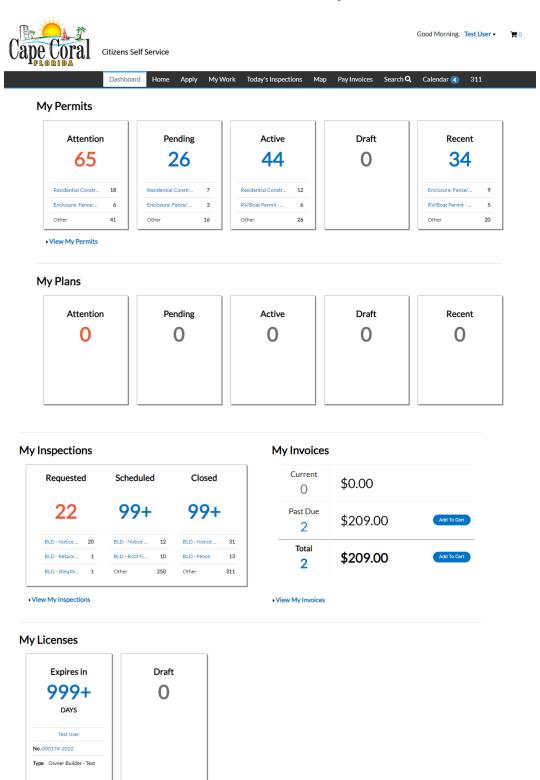
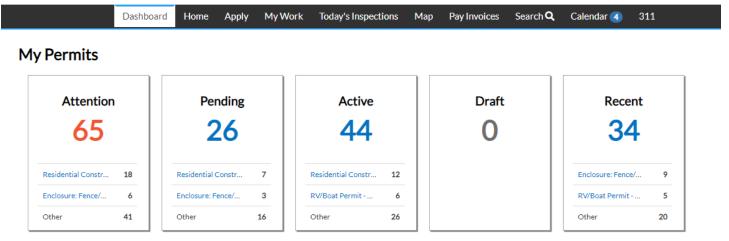
CSS Dashboard and My Work



View My Licenses

My Permits and My Plans

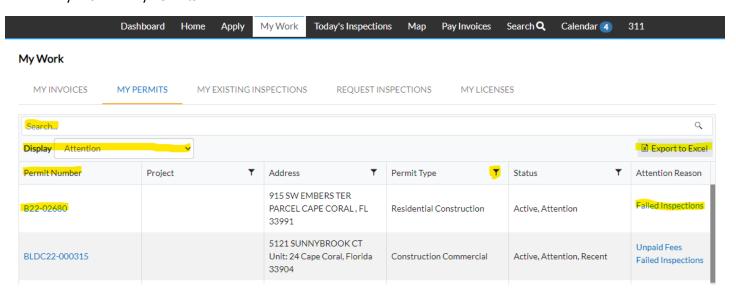
1. Clicking any of the boxes in the My Permits or My Plans section will take you to the same screen as the "My Work" tab (see point 2 below), but with filters automatically applied



- View My Permits
 - a. Attention shows all permits that need attention for failed inspections, unpaid fees, resubmit files, failed reviews, or on hold
 - b. Pending shows all permits that are not yet issued or closed out
 - c. Active shows issued permits
 - d. Draft shows permit applications that have not yet been submitted (saved as a draft)
 - e. Recent shows permits recently viewed
 - f. View My Permits shows all issued permits (same as the "Active" box)
 - g. Above points also apply to "My Plans"
 - i. "My Plans" shows plans submitted to be mastered

My Permits and My Plans (continued)

2. My Work → My Permits



- a. Search bar: search by permit number, address, permit type, status, or attention reason
- b. <u>Display:</u> change the drop down menu to filter by attention reason, pending permits, active permits, or to see all permits. *Use this to filter out the permits "on hold"
- c. Headers: click the top of any column to sort alphabetically
- d. Filters: click the filter icon to filter by permit type
- e. Permit Number: click the blue permit number link to go directly to that permit's summary page
- f. Export: click the button to export as an excel file
- g. Attention Reasons: click the blue link for more information
 - i. Unpaid Fees: takes you to the Permit Fee Summary page where you can pay fees
 - ii. Failed Inspections: takes you to the Permit Inspections tab where you can see failure reasons and reschedule
 - iii. Failed Reviews: takes you to the Permit Reviews tab where you can see plan review rejection comments
 - iv. Resubmit File: takes you to the Permit Attachment tab where you can upload the documents needed
 - v. On Hold: this does NOT mean the permit itself is on hold. Click the permit number, then the "Holds" icon to see the reason. Flood Zone Conditions need no action. Protected Species Conditions require a burrowing owl/gopher tortoise affidavit, or eagle affidavit, to be submitted, as applicable (see Permitting with Protected Species handout)

My Inspections

1. Clicking any of the boxes in the My Inspections section will take you to the same screen as the "My Work" tab (see point 2 below), but with filters automatically applied

My Inspections

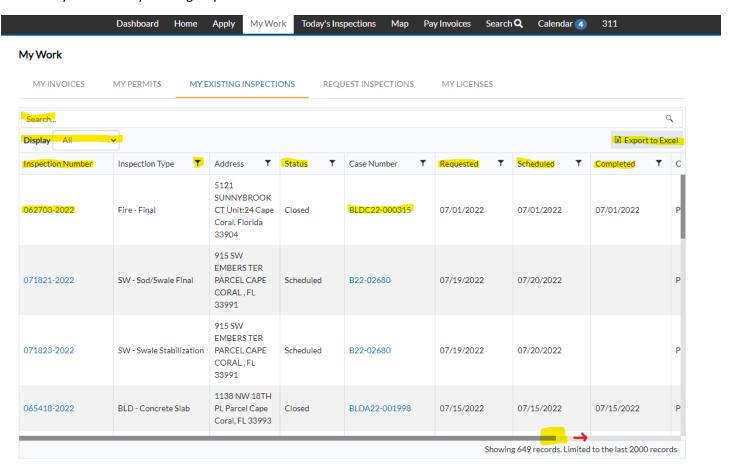
Requested	Scheduled	Closed
22	99+	99+
BLD - Notice 20	BLD - Notice 12	
BLD - Retaini 1 BLD - Sheathi 1	Other 250	

View My Inspections

- a. Requested shows inspections that have been requested
- b. Scheduled shows inspections that have been scheduled, which means an inspector has been assigned
- c. Closed shows inspections that have been resulted (either passed, failed, or partialed)
- d. View My Inspections shows scheduled inspections

My Inspections (continued)

2. My Work → My Existing Inspections



- a. <u>Search bar:</u> search by permit number, inspection number, address, inspection type, inspection status, or yes/no (for reinspection needed)
- b. <u>Display:</u> change the drop down menu to filter by inspections that are requested, scheduled, or closed
- c. Export: click the button to export as an excel file
 - d. Headers: click the top of any column to sort alphabetically
 - e. Filters: click the filter icon to filter by inspection type
 - f. <u>Inspection Number:</u> click the blue inspection number link to go directly to the inspection detail page
 - g. Case Number: click the blue link to go to the permit summary page
 - h. Requested: shows the date the inspection is scheduled for
 - i. Scheduled: shows the date the inspection was assigned to an inspector
 - j. <u>Completed:</u> shows the date the inspector resulted the inspection (does not necessarily mean the inspection has passed)
 - k. Horizontal Scroll Bar: slide to see if reinspection is needed or not
 - I. <u>Reinspection:</u> Yes = the inspection needs to be rescheduled. Click the blue inspection number link for more details. No = the inspection does not need to be rescheduled (either passed or is not needed)



My Invoices

- 1. Current: open invoices with fees due
- 2. Past Due: invoices that are past the due date and still have fees due
- 3. Add to Cart: will take you directly to the Shopping Cart

My Invoices

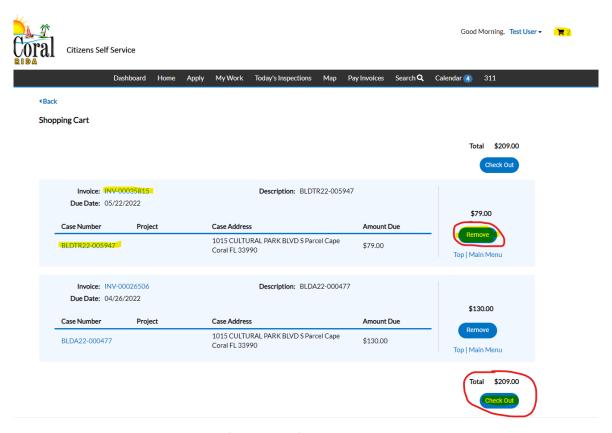
Past Due	\$0.00 \$209.00	Add To Cart
Total 2	\$209.00	Add To Cart

View My Invoices

4. View My Invoices: will take you to the "My Work → My Invoices" screen. Default view shows unpaid invoices

My Invoices (continued)

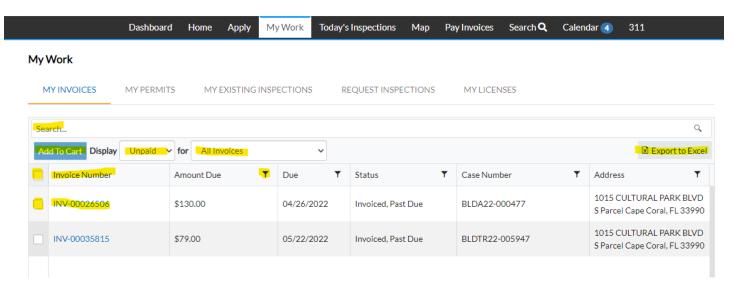
Shopping Cart



- a. Clicking the shopping cart icon (upper right) will also take you to this screen
- b. Click the invoice number for itemized fees and to see the billing contact
- c. Click the permit number to see the permit summary page
- d. Click remove to delete any invoices you don't want to pay at that time
- e. Click check out to pay all of the invoices listed (if you don't want to pay all invoices, you must delete them from your shopping cart)

My Invoices (continued)

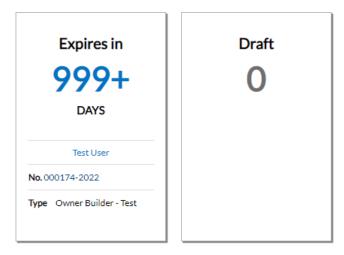
My Work → My Invoices



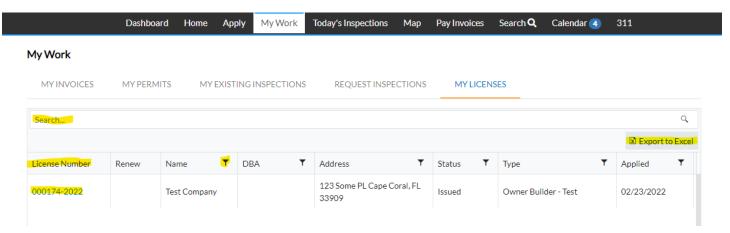
- f. Search Bar: search by invoice number, permit number (case number), or address
- g. Export: click the export to excel button to create an excel sheet
- h. Add to Cart: click the box beside the permit number that you would like to pay, then click "add to cart" to go directly to your shopping cart to check out. If you want to add all invoices, click the top box to select all
- i. Display: change the drop down menu to see unpaid, paid, or voided invoices
- j. For: change the drop down menu to see the invoice type (inspections, permits, plans, business license, professional license, or application fees)
- k. Header: click any header to sort alpha-numberically
- I. Filter: click the filter icon to search for invoices between certain dates, or for certain amounts
- m. Invoice Number: click the blue link to see the invoice details (itemized fees; billing contact)

My Licenses

My Licenses



- View My Licenses
- 1. Clicking the "Expires in" box will take you directly to the License Details page
- 2. Clicking "View My Licenses" will take you to "My Work → My Licenses"



- a. Search Bar: search by license number, company name, company address, or license type
- b. Header: click the top of any column to sort alphabetically
- c. License Number: click the blue link to go directly to the License Details page
- d. Filter: click to apply detailed filters
- e. Export to Excel: click the button to create an excel sheet