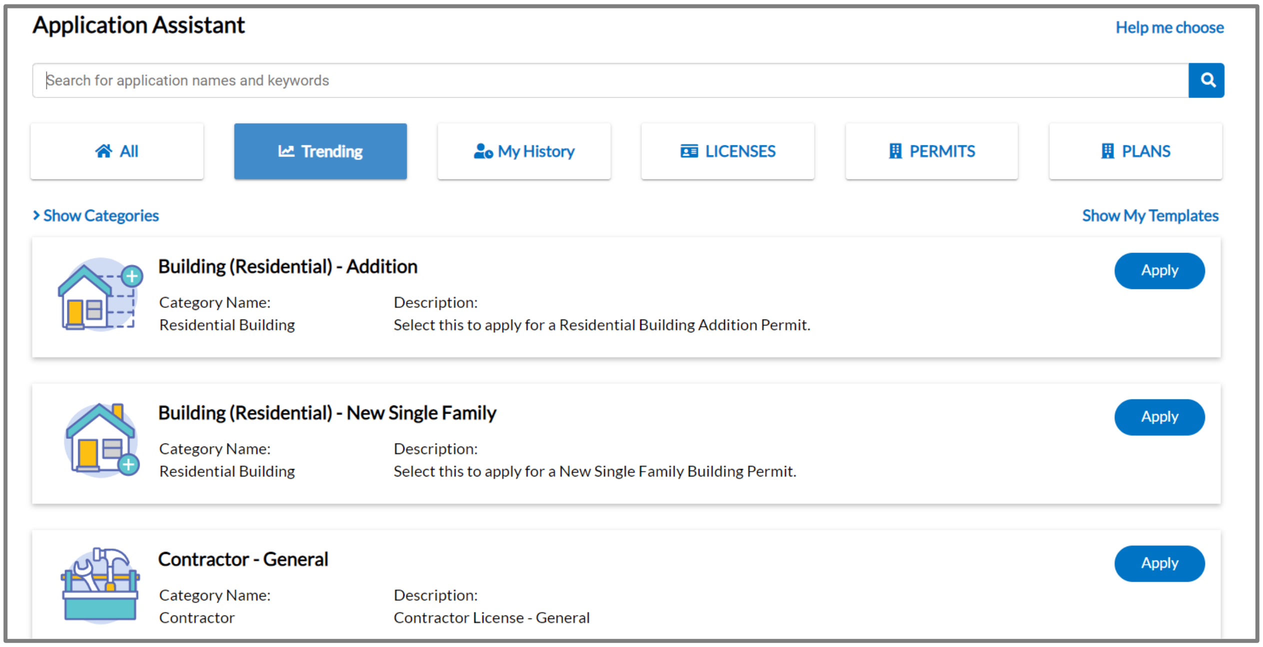
Apply with Application Assistant

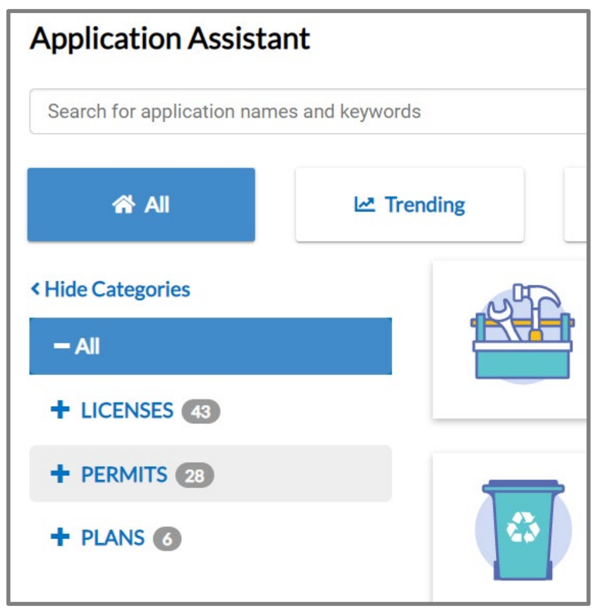
The Application Assistant offers a guided way to apply for licenses, permits, and plans. This guide uses a permit as an example application, but the process is similar for other applications. To use the Application Assistant:

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

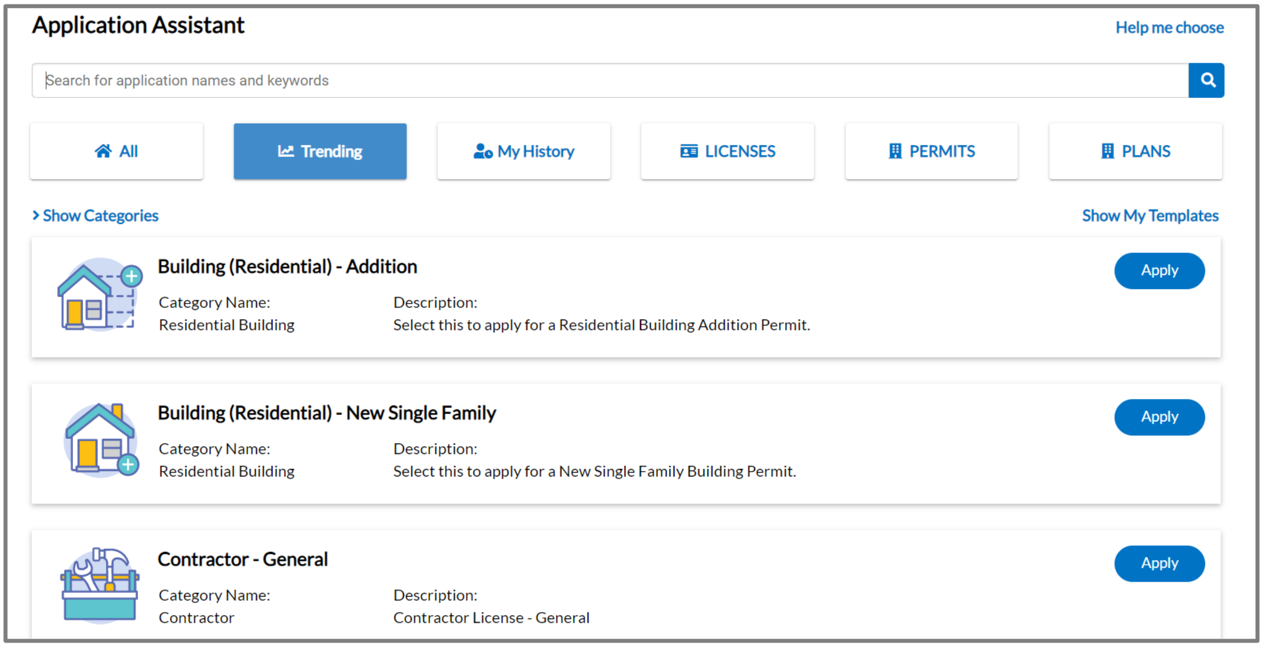
The Application Assistant displays tabs for all, trending, my history (when logged in), license, permit, and plan application types.



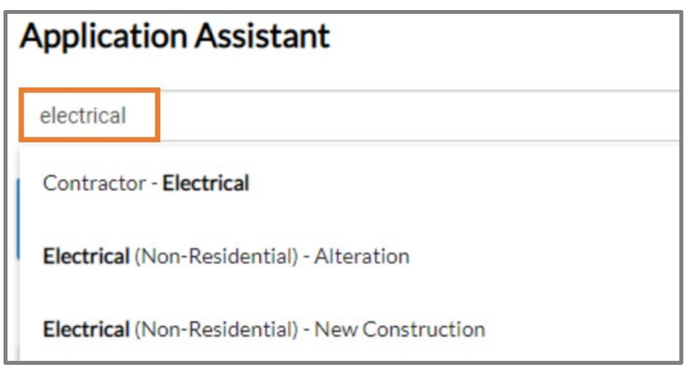
2. Click **All** to choose from all types of permit, plan, and license applications available in Civic Access.
3. Click **Show Categories** to select a category and narrow the results.
4. Click **Hide Categories** to collapse the category list.



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.



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.



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.

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.

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.

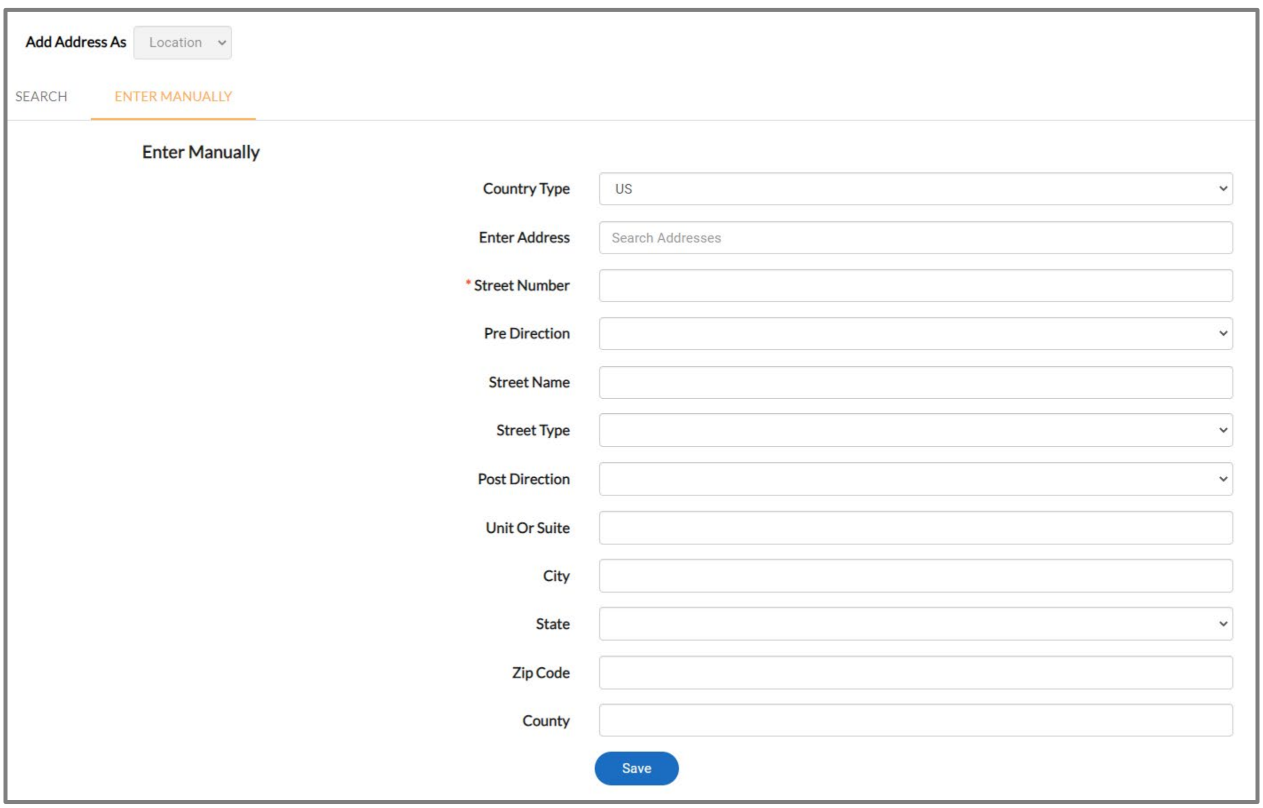
6. Mark the desired **Address.**
   a. Click **Add** in the search results to add a case at this location.
7. Or click **Add** in the popup on the map to add a case at this location.
8. Click **Next.**

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.**

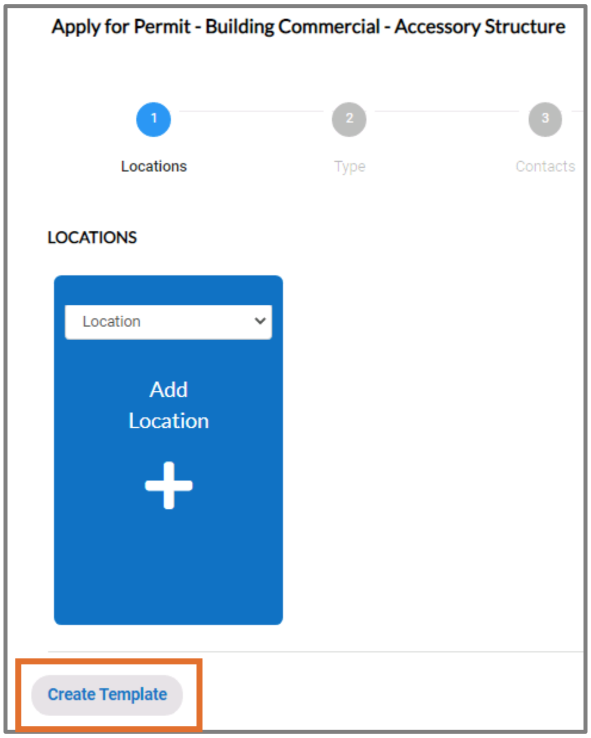


NOTE Required fields are noted with a red asterisk.

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.

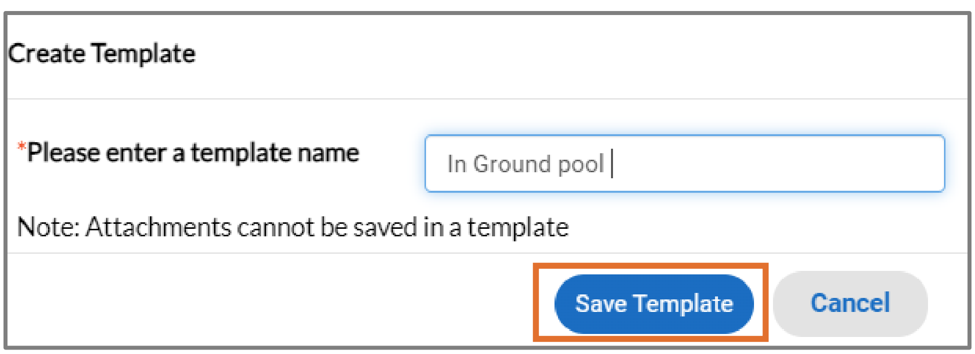
1. Click **Create Template** on the Location step of an application.



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.

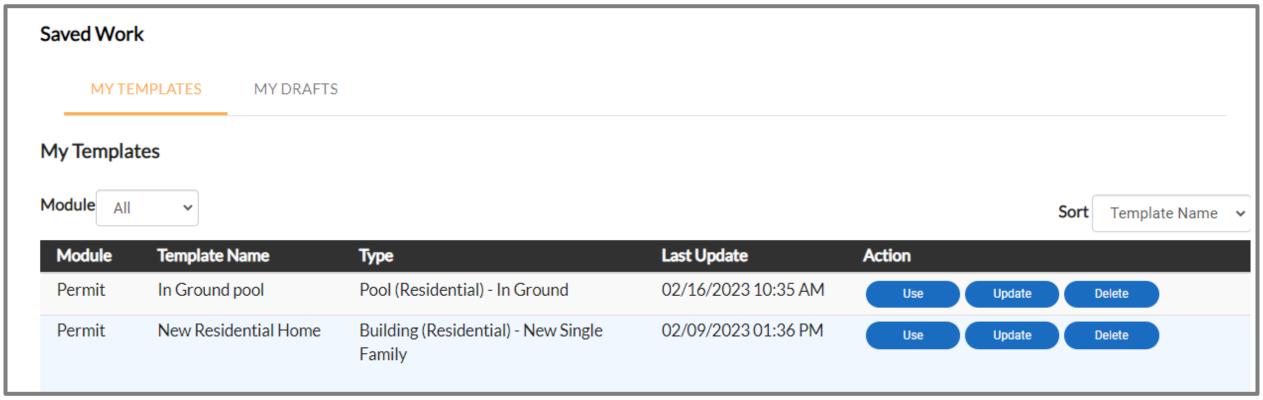
4. Click **Go to My Templates**.
5. Or click **OK**.
   a. Click the **user's name** to access the My Account information.
   b. Click **Saved Work**.

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.

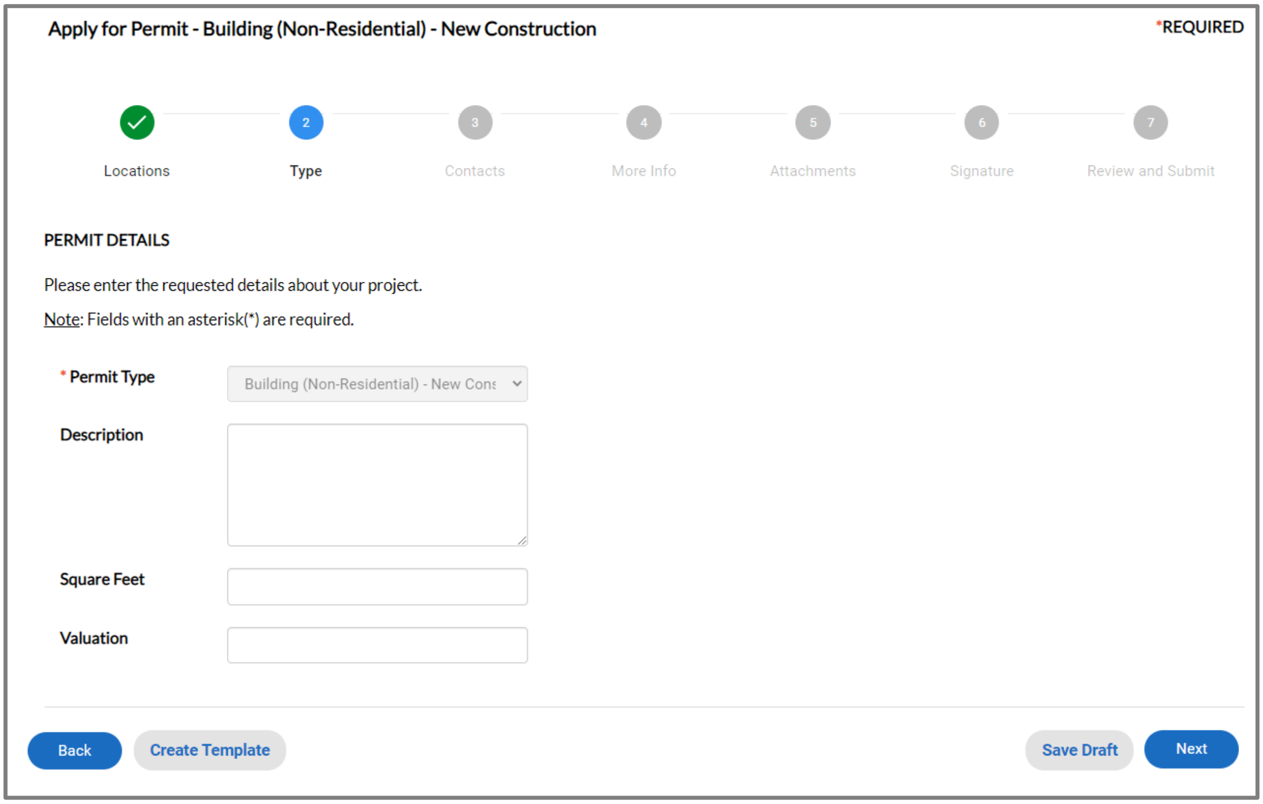
7. Click **Update** to modify the template.
8. Click **Delete** to remove the template from Civic Access.
   a. Click **Yes** to confirm.



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**.

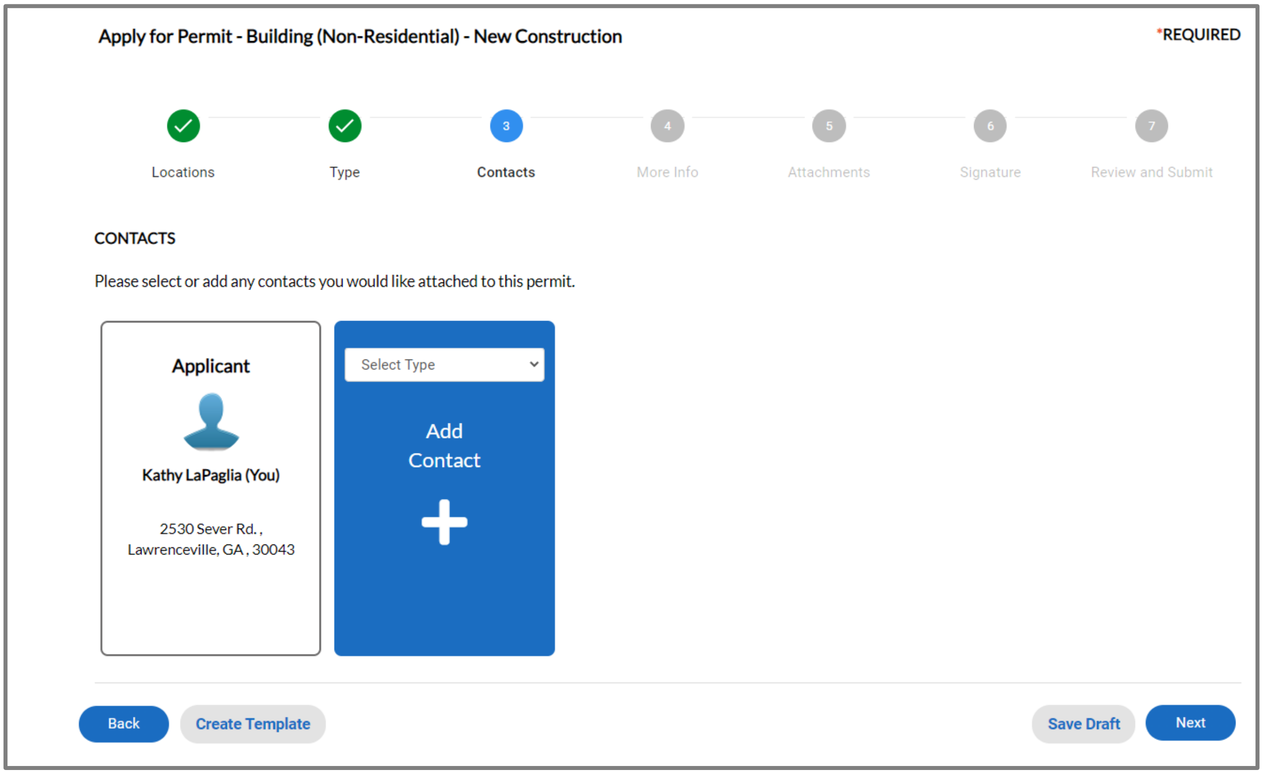


NOTE Required fields are noted with a red asterisk.

Step 3: Contacts

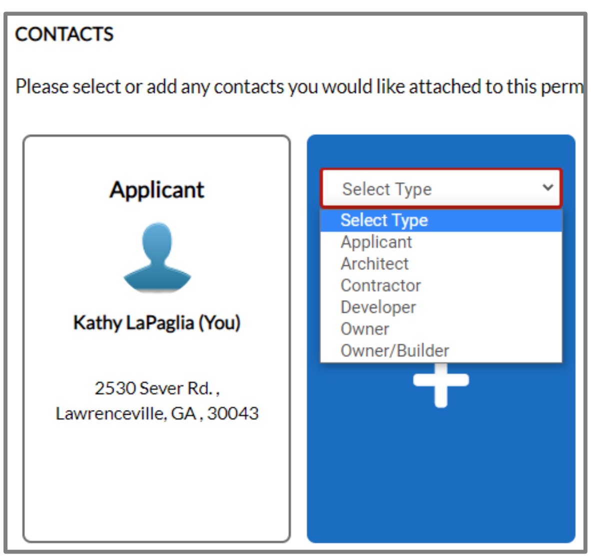
Civic Access populates the registered user's contact information as the first contact on permit and plan applications. The customer must add the first contact for other types of records. Customers can add more contacts if desired.

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

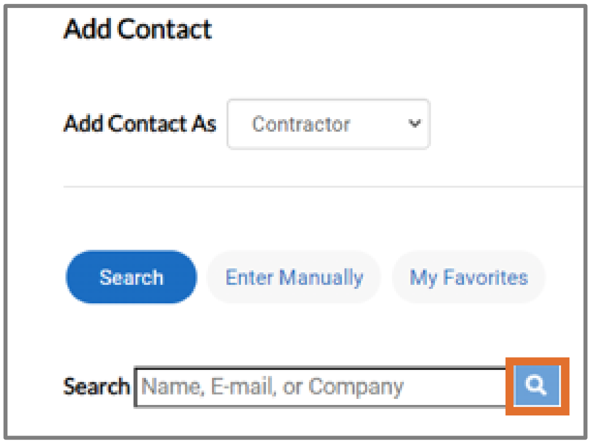


To add contacts:

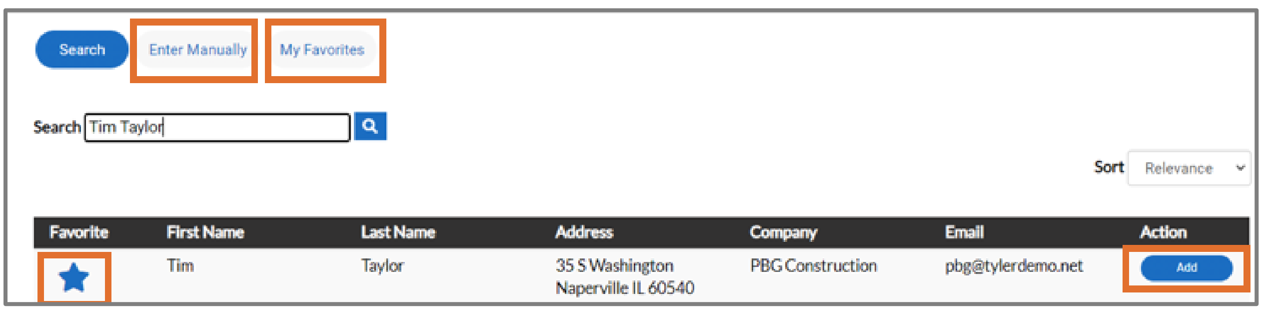
1. Select the **contact type** if the card displays the Select Type dropdown.
2. Click **add** (the plus button) to search for a contact or manually enter contact information.



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



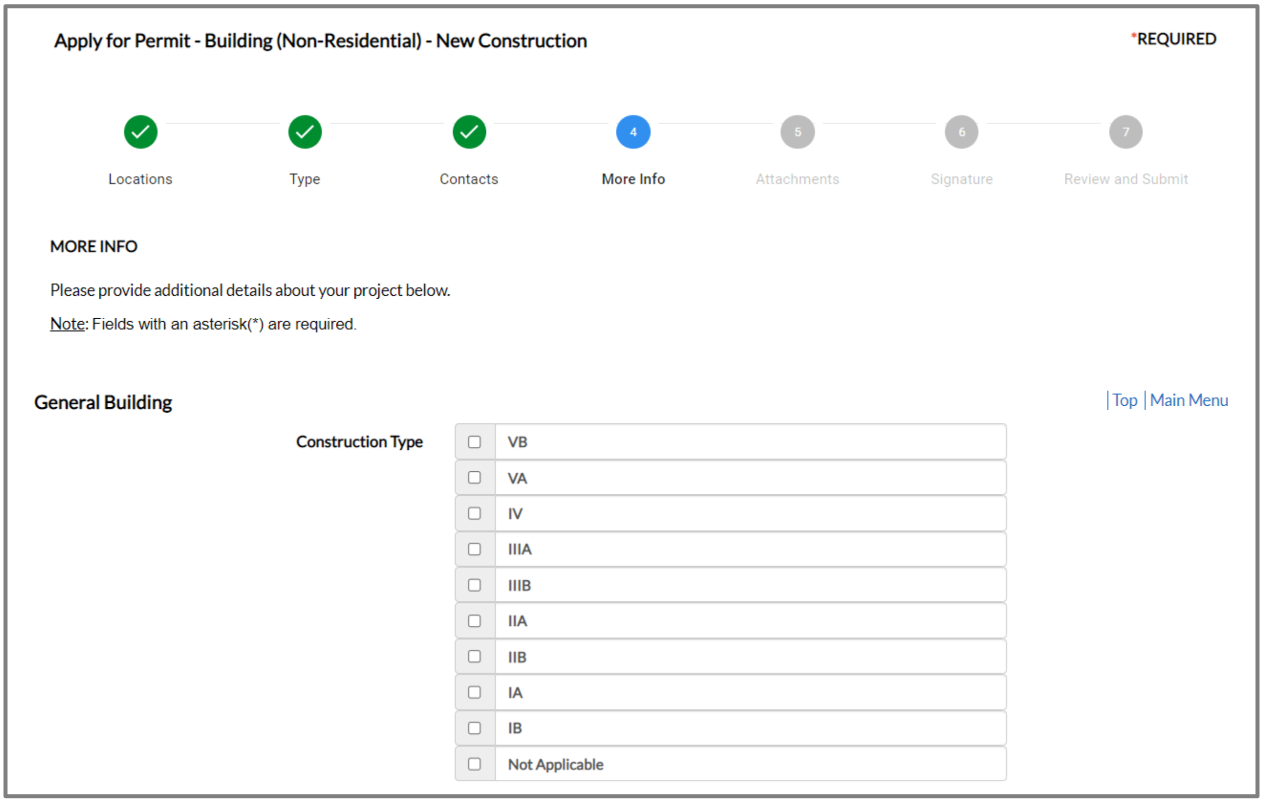
5. Click **add** to add the contact to the application if the person or company is an existing contact or their email address is connected to an existing contact.
6. Click **Enter Manually** the contact does not exist in the system. EPL displays the button only if configured by the jurisdiction.
   a. 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.



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.**

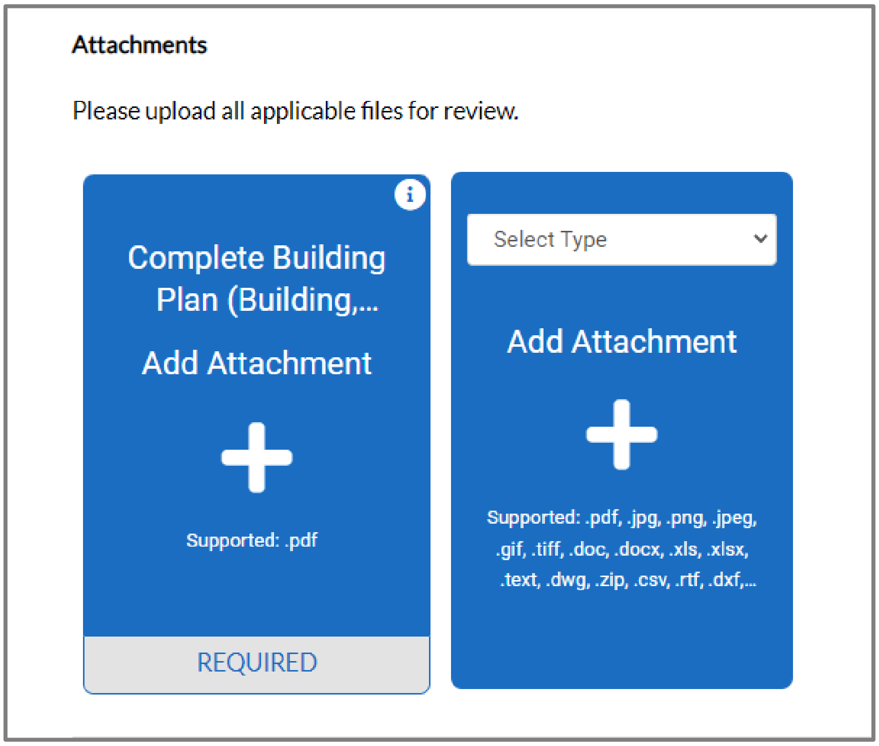


NOTE Required fields are noted with a red asterisk.

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.

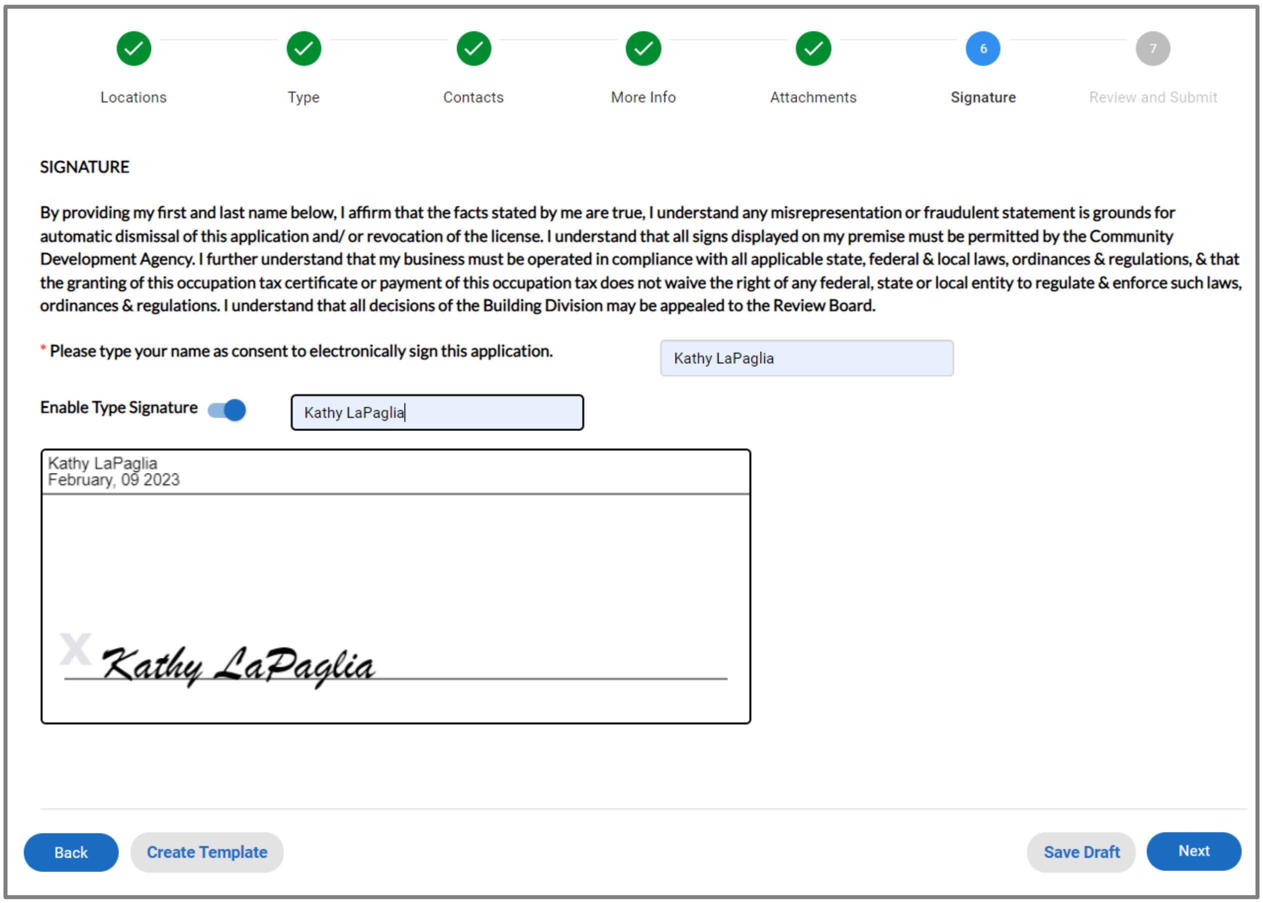


NOTE Jurisdictions may require customers to attach specific documents before moving to the next step. Customers must upload files used with electronic reviews as .pdf files to be compatible with Bluebeam, which jurisdictions use to mark up documents as part of the review process.

Step 6: Signature

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

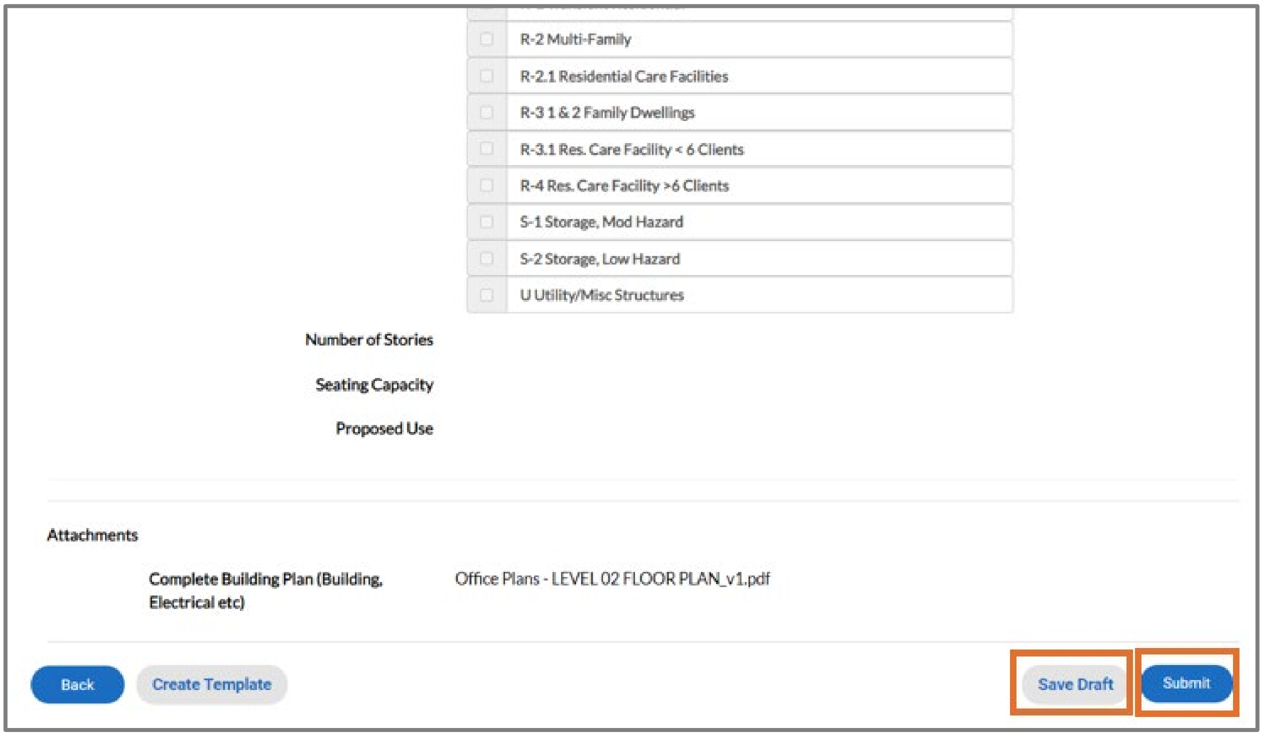
1. Type the **applicant's name** in the first field.
2. Toggle on **Enable Type Signature**.
3. Type the **name** again and Civic Access populates the signature field.
4. Or leave the **Enable Type Signature** toggled off and draw the **signature** in the signature field.
5. Click **Next**.



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.



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.