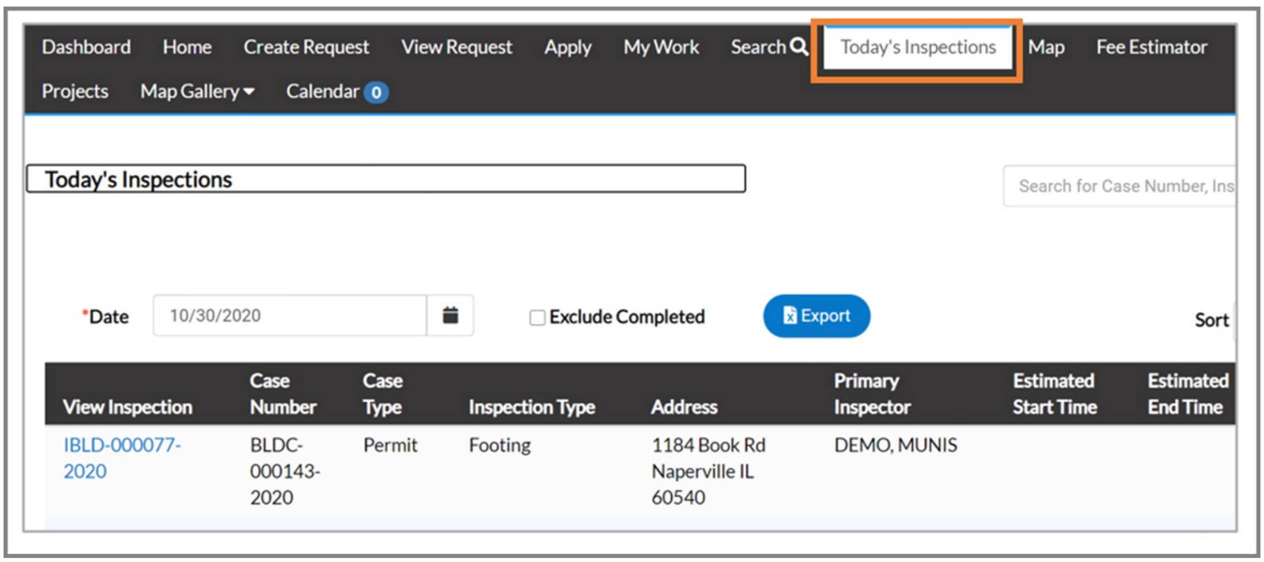
6. Click **Request Inspection** to open the Request Inspections window. For more information, please refer to Steps 4-10 on pages 48-49.



7. To use the page navigation, please refer to Steps 9-10 on Page 57.

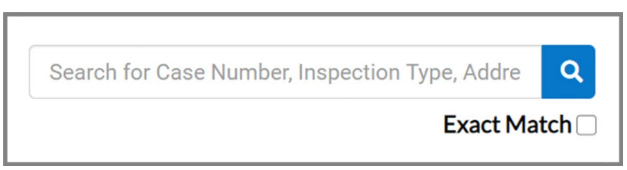
Today's Inspections

1. Click **Today's Inspections**, to view, sort, and access all inspections scheduled for a specific day.



2. Type a **case number, inspection type** or **address** in the Search field.

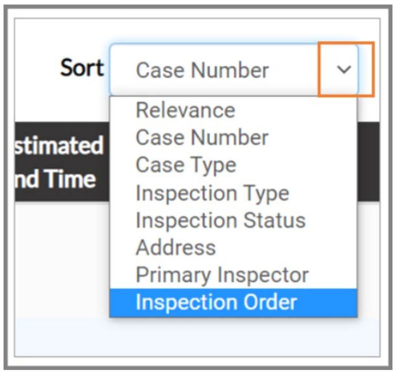
3. Click **Search**.



4. Click the **Calendar** to select an inspection due date or type the **date** in the Date field.

5. Mark **Exclude Completed** to exclude completed inspections from the results.

6. Click the **Sort** dropdown to sort the Inspections within the search.



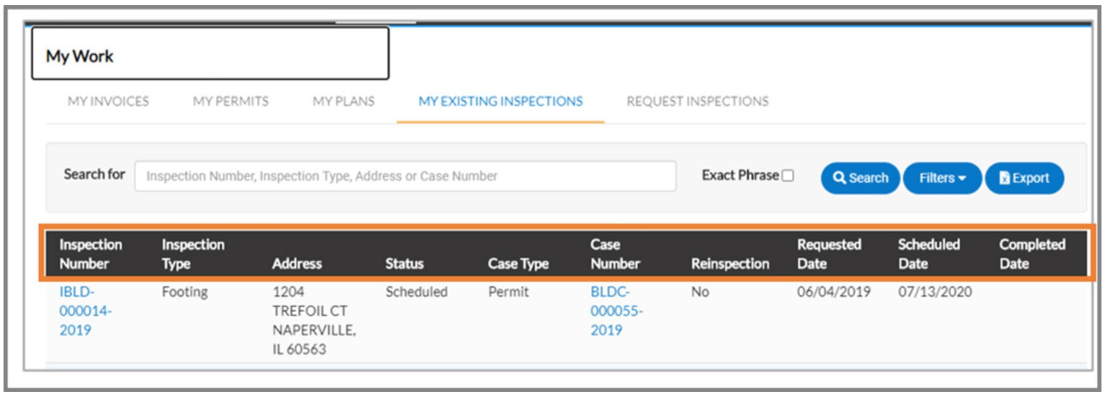
8. To use the page navigation, please refer to Steps 9-10 on Page 57.

Manage an Inspection

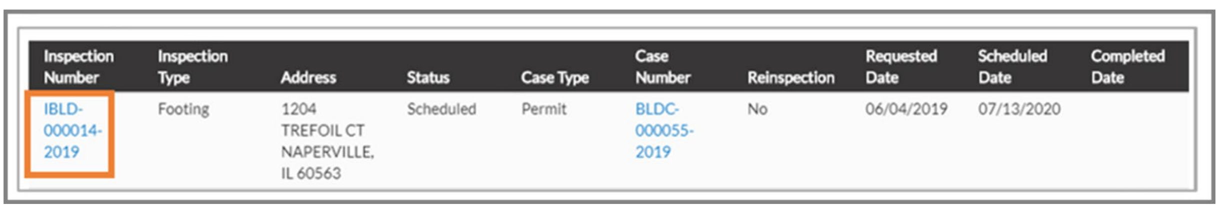
The citizen may navigate to an Inspection multiple ways:

- via the Parent case
- by clicking on a specific Inspection
- from the Dashboard
- or by searching for an inspection

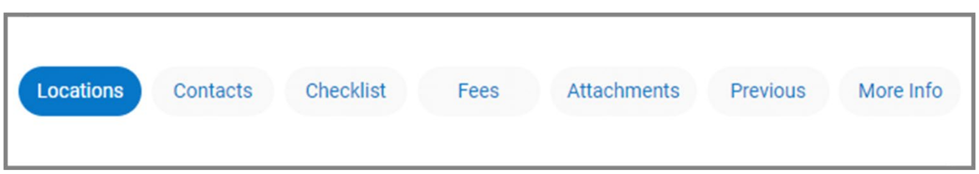
The main details of the Inspection are listed at the top of the page and include Inspection Number, Inspection Type, Address, Status, Case Type, Case Number (a Permit/License number), Reinspection, Requested Date, Scheduled Date, and Completed Date.



1. Click the **Inspection Number** to view the Inspection Details.



2. The middle tabs within the Inspection allow the citizen to manage/view the following: Location, Contacts, Checklist Items, Fees, Attachments, Previous Inspections, and Additional Information.

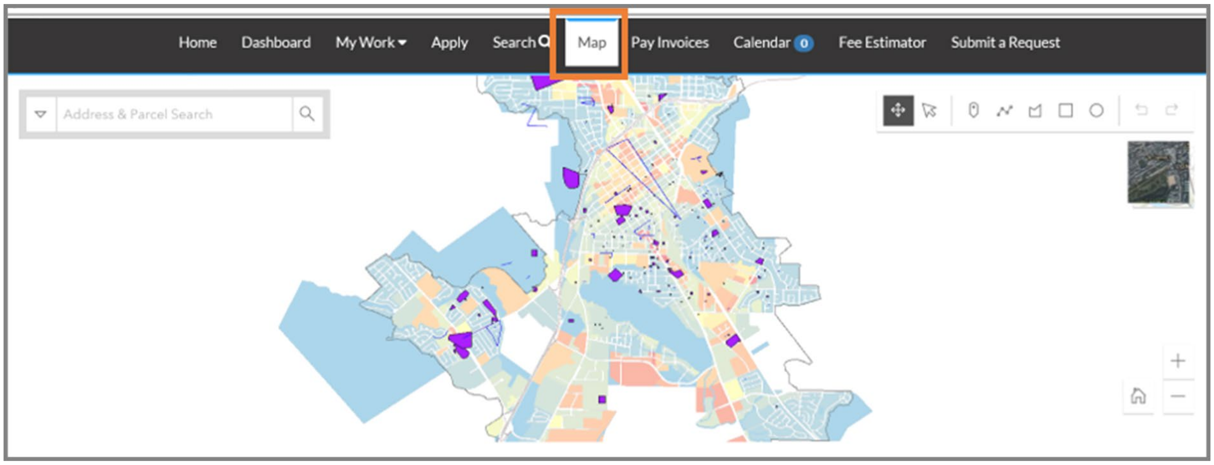


Use the Map

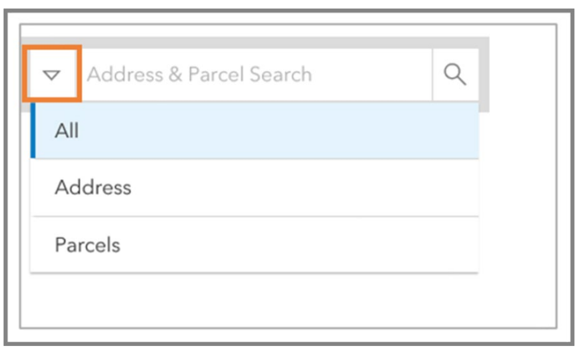
Civic Access integrates with ESRI's map functionality to allow for powerful searches, pinned results, submitting applications, Enterprise Permitting and Licensing server data incorporation, leveraging GIS layers, and more. ArcGIS 10.3.1 or higher must be in place before beginning Civic Access installation.

To use the Civic Access map:

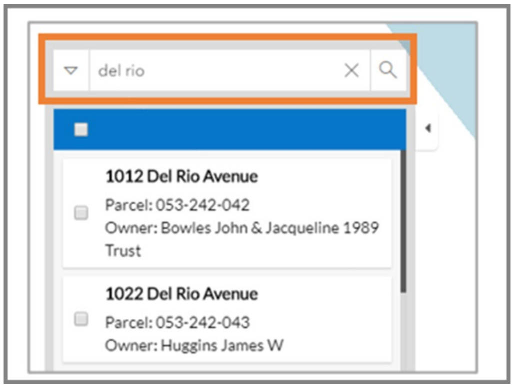
1. Click Map in the main menu.



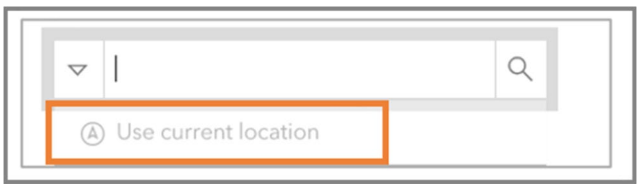
2. Click the **arrow** and select a search category.



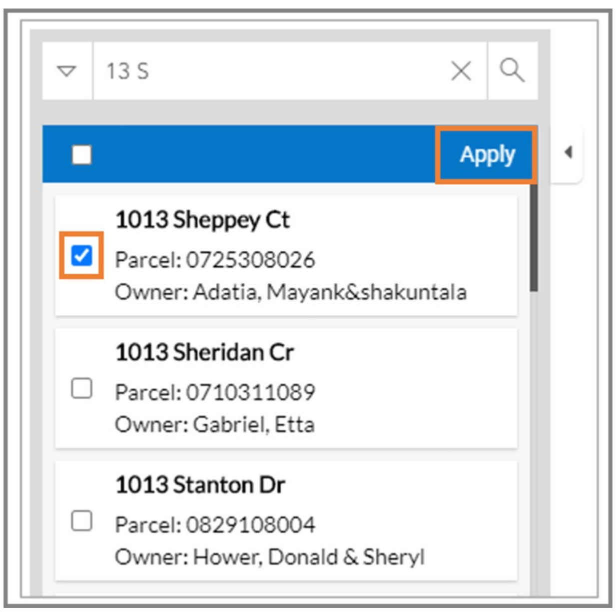
4. Type an address or a parcel in the **Address & Parcel Search** field in the top, left corner of the map. This field also allow partial information of the address. Results auto-fill below the field.



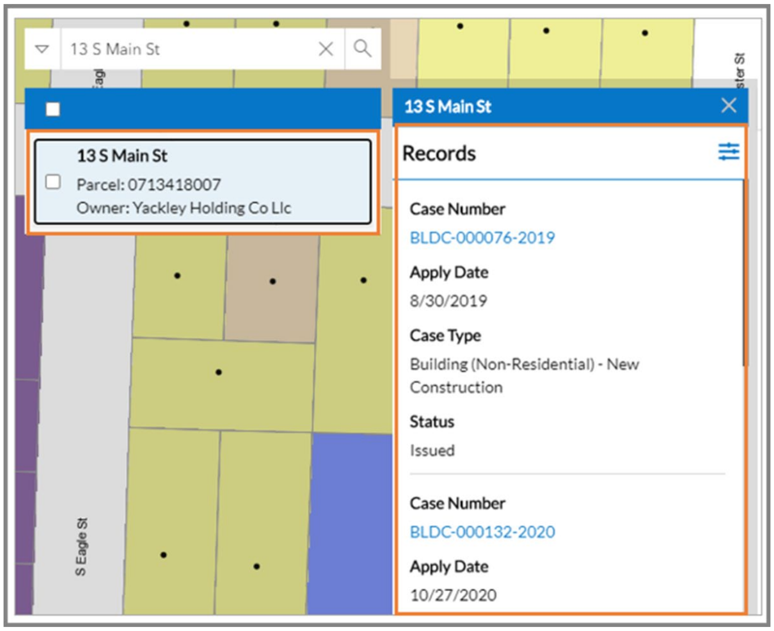
5. Click **Use Current Location** to use the current location that appears when clicking in the search field.



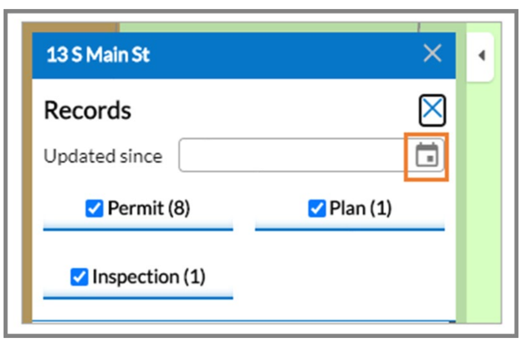
6. The citizen may choose from the list of addresses by clicking the **box** next to the desired address(es). The **Apply** button displays in the blue ribbon. (See previous instructions on how to Apply for a case using the map).



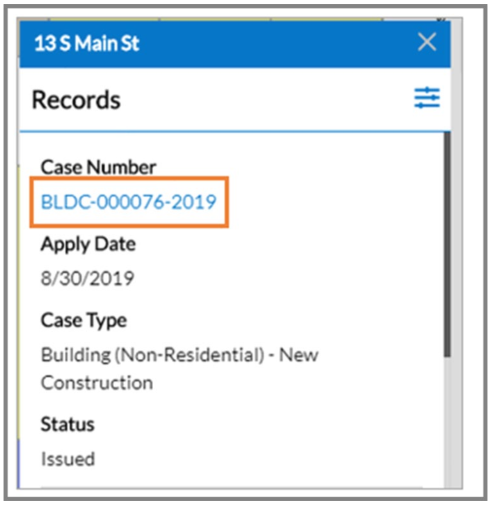
7. To see information related to a specific address or parcel, click into the box of the desired address or parcel. The information displays in a fly out to the right.



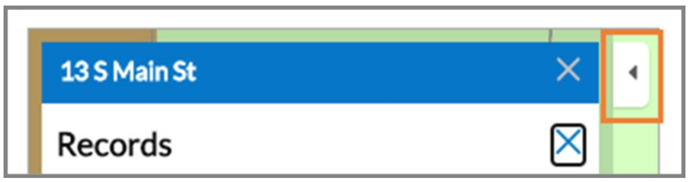
8. Click the **More Options** menu to access the Calendar to change the date range of information brought back.



9. Click the **Case Number** on the results that were returned.

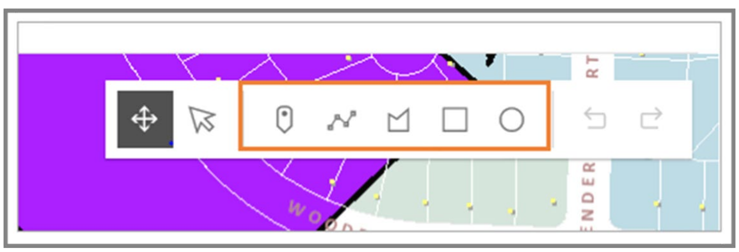


10. Another tab open to show the details of the case.
11. To collapse the information on the page to see the full map, click the arrow tab.

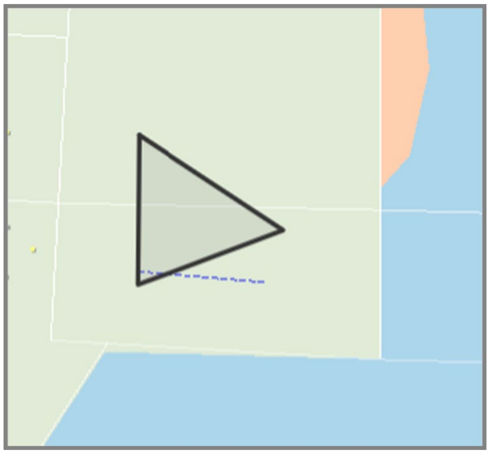


12. To clear all information given click the **X** in the blue ribbon or on the **Address & Parcel Search** field. The user may start their search anew.

13. To **Draw to Apply or Search**, navigate to the area of the map that the spatial collection needs to be drawn.
14. Select the desired feature to draw a point, line, polygon, rectangle, or a circle on the map.

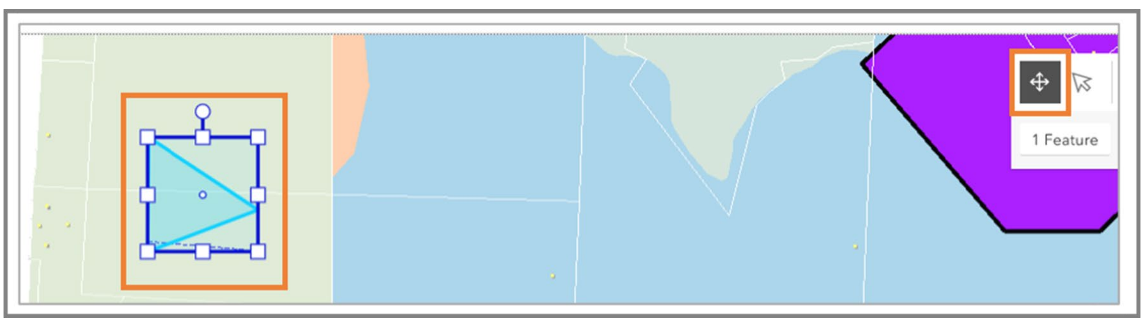


15. Each single click allows a turn of a line in the shape and a double click allow the user to finish drawing the desired shape.

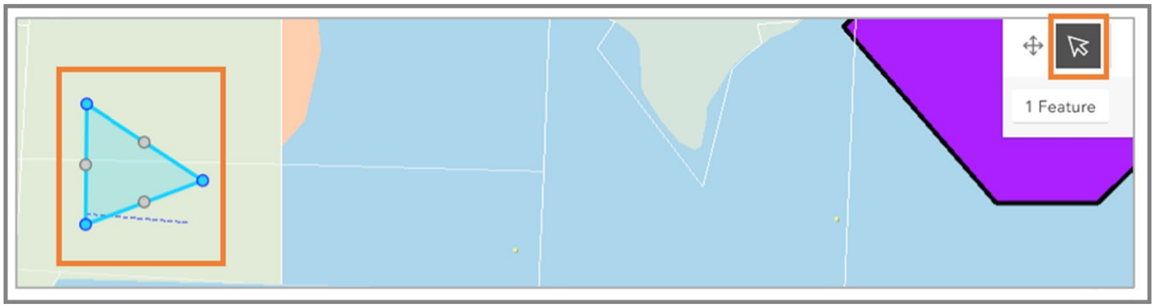


16. To transform the feature, click the **Transform** button.

17. A box displays around the feature and allow the user to transform the original by moving the smaller white squares into the desired positions.



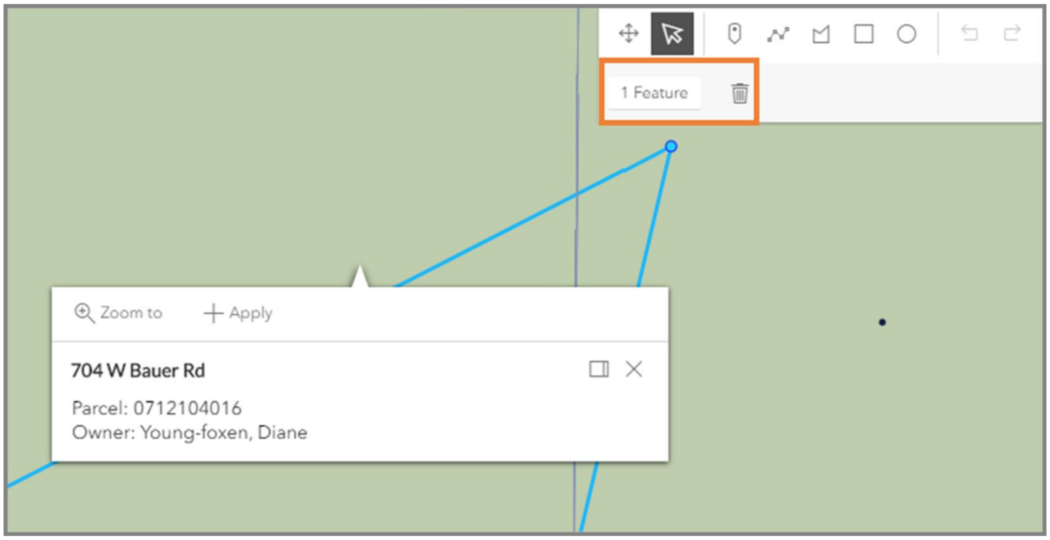
18. To Reshape the feature, click the **Reshape** button.



19. Small circles display on the feature and allow the user to reshape the original by moving the circles into the desired positions.
20. Once done drawing and editing the feature, click the desired **Spatial Collection** and click **Apply,** if the user would like to use the feature to apply for a case.

21. To **Undo** a feature or **Redo** a feature, click the arrows pointing to the left or right on the right side of the drawing tools.

22. To delete a feature, select a shape on the map, and a dropdown displays under the drawing tools.
23. Click **Delete**.



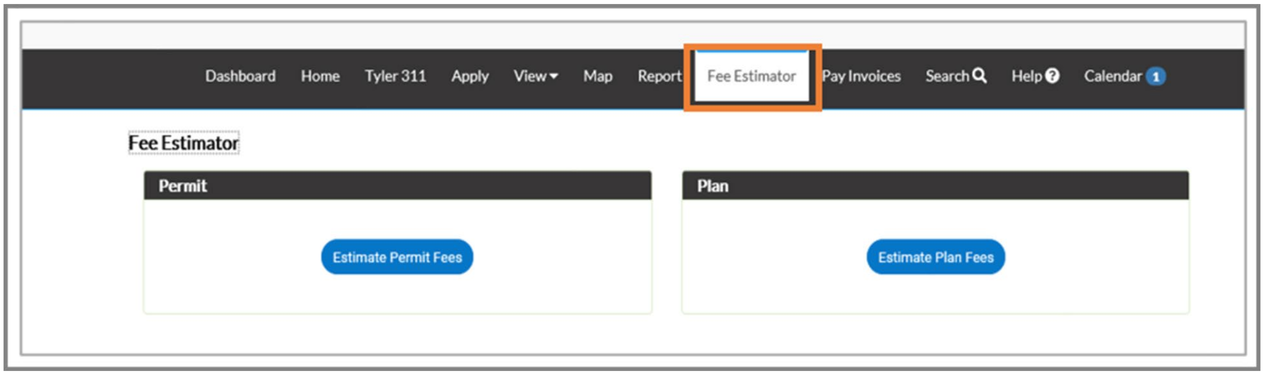
24. To toggle the base map, click the **Square** to the right of the page. This toggle the base map between the aerial view and the base map view.

25. To return to the Default map view, click the **House**.
26. To zoom in and out on the map, click **Plus** or **Minus**. Other ways to zoom on the map include double clicking the left button on the mouse and using the roller ball on the mouse.

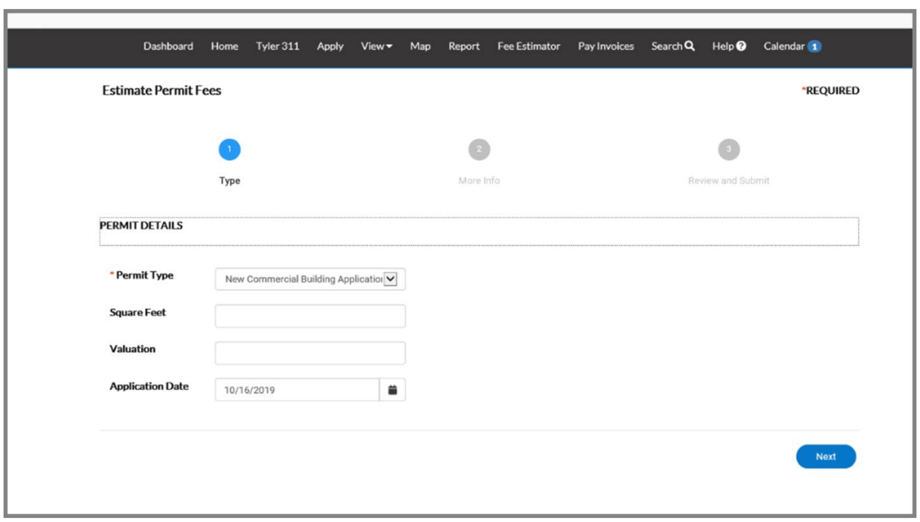
Fee Estimator

Citizens can use Civic Access to estimate fees for Permits and Plans. The estimation displays fees based on square feet, valuation, and custom fields.

1. To use the estimate fees, click **Fee Estimator** on the main menu.
2. Click **Estimate Permit Fees** or **Estimate Plan Fees**.

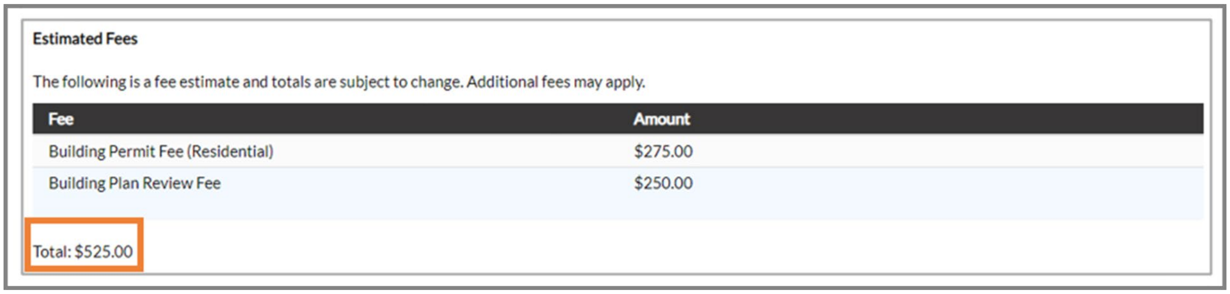


3. Type the applicable information in the fields on the Type page.
4. Click **Next**.



5. Type the applicable information in the fields on the **More Info** page.
6. Click **Next.**

7. The estimated fees display on the **Review and Submit** page.

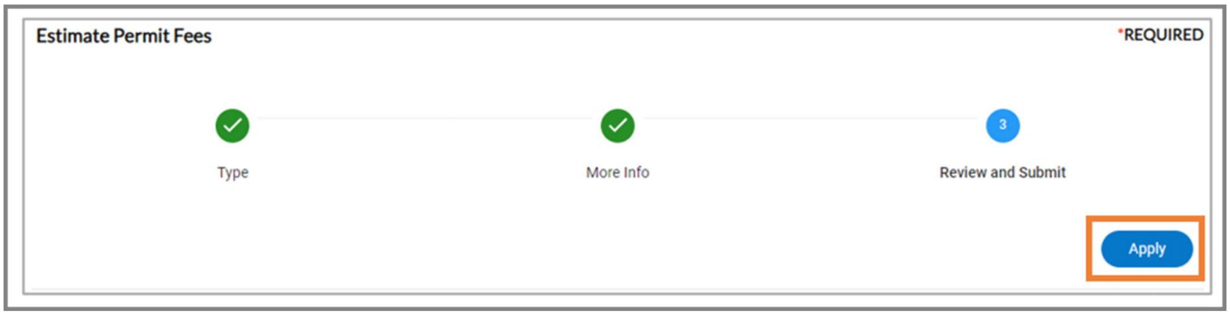

Estimated Fees

The following is a fee estimate and totals are subject to change. Additional fees may apply.

Fee	Amount
Building Permit Fee (Residential)	$275.00
Building Plan Review Fee	$250.00

Total: $525.00

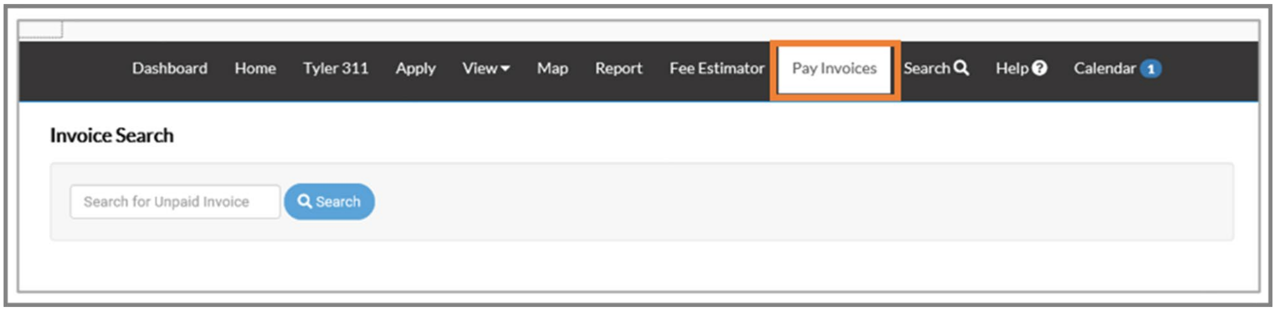
8. Click **Apply** to apply for the case.
9. If not logged in, Civic Access prompts the user to log in.



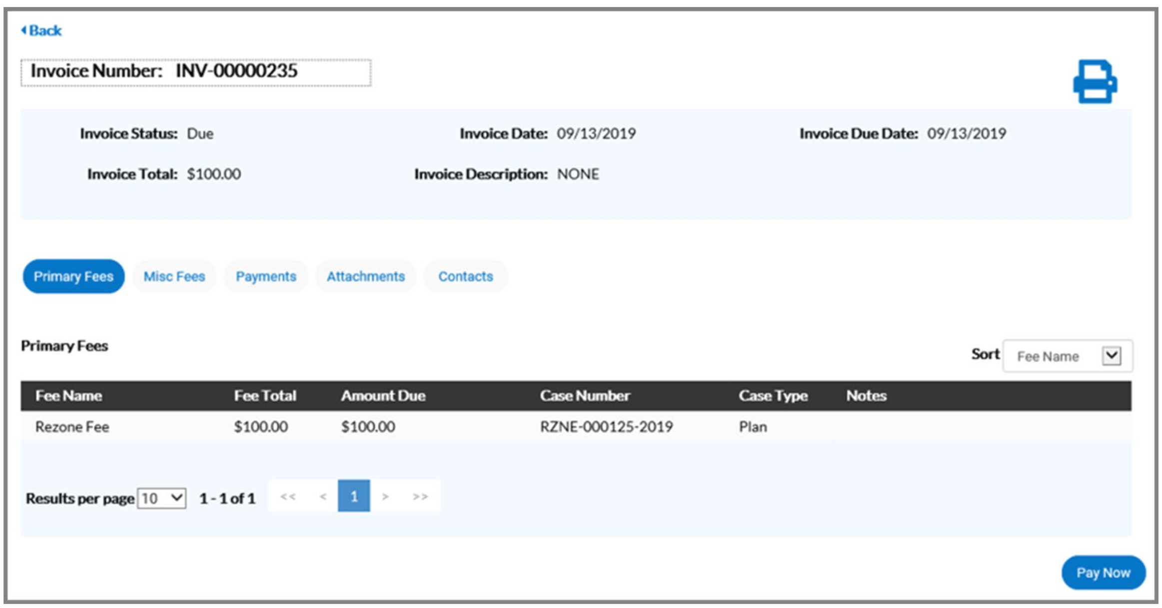
Pay Invoices

Pay Invoices may be accessed from the Home page or the Pay Invoices menu.

1. Click **Pay Invoices**.
2. Type the **Unpaid Invoice** number in the Search field. Example: INV-000024
3. Click **Search**.



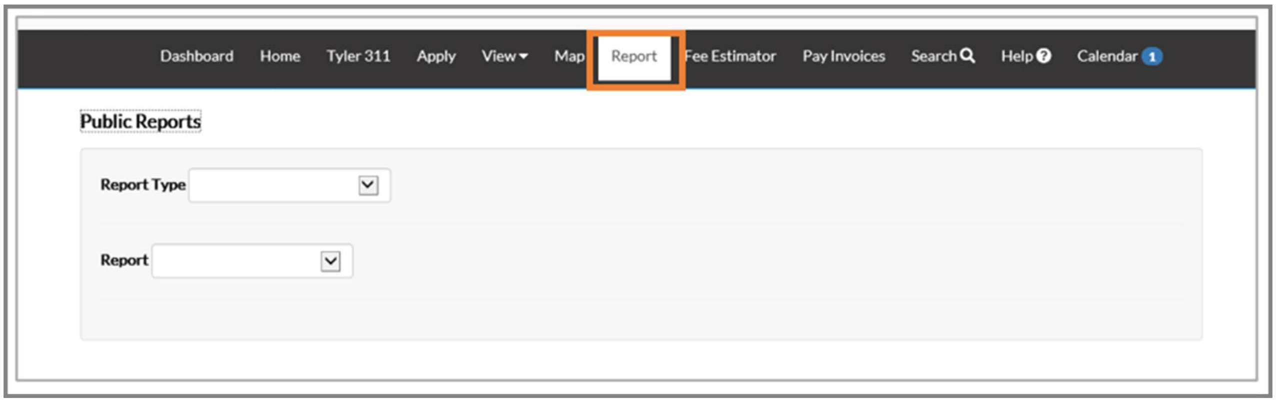
The Invoice Number page displays.



Public Report

The Report menu allows citizens to access public-facing documents and reports from different modules.

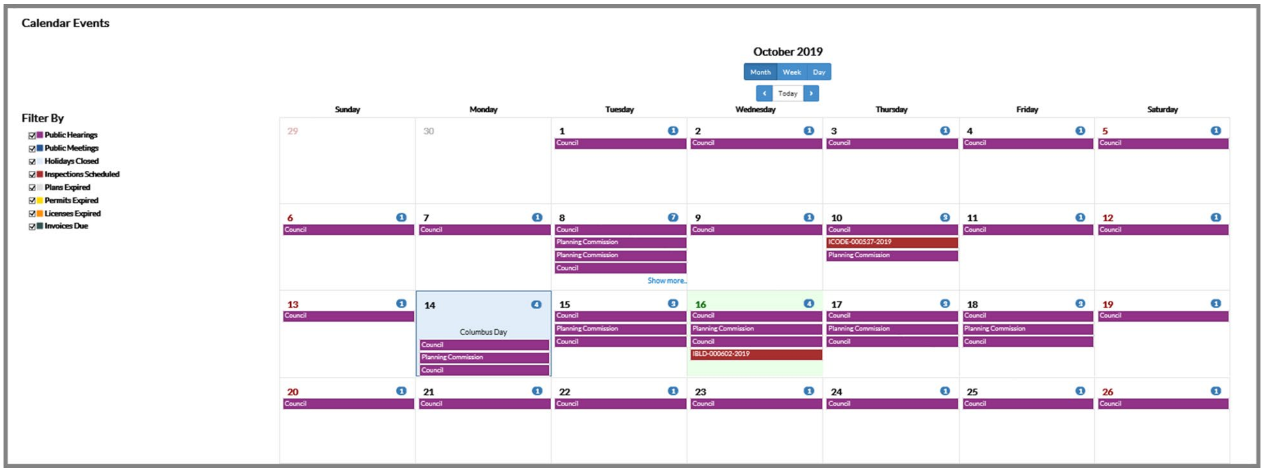
1. Click **Report**.
2. Select the desired **module type** from the Report Type dropdown.
3. Select the desired **Report** from the Report dropdown.



4. Enter a **Start Date** or click the Calendar to select a date.
5. Enter an **End Date** or click the Calendar to select a date.
6. Click **Generate Report**.

Calendar

The Calendar displays Public Hearings, Public Meetings, and Holidays based on configuration in the Enterprise Permitting and Licensing suite. These categories are visible to all users whether they are logged in. Once logged in to Civic Access, the citizen can view Inspections Scheduled, Plans Expired, Licenses Expired, Permits Expired, and Invoices Due dates in addition to the Hearings, Meetings, and Holidays. The citizen can click events and information through links that display on the right.



ADA Compliant

Civic Access and Civic Access Administration are Americans with Disabilities Act (ADA)-compliant at the WCAG 2.0 AA level. Numerous features are designed to make the site accessible to individuals with various impairments. For the "Speak to Read" feature to work in Civic Access, Chrome Vox need to be installed. Chrome Vox is an extension for Chrome on Windows and Mac OS X which operates as an alternative page reader for Web content. Chrome Vox speaks the content of the page, plays audio indicators for page load progress and objects on the page, and provides a way to navigate all web content from the keyboard.

This feature may be installed from: http://www.chromevox.com/installing.html

NOTE Please see other guides for Civic Access for information on Business License application, Tax Remittance, and License Renewal through Civic Access.

Feature List

Feature	Description
ADA Compliance	Civic Access and Civic Access Administration are Americans with Disabilities Act (ADA)-compliant at the WCAG 2.0 AA level. Numerous features are designed to make the site accessible to those with various impairments.
Application Security	Civic Access and Civic Access Administration come with powerful and professional security, CAPTCHA support for user registration, secure authentication, password strength indicators, case-sensitive credentials, and more.
Draft Saving	Civic Access users can begin applying for cases and resume the application process later. This is helpful when users want to save completed work and continue later.
Exception Handling	Civic Access Administration users can leverage exception reports and tools to view details about client- and server-side exceptions encountered within the application.
GIS Maps	Civic Access integrates with ESRI map functionality. The maps allow for powerful searches, pinned results, Enterprise Permitting and Licensing data incorporation, layers, filters, a legend, and more. The map is available to both registered and guest users.
Global Search	Citizens can perform robust searches across several key areas in Civic Access (i.e., permits, plans, inspections, and addresses) from one central location.
Invoice Management	Civic Access users can access invoices that are paid, voided, or unpaid. Invoices, accessible from the dashboard and menus, can be added to an electronic shopping cart.
Menu System	Civic Access offers powerful and flexible parent and child menu systems. Administrators can configure menu items, categories, positions, and visibility.
Metric Dashboards	Visual dashboards in Civic Access display data that are contextual to the registered user. The dashboard communicates the statuses and counts of several key items (e.g., permits plans, inspections, and invoices).
Mobile Capabilities	The fully functional Civic Access and Civic Access Administration sites are accessible on mobile devices without having to install or configure any mobile applications. The sites automatically adjust to device screen sizes.

Feature	Description
Overall Architecture	Civic Access and Civic Access Administration leverage the latest Microsoft technologies, HTML 5, and solid performance. The sites can be hosted or maintained on premise. Clients can purchase APIs to extend functionality.
Permits & Plans	Core Civic Access functionality allows permits and plans to be viewed online.
Printable Reports	Printable reports are available in Civic Access and Civic Access Administration. Examples include permits and invoices. These documents can be printed and/or saved as a PDF based on business rules.
Public Notifications	Site administrators can create public notifications (e.g., site maintenance, public hearings, job fairs, events, etc.) through the Civic Access Administration application. Notifications are displayed on Civic Access's Home and Dashboard pages.
Request Inspections	Civic Access users can request multiple related/unrelated inspections simultaneously. Inspection requests interact with the inspection-related data on the dashboard.
Shopping Cart	Civic Access's integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single or multiple cases associated with each invoice.
System Admin Tool	Municipalities use Civic Access Administration to configure headers, footers, payments, maps, permit types, plan types, menus, categories, notifications, and more.
User Registration	Civic Access user registration includes several key features: user profiles, user account registration, password retrieval, automatic Enterprise Permitting & Licensing global entity recognition, secure authentication, and more.