Civic Access User Guide

Enterprise Permitting & Licensing

2023

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Overview

This guide describes how public users and registered users access Tyler Technologies' Civic Access online solution, a public-facing application that allows customers to interact with land management, permitting, and business licensing processes administered by local government jurisdictions. Users can search and apply for permits, plans, and licenses; search for parcels, projects, construction projects, operational permits; renew licenses, and schedule inspections.

Home Page, Main Menu Bar

Since jurisdictions administer and configure their own Civic Access Home page and main menu bar, the menus and cards may vary. The public may view the Home, Apply, Map, Report, Fee Estimator, Pay Invoices, Search, Calendar, and/or Help options in the menu. The Home page also may display Search Public Records, Apply, Login or Register, Pay Invoices, Map, Calendar, Request Inspection, and/or Estimate Fees menu cards. Administrators also can create custom menu cards.
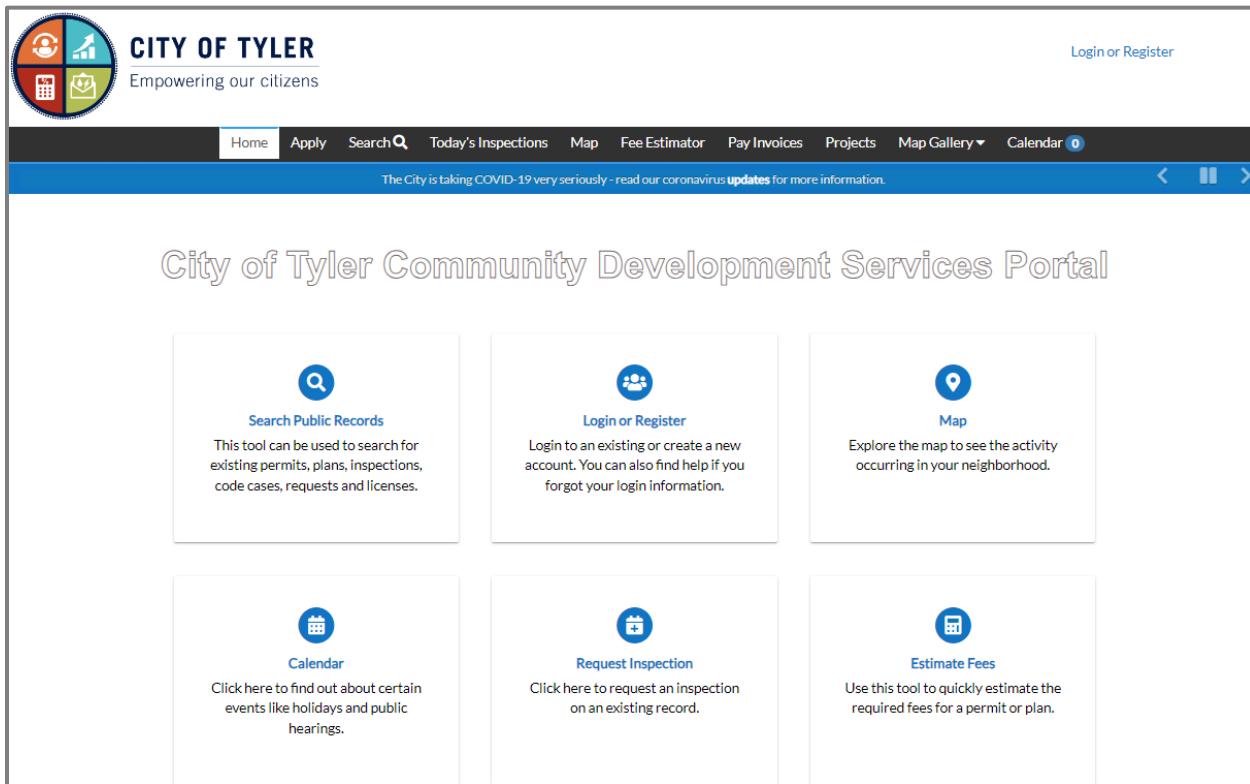

NOTE The Home page, Welcome page, and Dashboard may be configured differently than shown in this user guide. For information about configuring pages, please refer to the Civic Access Setup Guide.

Search Public Records without Logging In

To access public information without logging in to Civic Access:

1. Navigate to the jurisdiction's **Civic Access site**.
2. Click **Search** in the menu on the Civic Access Home page.
3. Or click the **Search Public Records card**.

4. Leave the word **All** in the search dropdown to search through all records.
5. Type **search terms** in the field. Type an asterisk as a wildcard before or after search terms (e.g., 2023*, *POOL *Main St).
6. Click **Search**.
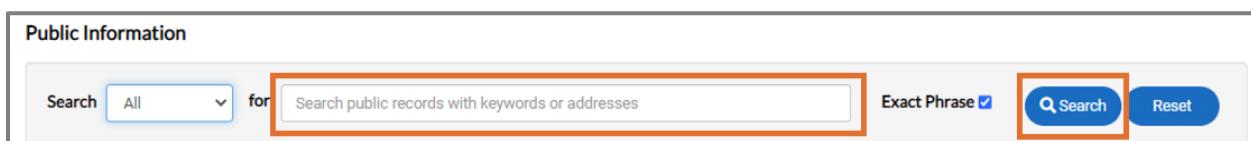
7. Select another **option** in the **Search** dropdown (e.g., Permit) to display additional fields to use as search criteria.
8. Click **Advanced.**
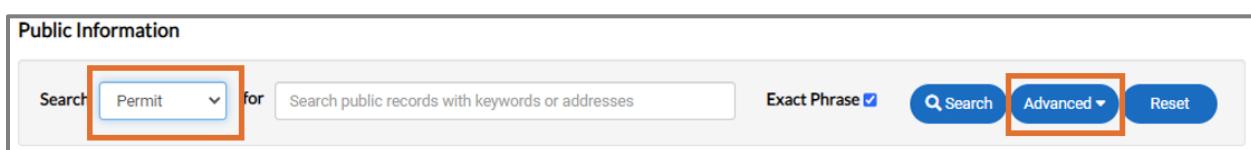
Permit

1. Type a partial or complete **Permit Number**.
2. Type a partial or complete **Project Name** associated with the permit.
3. Select the **Permit Type**.
4. Type a partial or full **Parcel Number** associated with the permit.
5. Select a permit **Status**.
6. Type a partial or full **Address** associated with the permit.
7. Type **key words** that might be in the permit Description.
8. Type **application dates** in the Applied Date and To fields or click the **calendar** and select **dates**.
9. Type **issued dates** in the Issued Date and To fields or click the **calendar** and select **dates**.
10. Type **expiration dates** in the Expiration Date and To fields or click the **calendar** and select **dates**.
11. Type **finalization dates** in the Finalized Date and To fields or click the **calendar** and select **dates**.
12. Click **Search** to display results.
13. Click **Advanced** to hide the search criteria.
14. Click **Reset** to clear the search criteria.
15. Click **Export** to export the results as a .csv file. Civic Access displays the Export button when the results display.

NOTE Customers do not have to enter data in all fields and may use any combination of criteria. Type an asterisk as a wildcard before or after search terms (e.g., 2023*, *POOL *Main St).

Plan

1. Type a partial or complete **Plan Number**.
2. Type a partial or complete **Project Name** associated with the plan.
3. Select the **Plan Type**.
4. Type a partial or full **Parcel Number** associated with the plan.
5. Select a **plan Status**.
6. Type a partial or full **address** associated with the plan.
7. Type **key words** that might be in the plan Description.
8. Type **application dates** in the Applied Date and To fields or click the **calendar** and select **dates**.
9. Type **completion dates** in the Completion Date and To fields or click the **calendar** and select **dates**.
10. Type **expiration dates** in the Expiration Date and To fields or click the **calendar** and select **dates**.
11. Click **Search** to display results.
12. Click **Advanced** to hide the search criteria.
13. Click **Reset** to clear the search criteria.
14. Click **Export** to export the results as a .csv file. Civic Access displays the Export button when the results display.

NOTE Customers do not have to enter data in all fields and may use any combination of criteria. Type an asterisk as a wildcard before or after search terms (e.g., 2023*, *POOL *Main St).

Inspection

1. Type a partial or full **Inspection Number**.
2. Type a partial or full **Parcel Number** associated with the inspection.
3. Select an **Inspection Type**.
4. Select an **inspection Status**.
5. Type a partial or full **address** associated with the inspection.
6. Type **requested dates** in the Requested Date and To fields or click the **calendar** and select **dates**.
7. Type **scheduled dates** in the Scheduled Date and To fields or click the **calendar** and select **dates**.
8. Click **Search** to display results.
9. Click **Advanced** to hide the search criteria.
10. Click **Reset** to clear the search criteria.
11. Click **Export** to export the results as a .csv file. Civic Access displays the Export button when the results display.

Public Information

Search	Inspection ▾		Q Search	Advanced ▲	Reset	Export
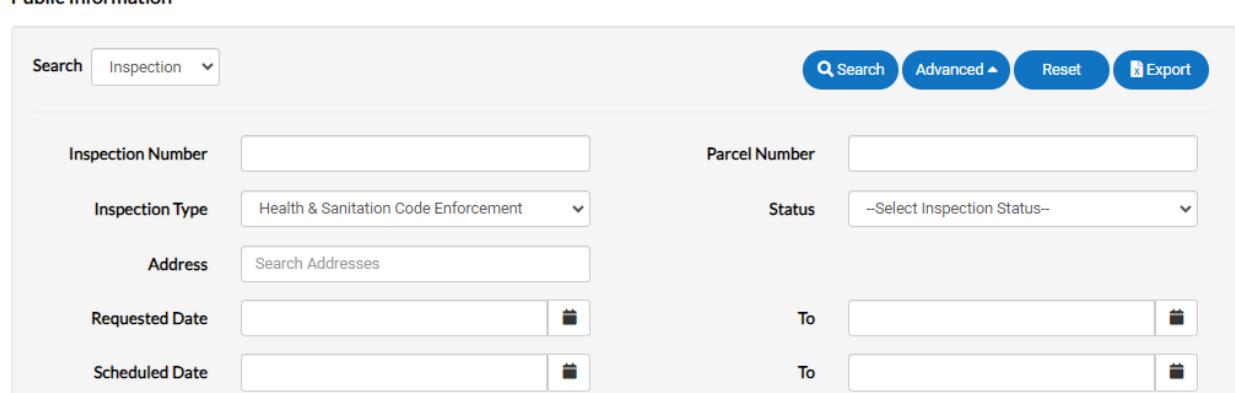
Inspection Number		Parcel Number	
Inspection Type	Health & Sanitation Code Enforcement ▾	Status	--Select Inspection Status-- ▾
Address	Search Addresses		
Requested Date		📅	To		📅
Scheduled Date		📅	To		📅

NOTE Customers do not have to type data in all fields and may use any combination of criteria. Type an asterisk as a wildcard before or after search terms (e.g., 2023*, *POOL *Main St).

Code Case, Request, License

To search for other types of records such as a code case, request, license, or project:

1. Select the desired **record type** in the Search dropdown.
2. Click **Advanced**.
3. Type the **information**.
4. Click **Search**.

Public Information

Search	All ▾	for	Search public records with keywords or addresses	Exact Phrase ☑	Q Search	Reset
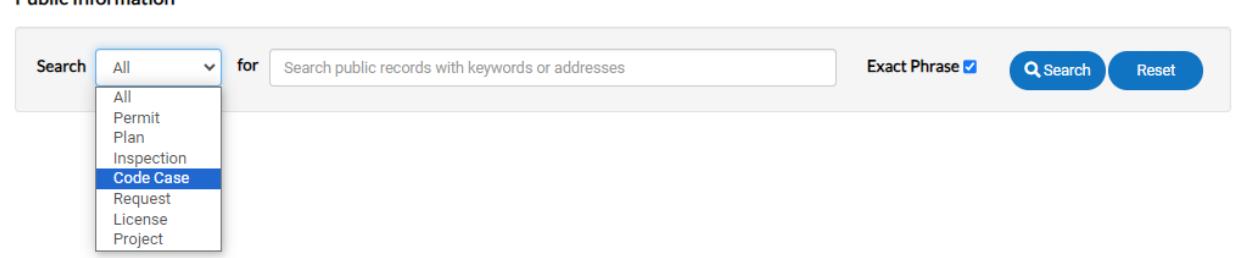
All
Permit
Plan
Inspection
Code Case
Request
License
Project

Register for Access

Many jurisdictions started using TID-C as the authentication method for Civic Access customers, beginning with EPL 2023.1+. This Tyler-wide authentication solution is designed to allow online products to use the same authentication method. Tyler enables TID-C authentication during deployment of new upgrades. For more information about TID-C authentication, please refer to the Civic Access Legacy to TID-C Authentication guide.

1. To register for Civic Access, please refer to the instructions in the **Civic Access Legacy to TID-C Authentication guide**.

Log in

To log in to Civic Access if already registered:

1. Navigate to the jurisdiction's **Civic Access Home page**.
2. Click **Login or Register** in the top right corner of the page.
3. Or click the **Login or Register card** on the page.
4. If previously registered:
   a. Type an **Email address**.
   b. Click **Next**.
5. Or click a **sign-in option** and follow the steps:
   a. Google
   b. Apple
   c. Microsoft
   d. Facebook
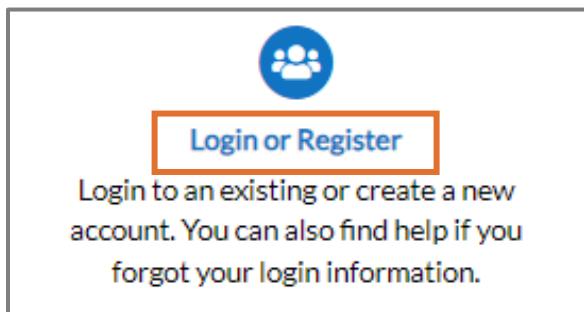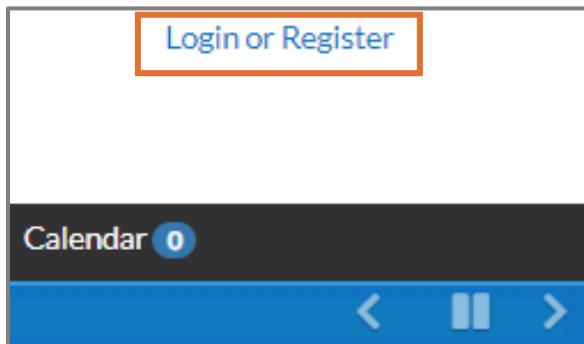
The browser may display a security method option based on the account used to log in.

6. Click **Select** next to the desired option.

Email Option

1. Click **Send me an email**.
2. Type the **code** from the email.
3. Click **Verify**.

The browser displays the jurisdiction's Civic Access Home page.

Password Option

1. Type the **Password**.
2. Click **Verify**.

The browser displays the jurisdiction's Civic Access Home page.

Forgotten Password

To reset a forgotten password:

1. To reset a password, follow the instructions in the **Civic Access Legacy to TID-C Authentication guide**.

Unlock Account

1. To unlock an account, follow the instructions in the **Civic Access Legacy to TID-C Authentication guide**.

Dashboard

The Civic Access Dashboard allows customers to view a visual representation of aggregated data. It displays data about permits, plans, inspections, invoices, and licenses (if the jurisdiction issues them). Customers can access saved drafts of submissions and add unpaid invoices directly to the shopping cart. The dashboard displays data that is contextual to the registered user. The menu items on the Dashboard are configurable as to wear they appear on the Dashboard and may show additional custom options set up by a jurisdiction.

To access the Dashboard:

1. Log in as a **registered user**.
2. Click **Dashboard** in the menu on the Civic Access Home page.

The browser displays the Dashboard.

My Permits

Attention	Pending	Active	Recent	Draft
58	**99+**	**50**	**99+**	**0**
Building (Resident... 21	Building (Resident... 37	Building (Resident... 16	Building (Resident... 42	
Building (Non-Resi... 13	Building (Non-Resi... 21	Building (Non-Resi... 9	Building (Non-Resi... 19	
Other 24	Other 57	Other 25	Other 57	

▸ View My Permits

My Plans

Attention	Pending	Active	Recent	Draft
6	**4**	**1**	**4**	**0**
Planned Unit Devel... 2	Site Plan - New 4	Planned Unit Devel... 1	Site Plan - New 3	
Land Use - Special U... 1			Planned Unit Devel... 1	
Other 3				

▸ View My Plans

My Inspections

Requested	Scheduled	Closed
31	**71**	**55**
Footing 4	Footing 11	Footing 13
Foundation W... 4	Foundation W... 9	Business Regi... 6
Other 23	Other 51	Other 36

▸ View My Inspections

My Invoices

Current 2	$4,300.00	Add To Cart
Past Due 29	$59,864.00	Add To Cart
Total 31	$64,164.00	Add To Cart

▸ View My Invoices

My Licenses

Expired	Expires in	Expires in	Expires in	Draft
33 DAYS	**255** DAYS	**296** DAYS	**304** DAYS	**0**
Test Business	PBG Construction, Tim Taylor	Yellow Rose Florist	Test Co.	
No. HOME-000072-2023	No. CON-000001-2020	No. RETL-000052-2023	No. RETL-000060-2023	
Type Home Business - Pho...	Type Contractor - General	Type Retail - Florist	Type Tobacco License	
Renew	Renew	Renew	Renew	

▸ View My Licenses

To use the Dashboard:

1. Click **Draft** in the My Permits or My Plans section to view saved permit or plan application drafts.

2. Click the desired **status card** in the My Permits section to view a list of the corresponding permits. Beneath each status is a breakdown of the permit types.
   a. Click **View My Permits** to view all permits.

3. Click the desired **status card** in the My Plans section to view a list of the corresponding plans. Beneath each status circle is a breakdown of the plan types.
   a. Click **View My Plans** to view all plans.

My Permits

Attention	Pending	Active	Recent	Draft
58	**99+**	**50**	**99+**	**0**
Building (Resident... 21	Building (Resident... 37	Building (Resident... 16	Building (Resident... 42	
Building (Non-Resi... 13	Building (Non-Resi... 21	Building (Non-Resi... 9	Building (Non-Resi... 19	
Other 24	Other 57	Other 25	Other 57	

▸ View My Permits

My Plans

Attention	Pending	Active	Recent	Draft
6	**4**	**1**	**4**	**0**
Planned Unit Devel... 2	Site Plan - New 4	Planned Unit Devel... 1	Site Plan - New 3	
Land Use - Special U... 1			Planned Unit Devel... 1	
Other 3				

▸ View My Plans

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4. Click the desired **status card** in the **My Inspections** section to view a list of the corresponding inspections. Beneath each status is a breakdown of the inspection types.
   a. Click **View My Inspections** to view all inspections.

5. Click **Add to Cart** next to **Current**, **Past Due**, or **Total** in the My Invoices section to add the corresponding invoices to the shopping cart.
   a. Click **View My Invoices** to view all invoices.

6. Click **Renew** in the **My Licenses** section to renew the license.
   a. Click **View My Licenses** to view all licenses.

My Permits

1. Click the **Attention card** to view a list of all permit applications that need the customer's attention. The list displays on the My Work page with each project name, address attached to the permit, type, status, and the reason that the permit needs the customer's attention. These permits may have active holds, unpaid fees, failed reviews (submittals), failed inspections, eReview file resubmissions, or do not have a completed status.

2. Click the **Pending card** to view a list of all permit applications with a pending status. The list displays on the My Work page with each project name, address attached to the permit, type, and status. These permits do not have an issue date, final date, or an expiration date.

3. Click the **Active card** to view a list of all permits with an active status. The list displays on the My Work page with each project name, address attached to the permit, type, and status. These permits have been issued or have an issued date but are not complete.

4. Click the **Recent card** to view a list of all permits applied for in the last 90 days.

5. Click the **Draft card** to view a list of all permits saved by the customer, but not submitted for review. These drafts may be incomplete, and action may resume at any point.

My Permits

Attention	Pending	Active	Recent	Draft
5	**6**	**2**	**8**	**1**
Building (Residentia... 2	Building (Residentia... 4	Building (Residentia... 2	Building (Residentia... 4	Electrical (Residenti... 1
Building (Non-Resid... 1	Building (Non-Resid... 1		Building (Residentia... 2	
Other 2	Building (Non-Resid... 1		Other 2	

▸ **View My Permits**
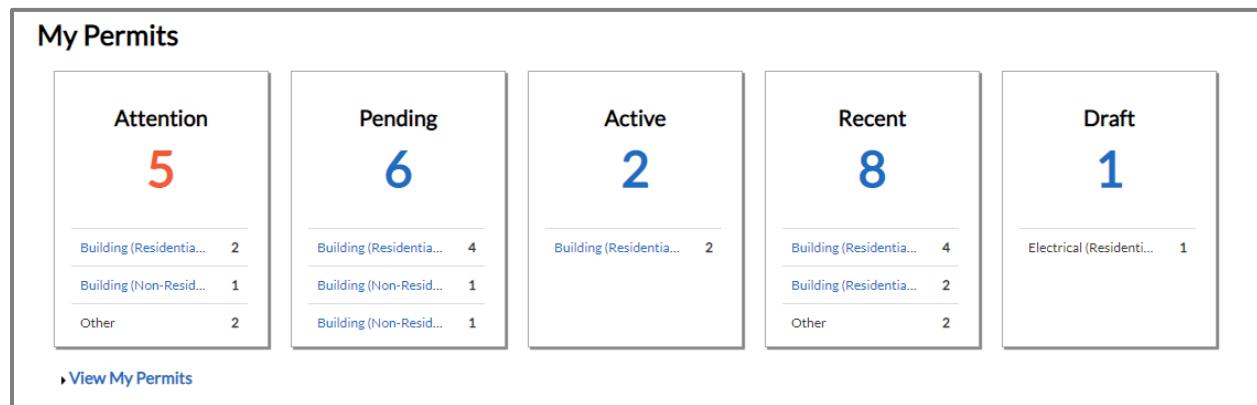
NOTE Success, failure, on hold, or cancelled statuses are tied to flags in Enterprise Permitting & Licensing (EPL), which do not always equate to the case being a success, failure, on hold, or cancelled.

6. Click **Delete** to delete any drafts no longer needed.

7. Type **criteria** in the My Work page search box and press **enter** on the keyboard to filter results. Or view the results as they display when they meet the criteria.

8. Select a **status** in the dropdown to further filter the view.

NOTE Success, failure, on hold, or cancelled statuses are tied to flags in EPL which do not always equate to the case being a success, failure, on hold, or cancelled.

My Plans

1. Click the **Attention card** to view a list of all plans with active holds, unpaid fees, failed reviews (submittals), failed inspections, eReview file resubmissions, and an unsuccessful status. The plans display on the My Work page with each project name, address, type, status, and the reason that the plan needs the customer's attention.

2. Click the **Pending card** to view a list of all plans with an unsuccessful, fail, on hold, or cancelled status. The plans display on the My Work page with each project name, address, type, and status.

3. Click the **Active card** to view a list of all the plans with an active status. The plans display on the My Work page with each project name, address, type, and status.

4. Click the **Draft card** to view a list of all the plans saved by the customer, but not submitted for review. Drafts may be incomplete, and action may resume at any point. Customers may delete drafts if they are no longer needed.

5. Click the **Recent card** to view a list of all plans applied for in the last 90 days.
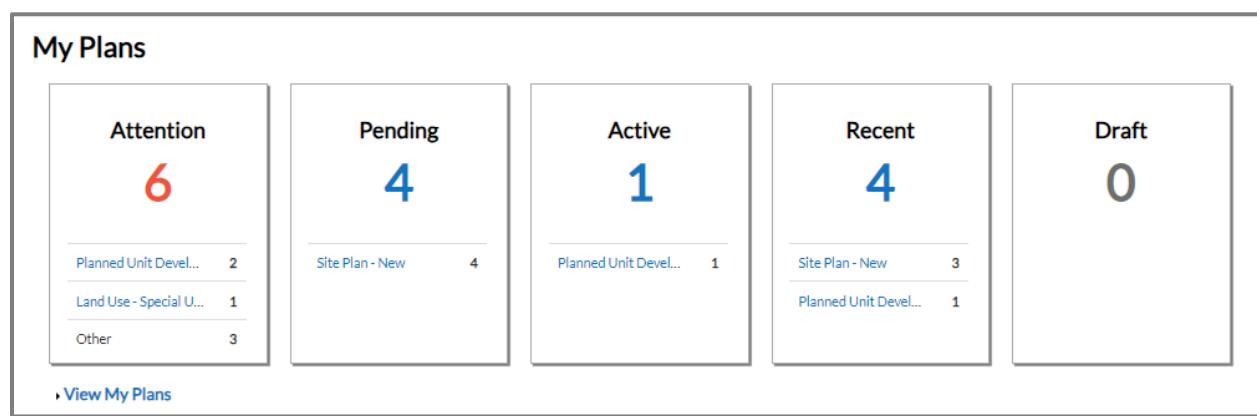
NOTE Success, failure, on hold, or cancelled statuses are tied to flags in EPL which do not always equate to the case being a success, failure, on hold, or cancelled.

My Inspections

1. Click the **Requested card** to view a list on the My Work page of inspections that have a requested status (e.g., has not been given a scheduled date for the inspection). The list displays the inspection type, address, and case number.

2. Click the **Scheduled card** to view a list on the My Work page of inspections that have a scheduled status. The list displays the inspection type, address, case number, and scheduled date.

3. Click the **Closed card** to view a list on the My Work page of inspections that have a closed status. These inspections are complete. The list displays the inspection type, address, and case number.
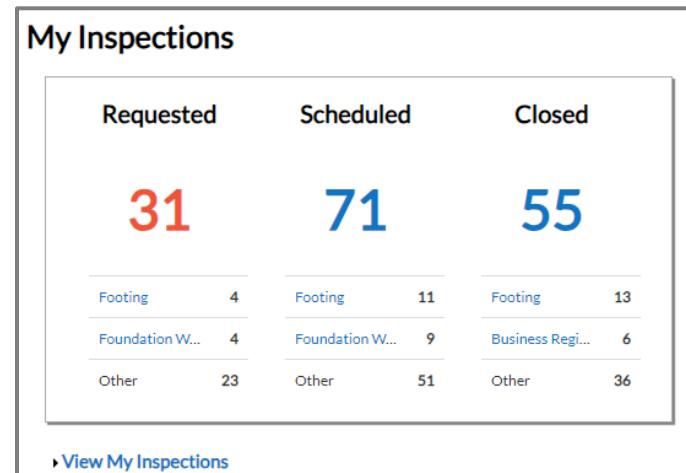
My Invoices

The My Invoices section allows Civic Access customers to access paid, voided, or unpaid invoices through the Dashboard and add them to an electronic shopping cart. Customers can view, add, pay, or remove invoices from the cart, which displays single or multiple cases associated with each invoice.

1. Click **Add To Cart** to the right of Current to view all current invoices.

2. Click **Add To Cart** to the right of Past Due to view all past due invoices.

3. Click **Add To Cart** to the right of Total to view all invoices.

4. Click the **Invoice Number** to view the invoice.

5. Click the **Case Number** to view the case.

6. Click **Remove** to remove an invoice from the shopping cart.

7. Click **Check Out** to display a payment page and complete the payment for the invoice(s).

My Invoices			
Current 4	$39,460.80	Add To Cart
Past Due 1	$1,072.50	Add To Cart
Total 5	$40,533.30	Add To Cart

‣ View My Invoices

Shopping Cart

Total $1,072.50

Check Out

Invoice: INV-00000154   Description: BLDR-000209-2022
Due Date: 01/15/2023

$1,072.50

Case Number	Project	Case Address	Amount Due
BLDR-000209-2022		1234 Chalet Rd Naperville IL 60563	$1,072.50

Remove

Top | Main Menu

Total $1,072.50

Check Out

My Licenses

Civic Access customers can access licenses through the My Licenses section on the Dashboard, which displays the days until the licenses expire and includes licenses that are up for renewal.

1. Click a **company name** to view the business details.
2. Click a **license number** to view the license details.
3. Click **Renew** on any card to begin the license renewal process. If a card does not display a Renew button, the license cannot be renewed at this time.
4. Click the **View My Licenses** to view all licenses on the My Work page.

My Licenses

Expired	Expires in	Expires in	Expires in	Draft
33	**255**	**296**	**304**	**0**
DAYS	DAYS	DAYS	DAYS	
Test Business	PBG Construction, Tim Taylor	Yellow Rose Florist	Test Co.	
No. HOME-000072-2023	No. CON-000001-2020	No. RETL-000052-2023	No. RETL-000060-2023	
Type Home Business - Pho...	Type Contractor - General	Type Retail - Florist	Type Tobacco License	
Renew	Renew	Renew	Renew	

▸ View My Licenses

The My Work page displays information about the case type.

5. Click a **License Number** to view the license details.

6. Click **Renew** to begin the license renewal process. The license cannot be renewed at this time if a row does not display a Renew button.

7. Click a **Name** to view the business details. This name may be different from the Doing Business As (DBA) name.

Other columns display the:

- **DBA** name, which may differ from the name of the actual business in EPL.

- **Address** of where the license is held.

- **Status** of the license. Names may vary by jurisdiction (e.g., expired, issued, in review, submitted).

- **License Type** for which the customer applied.

- **Applied** date when the customer applied for the license.

My Work

| MY INVOICES | MY PERMITS | MY PLANS | MY EXISTING INSPECTIONS | REQUEST INSPECTIONS | MY LICENSES | PROJECTS |

Search...   Export to Excel

License Number	Renew	Name	DBA	Address	Status	Type	Applied
CONT-000029-20...		Sunil Ojha		3412 Keller Ln Naperville, IL...	Submitted	Contractor - General	09/13/2023
BUS-000081-2023	Renew	PBG Construction	PBG Construction	1124 Kings Point Ct Naperv...	Issued	Business Registration - Cons...	09/13/2023
BUS-000079-2023		Harbors Barbers		344 Green Valley Dr Naperv...	Submitted - ...	Business Registration - Servi...	08/25/2023
000008-2020	Renew	PBG Construction	PBG Construction	35 S Washington St Napervi...	Issued	Business Registration - Cons...	08/24/2023
HOME-000072-2...	Renew	Test Business			Issued	Home Business - Photograp...	08/16/2023
RETL-000060-2023	Renew	Test Co.		1233 Haverhill Cr Napervill...	Issued	Tobacco License	08/02/2023
REST-000056-2023		Hulk's Hoagies		1212 Andria Ct Naperville, I...	Submitted - ...	Restaurant - Full Service	08/01/2023
BUS-000053-2023		Yellow Rose Flor...	Yellow Rose Flor...	349 Green Valley Dr Naperv...	Submitted	Business Registration - Retail	07/25/2023
RETL-000052-2023	Renew	Yellow Rose Flor...	Yellow Rose Flor...	349 Green Valley Dr Naperv...	Issued	Retail - Florist	07/25/2023
CONT-000013-20...		PBG Construction			Submitted - ...	Contractor - General	07/21/2023
SRVC-000051-20...		TW Rental		340 Green Valley Dr Naperv...	Submitted - ...	Service - Barber	07/21/2023
SRVC-000050-20...		Corgi Cyber Sec...		1011 Book Ct Naperville, IL ...	Submitted	Service - Gas Station	07/18/2023

Showing 16 records.

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.
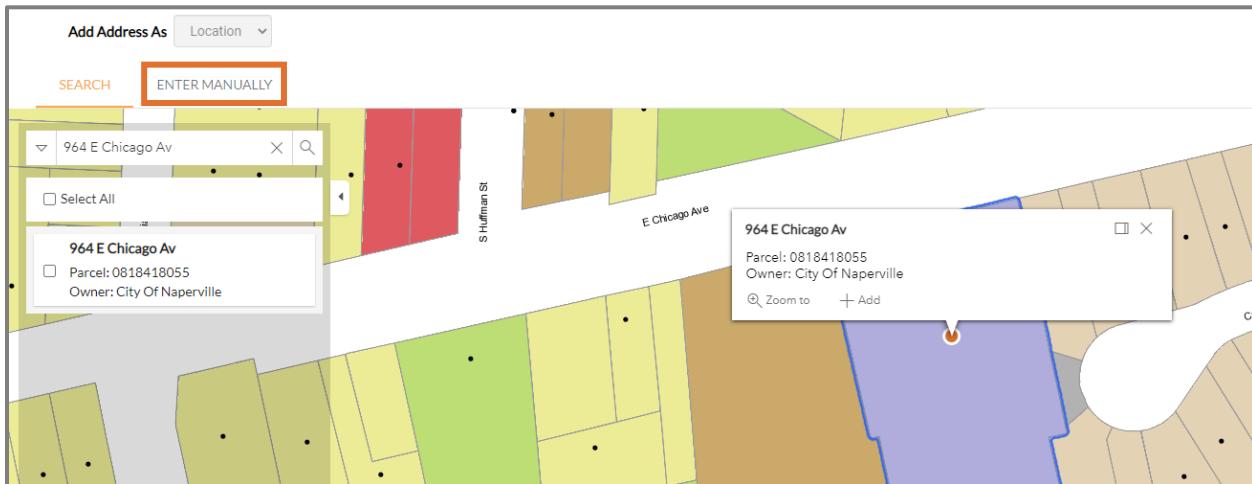
2. Type the **information**.
3. Click **Save**.
4. Click **Next.**
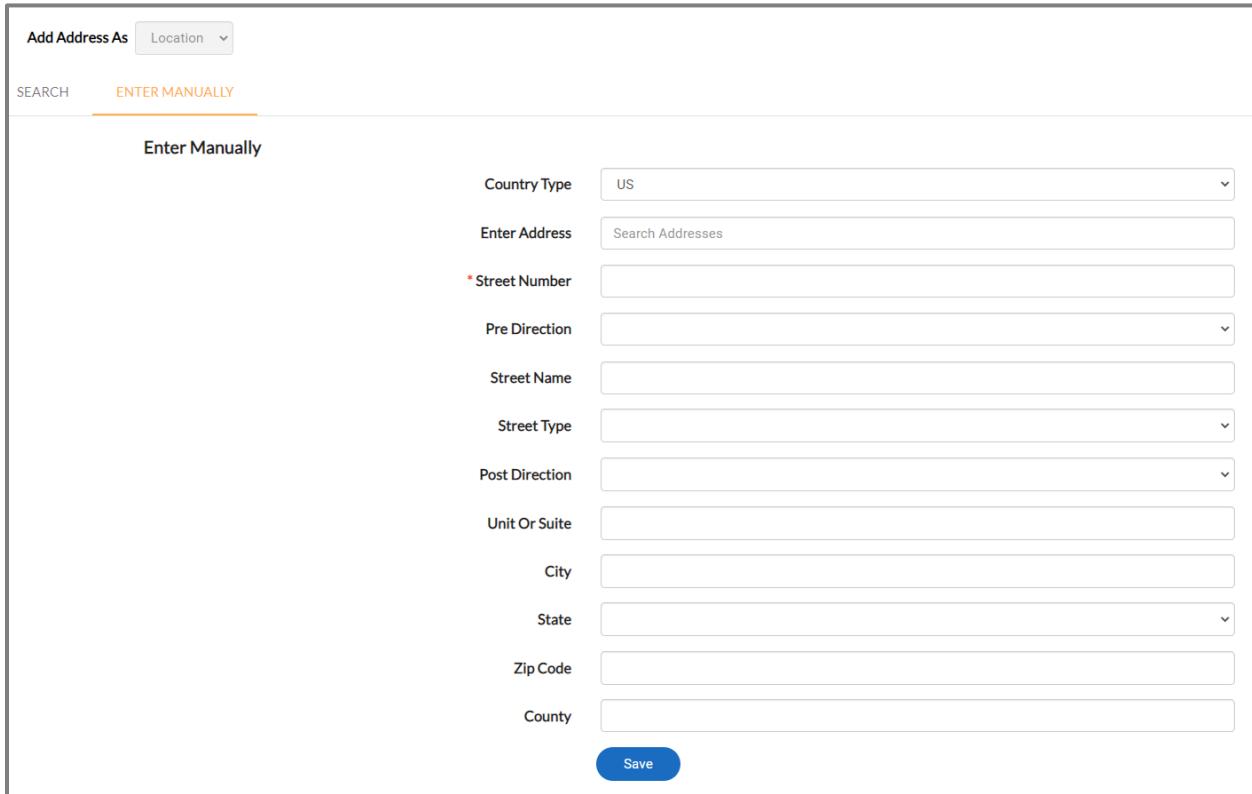
NOTE Required fields are noted with a red asterisk.

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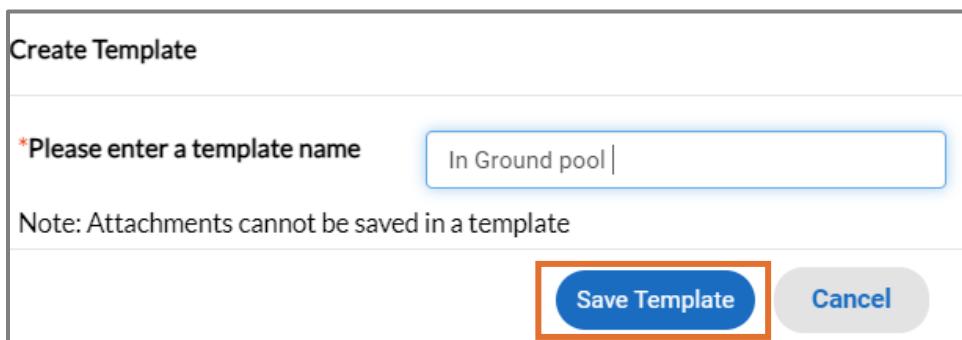
NOTE Required fields are noted with a red asterisk. Customers cannot add attachments to a template.

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.

Saved Work

| MY TEMPLATES | MY DRAFTS |

My Templates

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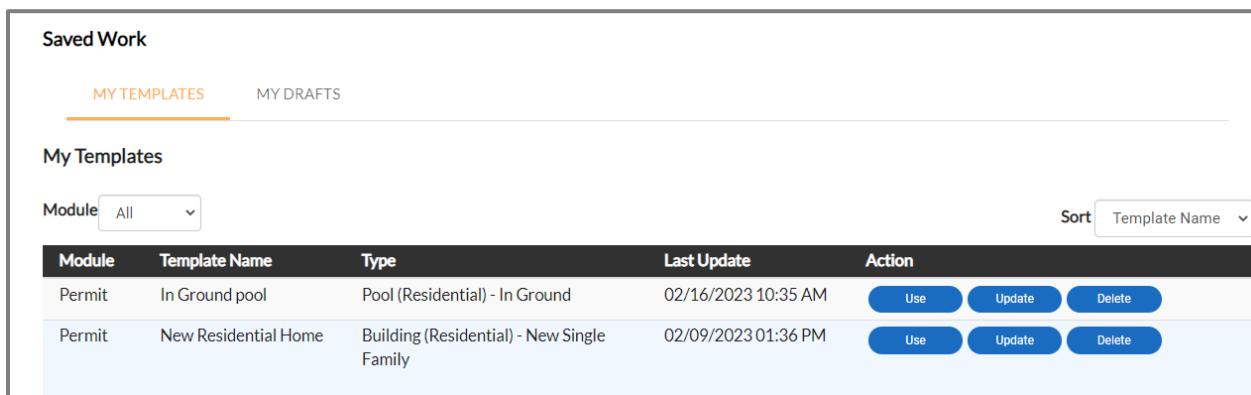
Module	Template Name	Type	Last Update	Action		
Permit	In Ground pool	Pool (Residential) - In Ground	02/16/2023 10:35 AM	Use	Update	Delete
Permit	New Residential Home	Building (Residential) - New Single Family	02/09/2023 01:36 PM	Use	Update	Delete

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

| ✓ | 2 | 3 | 4 | 5 | 6 | 7 |
| Locations | Type | Contacts | More Info | Attachments | Signature | 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 Cons ▾]

Description   [   ]

Square Feet   [   ]

Valuation   [   ]

[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.

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.

NOTE To prevent creating duplicate contacts, search for the desired contact before manually entering a new contact.

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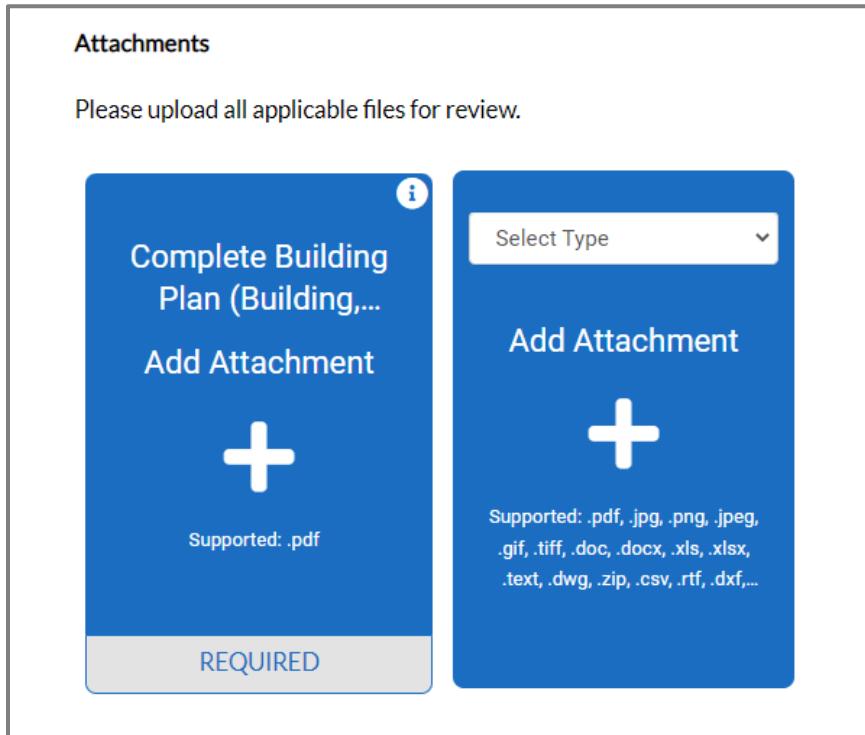
NOTE Jurisdictions may require customers to attach specific documents before moving to the next step. Customers must upload files used with electronic reviews as .pdf files to be compatible with Bluebeam, which jurisdictions use to mark up documents as part of the review process.

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.

Request Inspections

Customers can request an inspection through Civic Access after the jurisdiction issues a permit. This guide uses a permit as an example for requesting an inspection, but the process is similar for other records that allow customers to request inspections based on configuration. Customers must be registered users and a contact associated with the case. Inspection requests interact with the inspection-related data on the dashboard.

To request an inspection:

1. Click **Dashboard** in the menu.
2. Click the **Active card** in the My Permits section.

Civic Access displays the My Work page and active permits by default.

3. Click the **Permit Number** of the desired permit for which you would like to request an inspection.
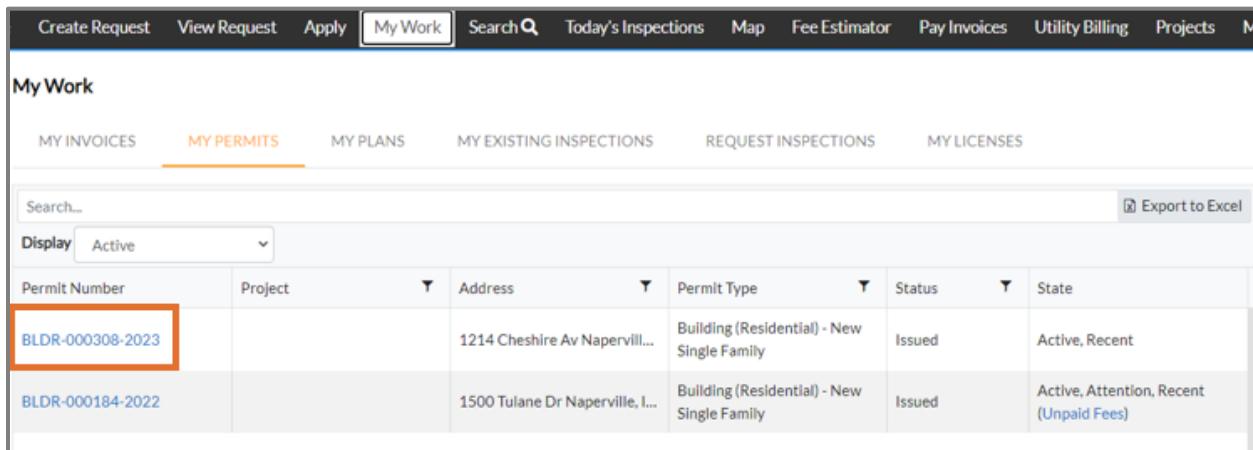
NOTE Customers also can request inspections through the My Work REQUEST INSPECTIONS tab. For more information, please refer to the Request Inspections section.

Civic Access displays the permit.

4. Click the **Inspections** tab.

5. Mark **Action** on the row for the desired inspection. Customers may request more than one inspection at the same time.
6. Click **Request Inspection.**

Request Inspections

Description	Reinspection	Action
Foundation Wall Inspection	No	☐
Concrete Slab Inspection	No	☐
Floor Framing Inspection	No	☐
Wall Framing Inspection	No	☐
Final Building Inspection	No	☐
Final Fire Inspection	No	☐

Request Inspection

NOTE If the case workflow is not complete in EPL up to the inspection step (based on the priority), Civic Access does not display the Action settings.

Civic Access displays the Request Inspections page.

7. Click the **calendar** and select a **date** for the inspection.

Request Inspections (1)

① #BLDR-000308-2023

Inspection Type:	Foundation Wall	Case Type:	Building (Residential) - New Single Family
Address:	1214 Cheshire Av Naperville, IL 60540		

* Requested Date [   ] 📅

Comments/Gate Code [   ]

8. Type **comments or a gate code** as desired.
9. Click **Submit**.

Comments/Gate Code
Call ahead so contractor can meet you.
Tim Taylor - 112-234-1234

Civic Access displays the inspection information and a green checkmark if it is successfully requested.

1 Case #BLDR-000308-2023

Inspection Type:	Foundation Wall
Case Type:	Building (Residential) - New Single Family
Address:	1214 Cheshire Av Naperville, IL 60540
Requested Date	02/10/2023
Comments/Gate Code	Call ahead so contractor can meet you. Tim Taylor - 112-234-1234

✅

10. Click **Back** to navigate back to the case details.

Civic Access displays the requested inspection in the Existing Inspections section.

11. Click **Cancel Inspection** to cancel the inspection.

Once scheduled by the jurisdiction, Civic Access does not display the Cancel Inspection button.

Summary | Locations | Fees | Reviews | **Inspections** | Attachments | Contacts | Sub-Records | More Info | Public Comments

Existing Inspections | Request Inspections | Optional Inspections | Next Tab | Permit Details | Main Menu

Existing Inspections

Sort | Description ⌄

View Inspection	Description	Status	Request Date	Scheduled Date	Inspector	Action
IBLD-000343-2023	Foundation Wall Inspection	Requested	02/10/2023			Cancel Inspection

Results per page 10 ⌄ 1 - 1 of 1 << < **1** > >>

Pay Fees

To view or pay fees, the fees must be invoiced first by the jurisdiction.

1. Navigate to the **desired record**.
2. Click the **Fees tab**.

Permit Number: BLDR-000308-2023

Permit Details | Tab Elements | Main Menu

Type:	Building (Residential) - New Single Family	**Status:**	Issued	**Project Name:**	
IVR Number:	100364	**Applied Date:**	01/31/2023	**Issue Date:**	01/31/2023
District:	East	**Assigned To:**	Lopez, Spencer	**Expire Date:**	07/31/2023
Square Feet:	2,800.00	**Valuation:**	$350,000.00	**Finalized Date:**	
Description:					

Summary | Locations | Fees | Reviews | Inspections | Attachments | Contacts | Sub-Records | More Info | Public Comments

   a. Click **Add To Cart** to add the invoice to the electronic shopping cart.

Fee Summary | Remaining Fees | Paid Fees | Next Tab | License Details | Main Menu
Fee Summary

Total Fees: $50.00   **Paid Fees:** $0.00   **Unpaid Fees:** $50.00   [Add to Cart]

3. Or navigate to **My Invoices** on the Dashboard.
4. Click **Add To Cart** in the My Invoices section on the Dashboard to add invoices to the electronic shopping cart.

My Invoices

Current 5	$40,285.80	[Add To Cart]
Past Due 1	$1,072.50	[Add To Cart]
Total 6	$41,358.30	[Add To Cart]

▸ View My Invoices

NOTE Customers can add both Current and Past Due invoices to the electronic shopping cart from the My Invoices section on the Dashboard.

Invoices

Customers can access paid, voided, or unpaid invoices through the Dashboard and the various menus as well as add invoices to the electronic Shopping Cart from a record or the My Work menu.

To view invoice information:

1. Mark an **Invoice Number(s)** on the **MY INVOICES** tab of My Work.

2. Or click an **Invoice number(s)** in the Remaining Fees section of the Fees tab of the case.

Updated: 1/29/2025

Civic Access displays the invoice.

3. Click **print** to print or save the invoice as a PDF.

4. Click **Primary Fees** to view the Fee Name, Fee Total, Amount Due, Case Number, Case Type, and Notes for all fees associated with the invoice.

5. Click **Misc Fees** to view the Fee Name, Fee Total, Paid Amount, and Amount Due for all miscellaneous fees associated with the invoice.

6. Click **Payments** to view the Receipt Number, Status, Transaction Type, Payment Type, Payment Amount, and Payment Date for any payments associated with the invoice.

7. Click **Attachments** to view the File Name and Added Date for all files attached to the invoice.

8. Click **Contacts** to view the Company name, First Name, Last Name, Title, and Email for all contacts associated with the invoice.

9. Click **Add to Cart** to add the invoice to the **Shopping Cart**.

10. Click **Pay Now** to make a payment.

Invoice Number: INV-00000254					Pay Now	
Invoice Total:	$34,249.05					
Status:	Due	**Invoice Date:**	01/30/2023		**Due Date:**	03/01/2023
Description:	BLDC-000300-2023 - Created during online application in Civic Access					

Primary Fees | Misc Fees | Payments | Attachments | Contacts

Primary Fees

Sort: Fee Name

Fee Name	Fee Total	Amount Due	Case Number	Case Type	Notes
Building Permit Fee (Non-Residential)	$20,757.00	$20,757.00	BLDC-000300-2023	Permit	
Building Plan Review Fee	$13,492.05	$13,492.05	BLDC-000300-2023	Permit	

Manage a Review

Customers can submit electronic plans through Civic Access for the jurisdiction to review. Once submitted, and the jurisdiction has reviewed the plans, the customer may receive an email or need to log into Civic Access to review failed or approved reviews. To view review results that need attention:

1. Click **Dashboard** in the menu.
2. Click the **Attention card** in the desired section.

Civic Access displays a list of the cases that need attention, listed by module.

3. Click the **Review Not Approved** link under the **State** column.

The application displays the type of review, the status, received, due, and completed dates. If there are corrections or comments from reviewers, Civic Access displays a dropdown arrow next to each review.

Corrections

1. Click the **arrow** to read the corrections or comments.

2. Click **Respond** to reply to the correction, if configured.
3. Click **Update Responses** if finished responding.

NOTE The response is visible in EPL to the person who created the correction in version two of the review. It displays in the next review for the subsequent submittal.

Each review in red must be acknowledged to move to the next step to submit new plans.

4. Click **Acknowledge**.
5. Click **Next**.

Reviews

All reviews in red must be acknowledged before continuing.

Building Review (Residential)

Submittal Status	Received Date	Due Date	Completed Date
Requires Re-submit	02/10/2023	02/27/2023	02/10/2023

🛈 **Building • Requires Re-submit • Thompson Tyler • Completed : 02/10/2023**

Due Date	Completed Date
02/27/2023	02/10/2023

Comment
See corrections for additional things needed upon resubmittal of plans.

Corrections (2)

Correction Type	Electrical Valuation	Category	General Correction		Hide Response
Corrective Action	Complete a "Certification of Construction Valuation" form.				
Comment	Electrical Certification of Valuation				

Will attach or email it in.

Correction Type	Signed Plans	Category	General Correction		Respond
Corrective Action	Have all plans signed and reattach.				
Comment	All sheets of the final plans shall bear the signature of the person who prepared the plans.				

🔘 Acknowledge

Back   Next

Attachments

Civic Access displays an alert on the Attachments tab if the jurisdiction failed any electronic files and the customer is required to resubmit the files.

1. Click **Attachments**.
2. Click **Markups** on the desired card to view text markups.
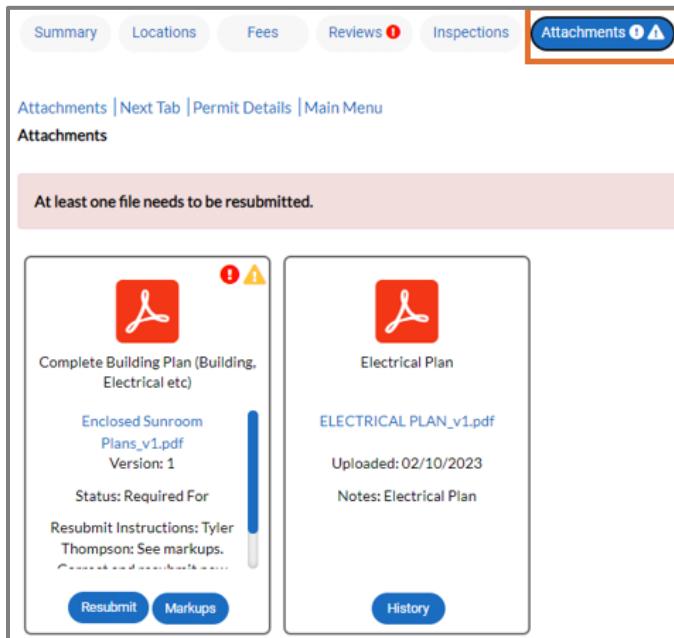
3. Click **Respond** to respond to the markups, if configured.
4. Click **Close** when done responding.
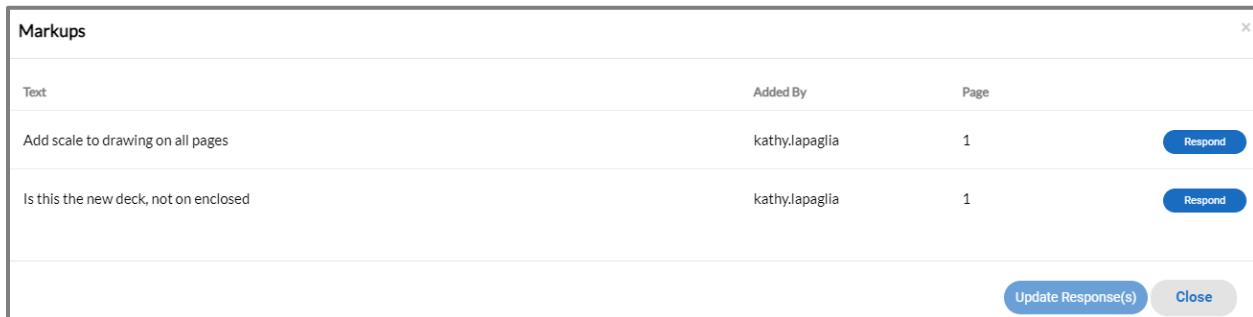
NOTE In 2023.1+, eReview files are not required for a resubmittal but can be resubmitted. They are listed under Optional Resubmits in the resubmit stepper.

5. Click the **file name** to open the PDF and view the markups.

6. Click **Resubmit** to upload the corrected file(s).

Civic Access displays the file(s) that need to be resubmitted.

7. Click **Next**.

8. Click **Select File** and choose the new version of the file.

9. Click **Submit.**

10. Click **History** on the Attachments tab to view the history of the submitted files.

My Work

1. Click **My Work** in the menu to access invoices, permits, plans, inspections, and licenses.

Civic Access displays tabs only if the customer related records.

My Permits

To view details of a permit:

2. Click **MY PERMITS**.

3. Type a **permit number, project name,** or **address**.

Civic Access displays records that meet the criteria.

4. Click the **Display** dropdown to select and filter the list by the **State** of the permit.
5. Click the **Records** and **In** dropdowns to filter further.

6. Click **filter** in a column to filter the list by additional options.
7. Click the **column header** to sort the list by that column.

8. Click a **permit number** to open the record.

9. Select the **number of records** to display on each page in the Results per page dropdown.
10. Click the **page navigation arrows** to move between pages of records.

My Plans

To view details of a plan:

1. Click **MY PLANS**.
2. Follow **steps 3-8** in the My Permits section to locate a plan.

Plan Number	Project	Address	Plan Type	Status	State
PLAT-000057-2023			Subdivision - Major	Submitted	Recent, Pending
RZNE-000055-2023		1125 Kings Point Ct Naperv...	Rezoning	Submitted - Online	Attention, Recent, P (Unpaid Fees)

NOTE: Not all plan data is available to all customers.

My Existing Inspections

To view details of a requested or scheduled inspection:

1. Click **MY EXISTING INSPECTIONS**.
2. Follow **steps 3-8** in the My Permits section to locate an inspection.

Inspection Number	Inspection Type	Address	Status	State	Case Number	Requested	Scheduled	Comp
IBLD-000263-2022	Concrete Slab	2400 Clifton C...	Requested	Scheduled	BLDC-000139-2022	11/17/2022	12/16/2022	
IBLD-000299-2022	Footing	1500 Tulane D...	Scheduled	Scheduled	BLDR-000184-2022	12/08/2022	12/20/2022	

Request Inspections

Customers can request inspections through Civic Access. Customers must be registered users and 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.

To view details of requested inspections:

1. Click **REQUEST INSPECTIONS**.
2. Follow **steps 3-8** in the My Permits section to locate an inspection.

3. Click a **Case Number** to open the associated record.
   a. Follow **steps 4-9** in the Request Inspections section.
4. Or mark the **desired case(s)** for which inspections are needed.
   a. Click **Request Inspection**.
   b. Follow **steps 7-9** in the Request Inspections section.

My Licenses

To view details of a license:

1. Click **MY LICENSES**.
2. Type a **license number** or **business** or **contact address**.

NOTE In EPL 2023.1+, users also can view their own operational permits in Civic Access under an OPERATIONAL PERMIT tab. The permits also display in searches. By default, Civic Access hides all operational permits, so they can be enabled when a jurisdiction is ready to show them.

Today's Inspections

To view inspections schedule for a specific day:

1. Click **Today's Inspections** in the menu. Today's Inspections displays in the menu only if configured by the jurisdiction.

2. Type a **case number**, **inspection type** or **address** to locate a specific inspection.

3. Click **search**.

4. Click the **calendar** to select an inspection due date or type the **date** to narrow the list.

5. Mark **Exclude Completed** to have the results not include inspections that complete.

6. Click **Export** to save the list to your computer.

7. Click the **sort** dropdown to sort the inspections within the search.
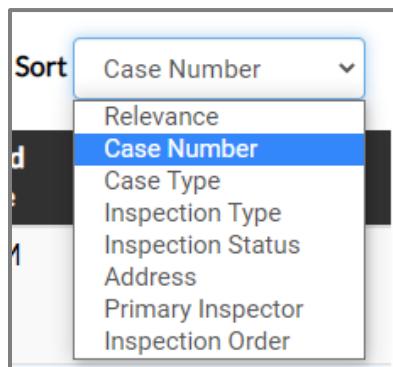
Manage an Inspection

1. To navigate to an **inspection**:
   a. Click the **Inspections tab** on the parent record.
   b. Search for a **specific inspection**.
   c. Click a **specific inspection** in a results list.

2. Click the **Inspection Number** to view the inspection details.

View Inspection	Case Number	Case Type	Inspection Type	Address	Primary Inspector	Estimated Start Time	Estimated End Time	Status	Order
FOOD-000235-2022	FOOD-000039-2022	Operational Permit	Retail Food	10 W Bauer Rd Naperville IL 60563	Biron, Heidi	04:00 PM	04:00 PM	Scheduled	0
IPLM-000163-2020	PLMC-000123-2020	Permit	Final Plumbing	1033 W Jefferson Av Naperville IL 60540	Lopez, Spencer	04:00 PM	04:00 PM	Scheduled	0
FOG-000239-2022	INDWA-000135-2022	Permit	Fat/Oil/Grease Interceptor Inspection	1033 W Jefferson Av Naperville IL	Kesler, Matt	04:00 PM	04:00 PM	Scheduled	0

3. Click **Location, Contacts, Checklist, Fees, Attachments, Previous Inspections** (if configured), and **More Info** (if configured) to view inspection information.

Inspection Number: IFIRE-000013-2019

Inspection Details │ Tab Elements │ Main Menu

Inspection Type:	Final Fire	**Requested Date:**	06/03/2019		
Inspection Status:	Scheduled	**Scheduled Date:**	01/24/2024	**Scheduled Time:**	05:00 PM
Permit Number:	BLDC-000055-2019	**Completed Date:**		**Completed Time:**	
Inspector Name:	Matt Kesler				
Main Address:	1404 Sunnybrook Naperville,IL 60540				

Locations | Contacts | Checklist | Fees | Attachments

Map

Civic Access integrates with the jurisdiction's GIS information to allow for searches, pinned results, submitting applications, and more.

To use the Civic Access map:

1. Click **Map** on the menu.
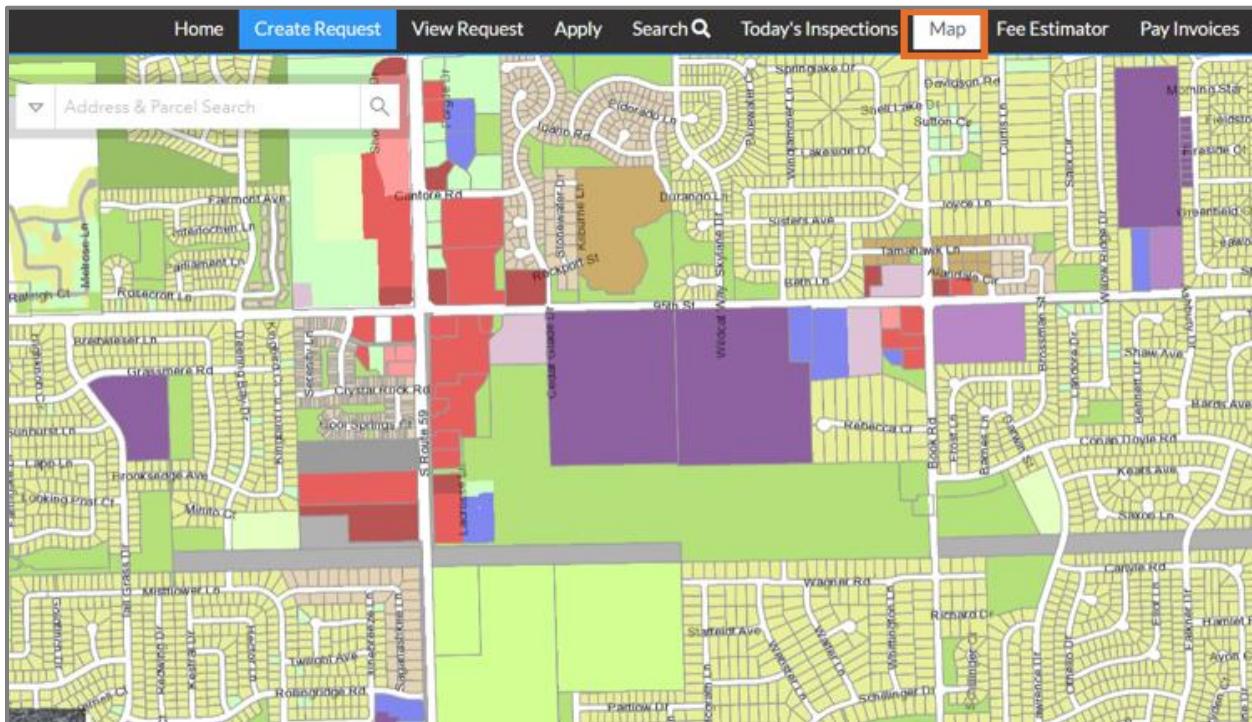
2. Click the **arrow** to select a search option. Choices are All as the default, Address, and Parcels.
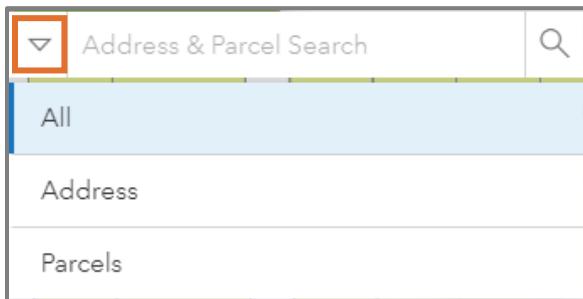
4. Type a partial or full **address** or a **parcel number**.
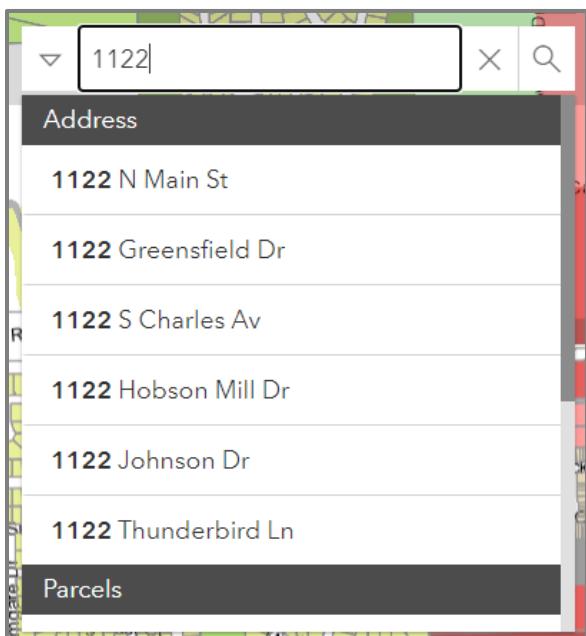
Civic Access displays results.

5. Click **Use current location** to use the current location.
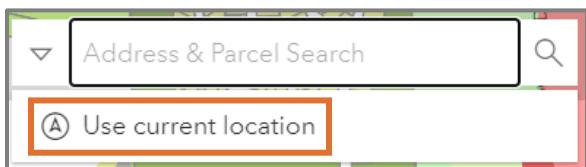
6. Mark the **box** to select an address.

Civic Access displays the **Start Application** button. For more information, please refer to Search For an Address section.
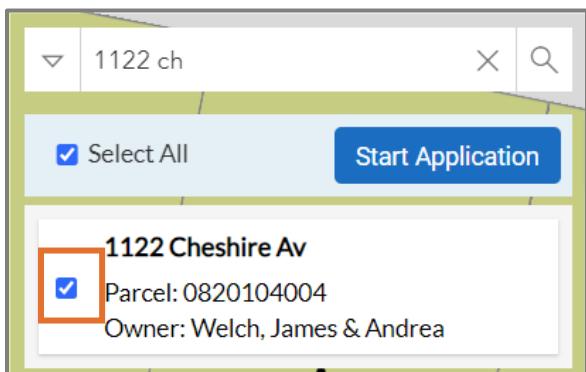
7. Click in the **box** of the desired address or parcel to view records related to the location.

8. Click **download** to save the results to the computer.

9. Click **more options** to view the calendar.
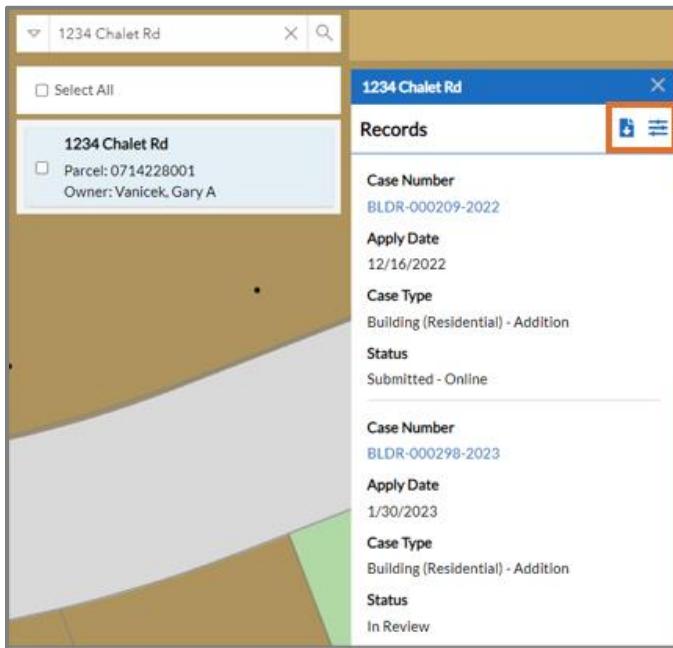
10. Click the **calendar** to select a date since the records have been updated.
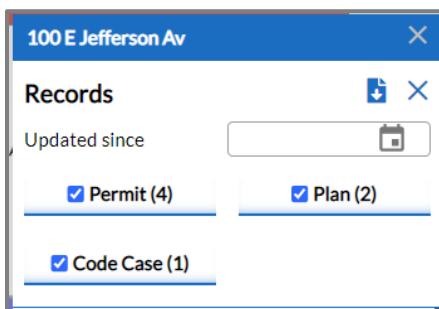
11. Click the **Case Number** to view information about the record.
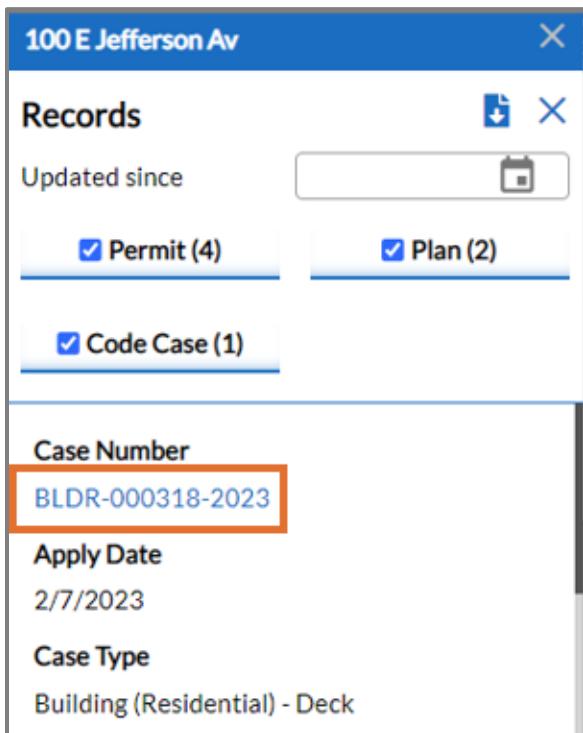
Civic Access display case details in another browser tab.

12. Click the **left arrow** to collapse the record information box and view the full map.
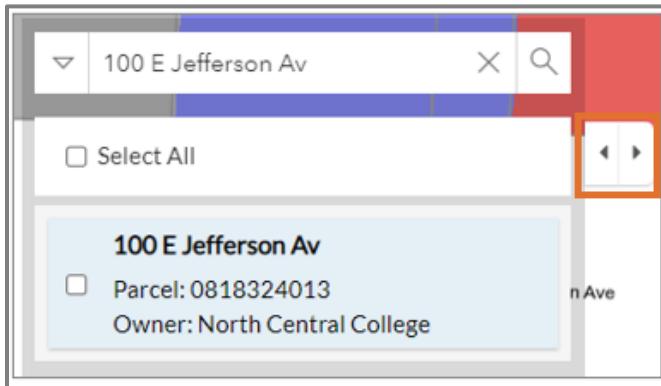
13. Click the **X** to clear the location information and start a new search.

Create a Spatial Collection

Spatial collections, also known as features, allow customers to create a record based on a location or feature, such as a parade route, without using an address or parcel. Customers can create spatial collections in the Maps tab and can apply right from the map.

1. Select any of the **map tools** to draw an area.
2. Select the desired **point, line, polygon, rectangle,** or **circle** tool.
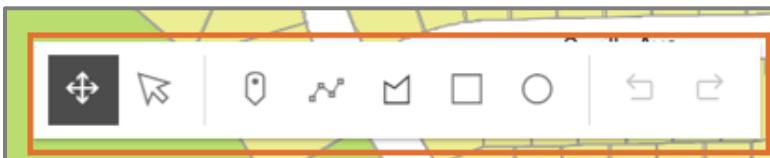
3. Click once on each **desired turn** of the line in the shape.
4. **Double click** to close the shape.

5. Click **transform** to modify the shape's size.
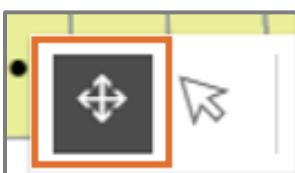
Civic Access displays a box around the feature.

a. Move the **white squares** into the desired positions.

6. Click **reshape** to reshape the feature.
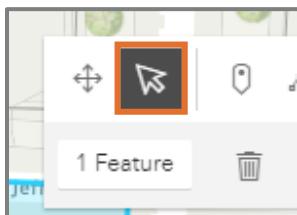
a. Move the **circles** into the desired positions.
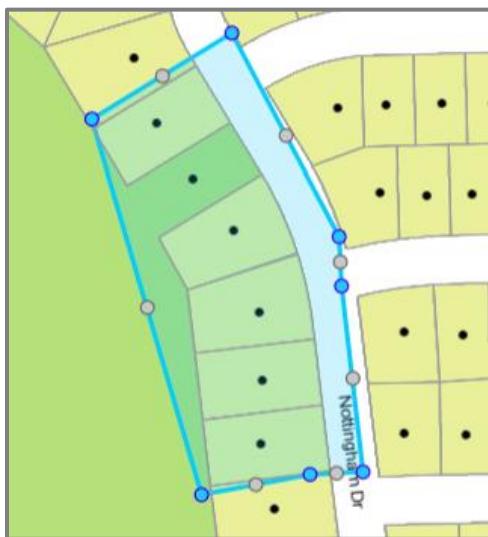
7. Click **outside the shape** once the modification is complete.
8. Click **Apply with this shape** to apply for a case using this area as the location.

NOTE Applying with a spatial collection may not be an option for all jurisdictions or all application types.

9. Select a **shape** on the map to delete it.

Civic Access displays a delete button under the tools.

10. Click **delete**.
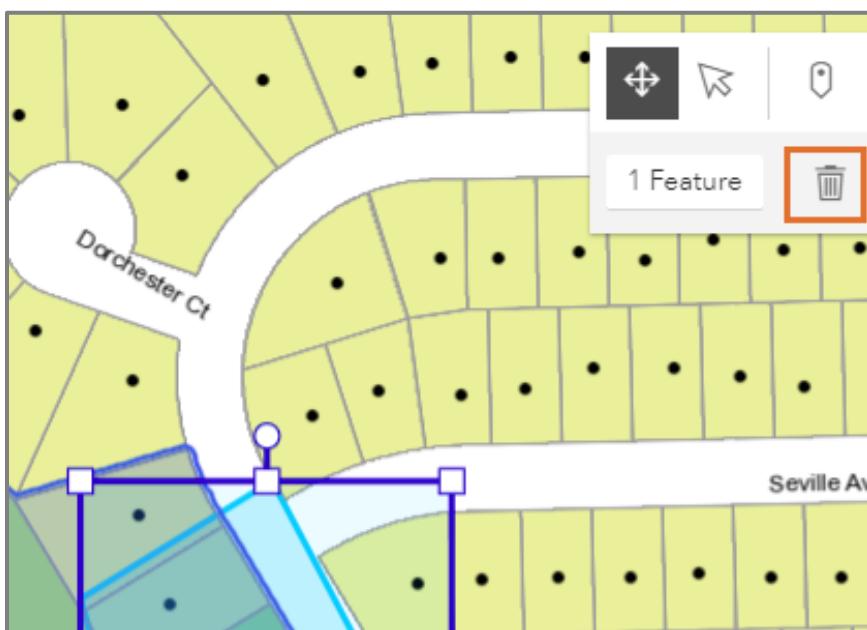
11. Click **undo** or **redo** while drawing a polygon to change a line of the shape. To use undo and redo, the polygon must not be a closed shape yet.
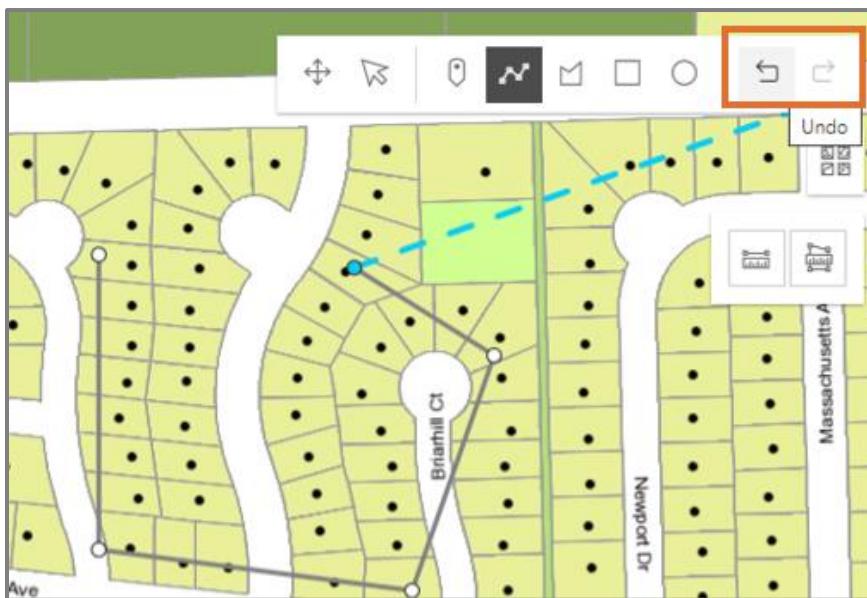
12. Click the **base map widget** to toggle between an aerial view and other map views. Map widgets do not display for all jurisdictions. They display based on configuration.

13. Click other **widgets** below the map tools to switch between views. Map widgets do not display for all jurisdictions. They display based on configuration.
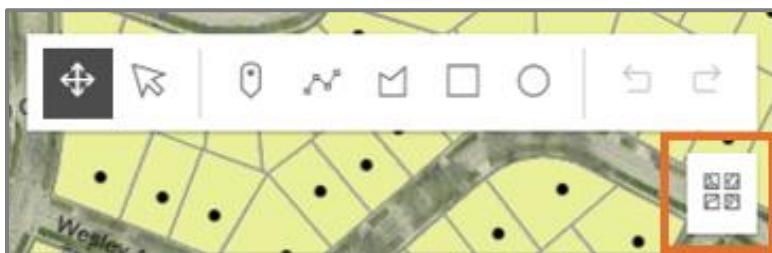
14. Click **home** to return to the default map view.

15. Click **plus** or **minus** to zoom in and out on the map.
    a. Or double click the **left mouse button**.
    b. Or use the **roller ball** on the mouse.

Fee Estimator

Customers can use Civic Access to estimate fees for permits and plans, if configured. The estimation may display fees based on square feet, valuation, and more info fields. To estimate fees:

1. Click **Fee Estimator** on the menu on the Civic Access Home page.
2. Click **Estimate Permit Fees** or **Estimate Plan Fees**.
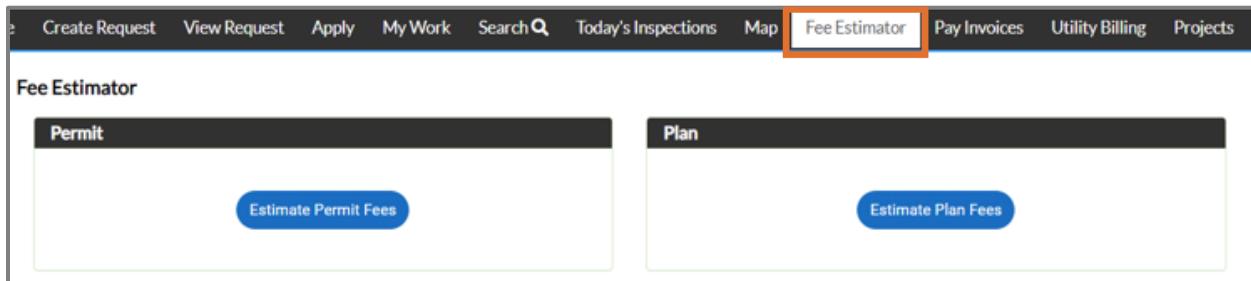
3. Type the relevant **information** on the Type step.
4. Click **Next**.
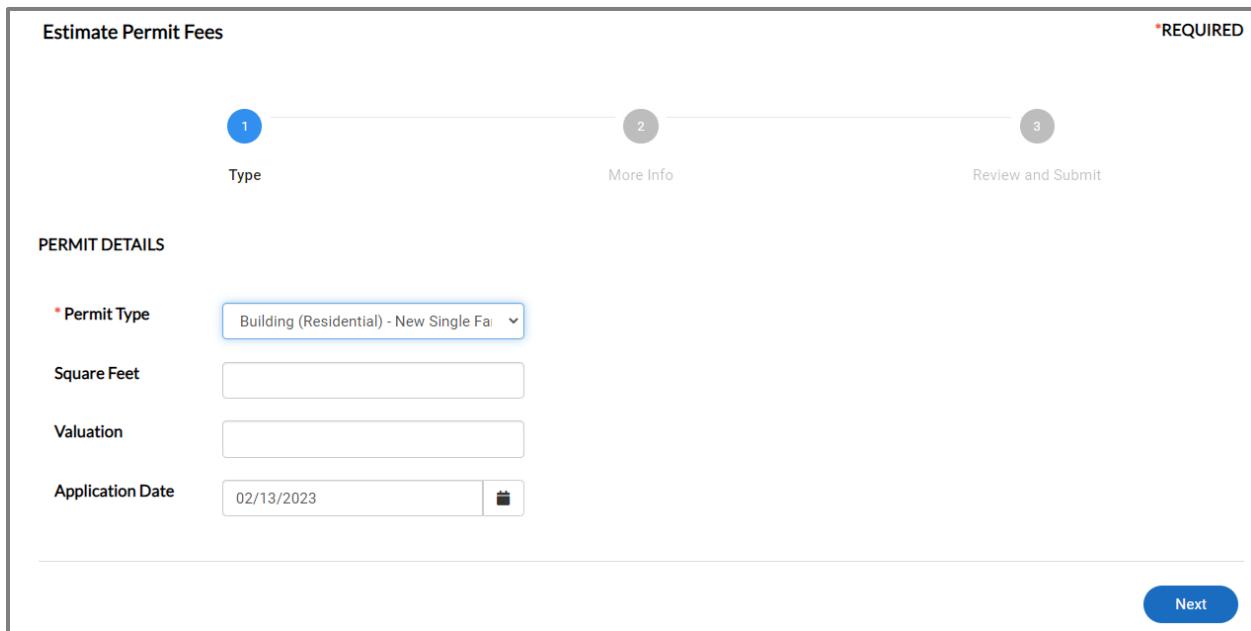
NOTE Required fields are noted with a red asterisk.

5. Type the relevant **information** on the more info step.

6. Click **Next.**

Civic Access displays the estimated fees on the Review and Submit step.

Estimated Fees

The following is a fee estimate and totals are subject to change. Additional fees may apply.

Fee	Amount
Building Permit Fee (Residential)	$537.50
Building Plan Review Fee	$2,511.92

Total: $3,049.42

---

7. Click **Apply** to apply for a permit or plan.

Civic Access prompts the customer to log in if not logged in already.

Estimate Permit Fees   *REQUIRED

✓ — Type   ✓ — More Info   3 — Review and Submit

Apply

Pay Invoices

To view invoices:

1. Click **Pay Invoices** on the Civic Access Home.
2. Type the full unpaid invoice **number** (e.g., INV-000024).
3. Click **Search**.
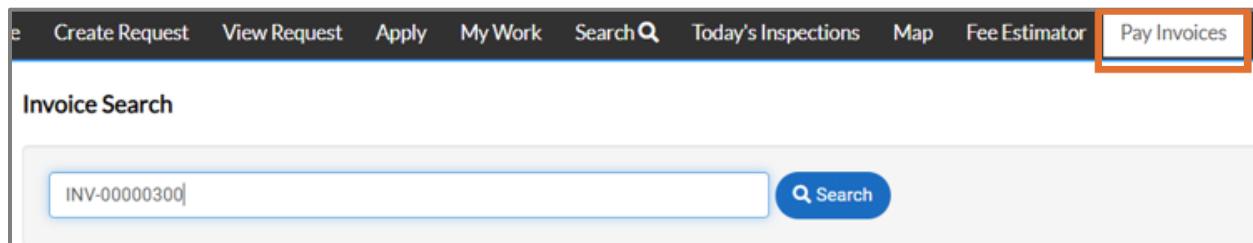
e	Create Request	View Request	Apply	My Work	Search 🔍	Today's Inspections	Map	Fee Estimator	Pay Invoices

Invoice Search

INV-00000300   🔍 **Search**

Civic Access displays the Invoice Number page.

4. Click **Pay Now** to pay the invoice.
5. Click **print** to print the invoice.

Invoice Number: INV-00000300   Pay Now   🖨️

Invoice Total:	$3,049.42				
Status:	Due	**Invoice Date:**	02/13/2023	**Due Date:**	03/15/2023
Description:	BLDR-000346-2023 - Created during online application in Civic Access				

Primary Fees Misc Fees Payments Attachments Contacts

Primary Fees   Sort Fee Name ▾

Fee Name	Fee Total	Amount Due	Case Number	Case Type	Notes
Building Permit Fee (Residential)	$537.50	$537.50	BLDR-000346-2023	Permit	
Building Plan Review Fee	$2,511.92	$2,511.92	BLDR-000346-2023	Permit	

Public Reports

The Report menu allows customers to access public-facing reports from different modules if configured by the jurisdiction. To view a report:

1. Click **Report** in the menu on the Civic Access Home page.
2. Select the desired **module** in the Report Type dropdown.
3. Select the desired **report** in the Report dropdown.
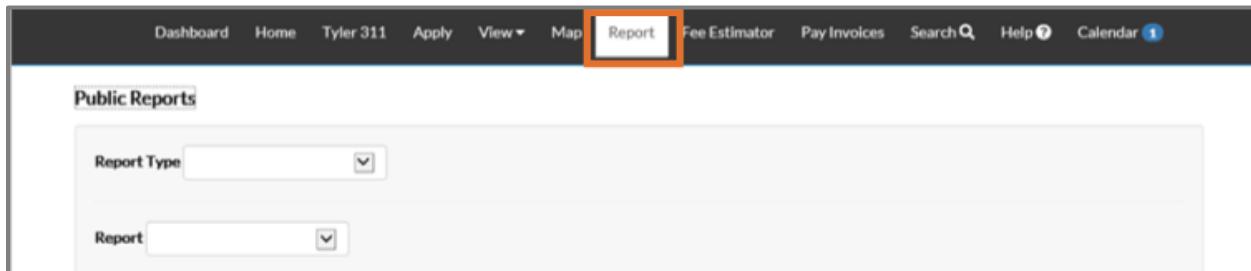
4. Type a **Start Date** or click the **calendar** and select a **date**.
5. Type an **End Date** or click the **calendar** and select a **date**.
6. Click **Generate Report**.

NOTE Required fields are noted with a red asterisk.

Calendar

The calendar displays public hearings, public meetings, and holidays based on EPL configuration. These categories are visible to all customers, not just registered users. If logged in, customers also can view scheduled inspections, expiration dates for plans and permits, and invoice due dates. To view the calendar:

1. Click **Calendar** in the menu on the Civic Access Home page.
2. Or click the **Calendar card**.

3. Click an **event** on the calendar to display event details.
4. Click **Close** to close the event details box.

Appendix A: Terminology and FAQs

For information about the following topics, please refer to the Terminology and FAQs User Guide:

- Universal Buttons for HTML Apps
- Universal Icons for HTML Apps
- Terminology/Common Acronyms
- FAQs
- Common Key Commands

About Tyler Technologies, Inc.

Tyler Technologies (NYSE: TYL) provides integrated software and technology services to the public sector. Tyler's end-to-end solutions empower local, state, and federal government entities to operate efficiently and transparently with residents and each other. By connecting data and processes across disparate systems, Tyler's solutions transform how clients gain actionable insights into opportunities and solutions for their communities. Tyler has more than 40,000 successful installations across nearly 13,000 locations, with clients in all 50 states, Canada, the Caribbean, Australia, and other international locations. Tyler has been recognized numerous times for growth and innovation, including Government Technology's GovTech 100 list. More information about Tyler Technologies, an S&P 500 company headquartered in Plano, Texas, can be found at tylertech.com.

Appendix B: Accessibility

Civic Access and Civic Access 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. Customers also can view Civic Access in different languages if configured by the jurisdiction.

ChromeVox

ChromeVox is a browser extension for Chrome on Windows and Mac OS X, which operates as an alternative page reader for online content. Chrome Vox 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. To use this feature:

1. Download **ChromeVox** at http://www.chromevox.com/installing.html.
2. Install **Chrome Vox** to use the speak-to-read feature in Civic Access.

Google Translate

Customers can view Civic Access information in different languages if configured by the jurisdiction. This function uses Google Translate.

1. Click the **globe** at the top of the Home page.

2. Select a **language** in the dropdown to view Civic Access menus and text in the desired language.
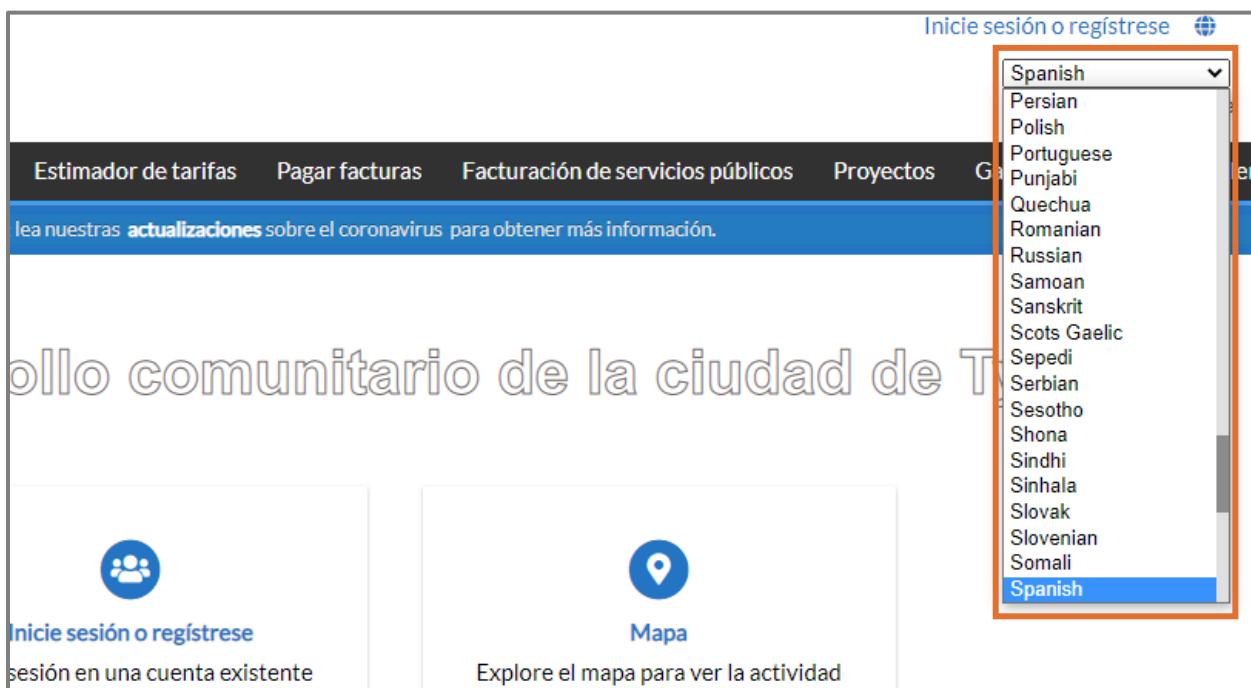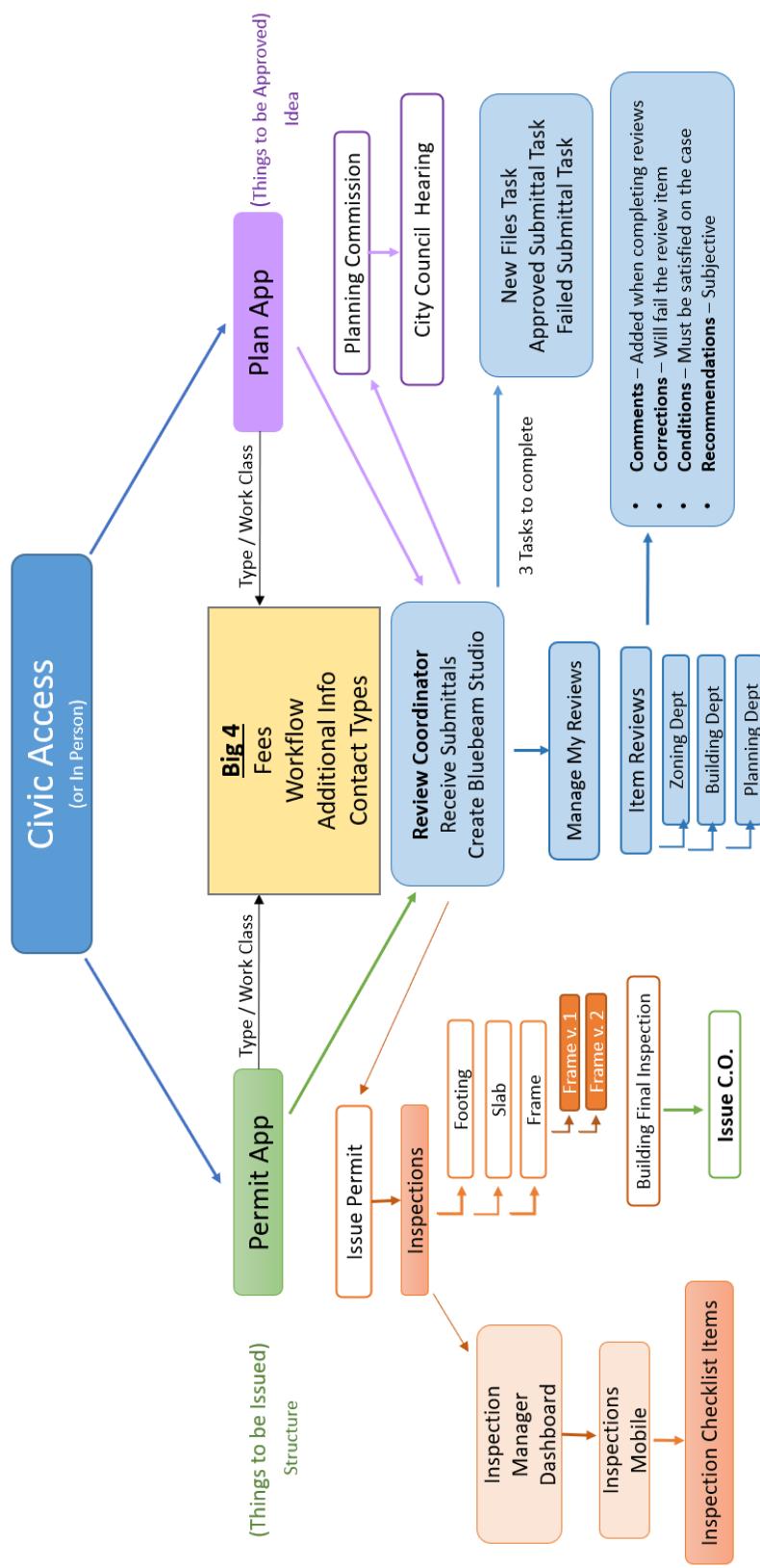
Appendix D: EPL Case/Record Availability

Although there are many cases/records that a customer can create and view in Civic Access, there are some EPL cases/records that are not available online for customers. The following table lists cases/records customers can access if configured by the jurisdiction:

EPL case/record	IN CIVIC ACCESS, CAN CUSTOMERS:		
	Apply/create case/record?	View case/record?	View/Add Files/Attachments?
Application	N	N	N
Business	Y	Y	Y
Business License	Y	Y	Y
Code Case	Y	Y	Y
Exam Request/ Exam Sitting	N	N	N
Impact Case	N	N	N
Inspection	Y	Y	Y
Inspection Case	N	N	N
Invoice	N	Y	Y
Landlord	N	N	N
Object Case	N	N	N
Operational Permit	N	Y	Y
Permit	Y	Y	Y
Plan	Y	Y	Y
Professional License	Y	Y	Y
Project	N	Y	Y
Rental Property License	N	N	N
Site	N	N	N
Tax Remittance Account	N	Y	Y