

Civic Access (CA)

Contact Best Practices and FAQs



**City of
Helena**

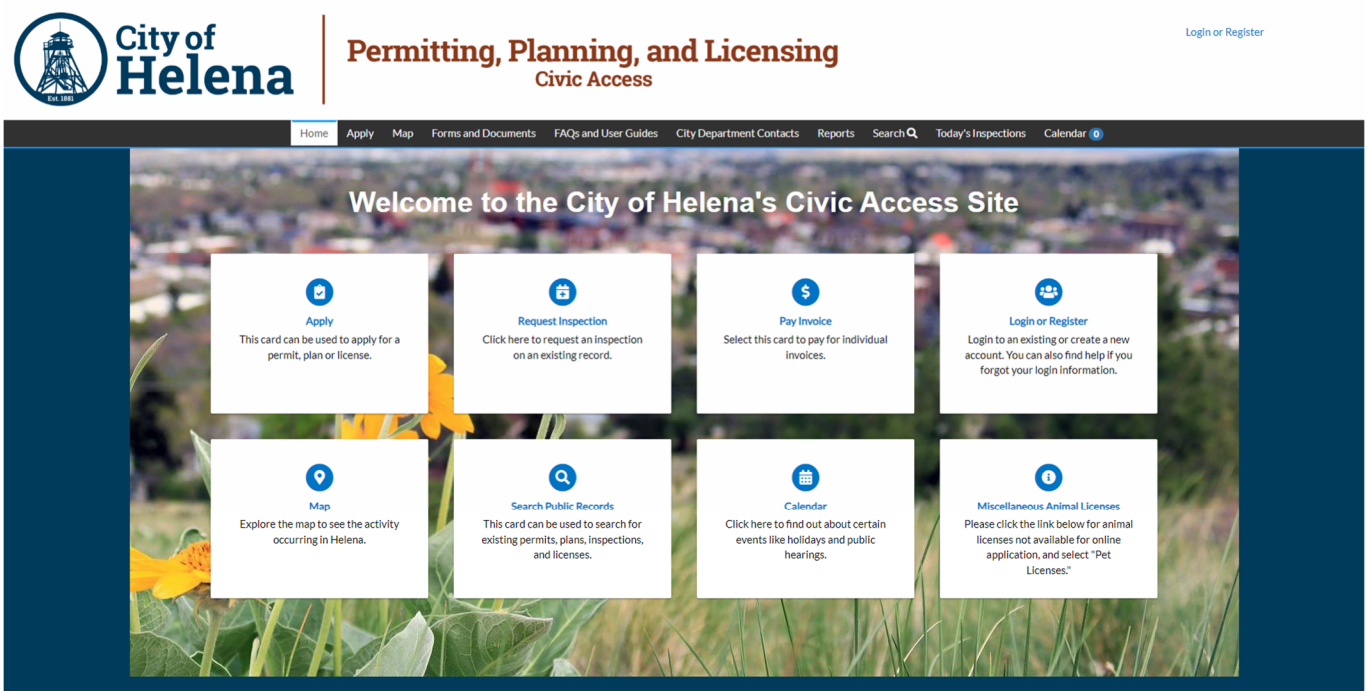


Civic Access Overview

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.



Contact Best Practices

What are Contact Records in EPL/CA?

Contact records are the way that EPL identifies individuals and companies and connects them to a CA account. EPL has contact records that are used for all service types in EPL and the Civic Access (CA) Portal. A contact can be connected to all types of cases.

How do I create accounts for a company?

The company should have a single (primary) contact and email address for their business. The contact may or may not have a person's name on the contact. This primary company contact record will be the license holder for contractor licenses. When you register your company through Civic Access (CA), please use the company email address already on file with the City of Helena or notify staff (by submitting a CA Contact/Case Connection Form) with the email address you'd like to designate as your primary contact record. By providing and using an existing email address on file, it will assist staff later when requesting connection to existing records.

My company has several employees that need access to records in CA, how do we add them to these records?

While one primary or shared CA account per company is recommended, it is not required. One account will help ensure that the company never loses access to permits even if an employee leaves the company. If you desire to have individual contacts for your company, then you can create individual contacts for your company in addition to the primary company contact.

When individuals create a CA account, they should use an email address that is on file for them as an individual (not the same email address that was used for the company record). Through the company's CA account, you can associate individuals with applicable cases, permits, or licenses. By associating an individual with cases, they will be able to view case information using their individual CA account.

Please reference the Application CA Guide for adding additional contacts to a record. When you submit for new applications, add the company contact record and any individual contact that should have access to the record in CA.

Why can't see old or current cases on my CSS account?

Any permits, cases, or licenses that were submitted or issued prior to June 25th, 2024 will need to be manually connected to your new CA account registration by staff before you are able to view or interact with them in CA. This may also happen if you used a different email address when creating your CSS account than one that was previously on file with us. If you are unable to view your records through CA, submit a CA Contact/Case Connection Form or speak with a respective department staff member, so we can assist you with making the connections.

We appreciate your patience as we work through a high volume of these types of requests. In the meantime, if you need assistance requesting inspections on records you are unable to view or renewing a particular license, please call the appropriate department for assistance.

How can I add additional contacts to an active case through CA?

Once you are registered and have been linked to your existing active permit, you have the ability to add additional contacts to your permits or licenses in CA. Provided your additional contacts have already created a new CA account, you have the ability to connect them to the record yourself. Some examples of additional contacts could be a homeowner, subcontractors, general contractors, project managers, etc.

How do I know which "contact type" to use when adding contacts to a record on CSS?

When adding a contact to a record, especially for contractors, it is important to select the correct contact type to help in processing your application. When adding an individual who should have viewing rights or billing capabilities, you can select the "Contact" or "Applicant" type.