Customer Self Service (CSS) User Guide: How to Create an Account & View Your Dashboard

EnerGov - 2019.3

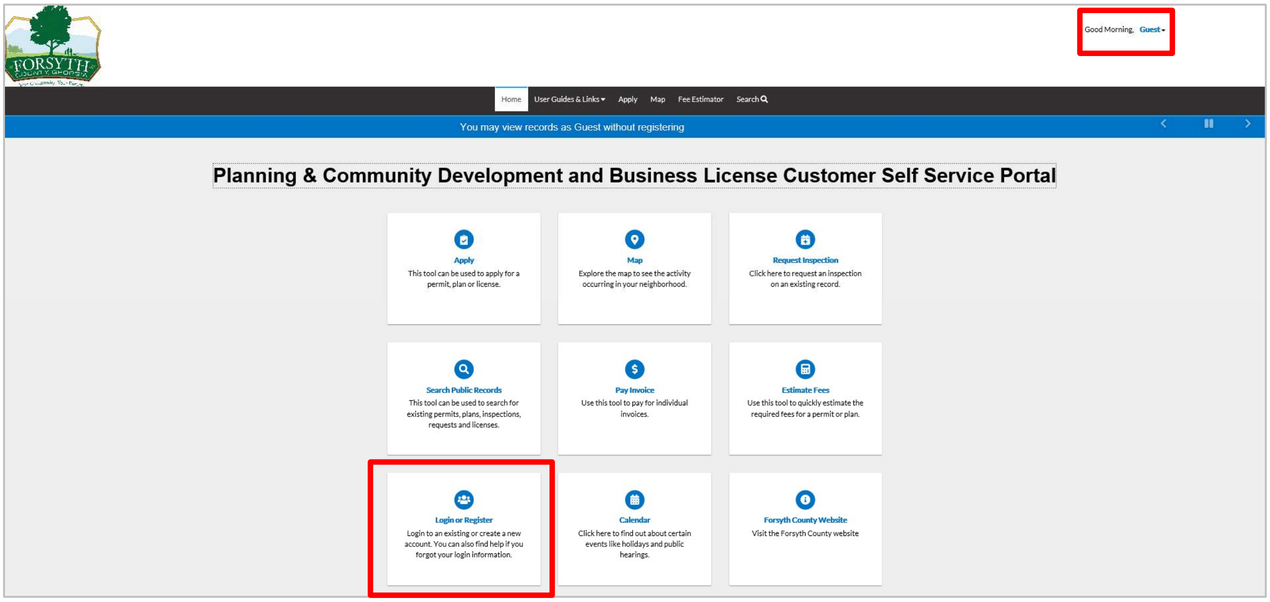
Empowering people who serve the public®

tyler technologies

Contents

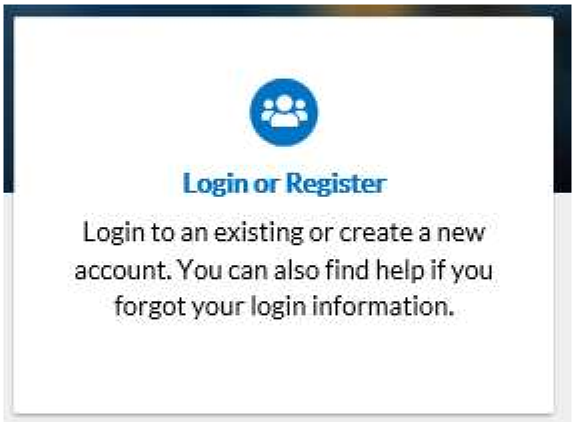
REGISTERING ON CSS

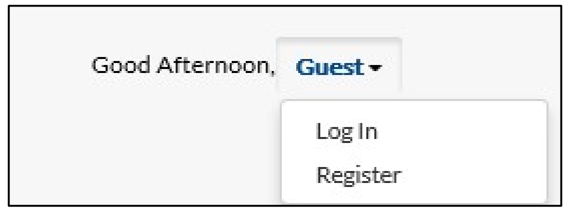
To register on CSS the user can click on the **Login or Register** box, and select Register. This will bring up a page that requires an email address. Once a valid email address is typed in the field and the **Next** button is clicked, a message will direct the user to check their email to complete their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



LOGGING INTO CSS

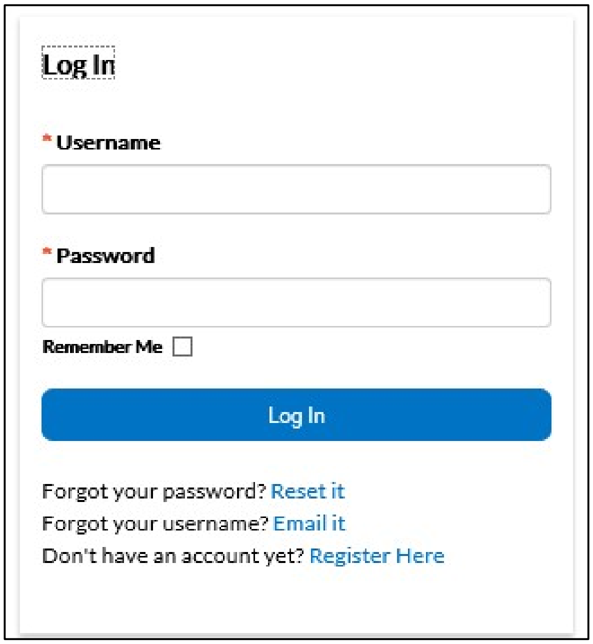
To login to CSS, the user can click the Login or Register box on the Home page and they will be brought to the login page. Login is also an option from the greeting dropdown in the right hand corner above the menu bar.





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.

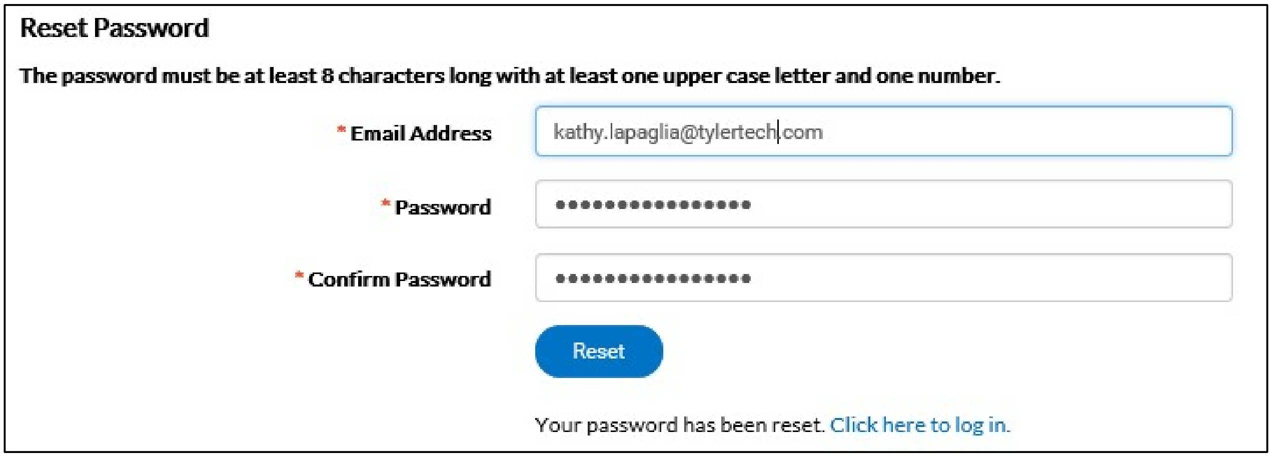


Logging in as a Registered User when you have forgotten your Username or Password.

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.



Reset Password

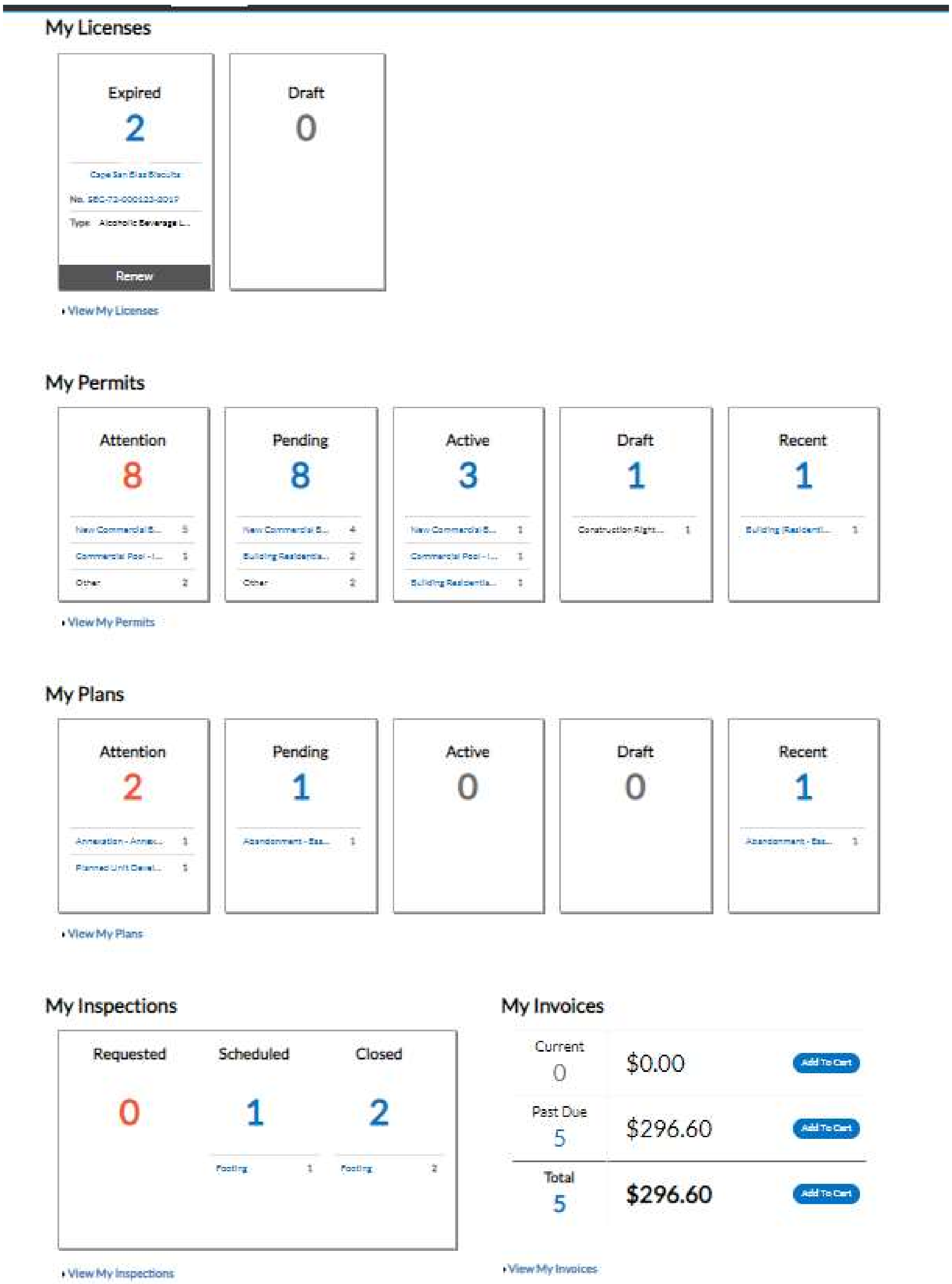
The password must be at least 8 characters long with at least one upper case letter and one number.

* Email Address	kathy.lapaglia@tylertech.com
* Password	••••••••••••••••
* Confirm Password	••••••••••••••••

Reset

Your password has been reset. Click here to log in.

DASHBOARD

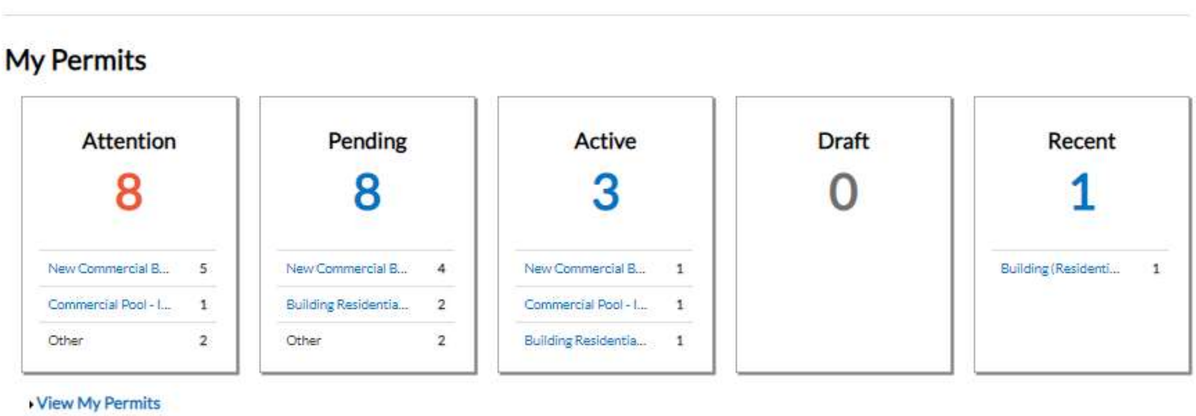

My Licenses
Expired
2
Draft
0
Renew
View My Licenses
My Permits
Attention
8
Pending
8
Active
3
Draft
1
Recent
1
View My Permits
My Plans
Attention
2
Pending
1
Active
0
Draft
0
Recent
1
View My Plans
My Inspections
Requested
0
Scheduled
1
Closed
2
View My Inspections
My Invoices
Current
0
$0.00
Add To Cart
Past Due
5
$296.60
Add To Cart
Total
5
$296.60
Add To Cart
View My Invoices

CSS provides the ability for users to see a visual representation of aggregated data on the dashboard. Users can see data for permits, plans, inspections, and invoices. Users can click on the Draft circles to access saved drafts; users can also add unpaid invoices directly to the shopping cart. The dashboard displays data that is contextual to the logged in user.

Follow the steps below 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.

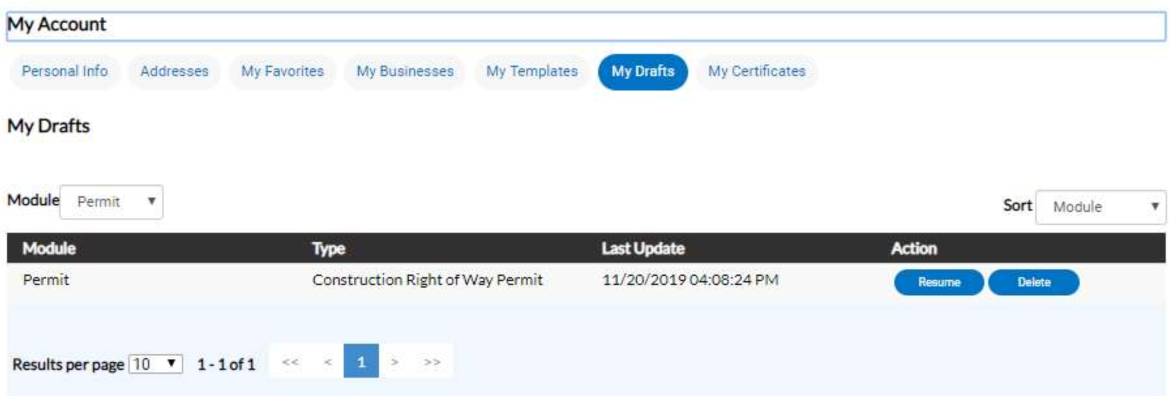
PERMITS



1. **Attention:** By clicking on the **Attention** status from the **Dashboard**, you will 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,

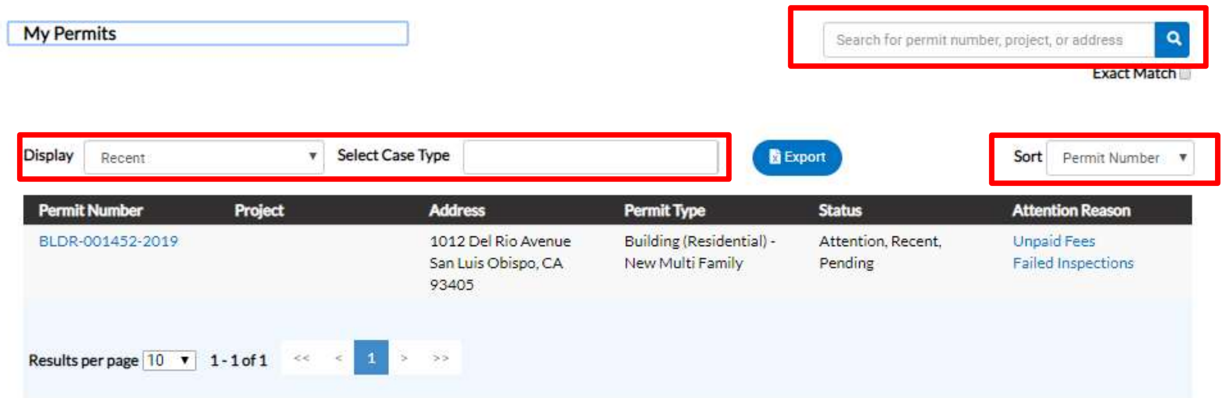
unpaid fees, failed reviews (submittals), failed inspections, eReview file resubmissions, and does not have a completed status.

2. **Pending:** By clicking on the **Pending** status from the **Dashboard**, you will 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 on the **Active** status from the **Dashboard**, you will 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 on the **Draft** status from the **Dashboard**, you will 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 screen if they are no longer needed.



5. **Recent:** By clicking on the **Recent** status from the **Dashboard**, you will be given the list of all Permit Numbers that have been applied for that have a status of Recent, Project name, Address attached to the Permit, Type, Status and Reason. Criteria for the Recent status is: is has been applied for in the last 30 days.

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



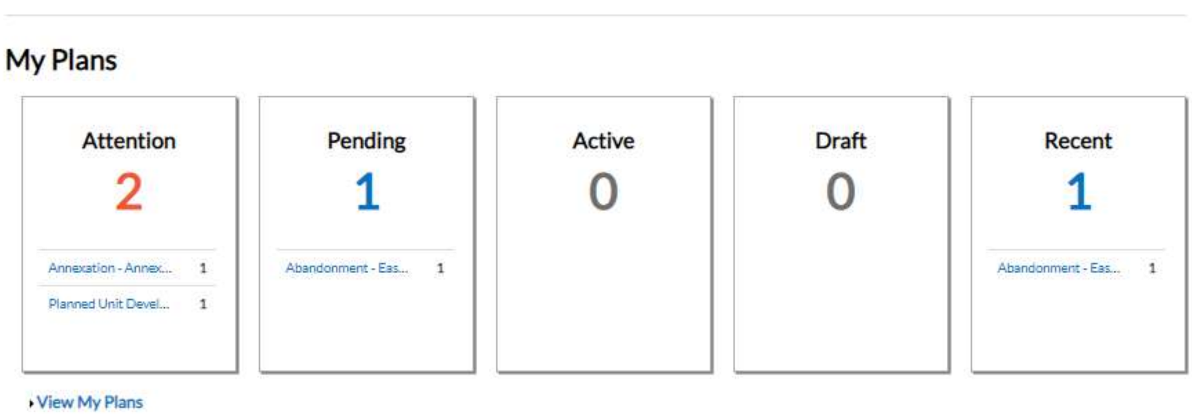
Display: This dropdown box allows the citizen a way to organize and select one **Status** to view.

Select Case Type: This field will allow the citizen to type in a specific Case Type and suggestions will show in a dropdown.

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

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 on the magnifying glass icon.

PLANS



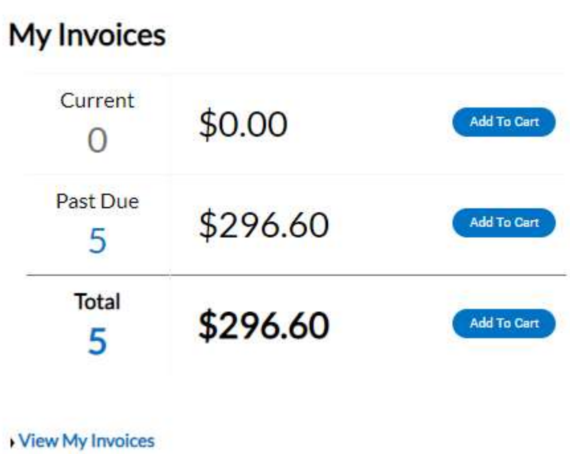
1. **Attention:** By clicking on the **Attention** status from the **Dashboard**, you will be given a list of all Plan numbers that have been applied for that have a status of Attention, Project name, Address attached to the Plan, Type, Status and the Reason that the Plan needs the citizen's attention. 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**, you will 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**, you will 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**, you will 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 screen if they are no longer needed.
5. **Recent:** By clicking on the **Recent** status from the **Dashboard**, you will 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. Criteria for the Recent status is: has been applied for within the last 30 days.

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

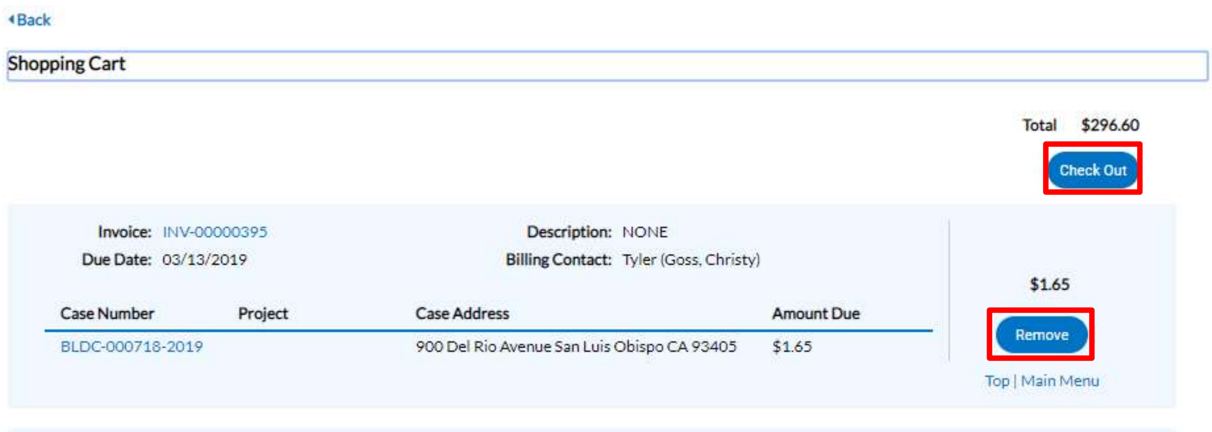
INSPECTIONS

1. **Requested:** By clicking on the **Requested** status from the **Dashboard**, you will 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**, you will 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**, you will 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

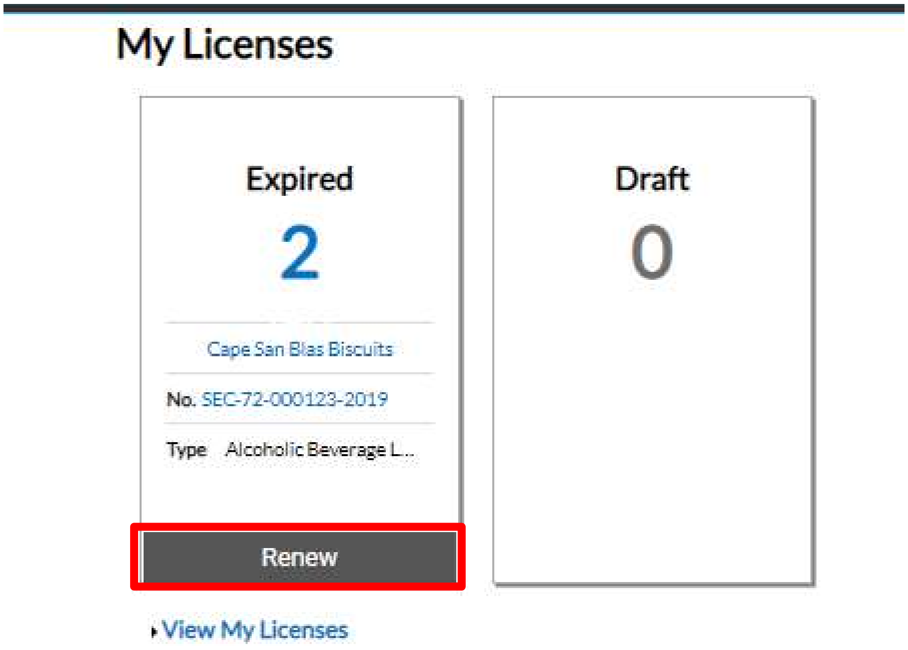


CSS users are able to access invoices that are paid, voided, or unpaid. Invoices are accessible from the **Dashboard** and the menu system and can be added to the electronic shopping cart. CSS's integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single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

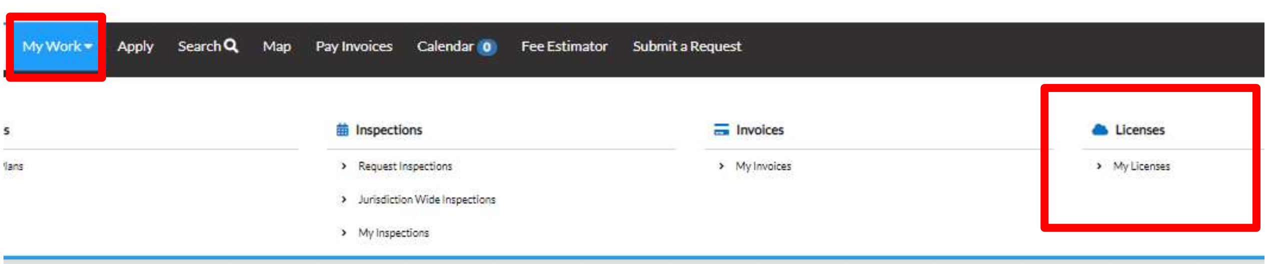


1. **Current:** By clicking on the **Add To Cart** oval to the right of Current invoices, the citizen will be able to access the Shopping Cart screen where all current invoices are listed. The citizen may access the Invoice by clicking on the Invoice Number or they may access the Case by clicking on 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 on the Check Out oval to the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).
2. **Past Due:** By clicking on the **Add To Cart** oval to the right of Past Due invoices, the citizen will be able to access the Shopping Cart screen where all past due invoices are listed. The citizen may access the Invoice by clicking on the Invoice Number or they may access the Case by clicking on 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 on the Check Out oval to the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).
3. **Total:** By clicking on the **Add To Cart** oval to the right of Total invoices, the citizen will be able to access the Shopping Cart screen where all invoices are listed. The citizen may access the Invoice by clicking on the Invoice Number or they may access the Case by clicking on 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 on the Check Out oval to the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).

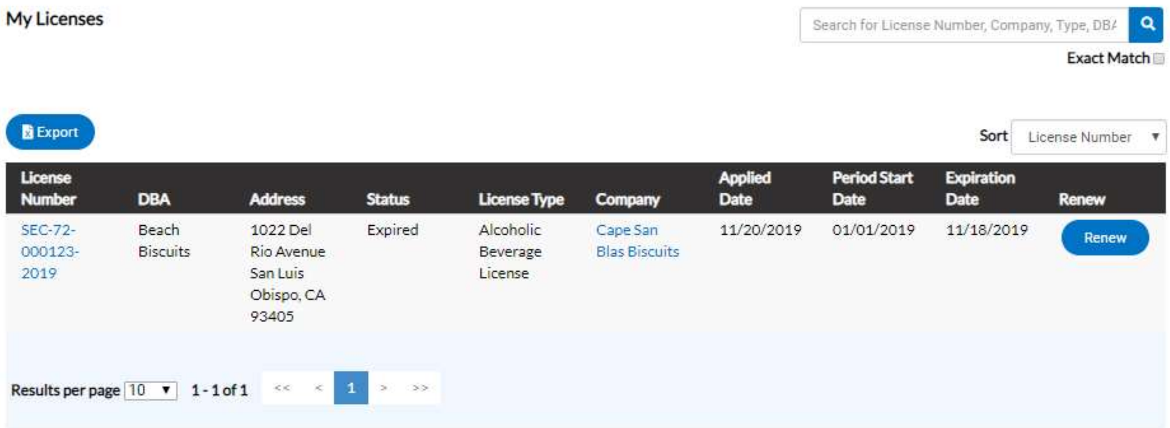
LICENSES



CSS users are able to access Licenses. The Dashboard view of Licenses will show licenses that are close to expiration. These will include licenses that are up for renewal. To view all Licenses, either click **View My Licenses** at the bottom of the **My Licenses** screen or click **My Work** at the top of the Dashboard and click the link under Licenses. Citizens may also click the **Renew** button on the Dashboard view.



Once on the My Licenses screen, CSS users are able to access all of their Licenses.



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

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