Customer Self Service (CSS) User Guide: How to Apply for and Manage a License, Permit or Plan

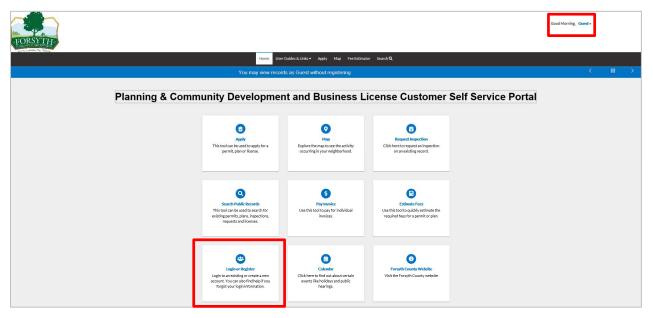
EnerGov - 2019.3

Contents

Registering on CSS	3
Logging Into CSS	3
Applying for permits, plans and licenses	
Success Screen	20
Paying Fees	21
Invoices	21
Pay Invoices	23
Managing a Review	23
View My Work	28
ADA Compliant	35

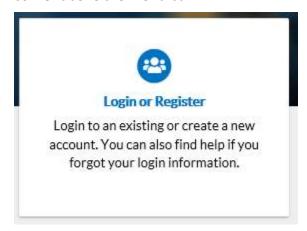
REGISTERING ON CSS

To register on CSS the user can click on the **Login or Register** box, and select Register. This will bring up a page that requires an email address. Once a valid email address is typed in the field and the **Next** button is clicked, a message will direct the user to check their email to complete their registration. Once that has been completed, they will be directed to a login page.



LOGGING INTO CSS

To login to CSS, the user can click the Login or Register box on the Home page and they will be brought to the login page. Login is also an option from the greeting dropdown in the right hand corner above the menu bar.

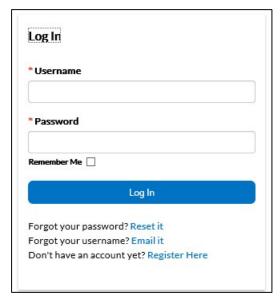






Follow the steps below to login to CSS:

- 1. Navigate to the URL designated for your Citizen Self Service environment.
- 2. Enter your **Username** and **Password** in the fields provided. If you do not have an **Username/Password** already registered with CSS and EnerGov, click on Register Here and follow the directions to register for an account.
- 3. Mark the **Remember me** checkbox to have the system remember your credentials.
- 4. Click **Log In**. CSS validates your login and, if it is valid, opens CSS with the functions you are authorized to access.



Logging in as a Registered User when you have forgotten your Username or Password.

1. If you have forgotten your User name, click the **Email It** option below the **Log In** button. You will be redirected to a Forgot Username page. Fill in a valid email address in the field and click Submit. An email will be sent your Username in it. Then you can return to the login page and click **Log In** and input it.

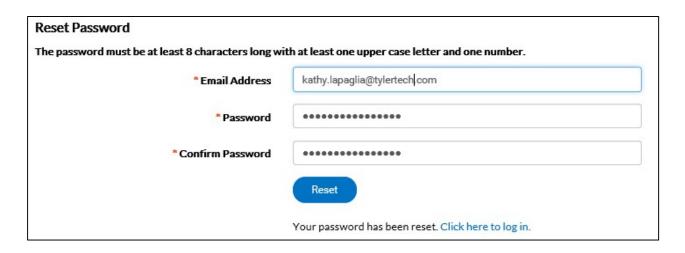


2. If you have forgotten your Password, click the **Reset It** option below the **Log In** button. Fill in a valid email address in the field and click Submit. An email will be sent with directions on resetting your Password.

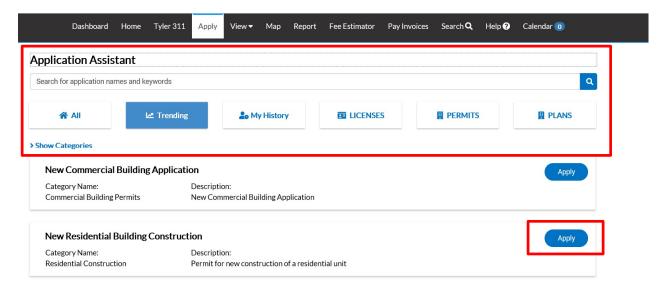




- 3. Open the email and click Reset.
- 4. You will be redirected to a CSS window where a new password can be entered and confirmed. Once confirmed, it has been reset, and you can login.



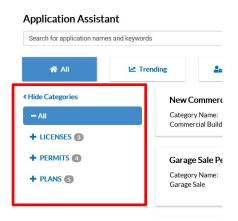
APPLYING FOR PERMITS, PLANS AND LICENSES





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

- 1. Click on **All** to choose from all types of Permits, Plans and Licenses available.
- 2. You may select **Show Categories** to help determine which category type to choose from.



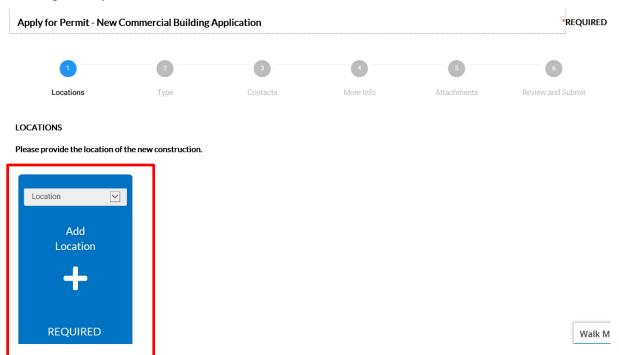
NOTE: Some permits require plan approval PRIOR to applying for the permit.

All sign permits must have a PLAN review prior to permit application.

- 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 logged in user. This tab will only show when logged in by a registered user.
- 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. Example: I would type in Alcohol to choose from the drop down, Alcohol Business License.
- 9. Click the Apply button to the right of the application type desired.

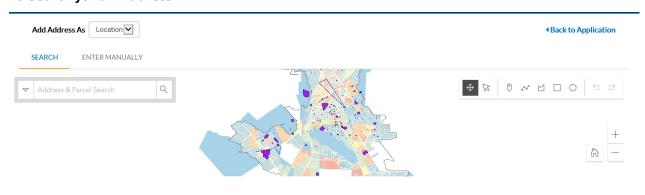


10. The **Apply for** screen will open and the steps to the application process will be listed along the top of the screen.



- 11. **Locations:** Click on the Add Location card to add the location for the application. Select from the dropdown box what type of address is being added.
- 12. Click on the + in the center of the Add Address card.
- 13. You will be directed to the Map screen. Here you may: search for an address, manually enter an address or draw a spatial collection to be used as an address.

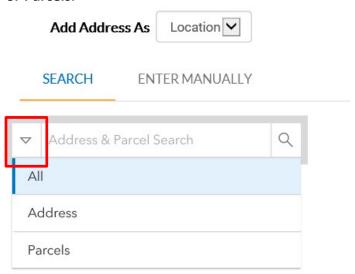
To Search for an Address:



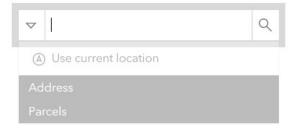
14. Choose from the drop down to **Add Address As: Location, Billing, Shipping, Home or Mailing.**



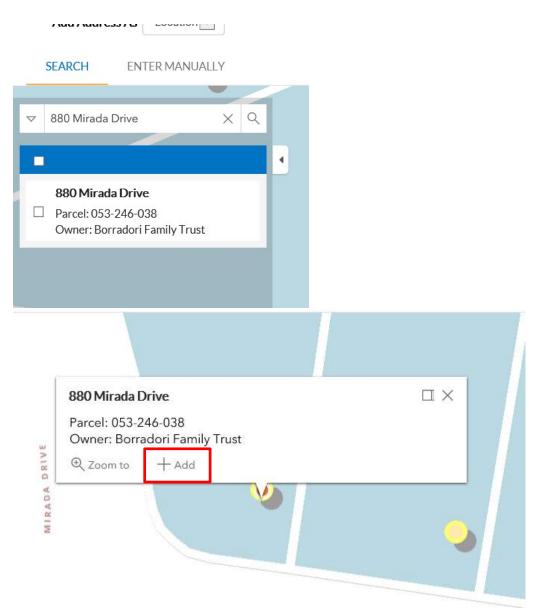
15. The user may click the drop down arrow on the left to choose to search by: **All, Address** or Parcels.



16. 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 you click in the field. This field will also allow partial information of the address.



17. Once an Address or Parcel has been entered, the information will render on the left of the screen and drop a pin on the map with a popup showing Parcel, Owner and allowing the user to Zoom To or Add.



18. Once an Address or Parcel has been found, click the box next to the Address on the left of the screen and click **Apply** or click **Add** on the popup on the map.

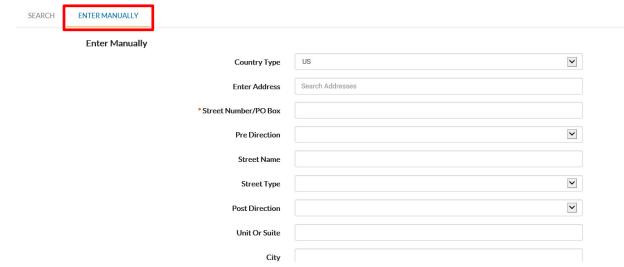




19. Once the address has been added to the Locations screen, click Next.

To Enter Manually an Address:

20. Select The Enter Manually tab.



- 21. Enter in all information required for the screen and for the application of the case.
- 22. Cick Save. Once the address has been added to the Locations screen, click Next.

To Add a Spatial Collection:

- 23. Navigate to the area of the map that the spatial collection will need to be drawn.
- 24. The tools to draw the spatial collection are to the right of the screen.



- 25. The user may draw a point, line, polygon, rectangle or a circle on the map.
- 26. Select the desired feature button and draw the shape on the map. Each single click will allow a turn of a line in the shape and a double click will allow the user to finish drawing the desired feature.



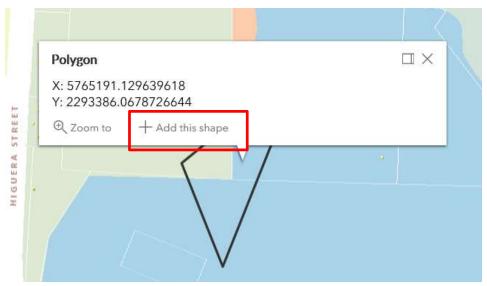
- 27. To transform the feature, click the **Transform** button.
- 28. A box will appear around the feature and will allow the user to transform the original by moving the smaller white squares into the desired positions.



- 29. To Reshape the feature, click the **Reshape** button.
- 30. Small circles will appear on the feature and will allow the user to reshape the original by moving the circles into the desired positions.



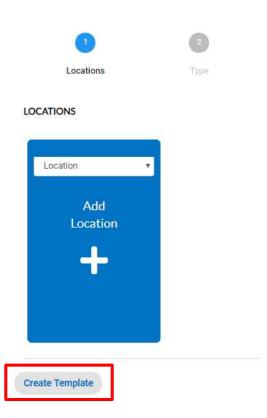
31. Once done drawing and editing the fature, click on the desired spatial collection and click **Add this shape**.



32. Once the fature has been added to the Locations screen, click Next.

Application Templates

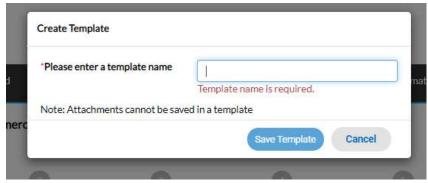
Apply for Permit - New Commercial Building



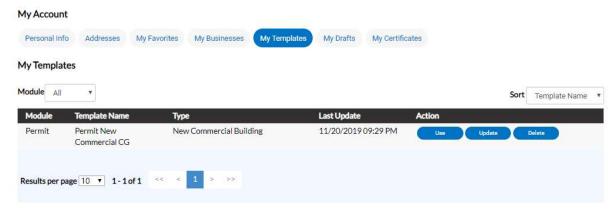
- 1. Application Templates are drafts that the citizen may reuse when applying for the same Case Type and Workclass.
- 2. Fill in any details on the case that are needed to be repeated for upcoming uses.

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

- 3. Click Create Template at the bottom of any stepper in the process.
- 4. By default the Template will not allow saving of Attachments.
- 5. Enter in the name of the template and click **Save Template**.

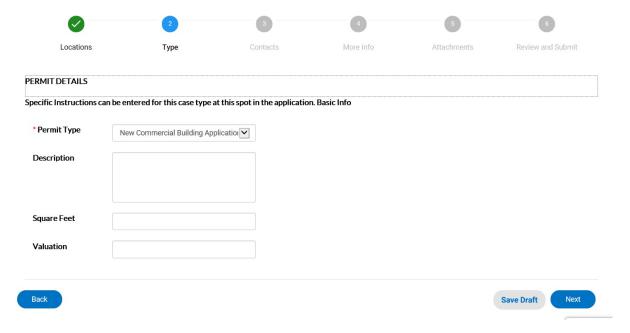


6. Once Template has been saved, a popup will appear to navigate to the template or the template may be found under **My Account** and click on the **My Templates** button.



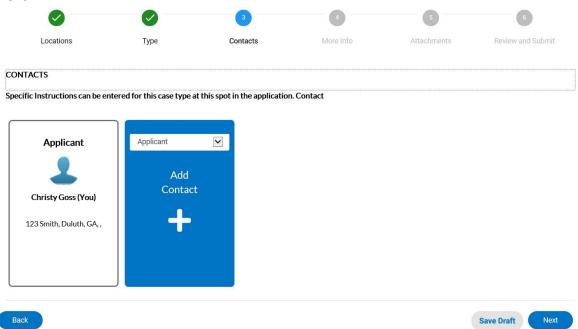
7. This will allow the citizen to **Use, Update or Delete** the template.

Application Details



- 1. **Type:** The type that was chosen originally will default in the Type field.
- 2. The citizen may add a description of the work being done in the **Description** memo box.
- 3. If **Square Feet and/or Valuation** are required, a field will be present and denoted by a red asterisk.
- 4. Click Next.

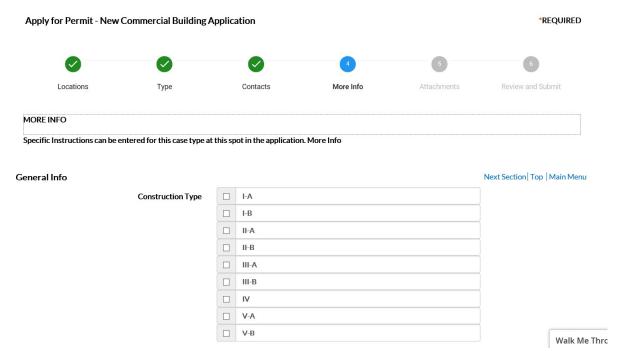
CONTACTS



- Contacts: The registrants contact information will default to the first Contact card listed.
 If there are additional contacts that need to be added to the application that is being applied for, click on the Add Contact +.
- 2. Choose from the dropdown box the contact type. In the search box, type in Name, Email, or Company name and click the magnifying glass to search the Global Contacts in EnerGov for an existing contact. If the person, email or company is an existing contact click Add to add the contact to the application. If contact does not exist in Global Contacts, click Enter Manually and fill in the required fields.
- 3. Click Next.



APPLICATION INFORMATION



- 1. **More Info:** The More Info fields reflects the Additional Information fields that are exposed to the citizen from EnerGov. The citizen may fill in the information needed and some fields may be required. Any information given in these fields will be shown in EnerGov. Once this information is submitted by the citizen, the citizen will not be able to edit the information. The end user may edit the information in EnerGov.
- 2. Click Next.

ATTACHMENTS

ATTACHMENTS



- 1. **Attachments:** Click on the **Add Attachment +** card to open Windows Explorer. The citizen may click to insert or drag files into the Add Attachment card.
- 2. **Indicate the type of attachment from the dropdown.** (Certain application types may have required documents that must be attached in order to save.)
- 3. **Only pdf documents should be attached.** Refer to any special requirements the applicable Department or Division may have.
- 4. Click Next.
- 5. **Signature** page will be shown. Enter the name of the user, then click on enable signature, and type the name again to produce the signature. Note the agreement regarding the electronic signature and the application being submitted.



*REQUIRED Apply for Plan - Final Plat

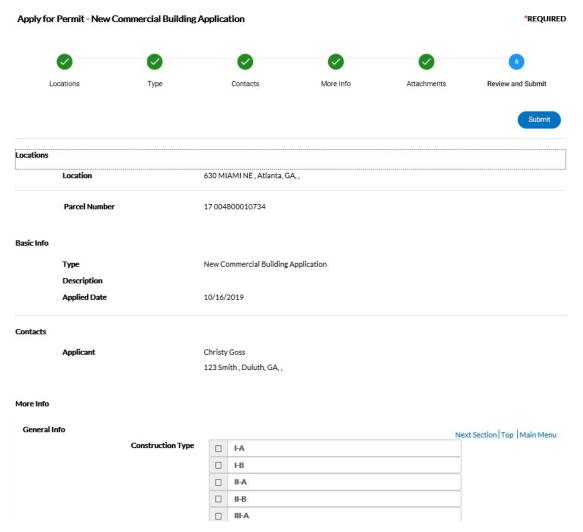


SIGNATURE

Isolemnly swear that the foregoing statements and information contained in this application are/is true and complete and understand that any material misstatement or the statement of the statconcealment of fact in the application shall be grounds for the denial of an application or the suspension or removal of rights granted thereunder, and may make the applicant liable to prosecution for perjury under the laws of the State of Georgia. By executing this application, I warrant and affirm having the authority to bind the entity (ies) on whose behalf this application is submitted.

* Please type your name as consent to electronically sign this application.			
Enable Type Signature 👅	Type Name Here	Consent name is required.	
Nick Nicholas April, 10 2020			
X			

REVIEW AND SUBMIT

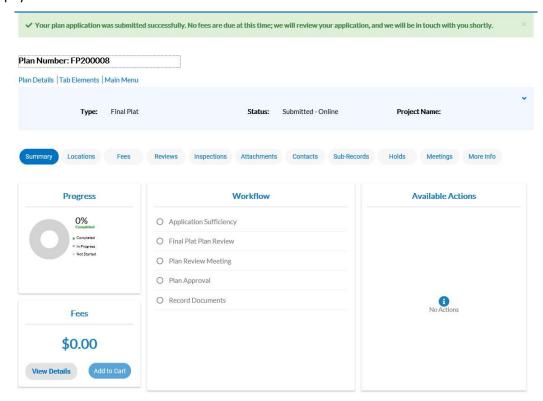


- 1. **Review and Submit**: The next screen will be the **Review and Submit** screen. This will show all information entered, attachments uploaded, estimated fees and additional information fields that were populated.
- 2. Click Submit or Save Draft at the bottom of the screen.
- 3. **Save Daft:** Click **Save Draft** if the information is incomplete and needs to be finished at a later date. The citizen may click on the Draft status circle on the Dashboard to resume their application.

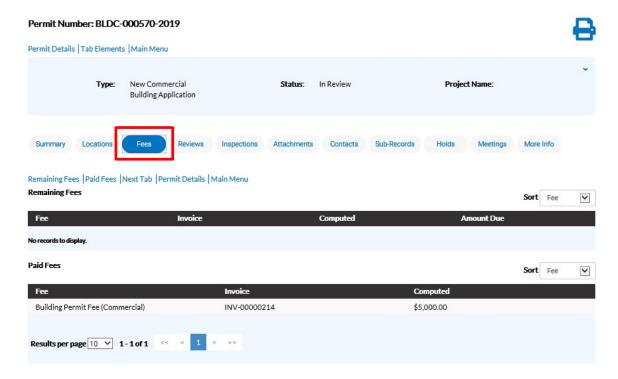
SUCCESS SCREEN

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

NOTE: Most applications will be reviewed by a staff member before fees are due. Any fees showing are only an estimate. Once the review of the information provided is complete, and invoice will be created for fee payment.



PAYING FEES

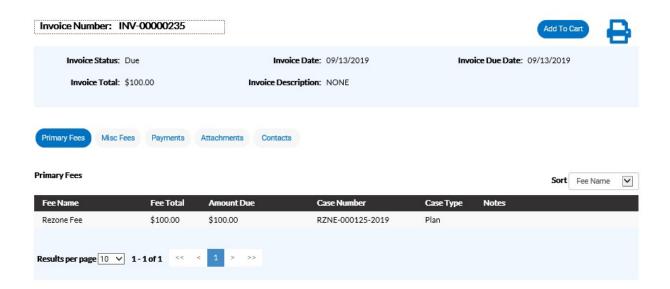


To Pay Fees on a case the citizen will need for the case manager to invoice the fees in EnerGov.

- 1. Navigate into the Plan/Permit of your choice.
- 2. Click on the **Fees** tab.
- 3. The citizen can see a list of **Remaining Fees** and **Paid Fees** listed with Invoice numbers listed next to the fee name.
- 4. Click on the **Dashboard** tab in the black banner at the top of the screen.
- 5. Navigate to **Invoices** at the bottom of the page.

INVOICES

CSS users are able to 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**.

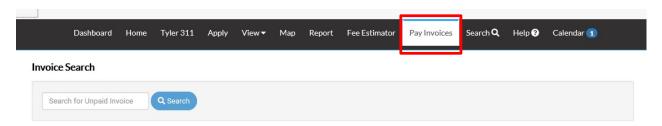


Follow the steps below to view invoice information:

- 1. Click the printer icon print or save the invoice as a PDF.
- 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. Select the column to sort the
 fees by from the Sort dropdown.
- 3. Click **Misc Fees** to view the **Fee Name**, **Fee Total**, **Paid Amount**, and **Amount Due** for all miscellaneous fees associated with the invoice. Select the column to sort the fees by from the **Sort** dropdown.
- 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. Select the column to sort the payments by from the Sort dropdown.
- 5. Click **Attachments** to view the **File Name** and **Added Date** for all files attached to the invoice. Select the column to sort the attachments by from the **Sort** dropdown.
- 6. Click **Contacts** to view the **Company**, **First Name**, **Last Name**, **Title**, and **Email** for all contacts associated with the invoice. Select the column to sort the contacts by from the **Sort** dropdown.
- 7. Click **Add to Cart** to add the invoice to the **Shopping Cart**.

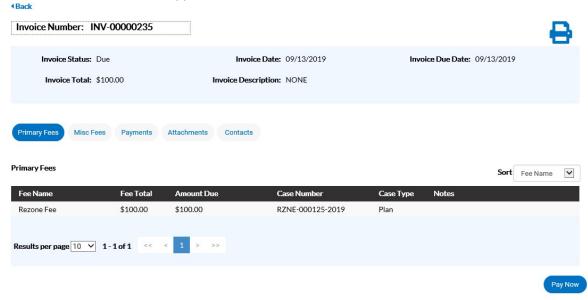


PAY INVOICES



Pay Invoices may be accessed from the Home screen or the Pay Invoices button on the top ribbon.

- 1. Enter in the **Unpaid Invoice** number. Example: INV-000024
- 2. Click Search.
- 3. The **Invoice Number** screen will appear with the desired invoice.

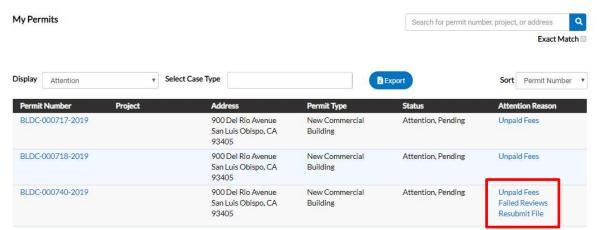


MANAGING A REVIEW

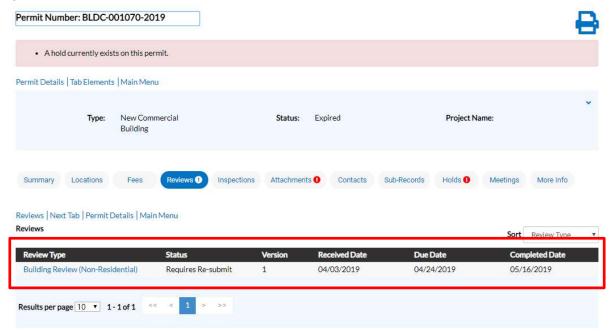
Citizens may submit electronic plans via CSS to be reviewed by the municipality. Once an application has been submitted and plans reviewed, the citizen may be notified by email or logging back into CSS to review Failed or Approved Reviews.

- 1. Navigate to the Dashboard and click on the **Attention** card.
- 2. A list of the cases needing attention in the specific module will be listed.
- 3. Click the Failed Reviews link under the Attention Reason column.

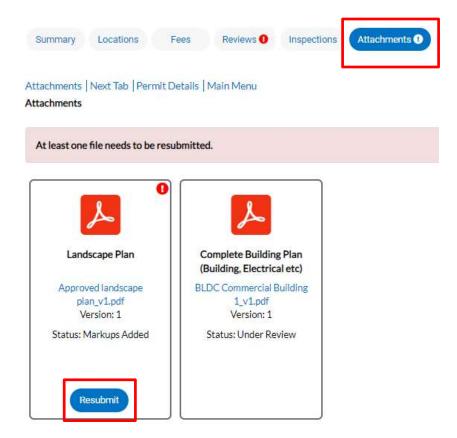




4. The Review Type will be listed and will include: Status, Version, Received Date, Due Date and Completed Date.



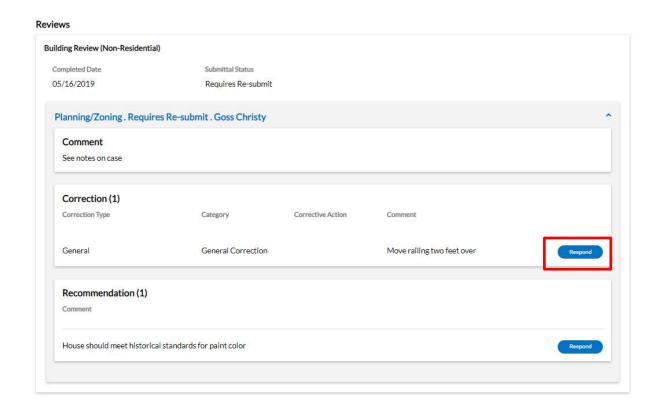
5. The citizen will also see an alert on the **Attachments t**ab. This will indicate which electronic file was failed and requires resubmission. Click on the **Attachments** tab.



- 6. Click the Resubmit button on the specific file(s) that need to be resubmitted.
- 7. The citizen may drill down on each item review from the submittal to view Corrections, Recommendations and Comments.







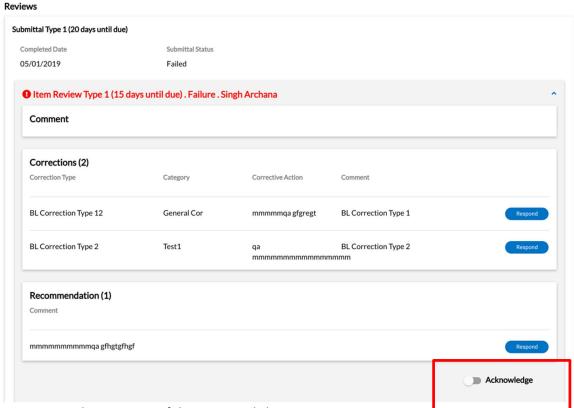
Next

8. Citizens may click the Respond button, on the right of each Correction or Recommendation, to give a response back to the Reviewer.



- 9. Once a Response is given, the citizen may click Hide Response.
- 10. The citizen must **Acknowledge** any **Comments, Corrections or Recommendations** that were given by the Reviewer by toggling the **Acknowledge** button to the right.

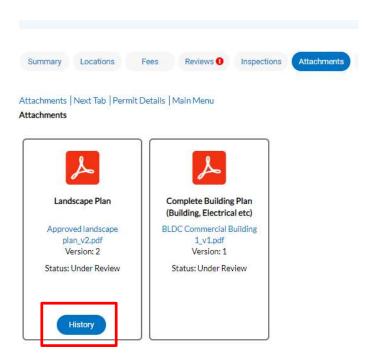




- 11. To navigate to the next step of the Review, click **Next**.
- 12. To Resubmit a file click Select File, choose the second version of the file to be resubmitted.



13. Click Submit.



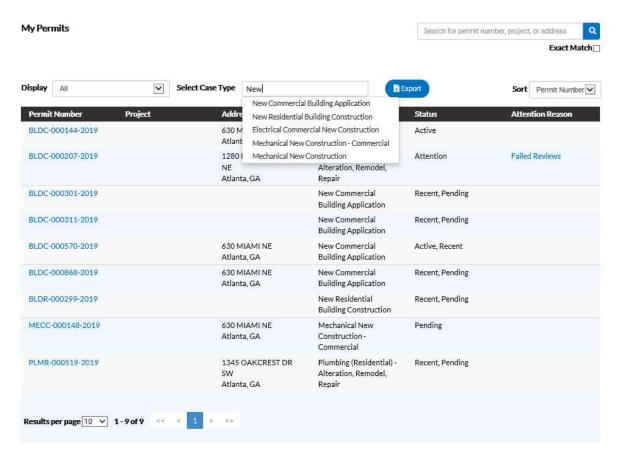
14. On the Attachments tab, the citizen may view the History of the submitted attachments.

VIEW MY WORK



Click the **View** tab at the top of the **Dashboard** screen to access the following: Invoices, Permits, Plans, Inspections, and Licenses.

My Permits



CSS allows users to view the details of a permit.

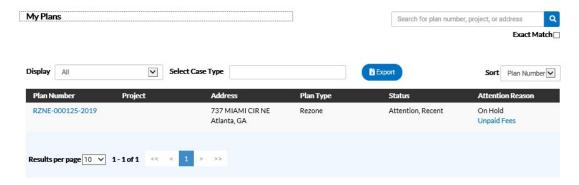
Follow the steps below to view permits:

Not all permit data is available to all users.

- 1. Type a specific project, address, or permit number to search for in the search field, and click the lookup icon to locate permits that meet the search criteria.
- 2. Select the statuses of the permits to display in the list from the **Display** dropdown.
- 3. **Select Case Type** by typing the particular case type. The results will display in a dropdown for the citizen to choose from.
- 4. Select the feature to sort the permits in the list by from the **Sort** dropdown.
- 5. Click a permit number to open the associated permit record.
- 6. Select the number of permits to display on each page from the **Results per page** dropdown.
- 7. Use the page navigation buttons to move between pages of permits.



My Plans



CSS allows users to view the details of a plan.

Follow the steps below to view plans:

- Not all plan data is available to all users.
 - 1. Type a specific project, address, or plan number to search for in the search field, and click the lookup icon to locate plans that meet the search criteria.
 - 2. Select the statuses of the plans to display in the list from the **Display** dropdown.
 - 3. **Select Case Type** by typing the particular case type. The results will display in a dropdown for the citizen to choose from.
 - 4. Select the feature to sort the plans in the list by from the **Sort** dropdown.
 - 5. Click a plan number to open the associated plan record.
 - 6. Select the number of plans to display on each page from the **Results per page** dropdown.
 - 7. Use the page navigation buttons to move between pages of plans.

My Licenses

CSS allows users to view the details of a license.

Follow the steps below to view licenses:

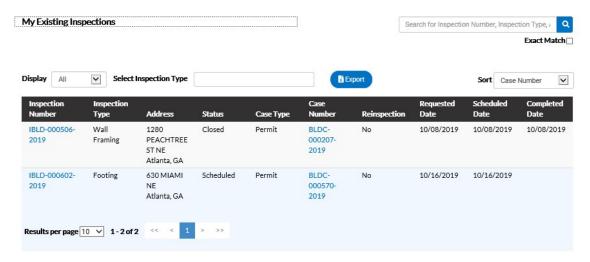
- Not all plan data is available to all users.
 - 1. Type a specific business, address, or license number to search for in the search field, and click the lookup icon to locate plans that meet the search criteria.
 - 2. Select the statuses of the plans to display in the list from the **Display** dropdown.



3. Click a license number to open the associated license record.

Inspections

My Existing Inspections



Use this window to view, sort, and access all available inspections.

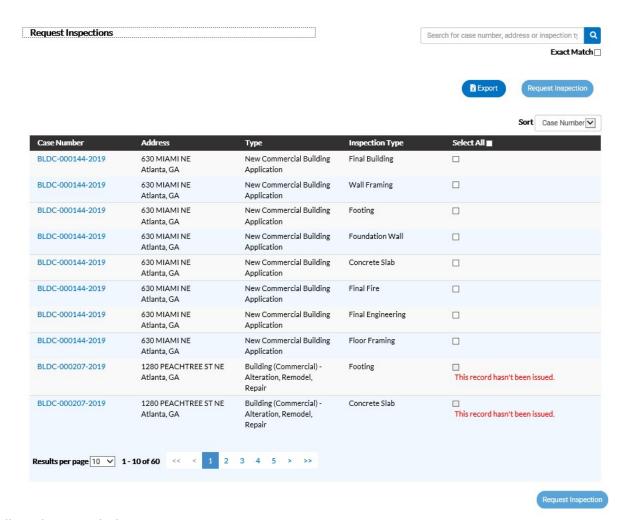
Follow the steps below to view inspections:

- 1. Type a specific Inspection Number or Inspection Type to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.
- 2. Select the statuses of the inspections to display in the list from the **Display** dropdown.
- 3. **Select Inspection Type** by typing in a particular Inspection type. Choose from the dropdown.
- 4. Select the feature to sort the inspections in the list by from the **Sort** dropdown.
- 5. Click the Inspection Number to open the associated Inspection record if desired or click on Case Number to open the associated Permit.
- 6. Select the number of inspections to display on each page from the **Results per** page dropdown.
- 7. Use the page navigation buttons to move between pages of inspections.

Request Inspections

CSS provides a great way for users to request inspections. Users must be logged in to CSS to request inspections, and they must 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.

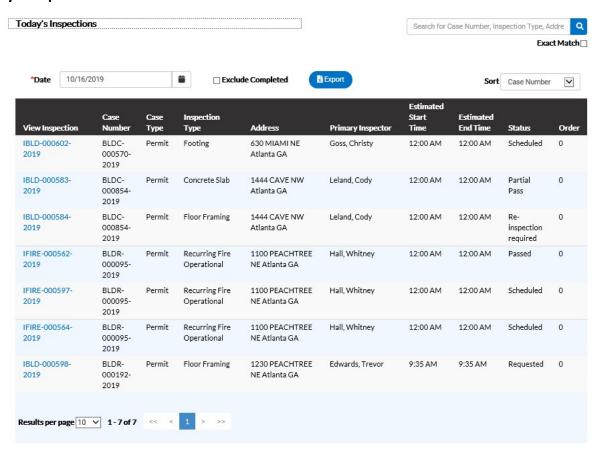


Follow the steps below to view inspections:

- 1. Type a specific case number, address, or inspection type to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.
- 2. Select the feature to sort the inspections in the list by from the **Sort** dropdown.
- Click a case number to open the associated permit record. Or, mark the checkboxes next to the cases that inspections need to be requested for, and click **Request Inspection** to open the Request Inspections window.
- 4. Select the number of inspections to display on each page from the **Results per page** dropdown.
- 5. Use the page navigation buttons to move between pages of inspections.



Today's Inspections



Use this window to view, sort, and access all inspections scheduled for a specific day.

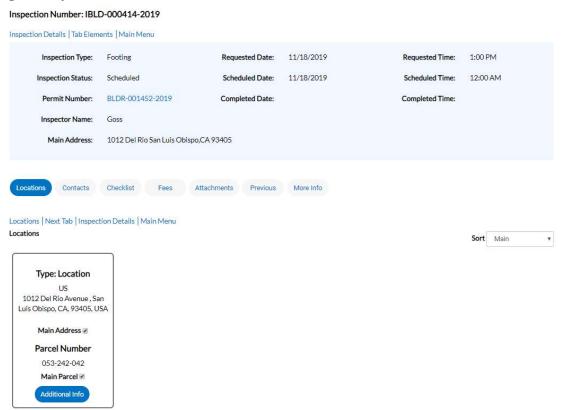
Follow the steps below to view inspections:

- 1. Type a specific case number, inspection type, or address to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.
- 2. Type the date to view due inspections for in the **Date** field, or click the calendar icon to select the date.
- 3. Mark the **Exclude Completed** checkbox to exclude completed inspections from the list of results.
- 4. Select the feature to sort the inspections in the list by from the **Sort** dropdown.



- 5. Select the number of inspections to display on each page from the **Results per page** dropdown.
- 6. Use the page navigation buttons to move between pages of inspections.

Managing An Inspection



- 1. The citizen may navigate to an inspection via the Parent case, clicking on the specific Inspection from the Dashboard or searching for an inspection.
- The main details of the Inspection are listed at the top of the screen and include: Inspection Type, Inspection Status, case Number (this may be Permit/License number), Inspector Name, Main Address, Requested Date, Scheduled Date, Completed Date, Requested Time, Scheduled Time and Completed Time.
- 3. The buttons in the middle of the screen will allow the citizen to manage/view the following: Location, Contacts, Checklist Items, Fees, Attachements, Previous Inspections, and Additional Information.

ADA COMPLIANT

CSS and CSS 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 CSS, Chrome Vox will need to be installed. ChromeVox is an extension for Chrome on Windows and Mac OS X which operates as an alternative screen reader for Web content. ChromeVox 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

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