# **Citizen Self-Service Portal User Guide**

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## Citizen Self-Service Portal User Guide

## **OVERVIEW**

The Citizen Self-Service Portal provides the Oakland County Water Resources Commissioner's (WRC) customers with the ability to apply for certain permits, view and pay invoices, access important permit requirements and search for Drain, Sanitary Sewer Extension, Soil Erosion and Water Extension permits.

## REGISTERING FOR A CITIZEN SELF-SERVICE ACCOUNT

In order to apply for a permit, you must create an account.

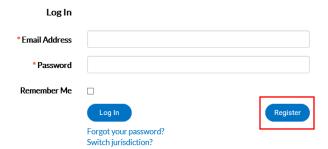
1. On the home page, click on Login or Register



#### **Login or Register**

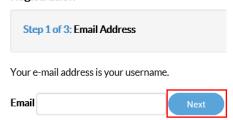
To view or apply for a permit, click here to login/create an account. Forgot password? Click Here

2. Click on Register



3. Enter your email address and then click Next

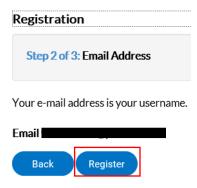
#### Registration



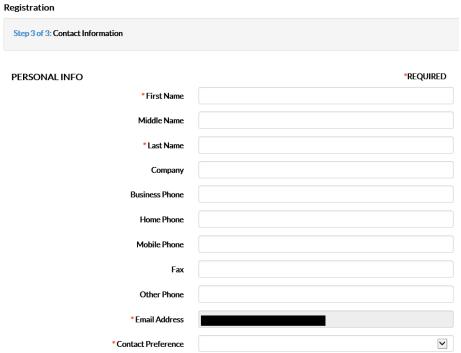


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- 4. Sign into your email and look for the email from *svc.CSSSMTP@tylerhost.net* and click **Confirm** at the bottom of your email. Note: If you do not receive this email, please check your junk folder to make sure the email was not automatically placed there.
- 5. This will take you back to Citizen Self-Service, where you will click Register.



6. Enter all required (\*) information in *Personal Info, Password* and *Address* sections and any additional information you would like.

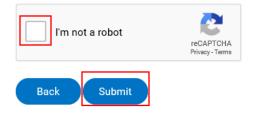




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## **PASSWORD** The password must be at least 8 characters long with at least one lower case letter, one upper case letter, and one number. \* Password \*Confirm Password **ADDRESS** Country Type United States **Enter Address** Enter a location \* Street Number \*Street Name \*City ~ State \* Postal Code County Unit or Suite ~ Billing \* Address Type

7. Check the box next to I'm not a robot and then click **Submit**.



8. Your account is created, you may now click Log In

Thank you for registering

Thank you for registering for an account. Your account is now active and ready to be used.





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## SIGNING INTO THE CITIZEN SELF-SERVICE PORTAL

If you already have a Citizen Self-Service account, logging in will give you access to apply for a permit, pay invoices and view your dashboard.

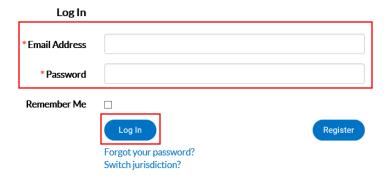
1. On the home page, click Login or Register



#### Login or Register

To view or apply for a permit, click here to login/create an account. Forgot password? Click Here

2. Enter your email address and password, then click Log In.



## **FORGOT MY PASSWORD**

If you forgot your password, you will be able to reset it.

1. On the home page, click Login or Register



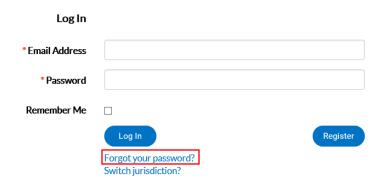
#### **Login or Register**

To view or apply for a permit, click here to login/create an account. Forgot password? Click Here

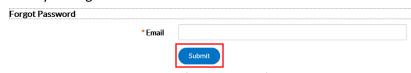


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2. Click Forgot your password?



3. Enter your registered email address and click Submit



- 4. Sign into your email and look for the email from svc. CSSSMTP@tylerhost.net and click **Reset** at the bottom of your email. Note: If you do not receive this email, please check your junk folder to make sure the email was not automatically placed there.
- 5. This will take you back to Citizen Self-Service, where you can type in your new password and then click **Reset.**



6. You will receive a message at bottom of screen and will be able to log in by clicking **Click here to log in**.



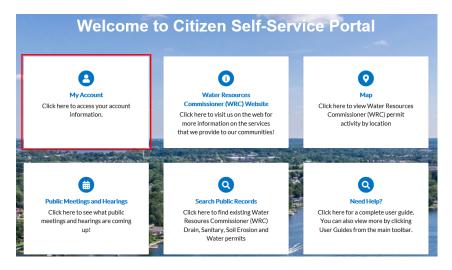


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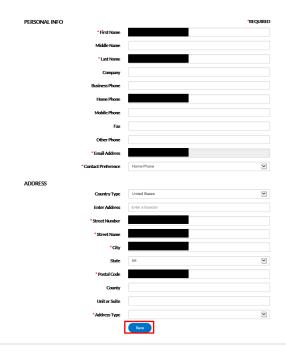
## **UPDATING PROFILE INFORMATION**

If your personal information changed, you can update it on your profile.

- 1. Log in to Citizen Self-Service
- 2. Click on My Account from the welcome page



- 3. Update information as needed.
- 4. Click Save.





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## **MAIN TOOLBAR OPTIONS**

#### **SANITARY**

 Click on Sanitary drop-down to find important design standards, forms, specifications, standard details and wastewater disposals standard for sanitary sewer extension permits.



#### SOIL EROSION

• Click on **Soil Erosion** drop-down to find FAQ, jurisdiction map, printable forms, program information and standard details for soil erosion permits.



#### STORM DRAIN

• Click on **Storm Drain** drop-down to find design standards, forms, specification and standard details for drain permits.



#### WATER

• Click on **Water** drop-down to find design standards, forms, specifications, standard details and water use ordinance.



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#### **USER GUIDES**

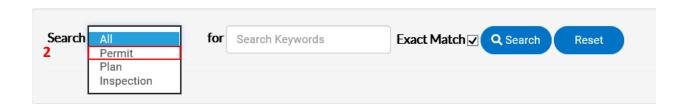
• Click on **User Guides** drop-down to find step by step instructions on a multitude of different topics within Citizen Self-Service Portal.



## **SEARCHING PERMITS**

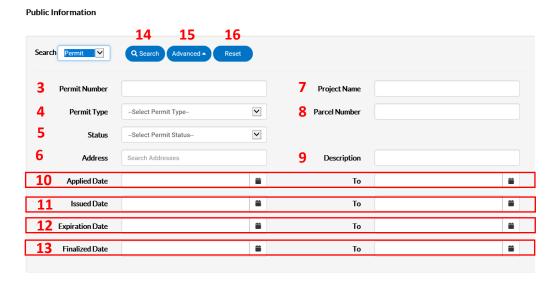
- 1. Click **Search** on the home screen, which will take you to the following page.
  - NOTE: Not all fields need to be filled in to perform search
- 2. Select Permit from search drop-down.

#### **Public Information**





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- 3. Enter the permit number either fully or partially, if desired.
- 4. Select the appropriate permit type from the drop-down, if desired.
- 5. Select the current permit status from the drop-down, if desired.
- 6. Enter the site address either fully or partially, if desired.
- 7. Enter the project name either fully or partially, if desired.
  - NOTE: Currently only available on Drain, Sewer Extension and Water Extension permits
- 8. Enter the parcel identification number (PIN) either fully or partially, if desired.
- 9. Enter the description of the project either fully or partially, if desired.
- 10. Select a date range of applied dates, if desired.
- 11. Select a date range of issued dates, if desired.
- 12. Select a date range of expiration dates, if desired.
- 13. Select a date range of finalized dates (closed), if desired.
- 14. The Search button runs a search based on the selected criteria.
- 15. The Advanced button toggles between hiding and showing search criteria fields.
- 16. The Reset button clears your all search criteria fields.

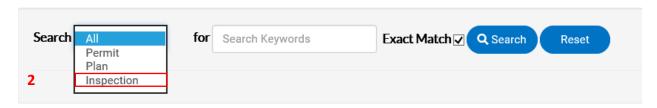
## **SEARCHING INSPECTIONS**

- 1. Click **Search** on the home screen, which will take you to the following page.
  - NOTE: Not all fields need to be filled in to perform search
- 2. Select *Inspection* from search drop-down.

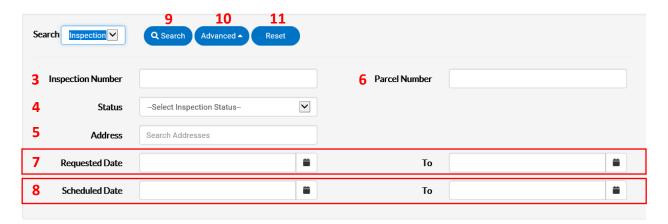


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#### **Public Information**



#### **Public Information**



- 3. Enter the inspection number either fully or partially, if desired.
- 4. Select the current status of the inspection either fully or partially, if desired.
- 5. Enter the site address either fully or partially, if desired.
- 6. Enter the parcel identification number (PIN) either fully or partially, if desired.
- 7. Select a date range of requested dates, if desired.
- 8. Select a date range of scheduled dates, if desired.
- 9. The Search button runs a search based on the selected criteria.
- 10. The Advanced button toggles between hiding and showing search criteria fields.
- 11. The Reset button clears your all search criteria fields.

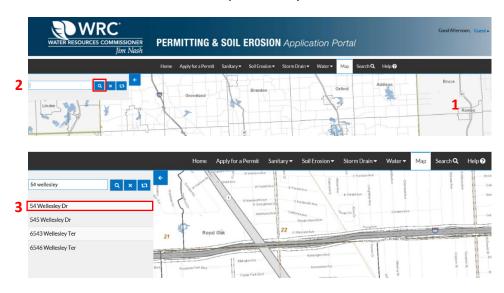
## **SEARCHING FROM THE MAP**

1. Click Map on the home screen, which will take you to the following page.

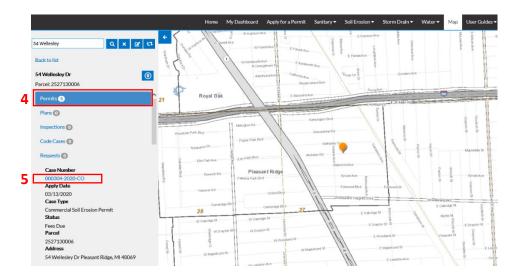


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- 2. Click on search bar and type in a site address or parcel identification number (PIN) and hit *Enter* or click on magnifying glass.
  - NOTE: Map will zoom to the address at top of list
- 3. Click on desired address from the search results, if needed.
  - NOTE: Search results show all permit activity within a ½ mile of selected address



- 4. Click on **Permits** to view basic permit information. You can use the scroll bar to move up or down in the list of results.
- 5. Click on Case Number hyperlink to view additional information about the permit



6. Click on each tab to see more detailed information about the permit.



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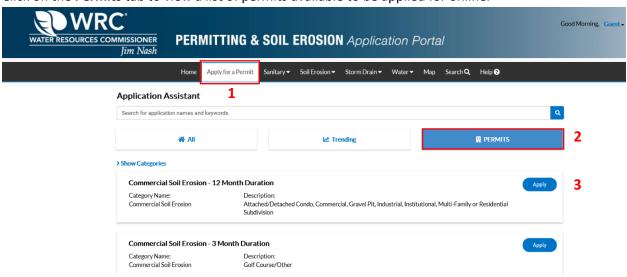
NOTE: Only logged in case contacts on the permit have access to more detailed information. If you are not a case contact on the permit you will see the following message: This information is not available.

#### Permit Number: 000304-2020-CO Permit Details | Tab Elements | Main Menu Type: Commercial Soil Erosion Status: Submitted - Online Project Name: - 12 Month Duration Summary Locations Fees Inspections Attachments Contacts Sub-Records Holds Meetings More Info · This information is not available.

## **APPLY FOR A PERMIT**

You must be a registered user in order to apply for a permit with the Water Resources Commissioner's (WRC) office.

- 1. From the CSS home page, click **Apply for a Permit**.
- 2. Click on the **Permits** tab to view a list of permits available to be applied for online.



- 3. Find the permit type that you would like to apply for and click the **Apply** button.
- 4. Log in to Citizen Self-Service, if needed.

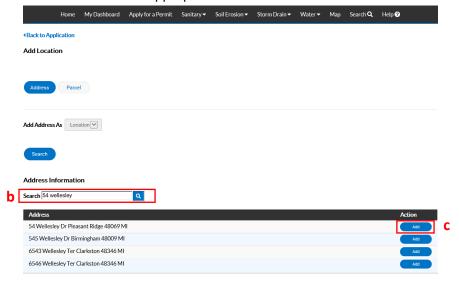


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5. Your permit application has now begun, at any time during the application process you can save your progress by clicking **Save Draft**.

# a. Click Add Location Apply for Permit - Commercial Soil Erosion - 12 Month Duration \*REQUIRED \*\*REQUIRED \*\*Locations\*\* Type Contacts More Info Attachments Review and Submit \*\*LOCATIONS\*\* Please add the site address or parcel identification number (PIN) associated with this application. \*\*Location\*\* Add Location \*\*REQUIRED\*\* \*\*R

- b. Enter the address you would like to add and click the magnifying gass next to the right of the search bar.
  - NOTE: If you are trying to search an address that is a vacant lot, please skip to Step 9.
- c. Click **Add** on the appropriate address from the list of search results.





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#### d. Click Next

LOCATIONS

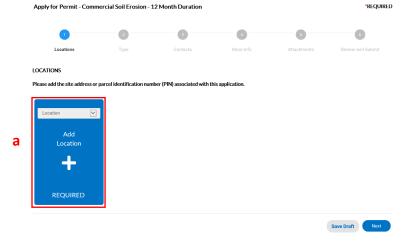
 $Please \ add\ the\ site\ address\ or\ parcel\ identification\ number\ \mbox{(PIN)}\ associated\ with\ this\ application.$ 





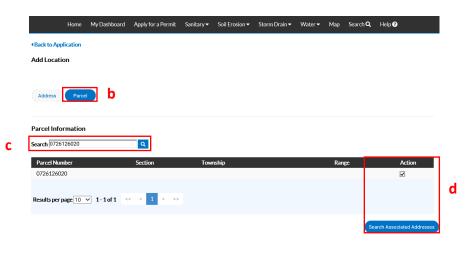
#### ADD LOCATION BY PARCEL IDENTIFICATION NUMBER (PIN):

- a. Click Add Location
- b. Click on the Parcel tab.
- c. Enter the parcel identification number (PIN) without dashes (ex. 2527130006) and click the magnifying glass next to the right of the search bar.
- d. Click the check box under Action and then click Search Associated Addresses





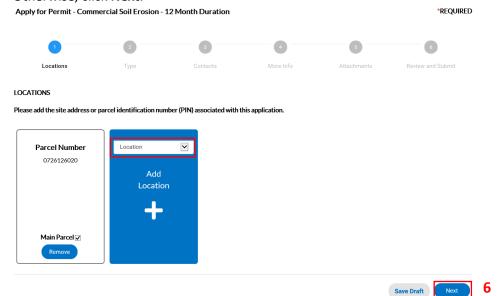
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e. Click Add Selected



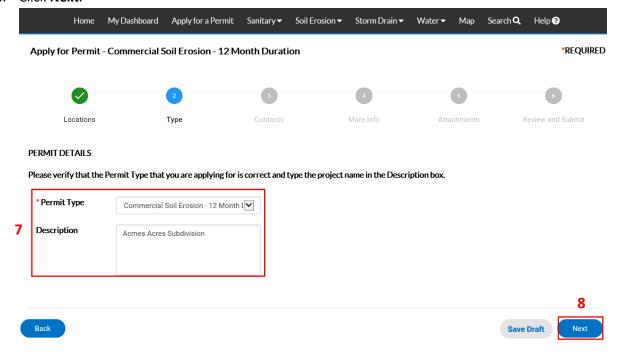
6. If you have more addresses or parcels to add, you can do so by selecting the appropriate type from the **Location** drop-down menu and repeating the steps above for site address or parcel. Otherwise, click **Next**.





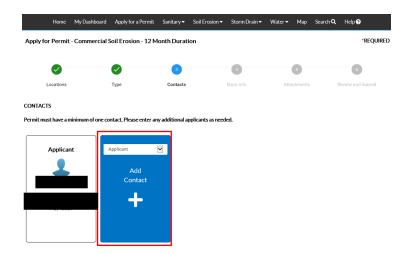
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- 7. Verify that **Permit Type** that you are applying for is correct and type the project name in **Description**.
- 8. Click Next.



#### SEARCH AND ADD EXISTING CONTACT(S)

a. Click Add Contact to add additional contacts on the permit





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- b. Enter the contact name, email address or company name, then click the magnifying glass to the right of the search box.
- c. Click on the star to the left of the contact to add them to your Favorites list if you work with this contact on multiple permits that you may apply for in the future.
- d. Locate your desired contact and click  $\boldsymbol{Add}.$

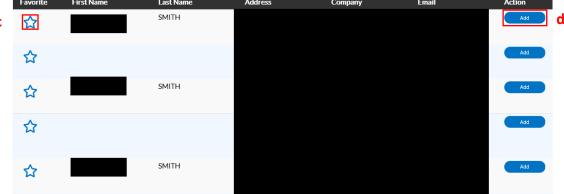
Add Contact As Applicant 

Search Enter Manually My Favorites

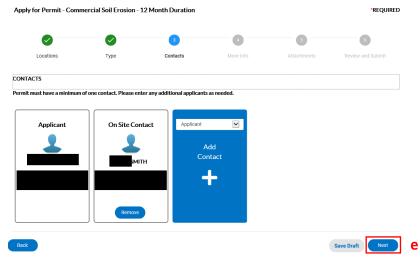
Sort Relevance 

Favorite First Name Last Name Address Company Email Action

SMITH



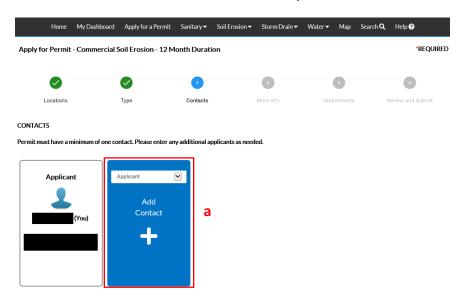
e. If additional contacts are needed, you may add them by repeating the steps above. Otherwise, click **Next.** 



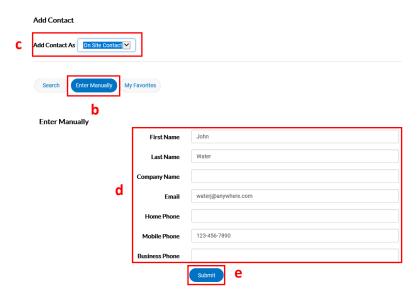
# **Citizen Self-Service Portal User Guide**

## ADD NEW CONTACT(S)

a. Click Add Contact to add additional contacts on the permit.



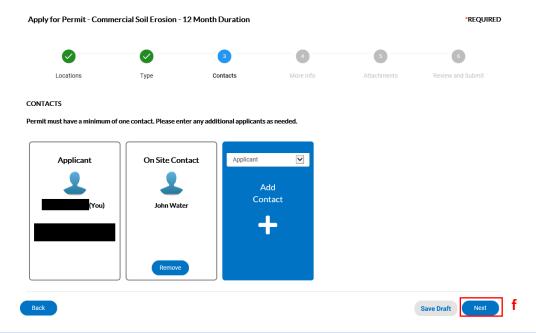
- b. Click the Enter Manually tab.
- c. Select type of contact from the Add Contact As drop-down.
- d. Enter the required (\*) information for new contact.
- e. Click Submit





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f. If additional contacts are needed, you may add them by repeating the steps above. Otherwise, click **Next.** 



#### REVIEW APPLICATION REQUIREMENTS

- a. Please review all information and requirements related to the permit that you are applying for, as well as entering information in the required (\*) fields along with any other information.
- b. After carefully reviewing all information and requirements, click Next.

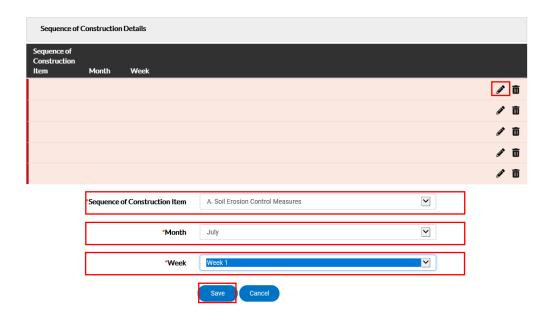


#### SEQUENCE-OF-CONSTRUCTION CHART (RESIDENTIAL SOIL EROSION PERMIT ONLY)

- a. Click pencil on the line.
- b. Select Item A. Soil Erosion Control Measures from Sequence of Construction Item dropdown list.
- c. Select Month from dropdown list in which this item will be completed.
- d. Select Week of the Month from the dropdown list in which this item will be completed.
- e. Click Save.
- f. Repeat steps a-e for the remaining items B-F from the Sequence of Construction Item dropdown list. (\*\*See below for an example of a Sequence of Construction Chart that is filled out correct.)



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#### \*\*Example of a Sequence of Construction Chart filled out correctly

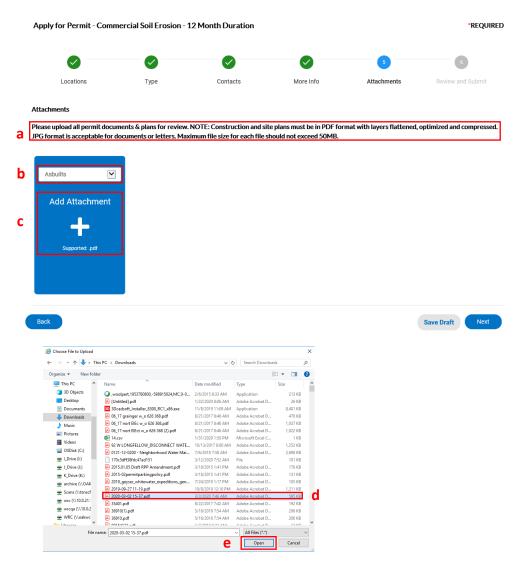


#### ADDING ATTACHMENTS

- a. Review attachment requirements before uploading any attachments.
- b. Select the appropriate attachment type from the drop-down.
- c. Click Add Attachment.
- d. Navigate to the file that you would like to attach, select it.
- e. Click Open.



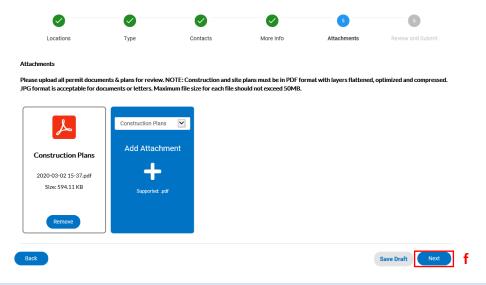
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f. Repeat steps b - e for any additional attachments you want to upload. Otherwise, click Next.



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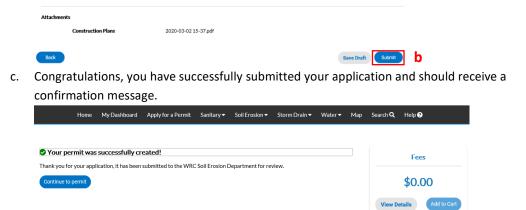
#### SUBMITTING YOUR APPLICATION

- a. On the final page, please ensure that you have reviewed that all the information is correct.
- b. Click **Submit** at the bottom to submit your application for review.





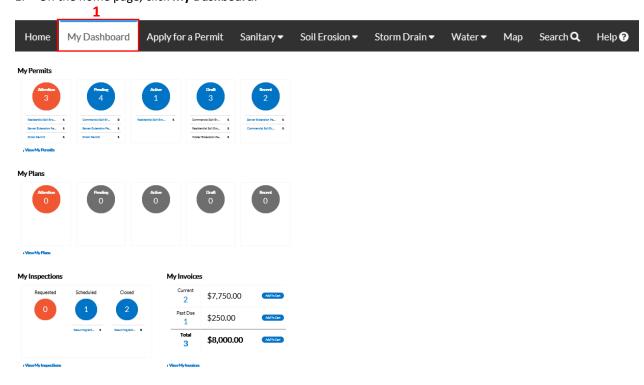
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# **NAVIGATING YOUR DASHBOARD (REGISTERED USERS ONLY)**

As a registered user, you have access to an easy to use dashboard to view permits, inspections (if applicable) and view/pay invoices.

1. On the home page, click My Dashboard.



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#### MY PERMITS DASHBOARD

- a. **Attention** Shows number of permits that require an action.
- b. **Pending** Shows number of permits that have been submitted for review.
- c. Active Shows number of active permits that have been approved.
- d. **Draft** Shows number of applications you have saved but have not been submitted.
- e. Recent Shows permits with recent activity.
- f. View My Permits Shows list of your open permits.



#### MY INSPECTIONS DASHBOARD

- a. Requested Shows inspections that have been requested but has not been scheduled.
- b. **Scheduled** Shows inspections that have been scheduled.
- c. Closed Shows inspections that have been closed.
- d. View My Inspections Shows list of your inspections.



#### MY INVOICES DASHBOARD

- a. **Current** Shows number of invoices with due dates that are current.
- b. Past Due Shows number of invoices that are past due.
- c. **Total** Shows total number of current and past due invoices.
- d. View My Invoices Shows list of all unpaid invoices.





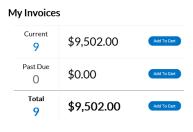
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## **MAKING A PAYMENT**

Click on My Dashboard from the top menu bar

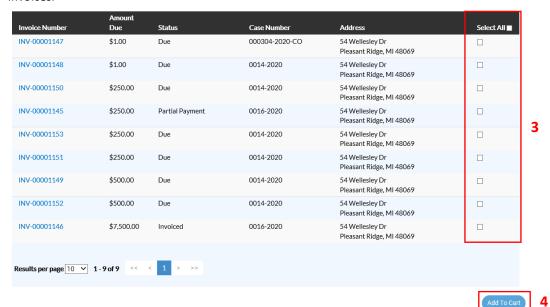


2. Navigate to your My Invoices dashboard and click View My Invoices



2 View My Invoices

3. Select one or more invoices by clicking the check box on the right-hand side or click **Select All** to select all invoices.



4. Click **Add to Cart**.

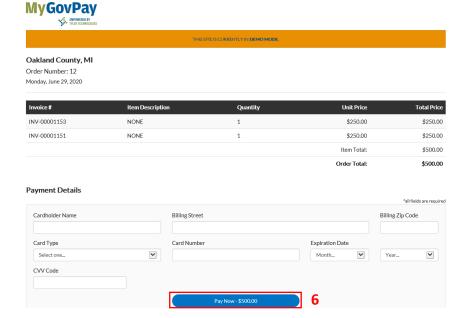
5. Review list of selected invoices and click Check Out



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6. Enter in payment information and click Pay Now.



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## **RE-SUBMIT REVISED FILE(S)**

If you received notification that a plan review failed on any of the permits that you applied for, you can revise the plans and re-submit them for approval.

- 1. From the CSS home page, click My Dashboard.
- Click Attention from your My Permits dashboard.



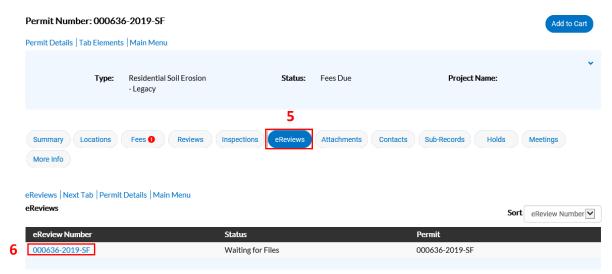
- View My Permits
- 3. Locate permit(s) that has *Resubmit File* as an attention reason.
- 4. Click Permit Number hyperlink.



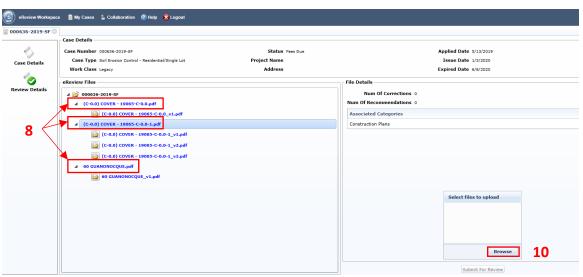
- 5. Click the **eReviews** tab.
- 6. Click eReview Number hyperlink.



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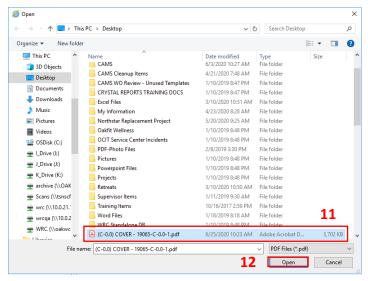
- 7. If prompted, enter User Name and Password and click Login (Note: Login Information is the same as when applying for a permit). If not prompted, it will open the permit review documents.
- 8. Click Headers of each file to determine what file needs to be revised and re-submitted.
- Make necessary revisions on file(s) as requested and save a new copy to your desired location on your computer. (NOTE: Construction and site plans must be in PDF format with layers flattened, optimized and compressed. JPG format is acceptable for documents or letters. Maximum file size for each file should not exceed 50MB.)



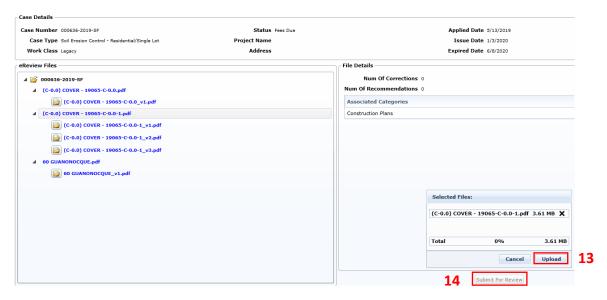
- 10. Click Browse.
- 11. Locate and select revised file to upload.
- 12. Click Open.



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- 13. Click Upload.
- 14. Click Submit for Review



15. Click OK



16. You have successfully re-submitted a file for review. You can now close out of the EReview Portal web browser tab.