

Civic Access (CA)

*Applying for a Permit,
Plan, or License*



**City of
Helena**

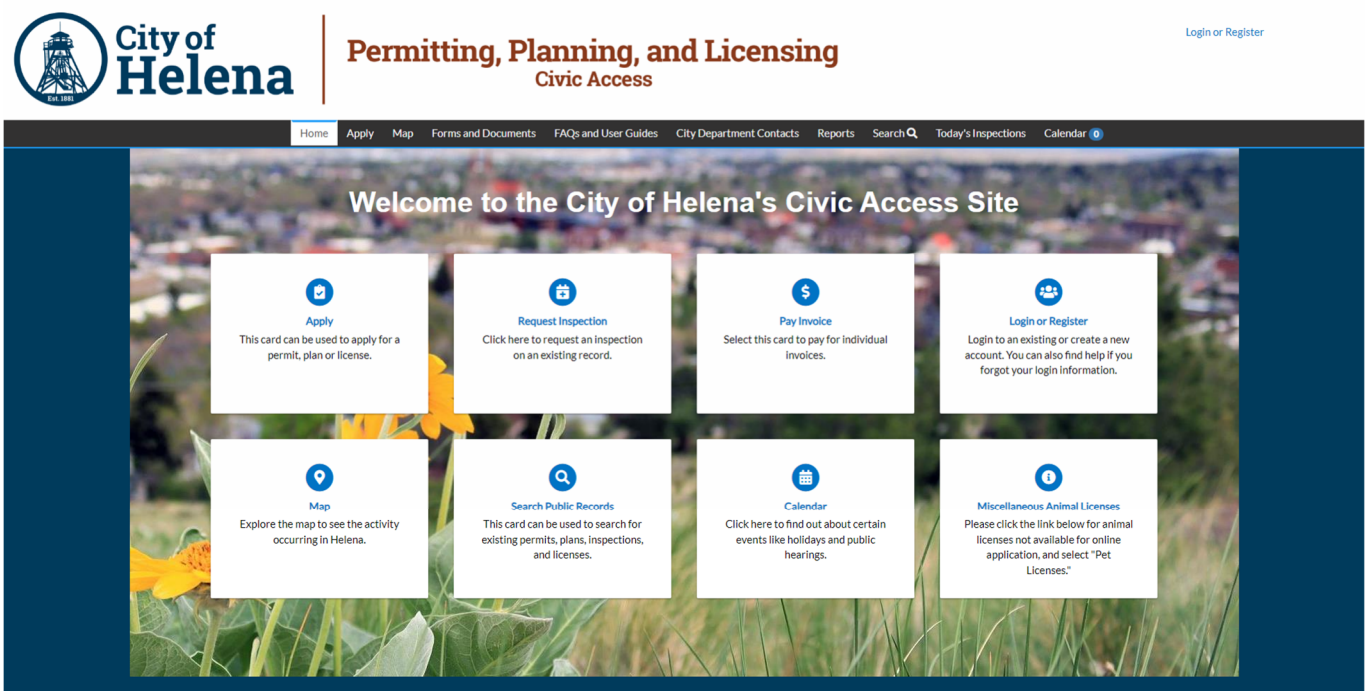
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Civic Access Overview

These series of guides describe how public users and registered users access the City of Helena’s Civic Access online portal. Civic Access is a public-facing application that allows our customers to interact with land management, permitting, planning, and licensing processes administered by the City of Helena. Users can search and apply for permits, plans, and licenses; search for parcels, projects, construction projects; renew licenses, and schedule inspections.

Home Page, Main Menu Bar

Our public can view the Home, Apply, Map, Report, Pay Invoices, Search, Calendar, and other options from the menu bar.

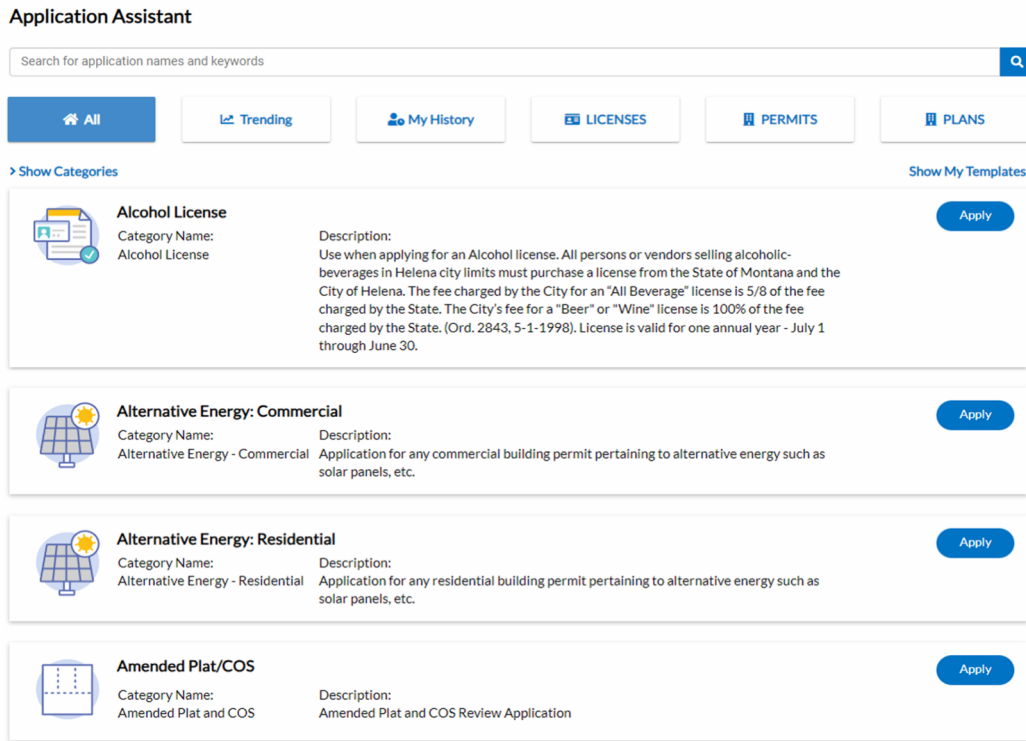


Apply with Application Assistant

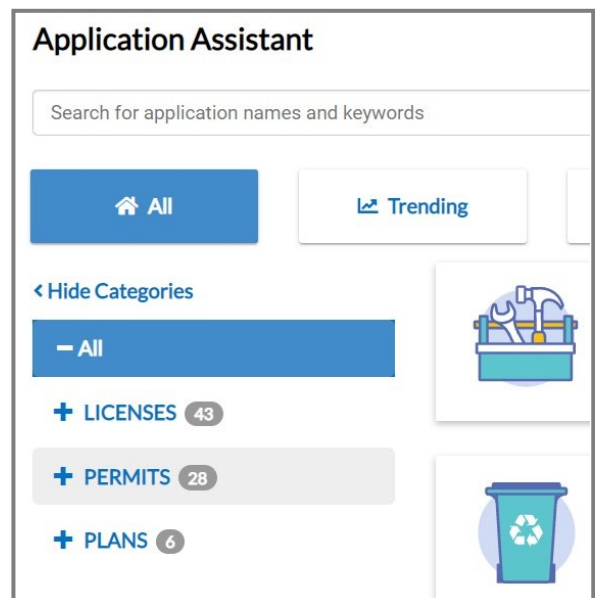
The Application Assistant offers a guided way to apply for licenses, permits, and plans. This guide uses a permit as an example application, but the process is similar for other applications. To use the Application Assistant:

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 our current most common application types.
6. Click **My History** to choose an application type for which you have previously applied. This tab displays only for registered users.
7. Click **LICENSES** to choose a type of license, which includes professional and business licenses.
8. Click **PERMITS** to choose a type of permit.
9. Click **PLANS** to choose a type of plan.

Application Assistant [Help me choose](#)

Search for application names and keywords Q

All

Trending

My History

LICENSES

PERMITS

PLANS

> Show Categories [Show My Templates](#)

Building (Residential) - Addition

Category Name: Residential Building

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

Apply

Building (Residential) - New Single Family

Category Name: Residential Building

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

Apply

Contractor - General

Category Name: Contractor

Description: Contractor License - General

Apply

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

Application Assistant

electrical

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

Step 1: Location

To add the location for the case:

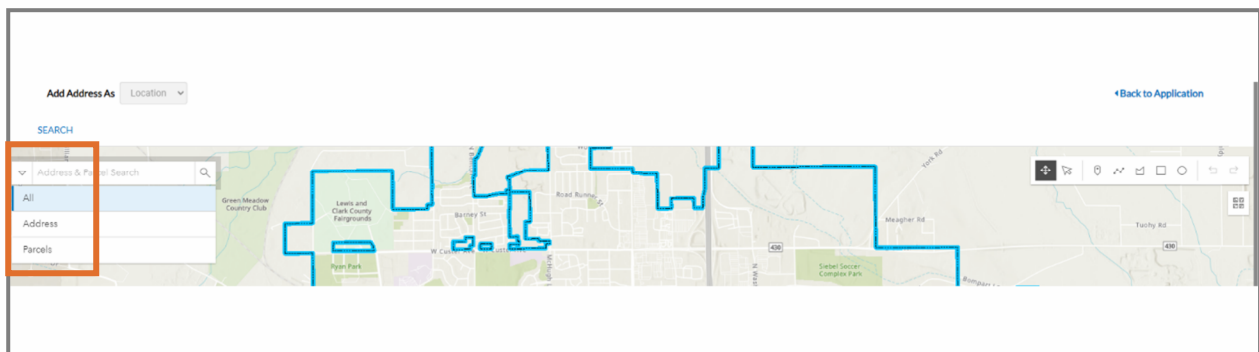
1. Select the **type of address** on the Add Location card. The card may display a default address type (e.g., Location).
2. Click **add** on the Location card to add a location.

The screenshot shows a multi-step process for applying for a permit. The current step is 'Locations', indicated by a blue circle with the number 1. The other steps are 'Type', 'Contacts', 'More Info', 'Attachments', 'Signature', and 'Review and Submit'. Below the progress bar, there is a section titled 'LOCATIONS' with instructions: 'Please provide the site address for the location at which the work permitted will be conducted or at which the application applies. If the site address is not known, enter the applicable tax parcel ID (geocode number). FOR ADDRESSES, LESS IS MORE. IF THE ENTIRE ADDRESS IS NOT ENTERED EXACTLY AS IT IS LISTED IN THE CITY/COUNTY RECORDS, THE ADDRESS MAY NOT SHOW UP. HINT: START WITH THE ADDRESS NUMBER AND THEN THE BEGINNING OF THE STREET NAME - THE ADDRESS SHOULD BEGIN TO SELF-POPULATE AND THE APPLICABLE ADDRESS WILL SHOW.' Below the instructions is a blue card with a dropdown menu set to 'Location', the text 'Add Location', a white plus sign, and the word 'REQUIRED'. At the bottom of the form are buttons for 'Create Template', 'Save Draft', and 'Next'.

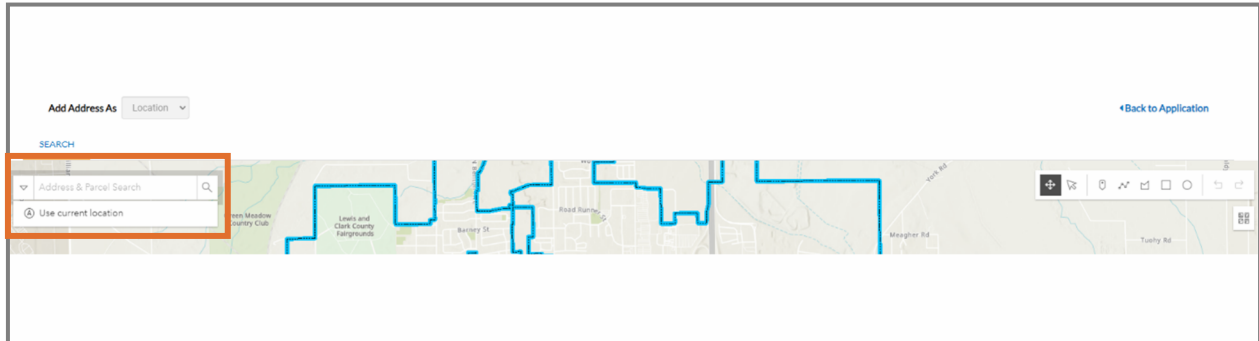
Civic Access displays the Map page. Customers can search for an address, manually type an address, or draw a spatial collection (if configured).

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.

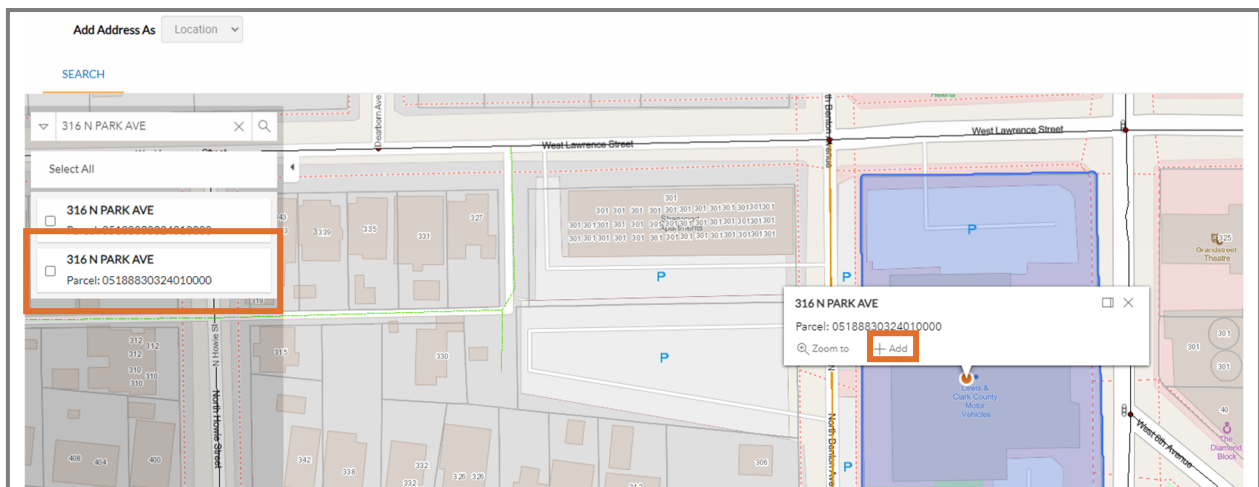


3. Or type an **address, parcel number, or partial address** or **parcel number**.
4. Click **search** or press **enter** on the keyboard.
5. Or click **Use current location**.



Civic Access displays:

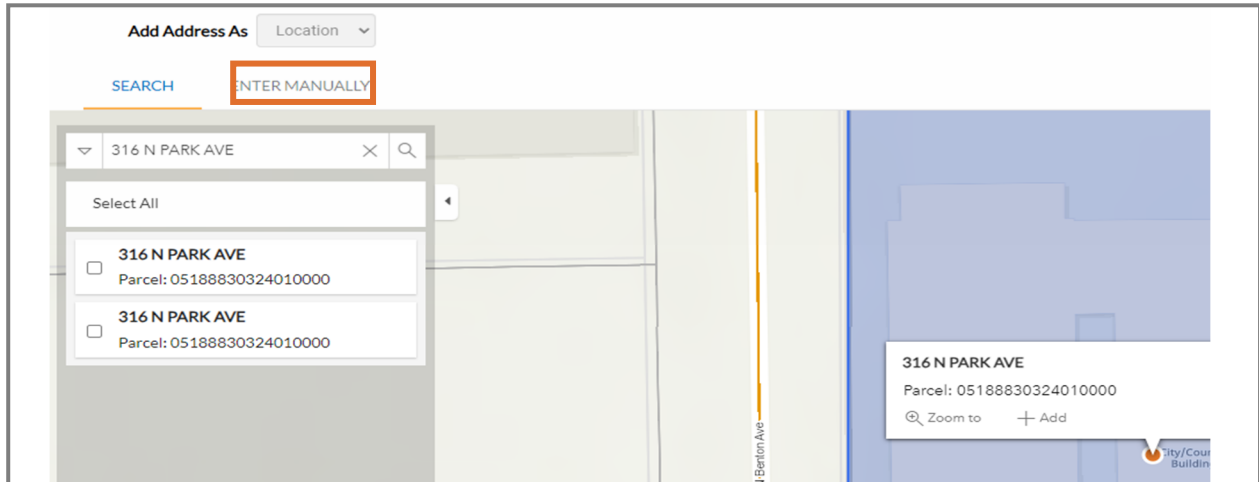
- Results specific to the criteria.
 - A pin on the map with a popup listing parcel and owner information, allowing you to zoom to the location or add a case.
6. Mark the desired **Address**.
 - a. Click **Add** in the search results to add a case at this location.
 7. Or click **Add** in the popup on the map to add a case at this location.
 8. Click **Next**.



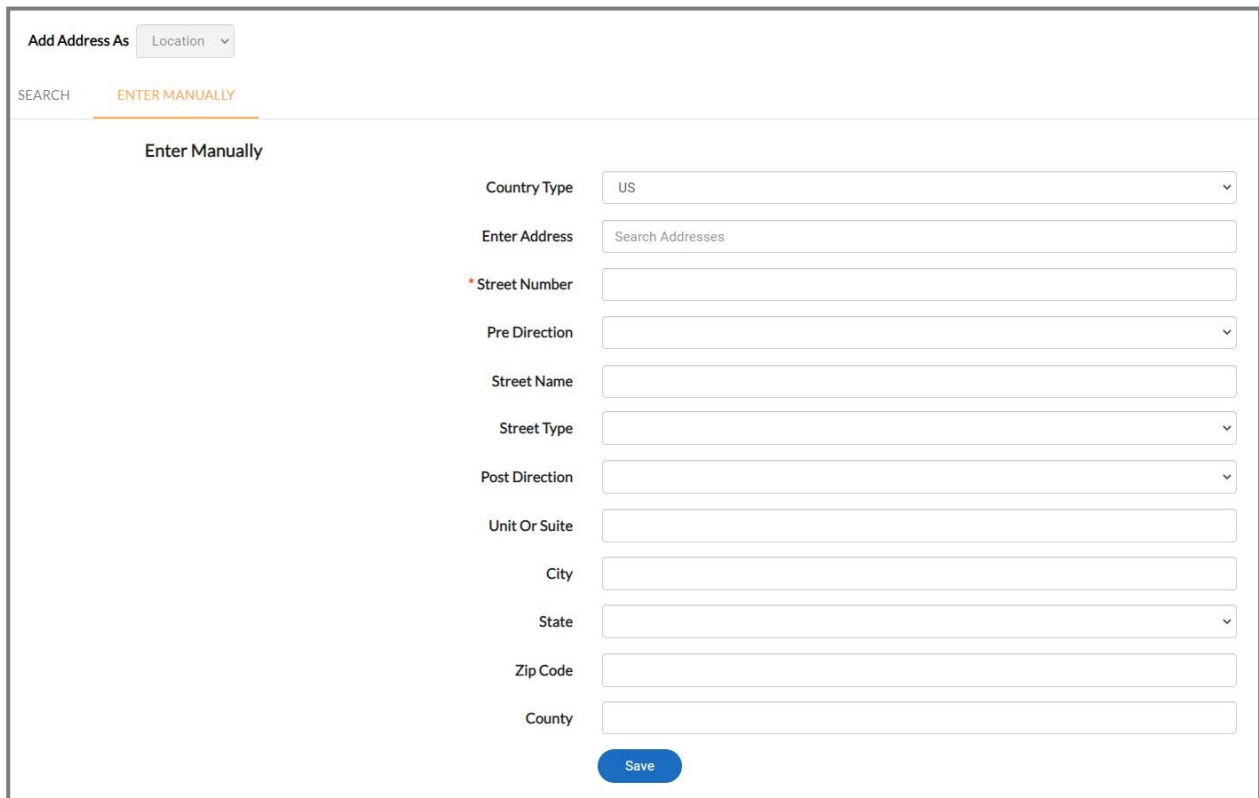
Manually Enter an Address

You can also create cases based on an address that are not in our GIS records. To manually add an address:

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



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

A screenshot of the 'Enter Manually' form in the GIS application. The form is titled 'Enter Manually' and has a 'Save' button at the bottom. The form contains the following fields:

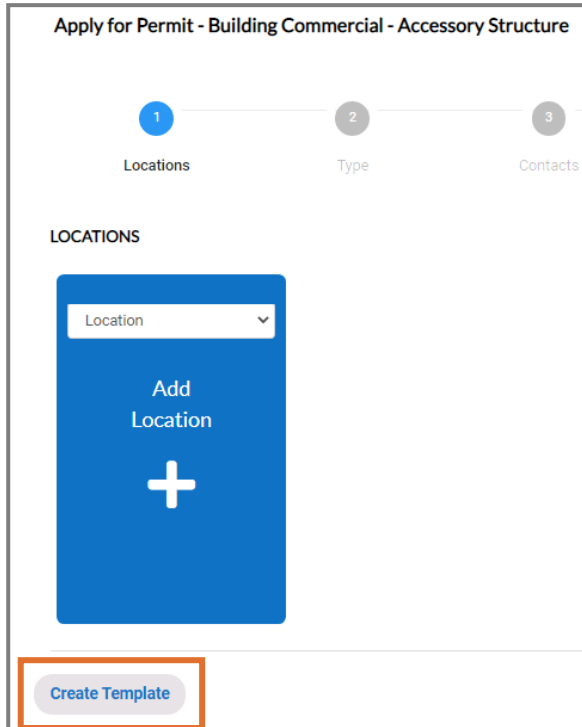
- Country Type: US (dropdown)
- Enter Address: Search Addresses (text input)
- * Street Number: (text input)
- Pre Direction: (dropdown)
- Street Name: (text input)
- Street Type: (dropdown)
- Post Direction: (dropdown)
- Unit Or Suite: (text input)
- City: (text input)
- State: (dropdown)
- Zip Code: (text input)
- County: (text input)

NOTE Required fields are noted with a red asterisk.

Application Templates

You 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.

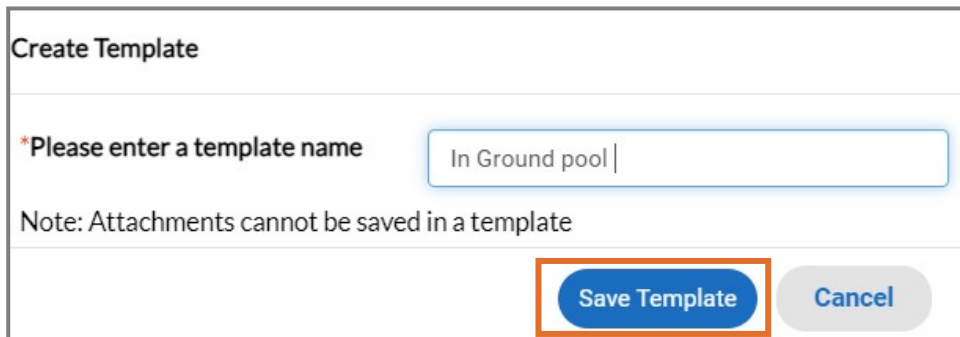
1. Click **Create Template** on the Location step of an application.



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. You cannot add attachments to a template.

Once the you save 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 - Alternative Energy: Residential *REQUIRED

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

PERMIT DETAILS

Please provide general information relative to the case type/project. More detailed information should be provided in your project narrative or in "More Information," if applicable.

* Permit Type: Alternative Energy: Residential

Description:

* Valuation:

Buttons: Back, Create Template, Save Draft, Next

NOTE Required fields are noted with a red asterisk.

Step 3: Contacts

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

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

Apply for Permit - Alternative Energy: Residential *REQUIRED

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

CONTACTS

Based on your account information, you will initially be listed as the applicant. If you are also the property owner, contractor, or other trade or permittee type, or other listed application representative, you will need to add that to your contact information.

Property owner information is REQUIRED. All REQUIRED contact fields shall be completed to proceed with the application.

To add a contact, begin by clicking on the plus symbol. Next, on the subsequent screen, enter the name into the search bar and then tap 'enter'. If the individual already has established contact information, simply click on the 'ADD' button under the action tab. However, if the contact information isn't readily visible, it's possible that the contact isn't in the system or that the name is spelled differently.

For contacts not currently in the system, select the 'ENTER MANUALLY' button. On the 'enter manually' screen, fill out the form with the contact's first and last name, along with at least one phone number. An email address is required as this is an online system and notifications will be sent via email. The email address is required to access the permit application throughout the review and project process.

Additional contacts can be added later for administrative purposes by the applicant and contractor if any changes occur during the project.

Applicant
Chris Brink (You)
555 Main Street

Select Type
Add Contact
+

Back Create Template Save Draft Next

To add contacts:

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

CONTACTS

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

Applicant
Chris Brink (You)
555 Main Street

Select Type
Select Type
Applicant
Architect
Contractor
Developer
Owner
Owner/Builder
+

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

Add Contact

Add Contact As Contractor ▼

Search
Enter Manually
My Favorites

Search Q

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 MyFavorites.
8. Click **Next** after adding all case contacts.

Search
Enter Manually
My Favorites

Search Q

Sort Relevance ▼

Favorite	First Name	Last Name	Address	Company	Email	Action
★	Tim	Taylor	35 S Washington Naperville IL 60540	PBG Construction	pbg@tylerdemo.net	Add

Step 4: More Info

The More Info step displays fields defined by Permitting, Planning, and Licensing staff. We use this 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. You cannot edit this information after submitting the application. Only staff can edit the information in EPL. To add information:

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

Apply for Permit - Alternative Energy: Residential *REQUIRED

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

MORE INFO

Applicable for both the permit type and plan type, you will need to enter as much of the information listed in the following sections as possible. Some information is required, and you will not be able to proceed to the next step without entering the required information. Incomplete or missing information may delay the processing and review of your application.

Alternative Energy Information [Top](#) | [Main Menu](#)

Building Type

Alternative Energy Type

Select code edition

Total Contract Dollar Amount \$

Select multi-family group.

[Back](#) [Create Template](#) [Save Draft](#) [Next](#)

NOTE Required fields are noted with a red asterisk.

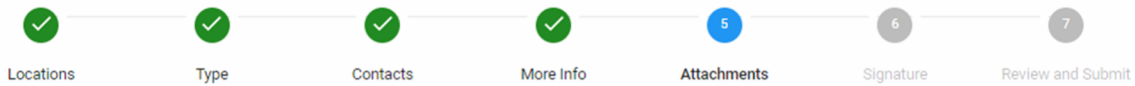
Step 5: Attachments

The Attachments step allows you 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 when we require a certain file type (e.g., building plans, blueprints, site plan, etc).
3. Locate and select the **file** on the computer or server.
4. Click **Open**.
5. Click **Next** after all files have been uploaded.

Apply for Permit - Alternative Energy: Residential

REQUIRED



Attachments

Please provide all of the listed attachments. Failure to provide the required materials will delay staff review of your application submittal. All submittals are not considered officially submitted until such time the required attachments are provided. PDF FILES SHALL BE UNLOCKED AND FLATTENED TO ALLOW FOR MARKUPS AND EDITS. Secured and digitally signed PDF's will delay the review of the permit application and will be returned as unreviewed.

The various attachment types are shown below or may be selected using the dropdown list.

If helpful, a separate permit, plan, or license application form or worksheet may be provided separately if additional information for your submittal would be beneficial. These forms can be found on the appropriate department webpage or located under the "Permit/Plan Apps & Documents" tab.

Three blue attachment cards are shown. Each card has an information icon (i) in the top right corner and a large white plus sign in the center. Below the plus sign is the text "Supported:" followed by a list of file extensions. At the bottom of each card is a grey bar with the word "REQUIRED" in blue capital letters.

- Card 1: *Complete Building Plan (Building, Site,..) Add Attachment. Supported: .pdf. REQUIRED.
- Card 2: *Equipment/Material Data Information Add Attachment. Supported: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf, ... REQUIRED.
- Card 3: Select Type dropdown menu. Add Attachment. Supported: .pdf, .jpg, .png, .jpeg, .gif, .tiff, .doc, .docx, .xls, .xlsx, .text, .dwg, .zip, .csv, .rtf, .dxf, ... REQUIRED.

A row of four navigation buttons: "Back", "Create Template", "Save Draft", and "Next". "Back" and "Next" are blue buttons with white text. "Create Template" and "Save Draft" are grey buttons with blue text.

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

Step 6: Signature

The Signature step requires you to consent electronically for the application.

Type the **applicant's name** in the first field.

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

The screenshot shows a multi-step process bar at the top with steps: Locations, Type, Contacts, More Info, Attachments, Signature (highlighted with a blue circle and '6'), and Review and Submit (highlighted with a grey circle and '7'). Below the bar, the 'SIGNATURE' section contains a consent agreement. The agreement text states: 'I understand and agree that I am using an electronic permit application process which requires me to provide my electronic signature (E-Signature). Such electronic submittal is done under the guiding requirements of the Montana Uniform Electronic Transactions Act (§30-18-106, Montana Code Ann.)' and 'The undersigned applicant hereby authorizes the filing of this application (and any subsequent revisions). If the applicant is not the property owner (e.g. prospective purchaser, contractor, individual tradesperson, other applicant representative), they have obtained the owner's consent and permission for the application and the City's entry onto the property (if submitting on behalf of another party, a separate notarized statement may be required). With the submittal of this application, the undersigned accepts the responsibility for ALL associated application fees, plan check/review fees, and other expenses, even if the application is denied or withdrawn.' It also authorizes City of Helena staff for site inspections and certifies that the information is true and accurate. A note at the bottom of the text says: 'The undersigned can elect to draw in their signature or enable the toggle to type in their signature. Select the 'Enable Type Signature' toggle for a box to type in the name for the signature.'

Below the text, there is a red asterisk: '* Please type your name as consent to electronically sign this application.' followed by a text input field containing 'Chris Brink'. Below that is the 'Enable Type Signature' toggle, which is turned on (blue), followed by another text input field containing 'Chris Brink'. A signature box below contains the text 'Chris Brink' and 'June, 13 2024' at the top, and a large 'X' followed by a handwritten signature 'Chris Brink' on a line.

At the bottom of the form are buttons: 'Back', 'Create Template', 'Save Draft', and 'Next'.

NOTE Required fields are noted with a red asterisk.

Step 7: Review and Submit

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

The screenshot shows a web form for reviewing and submitting an application. At the top, there is a table with a list of application types, each with a checkbox:

<input type="checkbox"/>	R-2 Multi-Family
<input type="checkbox"/>	R-2.1 Residential Care Facilities
<input type="checkbox"/>	R-3 1 & 2 Family Dwellings
<input type="checkbox"/>	R-3.1 Res. Care Facility < 6 Clients
<input type="checkbox"/>	R-4 Res. Care Facility >6 Clients
<input type="checkbox"/>	S-1 Storage, Mod Hazard
<input type="checkbox"/>	S-2 Storage, Low Hazard
<input type="checkbox"/>	U Utility/Misc Structures

Below the table are three input fields: "Number of Stories", "Seating Capacity", and "Proposed Use".

Under the "Attachments" section, two files are listed: "Complete Building Plan (Building, Electrical etc)" and "Office Plans - LEVEL 02 FLOOR PLAN_v1.pdf".

At the bottom of the form, there are four buttons: "Back", "Create Template", "Save Draft", and "Submit". The "Save Draft" and "Submit" buttons are highlighted with orange boxes.

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.

✔ Your application was successfully submitted!

Thank you for using the City of Helenas Civic Access portal for your application submittal! A permitting team member will now review your application for completeness and process your application accordingly. Once the permit has been approved for issuance, any fees will be generated, and an invoice will be created. Once all associated fees have been paid, your permit will be released for printing. FEES will be invoiced upon completion of the approval of the permit application. The invoice can be paid by navigating to the dashboard and selecting the fees tab.

[Continue to permit](#)