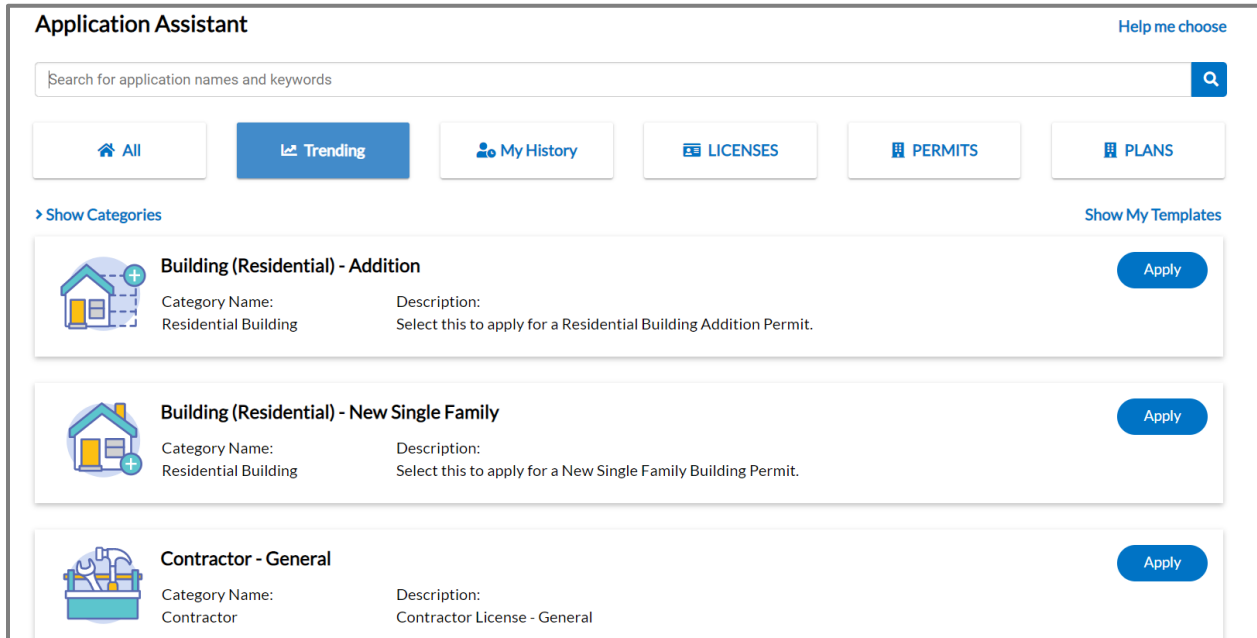


# Apply with Application Assistant

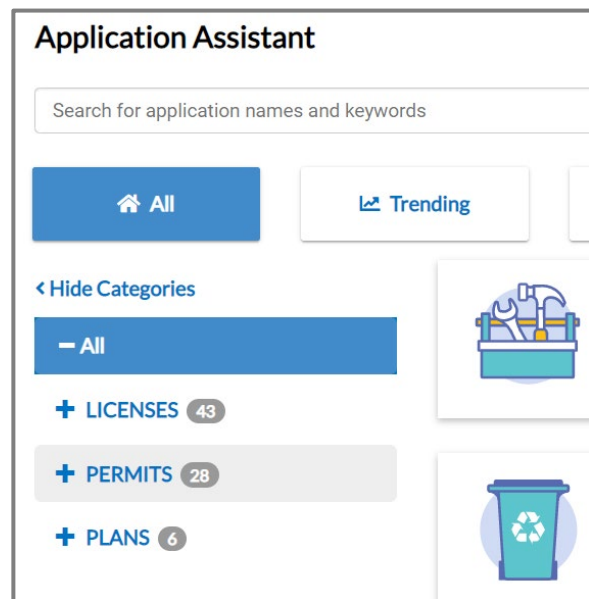
The Application Assistant offers a guided way to apply for licenses, permits, and plans. This guide uses a permit as an example application, but the process is similar for other applications. To use the Application Assistant:

1. Click **Apply** in the menu on the Civic Access Home page.

The Application Assistant displays tabs for all, trending, my history (when logged in), license, permit, and plan application types.



2. Click **All** to choose from all types of permit, plan, and license applications available in Civic Access.
3. Click **Show Categories** to select a category and narrow the results.
4. Click **Hide Categories** to collapse the category list.



5. Click **Trending** to choose from the jurisdiction’s current most common application types.
6. Click **My History** to choose an application type for which the customer has previously applied. This tab displays only for registered users.
7. Click **LICENSES** to choose a type of license, which includes professional and business licenses.
8. Click **PERMITS** to choose a type of permit.
9. Click **PLANS** to choose a type of plan.

### Application Assistant Help me choose

Q

All

Trending

My History

LICENSES

PERMITS

PLANS

Show Categories
Show My Templates

**Building (Residential) - Addition**

Category Name: Residential Building

Description: Select this to apply for a Residential Building Addition Permit.

Apply

**Building (Residential) - New Single Family**

Category Name: Residential Building

Description: Select this to apply for a New Single Family Building Permit.

Apply

**Contractor - General**

Category Name: Contractor

Description: Contractor License - General

Apply

10. Type **key words** to search for application types. As the customer types, Civic Access displays common results.
11. Select the **desired result** in the list.

### Application Assistant

Contractor - **Electrical**

**Electrical** (Non-Residential) - Alteration

**Electrical** (Non-Residential) - New Construction



## Step 1: Location

To add the location for the case:

1. Select the **type of address** on the Add Location card. The card may display a default address type (e.g., Location).
2. Click **add** on the Location card to add a location.

Apply for Permit - Building (Non-Residential) - Alteration \*REQUIRED

1 Locations 2 Type 3 Contacts 4 More Info 5 Attachments 6 Signature 7 Review and Submit

**LOCATIONS**

Please select or add the location of your project.

Location

Add Location

+

REQUIRED

Create Template Save Draft Next

Civic Access displays the Map page. Customers can search for an address, manually type an address, or draw a spatial collection (if configured). For more information, please refer to the [Using the Map section](#).

### Search for an Address

1. Click the **arrow** to expand the search box.
2. Select **All, Address, or Parcels** to filter the results. The default is All.

Add Address As Location Back to Application

SEARCH ENTER MANUALLY

Addresses & Parcel Search

All Address Parcels

Carriage Ct



3. Or type an **address, parcel number, or partial address** or **parcel number**.
4. Click **search** or press **enter** on the keyboard.
5. Or click **Use current location**.



Civic Access displays:

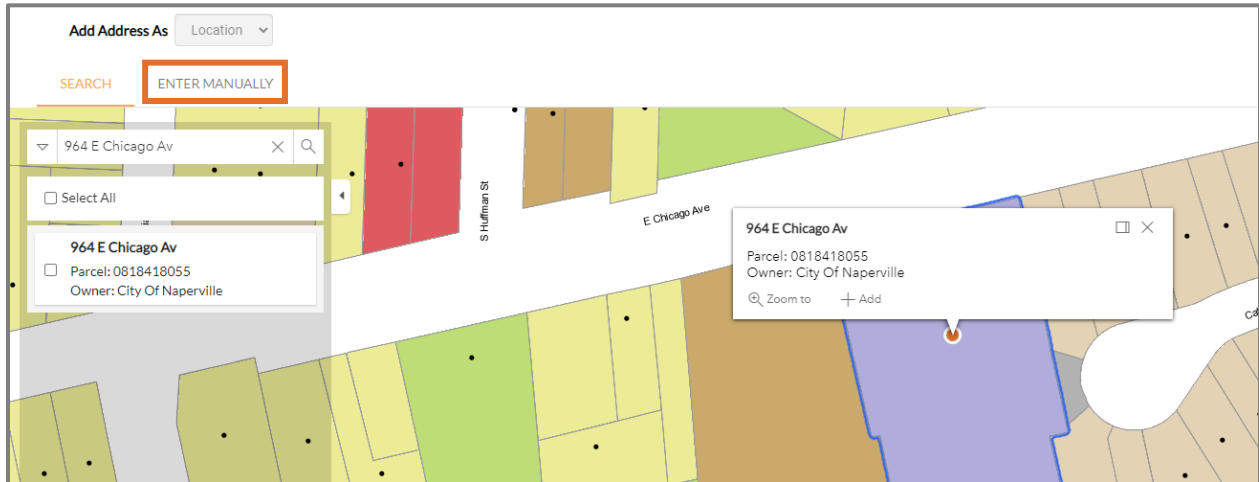
- Results specific to the criteria.
  - A pin on the map with a popup listing parcel and owner information, allowing the customer to zoom to the location or add a case. The parcel owner may not display, if configured.
6. Mark the desired **Address**.
    - a. Click **Add** in the search results to add a case at this location.
  7. Or click **Add** in the popup on the map to add a case at this location.
  8. Click **Next**.



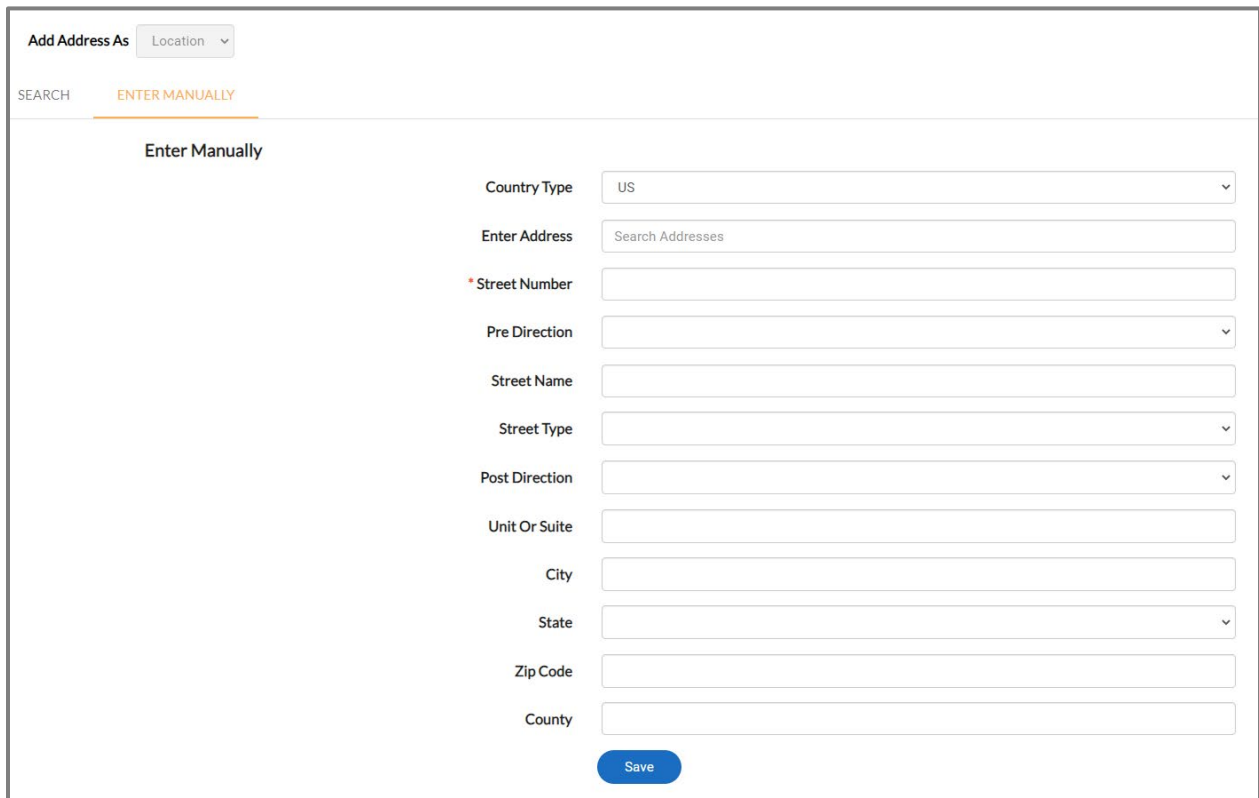
## Manually Enter an Address

Customers can create cases based on an address that is not in the jurisdiction's GIS. To manually add an address:

1. Click **ENTER MANUALLY** on the map.



2. Type the **information**.
3. Click **Save**.
4. Click **Next**.



Add Address As Location

SEARCH **ENTER MANUALLY**

Enter Manually

Country Type US

Enter Address Search Addresses

\* Street Number

Pre Direction

Street Name

Street Type

Post Direction

Unit Or Suite

City

State

Zip Code

County

Save

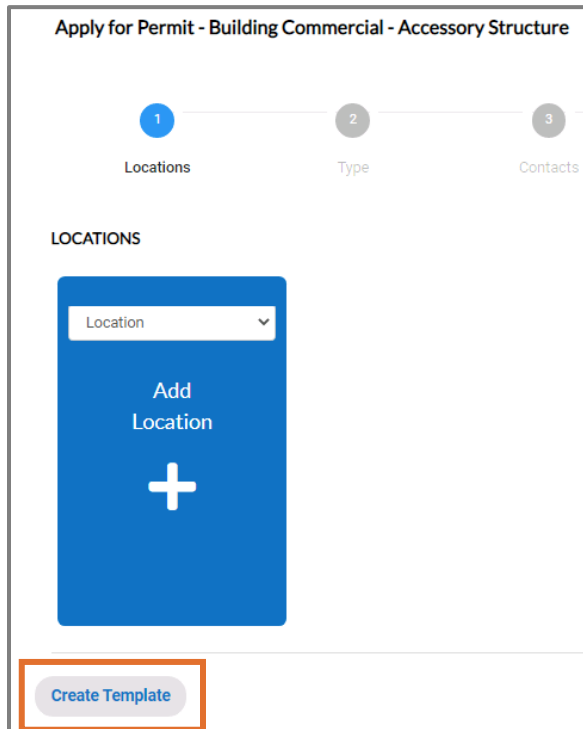
**NOTE** Required fields are noted with a red asterisk.



## Application Templates

Customers can create application templates or drafts on the Location step, which can be reused when applying for the same case type and work class. For example, this is convenient way for contractors who repeatedly submit the same type of permit or plan to start an application.

1. Click **Create Template** on the Location step of an application.



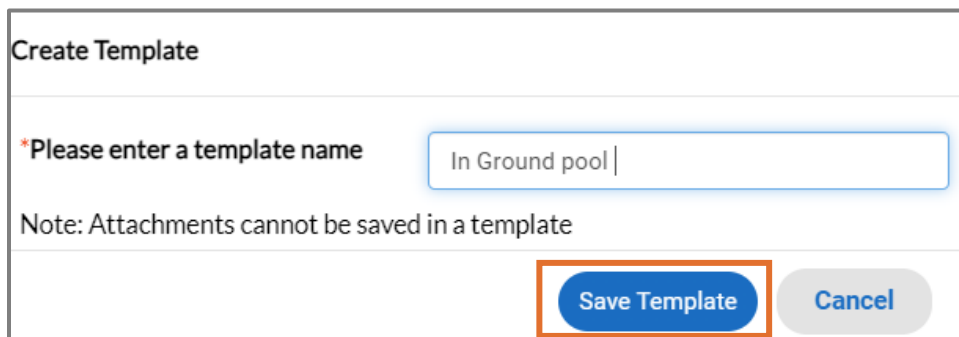
---

**NOTE** Civic Access may display the Add Location card when a customer creates a template, based on the application the user selected before clicking Create Template on the Location step.

---

Civic Access displays a Create Template popup.

2. Type the **name** of the template.
3. Click **Save Template**.



---

**NOTE** Required fields are noted with a red asterisk. Customers cannot add attachments to a template.

---



Once the customer saves the template, Civic Access displays a success message.

4. Click **Go to My Templates**.
5. Or click **OK**.
  - a. Click the **user's name** to access the My Account information.
  - b. Click **Saved Work**.

Civic Access displays the My Templates tab on the Saved Work page.

6. Click **Use** on the row with the desired template to use the template for an application.

Civic Access displays the Location step if the customer selects an application and clicks use.

7. Click **Update** to modify the template.
8. Click **Delete** to remove the template from Civic Access.
  - a. Click **Yes** to confirm.

Saved Work

MY TEMPLATES MY DRAFTS

My Templates

Module All

Sort Template Name

Module	Template Name	Type	Last Update	Action
Permit	In Ground pool	Pool (Residential) - In Ground	02/16/2023 10:35 AM	Use Update Delete
Permit	New Residential Home	Building (Residential) - New Single Family	02/09/2023 01:36 PM	Use Update Delete



## Step 2: Type

Civic Access displays the application type. To add case details:

1. Type a **Description**.
  - a. Click the **corner** to expand the field and enter a large amount of text.
2. Type **Square Feet** and/or **Valuation** if desired.
3. Click **Next**.

Apply for Permit - Building (Non-Residential) - New Construction \*REQUIRED

Progress: 1. Locations (✓) 2. Type (2) 3. Contacts 4. More Info 5. Attachments 6. Signature 7. Review and Submit

**PERMIT DETAILS**

Please enter the requested details about your project.

Note: Fields with an asterisk(\*) are required.

\* Permit Type: Building (Non-Residential) - New Construction

Description:

Square Feet:

Valuation:

Buttons: Back, Create Template, Save Draft, Next

**NOTE** Required fields are noted with a red asterisk.





## Step 3: Contacts

Civic Access populates the registered user's contact information as the first contact on permit and plan applications. The customer must add the first contact for other types of records. Customers can add more contacts if desired.

If a contact card is outlined in red and labeled Required, the customer must add the contact type to the application.


Apply for Permit - Building (Non-Residential) - New Construction \*REQUIRED

Locations ✓ Type ✓ **Contacts** 3 More Info 4 Attachments 5 Signature 6 Review and Submit 7

**CONTACTS**

Please select or add any contacts you would like attached to this permit.

**Applicant**

  
Kathy LaPaglia (You)  
2530 Sever Rd.,  
Lawrenceville, GA, 30043

Select Type ▼

Add Contact

+

Back Create Template Save Draft Next


To add contacts:

1. Select the **contact type** if the card displays the Select Type dropdown.
2. Click **add** (the plus button) to search for a contact or manually enter contact information.

**CONTACTS**

Please select or add any contacts you would like attached to this perm

**Applicant**

  
Kathy LaPaglia (You)  
2530 Sever Rd.,  
Lawrenceville, GA, 30043

Select Type ▼

Select Type

- Applicant
- Architect
- Contractor
- Developer
- Owner
- Owner/Builder

+



3. Type a full or partial **Name, email, or Company name**.
4. Click **search**.

### Add Contact

Add Contact As Contractor ▼

---

Search
Enter Manually
My Favorites

Search  🔍

5. Click **add** to add the contact to the application if the person or company is an existing contact or their email address is connected to an existing contact.
6. Click **Enter Manually** the contact does not exist in the system. EPL displays the button only if configured by the jurisdiction.
  - a. Type the **required information**.
7. Click the **star** to add the contact as a favorite to easily locate it in the future in My Favorites.
8. Click **Next** after adding all case contacts.

Search
Enter Manually
My Favorites

Search  🔍

Sort Relevance ▼

Favorite	First Name	Last Name	Address	Company	Email	Action
<span style="border: 1px solid orange; padding: 2px;">★</span>	Tim	Taylor	35 S Washington Naperville IL 60540	PBG Construction	pbg@tylerdemo.net	<span style="border: 1px solid orange; padding: 2px;">Add</span>



## Step 4: More Info

The More Info step displays fields defined by the jurisdiction that vary based on configuration. Jurisdictions use the step to collect data about an application that is not gathered through the standard fields. This information, also known as additional information, is often used to compute fees and print on documents or reports. The customer cannot edit this information after submitting the application. Jurisdiction users may edit the information in EPL. To add information:

1. Type **information** or mark applicable **boxes**.
2. Click **Next**.

Apply for Permit - Building (Non-Residential) - New Construction \*REQUIRED

Locations     Type     Contacts     **More Info**     Attachments     Signature     Review and Submit

**MORE INFO**

Please provide additional details about your project below.

Note: Fields with an asterisk(\*) are required.

**General Building** | Top | Main Menu

Construction Type	<input type="checkbox"/>	VB
	<input type="checkbox"/>	VA
	<input type="checkbox"/>	IV
	<input type="checkbox"/>	IIIA
	<input type="checkbox"/>	IIIB
	<input type="checkbox"/>	IIA
	<input type="checkbox"/>	IIB
	<input type="checkbox"/>	IA
	<input type="checkbox"/>	IB
	<input type="checkbox"/>	Not Applicable

**NOTE** Required fields are noted with a red asterisk.



## Step 5: Attachments

The Attachments step allows customers to upload files related to the application. To attach files:

1. Select the **file type** if the card displays the Select Type dropdown.
2. Click **add** on each card to attach files. Civic Access displays REQUIRED on a card if the jurisdiction requires a certain file type (e.g., building plans, blueprints, driver's license).
3. Locate and select the **file** on the computer or server.
4. Click **Open**.
5. Click **Next** after all files have been uploaded.

**Attachments**

Please upload all applicable files for review.

**Complete Building Plan (Building,...**

**Add Attachment**

+

Supported: .pdf

**REQUIRED**

Select Type

**Add Attachment**

+

Supported: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf,...

**NOTE** Jurisdictions may require customers to attach specific documents before moving to the next step. Customers must upload files used with electronic reviews as .pdf files to be compatible with Bluebeam, which jurisdictions use to mark up documents as part of the review process.



## Step 6: Signature

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

1. Type the **applicant's name** in the first field.
2. Toggle on **Enable Type Signature**.
3. Type the **name** again and Civic Access populates the signature field.
4. Or leave the **Enable Type Signature** toggled off and draw the **signature** in the signature field.
5. Click **Next**.

Locations    Type    Contacts    More Info    Attachments    **Signature**    Review and Submit

**SIGNATURE**

By providing my first and last name below, I affirm that the facts stated by me are true, I understand any misrepresentation or fraudulent statement is grounds for automatic dismissal of this application and/ or revocation of the license. I understand that all signs displayed on my premise must be permitted by the Community Development Agency. I further understand that my business must be operated in compliance with all applicable state, federal & local laws, ordinances & regulations, & that the granting of this occupation tax certificate or payment of this occupation tax does not waive the right of any federal, state or local entity to regulate & enforce such laws, ordinances & regulations. I understand that all decisions of the Building Division may be appealed to the Review Board.

\* Please type your name as consent to electronically sign this application.    Kathy LaPaglia

Enable Type Signature     Kathy LaPaglia

Kathy LaPaglia  
February, 09 2023

X *Kathy LaPaglia*

Back    Create Template    Save Draft    Next

**NOTE** Required fields are noted with a red asterisk.



## Step 7: Review and Submit

1. Review the application including uploaded attachments, more info fields, and estimated fees (if configured to display).
2. Click **Save Draft** if the information is incomplete and/or to finish the application later.
  - a. Click the **Draft status circle** on the Dashboard to resume the application.
3. Click **Submit** if the application is complete and accurate.

The screenshot shows a web form for reviewing and submitting an application. At the top, there is a list of application types with checkboxes: R-2 Multi-Family, R-2.1 Residential Care Facilities, R-3 1 & 2 Family Dwellings, R-3.1 Res. Care Facility < 6 Clients, R-4 Res. Care Facility >6 Clients, S-1 Storage, Mod Hazard, S-2 Storage, Low Hazard, and U Utility/Misc Structures. Below this list are three input fields labeled "Number of Stories", "Seating Capacity", and "Proposed Use". Underneath these fields is an "Attachments" section showing two files: "Complete Building Plan (Building, Electrical etc)" and "Office Plans - LEVEL 02 FLOOR PLAN\_v1.pdf". At the bottom of the form, there are four buttons: "Back", "Create Template", "Save Draft", and "Submit". The "Save Draft" and "Submit" buttons are highlighted with orange borders.

## Success Page

Once the application is submitted, Civic Access may display a success message or immediately display the record based on configuration. Civic Access displays fee information if an invoice for fees has been created automatically.

1. Click **Continue To** the record if no fees display.
2. Or click **Add to Cart** in the Fees section for fees that Civic Access has automatically invoiced. This section displays if the jurisdiction configured the application type to automatically invoice fees.

The screenshot shows a success page with a confirmation message and a fees summary. The confirmation message reads: "Your application was successfully submitted!" followed by "Your application has been submitted successfully! We are currently reviewing your application for completeness and will notify you if additional information is needed." Below the message is a "Continue to permit" button. To the right, there is a "Fees" summary box with a total of "\$825.00" and two buttons: "View Details" and "Add to Cart".

