EnerGov Citizen Self Service

EnerGov – 2016.1

OVERVIEW

Citizen online access is a crucial part of community development software. CSS ePortal uses the latest tools in software development and modern aesthetics. The essential purpose of this application is to provide public-facing tools for citizens to use to interact with the EnerGov land management and permitting processes administered by local government municipalities. CSS is compliant with the Americans with Disabilities Act (ADA).

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Contents

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FEATURE LIST

This page briefly describes the features of EnerGov's Citizen Self Service product.

Feature	Help	Description
ADA Compliance		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.
Application Security		CSS and CSS Administration come with powerful and professional security, CAPTCHA support for user registration, secure authentication, password strength indicators, case-sensitive credentials, and more.
Draft Saving		CSS users can begin applying for cases and resume the application process later. This is helpful when users want to save completed work and then continue when they're ready.
Exception Handling		CSS Administration offers exception reports and tools for site administrators to view details about client- and server-side exceptions encountered within the environment.
GIS Maps	NEW	CSS integrates with ESRI map functionality. The maps allow for powerful searches, pinned results, EnerGov data incorporation, layers, filters, a legend, and more. The map is available to both logged in and logged out users.
Global Search	NEW	Citizens can perform robust searches across several key areas in CSS (i.e., permits, plans, inspections, and addresses) from 1 centrally accessible location.
Invoice Management	NEW	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.
Menu System		CSS offers powerful and flexible parent and child menu systems. Administrators can configure menu items, menu item categories, menu item positions, and menu item visibility.
Metric Dashboards	NEW	Visual dashboards in CSS display data that is contextual to the logged in user. The dashboard communicates the statuses and counts of several key items (i.e., permits plans, inspections, and invoices).
Mobile Capabilities		The fully functional CSS and CSS Administration sites can be accessed on mobile devices without having to install or configure any mobile applications. The sites adjust to screen sizes automatically.
Overall Architecture		CSS and CSS Administration leverage the latest Microsoft technologies, HTML 5, and solid performance. The sites can be hosted or on premise. APIs are available for purchase to extend functionality.

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Permits & Plans	NEW	Core CSS functionality allows permits and plans to be viewed online.
Printable Reports		Printable reports are available in CSS and CSS Administration. Examples include permits and invoices. These documents can be printed and/or saved to PDF on demand based on business rules.
Public Notifications		Site administrators can create public notifications (e.g., site maintenance, public hearings, job fairs, events, etc.) through CSS Administration. Notifications are displayed on CSS's Home and Dashboard pages.
Request Inspections	NEW	CSS users are able to request inspections. Multiple related/unrelated inspections can be requested simultaneously. Inspection requests interact with the inspection-related data on the dashboard.
Shopping Cart	NEW	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.
System Admin Tool		CSS Administration is a web tool, separate from CSS, that is used to perform a variety of configurations: headers, footers, payments, maps, permit types, plan types, menus, categories, notifications, and more.
User Registration		CSS user registration includes several key features: user profiles, user account registration, password retrieval, automatic EnerGov global entity recognition, secure authentication, and more.

SEARCHING WITHOUT LOGGING INTO CSS

CSS provides a home page to allow users to access public information without being logged in to CSS. Users can still access the GIS Map, Global Search, User Registration, Today's Inspections, and Global Notifications.

Citizens may click on the following links to access information:

Search Permits
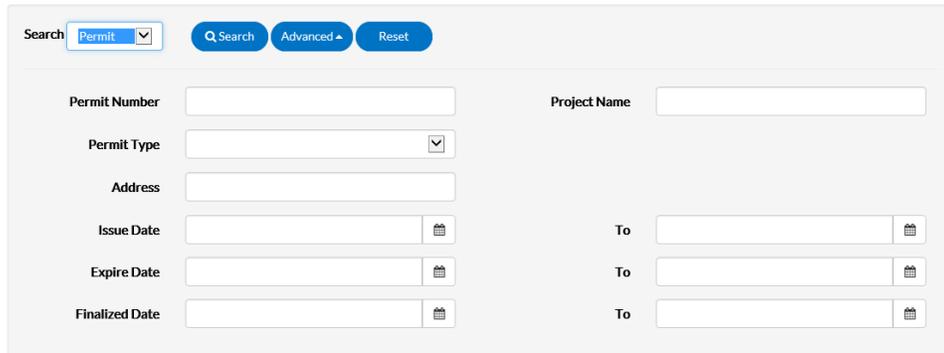This tool can be used to search for existing permits.

Search Plans
This tool can be used to search for existing plans.

Search Inspections
This tool can be used to search for inspections associated with permits.

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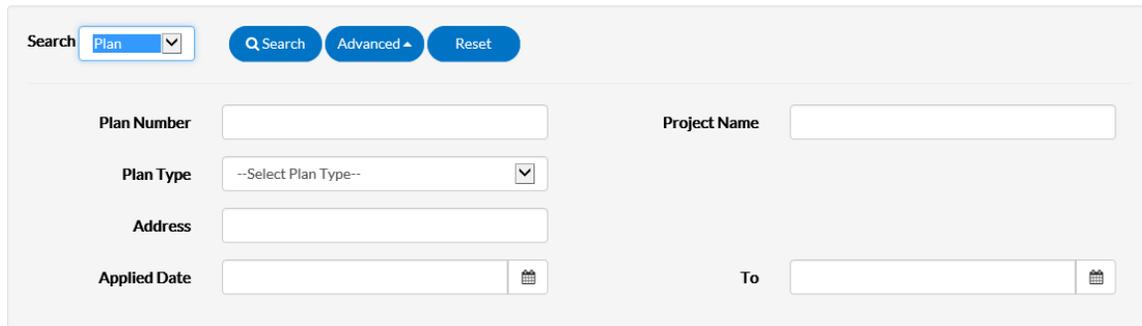
Search Permits

Search

Not all fields need to be utilized.

1. Type at least part of the permit number to search for in the **Permit Number** field.
2. Type at least part of the name of the project associated to the permit to search for in the **Project Name** field.
3. Select the type of permit to search for from the **Permit Type** dropdown.
4. Type at least part of the address associated to the permit to search for in the **Address** field.
5. Type a range of permit issue dates to search for permits within in the **Issue Date** and **To** fields, or click the calendar icons to select the dates.
6. Type a range of permit expiration dates to search for permits within in the **Expire Date** and **To** fields, or click the calendar icons to select the dates.
7. Type a range of permit finalization dates to search for permits within in the **Finalized Date** and **To** fields, or click the calendar icons to select the dates.
8. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.

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Search Plans

Search

 Not all fields need to be utilized.

1. Type at least part of the plan number to search for in the **Plan Number** field.
2. Type at least part of the name of the project associated to the plan to search for in the **Project Name** field.
3. Select the type of plan to search for from the **Plan Type** dropdown.
4. Type at least part of the address associated to the plan to search for in the **Address** field.
5. Type a range of plan application dates to search for plans within in the **Applied Date** and **To** fields, or click the calendar icons to select the dates.
6. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.

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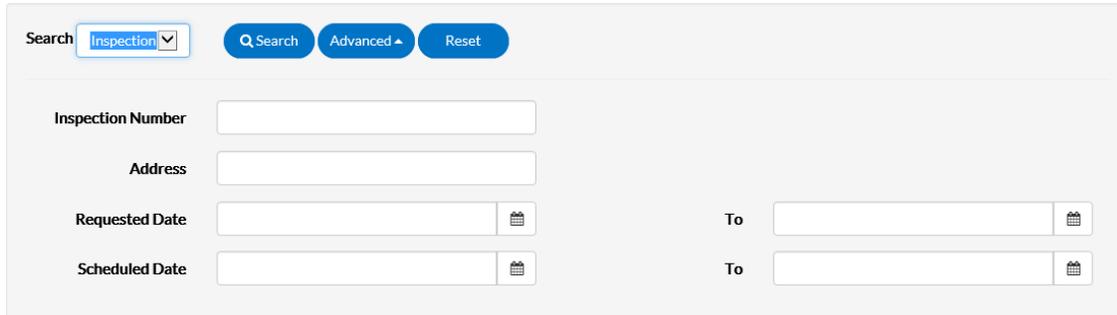
Search Inspections

Search

Not all fields need to be utilized.

1. Type at least part of the inspection number to search for in the **Inspection Number** field.
2. Type at least part of the address associated to the inspection to search for in the **Address** field.
3. Type a range of inspection request dates to search for plans within in the **Requested Date** and **To** fields, or click the calendar icons to select the dates.
4. Type a range of inspection schedule dates to search for plans within in the **Scheduled Date** and **To** fields, or click the calendar icons to select the dates.
5. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.

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LOGGING INTO CSS

Not a Member? Register.

Create a new account now - click Sign Up to get started.

[Sign Up]

Today's Inspections

View the jurisdictions' scheduled inspections by date.

[View]

Login

Log in with an existing account.

Follow the steps below to log in to CSS:

[Login]

1. Navigate to the URL designated for your Citizen Self Service environment.
2. Enter your **Email Address** and **Password** in the fields provided. If you do not have an **Email Address/Password** already registered with CSS and EnerGov, click on SignUp 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 the registration has been forgotten)

1. Navigate to the URL designated for your Citizen Self Service environment.
2. Click the **Sign Up** option located in the second column on the right under the heading of **Not a Member? Register**.
3. Enter your email address.
4. You will be sent a confirmation email. Click **Confirm** in the email. This will navigate you back to the CSS registration site.
5. A confirmation of an existing contact in CSS will show.
6. Click **Log In**.

Registration

Step 2 of 3: Email Address

Your e-mail address is your username.

Email christy.goss@tylertech.com

Is this you?

Christy Goss

christy.goss@tylertech.com

Christy's Kayak Company

[Log In]

[Back]

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1. Type in your email address into the email address field.
2. Select "**Forgot Your Password?**".
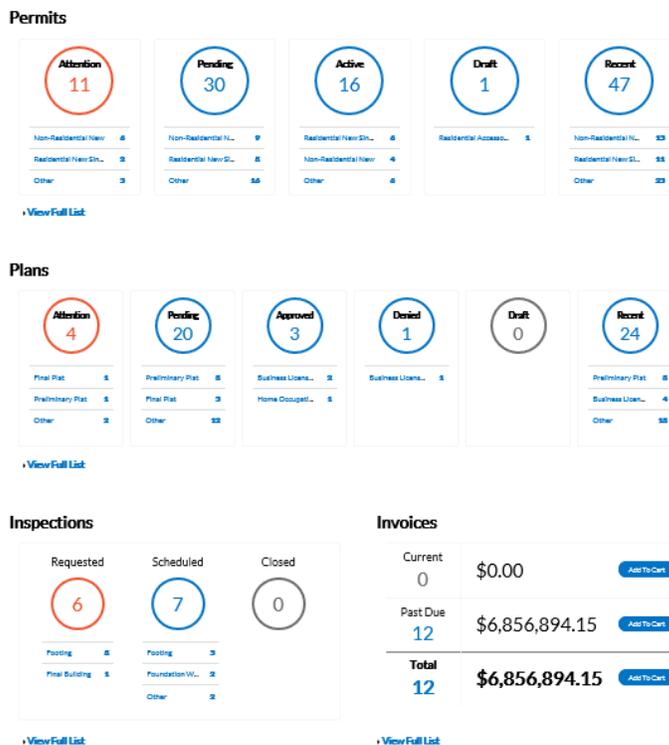
3. The page will be redirected to a **Forgot Password** screen.
4. Click **Submit**.

5. An email will be sent to the address that was given.
6. Open the email and click **Reset**.
7. You will be redirected to a CSS window where a new password can be entered and confirmed.

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DASHBOARD

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 circle in the **Permits** section to view a list of the corresponding Permits. Beneath each status circle is a breakdown of the Permit Types. Click **View Full List** to view all Permits.
3. Click the appropriate status circle 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 Full List** to view all Plans.
4. Click the appropriate status circle in the **Inspections** section to view a list of the corresponding Inspections. Beneath each status circle is a breakdown of the Inspection Types. Click **View Full List** to view all Inspections.

5. Click **Add to Cart** next to **Current**, **Past Due**, or **Total** in the **Invoices** section to add the corresponding Invoices to the Shopping Cart. Click **View Full List** to view all Invoices.

PERMITS

Permits

Attention 11	**Pending** 30	**Active** 16	**Draft** 1	**Recent** 47
Non-Residential New 6	Non-Residential N... 9	Residential New Sin... 6	Residential Accesso... 1	Non-Residential N... 13
Residential New Sin... 2	Residential New Si... 5	Non-Residential New 4		Residential New Si... 11
Other 3	Other 16	Other 6		Other 23

▸ **View Full List**

Permit Number	Project	Address	Type	Status	Reason

1. **Attention:** By clicking on the **Attention** status circle 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.
2. **Pending:** By clicking on the **Pending** status circle 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.
3. **Active:** By clicking on the **Active** status circle 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.
4. **Draft:** By clicking on the **Draft** status circle 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.

My Drafts

Module [Permit ▾]   Sort [Module ▾]

Module	Type	Last Update	Action	
Permit	Residential Accessory Structure	4/12/16 6:31 AM	Resume	Delete

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5. **Recent:** By clicking on the **Recent** status circle 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.

My Permits

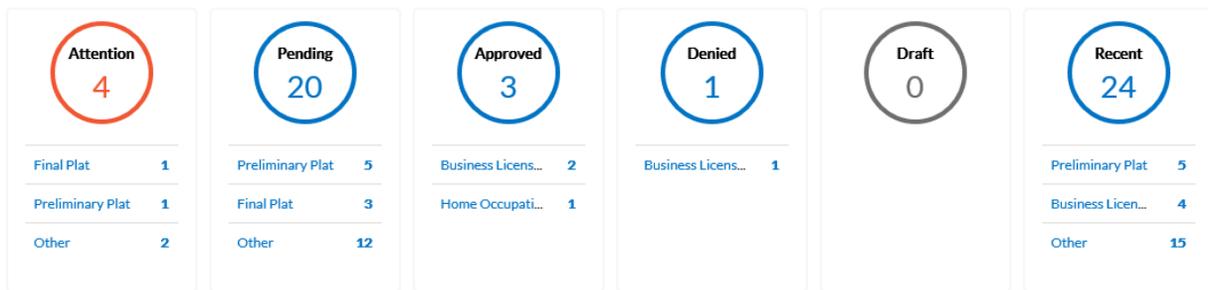| Search for permit number, project, or address | 🔍 |

Display | Recent ▾

Sort | Permit Number ▾

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

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.
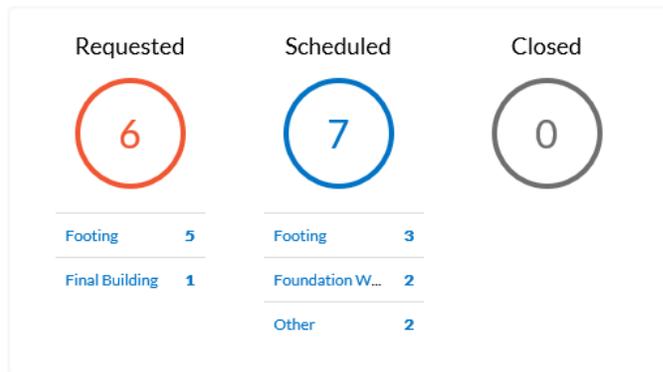
PLANS

Plans

Attention 4	Pending 20	Approved 3	Denied 1	Draft 0	Recent 24
Final Plat 1	Preliminary Plat 5	Business Licens... 2	Business Licens... 1		Preliminary Plat 5
Preliminary Plat 1	Final Plat 3	Home Occupati... 1			Business Licen... 4
Other 2	Other 12				Other 15

▸ View Full List

1. **Attention:** By clicking on the **Attention** status circle 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.
2. **Pending:** By clicking on the **Pending** status circle 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.
3. **Approved:** By clicking on the **Approved** status circle from the **Dashboard**, you will be given the list of all Plan Numbers that have been applied for that have been Approved, Project name, Address attached to the Plan, Type, Status and Reason.

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4. **Denied:** By clicking on the **Denied** status circle from the **Dashboard**, you will be given the list of all Plan Numbers that have been applied for that have been Denied, Project name, Address attached to the Plan, Type, Status and Reason.

5. **Draft:** By clicking on the **Draft** status circle 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.

6. **Recent:** By clicking on the **Recent** status circle 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.

INSPECTIONS

Inspections

Requested	Scheduled	Closed
6	7	0

Footing	5	Footing	3
Final Building	1	Foundation W…	2
		Other	2

▸ **View Full List**

Case Number	Address	Inspection Type	Inspection Status	Requested Date	Scheduled Date

1. **Requested:** By clicking on the **Requested** status circle 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 circle 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 circle 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.

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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).

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APPLYING FOR A PLAN OR A PERMIT
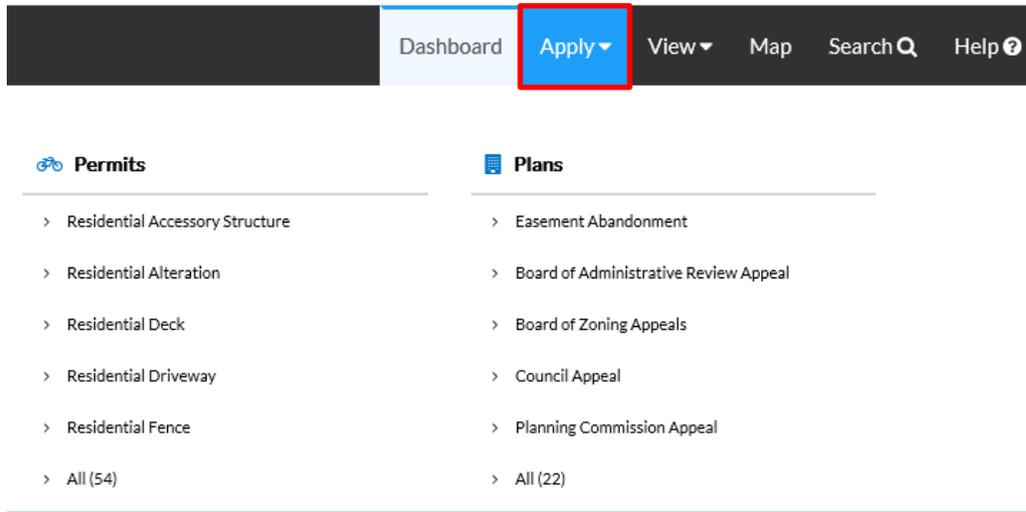
Users are presented with 2 options under the Apply menu: Permits and Plans. The top 5 permit types and plan types are configured on the CSS Administration website, and they are displayed in the order in which the jurisdiction decides to display them. If the user does not see the permit or plan they want to apply for, then the user can click **All** at the bottom of the list to access the Permit Application Assistant; this tool helps guide the user into choosing the correct permit type to apply for all. CSS users can begin applying for cases and resume the application process later. This is helpful when users want to save completed work and then continue when they're ready.

1. Click on **Apply** and choose from the Permit(s) or Plan(s) listed.

2. The **Apply for Permit/Plan** screen will open and the Type chosen will default under **Details**.

- (*****)Denotes that the field is required in order to save the Permit/Plan.
- **Description:** Citizen will need to complete a description of the work that the Permit/Plan is being created for in this field.
- **Square Feet:** (may not be required for all types) Citizen will need to provide how many square feet the Permit/Plan will occupy. This value must be greater than zero.
- **Valuation:** (may not be required for all types) Citizen will need to provide the estimated cost of the task that the Permit/Plan relates to in this field. This value must be greater than zero.

3. **Add Address:** Select from the dropdown box what type of address is being added. Click on the **+** in the center of the **Add Address** card. An **Add Address** screen will appear. Enter the full address and click **Search** or the magnifying glass. If your address is located within the municipality, the record for the address will appear. If not, choose **Enter Manually** if your address is outside the municipality. (EnerGov Best Practice is to always **Search** first.) Add in the address for the Permit/Plan. The street number, street name, city and postal code are required. Click **Submit**.

4. **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 Permit/Plan that is being applied for, click on the **Add Contact +**. 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. Click **Submit**.

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ATTACHMENTS

click or drag files

Add
Attachment

+
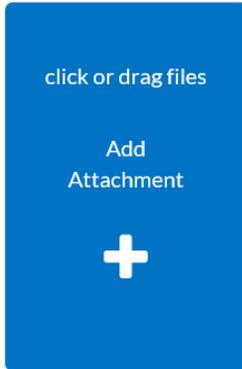
5. **Attachments:** Click on the **Add Attachment +** card to open Windows Explorer. The citizen may click to insert or drag files into the Add Attachment card. (Certain Plan/Permit types may have required documents that must be attached in order to save.)

Save Draft   Next   Save

6. **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 Permit/Plan.

7. **Next:** Click **Next** to be taken to the **Additional Information** page. These fields are customized by the System Administrator.

8. **Save:** Click **Save** to submit the application if the no other fields are required.

**If fields are left blank and Save Draft, Next or Save is clicked, an alert box will notify the citizen that information is missing.

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REQUESTING INSPECTIONS AFTER A PERMIT IS ISSUED

Permit Number: ELER-000147-2016

Permit Details | Tab Elements | Main Menu

Type:	Residential Electrical New Construction	**IVR Number:**	100211	**Application Date:**	05/16/2016
Status:	Issued	**Project Name:**		**Issued Date:**	05/16/2016
Description:	dfgsdf	**District:**		**Expiration Date:**	11/14/2016
Valuation:	$5,678.00	**Square Feet:**	50.00	**Finalized Date:**	

Address | **Inspections** | Fees | Sub Permits | Sub Plans | eReviews | Attachments | Contacts | Submittals

Existing Inspections | Remaining Inspections | Next Tab | Permit Details | Main Menu

Existing Inspections   Sort [Description ▾]

Description	Status	Request Date	Scheduled Date	Inspector	Action

No records to display.

Remaining Inspections   Sort [Description ▾]

Description	Reinspection	Action
Electrical Permanent Service	No	☐
Electrical Rough	No	☐
Electrical Temporary Service	No	☐
Electrical Underground	No	☐
Final Electrical	No	☐

Results per page [10 ▾]   1 - 5 of 5   << < 1 > >>

[Request]

1. Click on the Permit Number of the Permit you would like to request an inspection for.
2. The Permit case will open. Click on the **Inspections** tab.
3. A list of **Remaining Inspections** will be at the bottom of the page.
4. Click in the box under **Action of the Inspection** you would like to request. (If Fees are unpaid the Action boxes will not show.)
5. Click **Request** at the bottom the page on the right.

Request Inspections (1)

① #ELER-000147-2016   ✕

Inspection Type:	Electrical Rough
Permit Type:	Electrical (Residential)
Address:	900 Del Rio Ave Unit/Suite: San Luis Obispo, CA 93405

* **Requested Date** [   ] 📅

* **Comments** [   ]

[Request]

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6. The **Request Inspections** screen will open.
7. Choose a requested date for the inspection by clicking on the calendar to the right of the **Requested Date** field.
8. Fill in comments about the requested inspection in the **Comments** box.
9. Click **Request**.

Request Inspections (1)

1 Permit **#BLDR-000146-2016**

Inspection Type:	Footing
Permit Type:	Building (Residential)
Address:	900 Del Rio Ave Unit/Suite: San Luis Obispo, CA 93405

Requested Date	05/25/2016
Comments	qwerqwe

10. The inspection information and a green check will pop up in a **Requested Inspections** screen if it is successfully requested.
11. Navigate back to the Permit Details screen. The inspection will now be listed under **Existing Inspections** in the full list of inspections.

PAYING FEES

Permit Number: BLDR-000151-2016

- Permit cannot be printed at this time. Permit has unpaid fees.

Permit Details | Tab Elements | Main Menu

Type: Residential Deck	**IVR Number:** 100216	**Application Date:** 05/17/2016
Status: Issued	**Project Name:**	**Issued Date:** 05/17/2016
Description: Test	**District:**	**Expiration Date:** 11/14/2016
Valuation: $1,000.00	**Square Feet:** 500.00	**Finalized Date:**

| Address | Inspections | **Fees** | Sub Permits | Sub Plans | eReviews | Attachments | Contacts | Submittals |

Remaining Fees | Paid Fees | Next Tab | Permit Details | Main Menu

Remaining Fees   Sort [Fee ▾]

Fee	Invoice	Computed	Amount Due
Building Permit Fee (Residential)	INV-00000059	$1.00	$1.00
Building Plan Review Fee	INV-00000059	$0.65	$0.65

Results per page [10 ▾] 1 - 2 of 2   <<   <   [1]   >   >>

Paid Fees   Sort [Fee ▾]

Fee	Invoice	Computed
No records to display.		

To Pay Fees on a Plan/Permit 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.

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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.

Invoice Number: INV-00000006

Billing Contact:	Tyler Technologies (Demo, Tyler)	Invoice Status:	Invoiced, Past Due	Invoice Date:	04/05/2016
Invoice Due Date:	04/05/2016	Invoice Total:	$1.65	Invoice Description:	NONE

Primary Fees | Misc Fees | Payments | Attachments | Contacts

Primary Fees

Sort: Fee Name

| Fee Name	Fee Total	Amount Due	Reference Entity	Entity	Notes
Building Permit Fee (Residential)	$1.00	$1.00	BLDR-000012-2016	Permit	
Building Plan Review Fee	$0.65	$0.65	BLDR-000012-2016	Permit	

Results per page 10 ▾ 1 - 2 of 2   << < 1 > >>

Add To Cart

Follow the steps below to view invoice information:

1. Click the printer icon print or save the invoice as a PDF.
2. Click **Primary Fees** to view the **Fee Name**, **Fee Total**, **Amount Due**, **Reference Entity**, **Entity**, 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.

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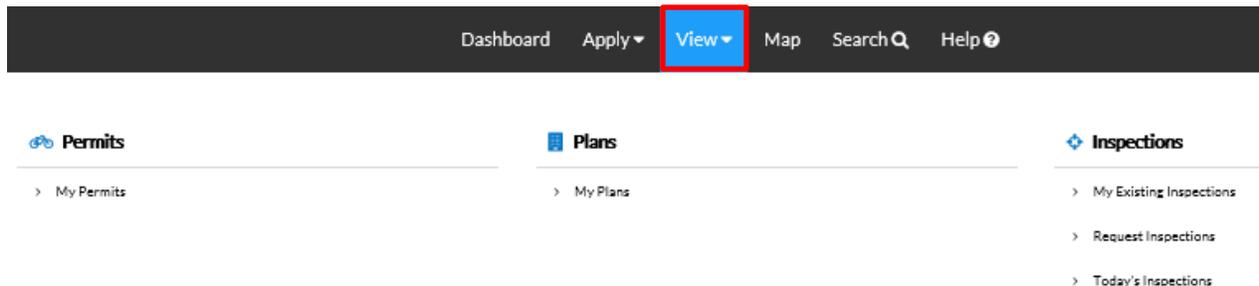
VIEW

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

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. See Field Notes below.
3. Select the feature to sort the permits in the list by from the **Sort** dropdown. See Field Notes below.
4. Click a permit number to open the associated permit record.
5. Select the number of permits to display on each page from the **Results per page** dropdown.
6. 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.

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2. Select the statuses of the plans to display in the list from the **Display** dropdown. See Field Notes below.
3. Select the feature to sort the plans in the list by from the **Sort** dropdown. See Field Notes below.
4. Click a plan number to open the associated plan record.
5. Select the number of plans to display on each page from the **Results per page** dropdown.
6. Use the page navigation buttons to move between pages of plans.

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 project, address, or permit number 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. See Field Notes below.
3. Select the feature to sort the inspections in the list by from the **Sort** dropdown. See Field Notes below.
4. Click a case number to open the associated permit record if desired.
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.

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 permit 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.

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2. Select the feature to sort the inspections in the list by from the **Sort** dropdown. See Field Notes below.
3. Click a permit number to open the associated permit record. Or, mark the checkboxes next to permits 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. See Field Notes below.
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.

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MAP
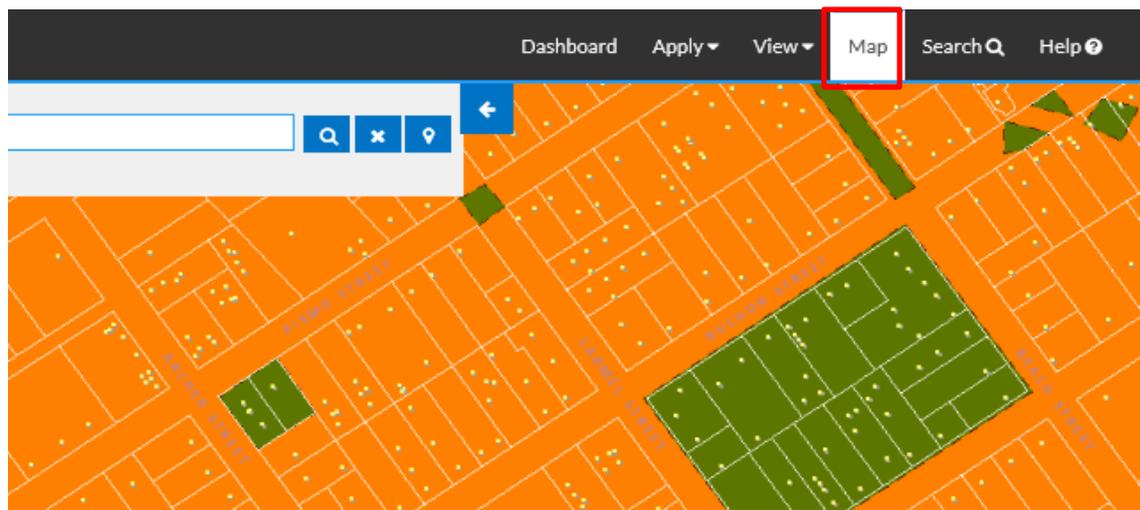
CSS integrates with ESRI's map functionality to allow for powerful searches, pinned results, applying for cases, EnerGov Enterprise Server data incorporation, GIS layers, and more. ArcGIS 10.3.1 or higher must be in place before beginning CSS installation.

Follow the steps below to use the CSS map:

 Filter options are different for logged in users than for users who are not logged in.
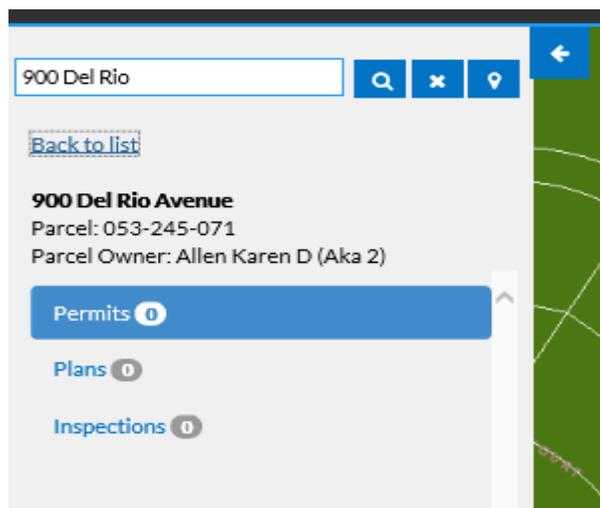
1. Type an address or part of an address to search for in the **Search by Address** field in the top, left corner of the map.
2. Click the magnifying glass for the search results to be returned below the search criteria, or click the X icon to clear the search criteria.

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3. Locate the appropriate search result if the magnifying glass is clicked. Use the page navigation buttons at the bottom of the pane if necessary.
4. Click one of the listed search results to view the associated Parcel, Parcel Owner, Permits, Plans, and Inspections. If only 1 search result is returned, simply view the information.
5. Click **Back to list** to return to the list of search results.
6. To drop a pin on a parcel and have search results returned regarding the parcel chosen, click on the [icon] icon and then click on the parcel of land. The search results will be listed on the left.
7. Click the arrow icon at the top of the search criteria pane to collapse or expand the pane.
8. Click the arrow icon at the top, right corner of the map to collapse or expand the Filters and Legend pane.
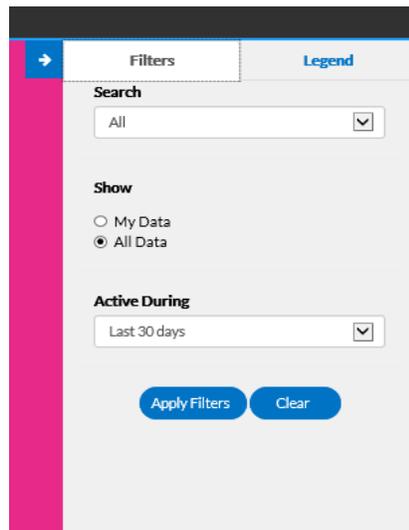
9. Choose the Filters tab to enter information to narrow search results.
10. Select whether to search by *Permits*, *Plans*, *Inspections*, or *All* from the **Search** dropdown.
11. Select the appropriate option in the **Show** field. Available selections depend on the selection made from the **Search** dropdown.
12. Select the appropriate active time span (*Last 30 days*, *Last 60 days*, or *Last 90 days*) from the **Active During** dropdown.
13. Select the appropriate applied for time span (*Last 30 days*, *Last 60 days*, or *Last 90 days*) from the **Applied During** dropdown if available.
14. Choose the Legend tab to view the significance of icons that appear on the map.

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SEARCH

Citizens can perform robust searches across several key areas in CSS (i.e., permits, plans, inspections, and addresses) from 1 centrally accessible location. Users do not have to be logged in to CSS to access the global search tool.
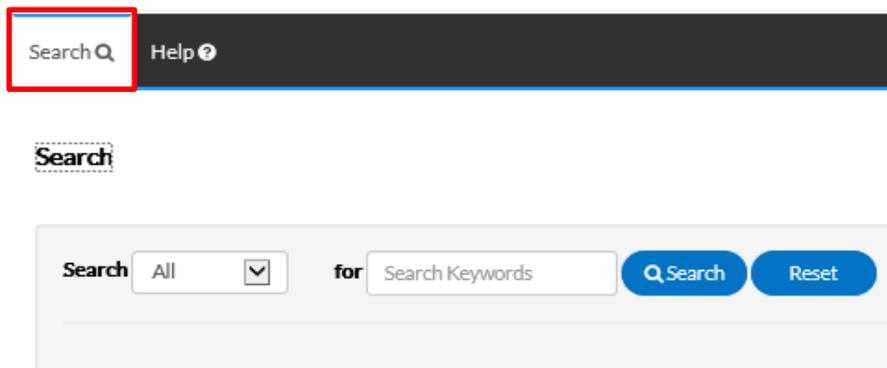
Follow the steps below to search:

1.   Select the type of record to search for from the **Search** dropdown.

All

1.   Type relevant search keywords in the **for** field.
2.   Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria.

Permit

Not all fields need to be utilized.

1.   Type at least part of the permit number to search for in the **Permit Number** field.
2.   Type at least part of the name of the project associated to the permit to search for in the **Project Name** field.
3.   Select the type of permit to search for from the **Permit Type** dropdown.
4.   Type at least part of the address associated to the permit to search for in the **Address** field.
5.   Type a range of permit issue dates to search for permits within in the **Issue Date** and **To** fields, or click the calendar icons to select the dates.
6.   Type a range of permit expiration dates to search for permits within in the **Expire Date** and **To** fields, or click the calendar icons to select the dates.

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7. Type a range of permit finalization dates to search for permits within in the **Finalized Date** and **To** fields, or click the calendar icons to select the dates.
8. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.

Plan

💡Not all fields need to be utilized.

1. Type at least part of the plan number to search for in the **Plan Number** field.
2. Type at least part of the name of the project associated to the plan to search for in the **Project Name** field.
3. Select the type of plan to search for from the **Plan Type** dropdown.
4. Type at least part of the address associated to the plan to search for in the **Address** field.
5. Type a range of plan application dates to search for plans within in the **Applied Date** and **To** fields, or click the calendar icons to select the dates.
6. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.

Inspection

💡Not all fields need to be utilized.

1. Type at least part of the inspection number to search for in the **Inspection Number** field.
2. Type at least part of the address associated to the inspection to search for in the **Address** field.
3. Type a range of inspection request dates to search for plans within in the **Requested Date** and **To** fields, or click the calendar icons to select the dates.
4. Type a range of inspection schedule dates to search for plans within in the **Scheduled Date** and **To** fields, or click the calendar icons to select the dates.
5. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.
6. Click on a record number in the list of search results to open the associated record.

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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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