

User Help Guide

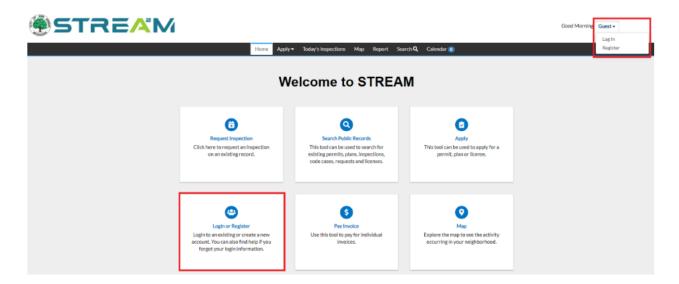
Contents

Logging in and Registering Error! IS THIS YOU? Error!	
Log In Issues Troubleshooting your Login Issue	
Applying for a Permit, Plan, or License Application Progress Bar	
Application save options	11
Save Draft	11
Create Template	11
Add One or More Locations	12
What to do if you cannot find an Ann Arbor address in our system	13
Туре	15
Contacts page	15
Manually adding a contact, and how to handle "Email is already in us	e" message17
Error Messages on the Contacts Page	18
Contact does not have the required certifications	18
Email is already in use. Please use a different one	18
Warning: An unexpected problem has been encountered. Please of this site and note the following reference number	σ,
More Info Page	19
Uploading Attachments	19
Signature	20
Review and Submit	20
Success Page	21
Paying Fees	23
Navigating and Drawing on the Map	

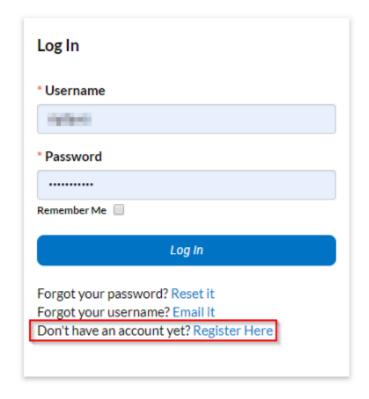
Applying from Address/Parcel Search	26
Troubleshooting Map Not Rendering:	26
Creating Map Drawings/Spatial Representations	27
Beginning an Application Using your Drawing or Spatial Collection	30
Troubleshooting Common Error Messages During Applications	
I am getting an error about missing certifications on the Contacts page	31
I am getting an error message with a Reference Number	32
I am getting "An Error Has Occurred" message upon clicking Submit	32
I have reached Attachments but it won't let me upload files	32
I have reached the end of my application but there is no Submit button	33
Utilizing Templates for Common Applications	33
STREAM Dashboard Overview	36
My Inspections	39
My Invoices	39
My Licenses	40
Paying Invoices	41
Finding and Paying Invoices that are affiliated with your account	41
Finding and Paying Invoices that are not on your account	42
Option 1:	43
Option 2:	44
Printing an Invoice	46
Viewing Your Application Details and Attachments in STREAM	48
Request an Inspection in STREAM	
Troubleshooting Inspection Request Issues Online	
Inspection cannot be requested due to prerequisites.	54
A hold exists on the permit	54
Fees are due	54
You are not a case contact	54
Review Comments and Resubmit Information	
Troubleshooting Resubmitting File Issues Online	
The option to resubmit files is not visible	
The option to resubmit is visible but fails when I try to upload the new file	59
Don't see your issue? Contact us for help!	60

Register for a new account

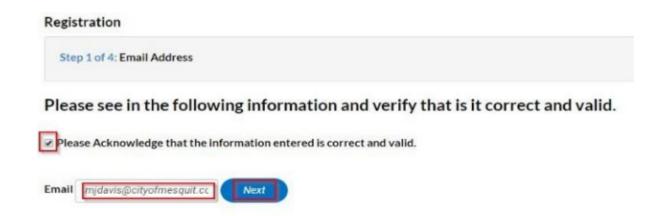
- 1. Access the STREAM website by going to stream.a2gov.org
- 2. Access the registration process either by expanding the "Guest" drop-down menu in the top-right corner, or by selecting the Login or Register tile located on the home page.



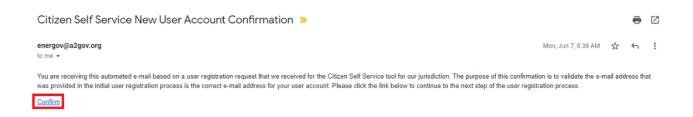
3. From the Log In screen, click the Register Here option at the bottom of the page.



- 4. Click the Checkbox to the left of Please Acknowledge that the information entered is correct and valid.
- 5. Enter a valid email address and click Next. This will generate an email to your email address.

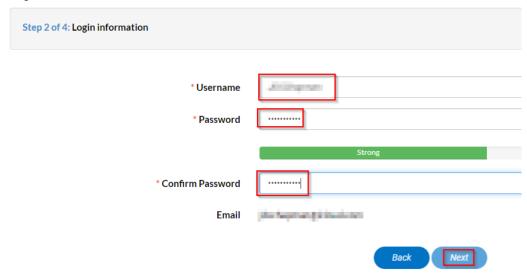


- 6. Once you have received the email, click on the Confirm link.
 - a. Note: If you don't see the email within a few minutes, check your spam folder. All emails from us will come from energov@a2gov.org or stream@a2gov.org.

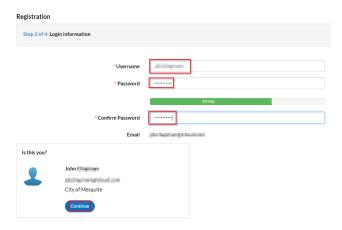


- 7. Enter a Username to be utilized for logging into STREAM
 - a. Note: The username should be your email address to avoid confusion with troubleshooting and logging in in the future.
- 8. Enter a Password, Confirm the Password, and click Next

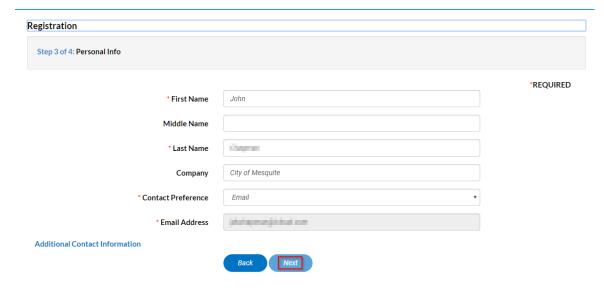
Registration



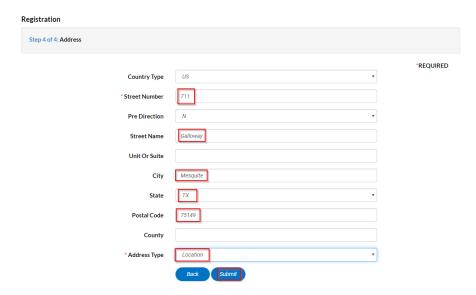
1. **IS THIS YOU?** At this stage, if STREAM identifies a pre-existing account with your same email address, you will see a message asking if that account is you. If so, click **Continue** to connect to that account.



2. Enter all required fields (marked by a red asterisk *) and click Next



3. Enter your address, and click Submit

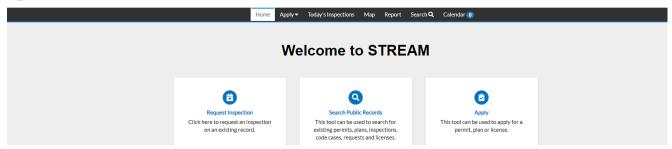


You have Successfully registered for your STREAM account and will be redirected to your Dashboard

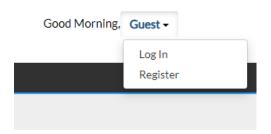
Log In Issues

- 1. Access the STREAM website by going to stream.a2gov.org
- 2. If you are not currently logged in, you will see that you are referred to as a Guest in the top-right corner of the screen.
 - a. If you are already logged in, you will see your account name in that corner instead of Guest.

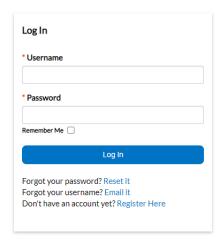




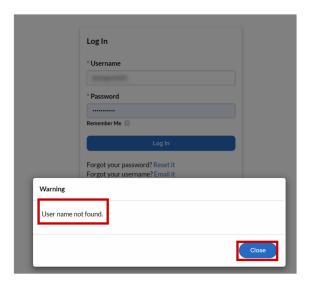
Click the down-arrow next to the word "Guest" to see the options to either Login or Register



4. The log in page has three help options below the blue **log in** button: receive an email reminder of your username, reset your password, or register for a new account. The instructions under **step 5** below will help you understand which option to choose based on your error message.



- 5. Troubleshooting your Login Issue
 - b.If you receive an error message when attempting to log into the online system, it might mean...
 - i. The username entered was incorrect
 - ii. The password entered was incorrect
 - iii. You might not be registered yet
 - iv. The link you clicked to register or reset your password might be expired (invalid token)

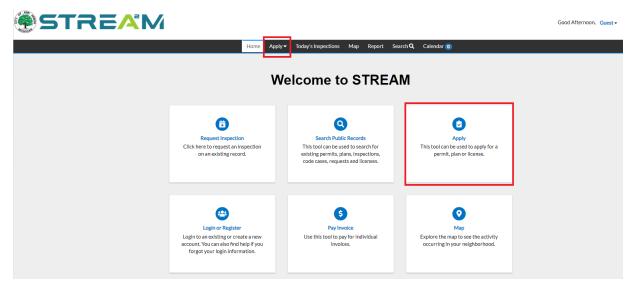


- c. Click close on whichever warning you have received
- d. We recommend you begin your troubleshooting with your username:
 - i. Select Forgot your username? Email it
 - ii. Enter your email address and click Submit. You will receive an email within 5-10 minutes with your requested information. Please check your spam folder if you are not seeing this email.
 - iii. If you receive an email with a *different username than what you typed in*, you can now proceed to log in with the corrected username. You may still need to request a password reset if you have also forgotten your password.
 - iv. If you receive an email with the *same username you typed in*, you can now eliminate the username as a problem. Proceed to the **Forgot your password? Reset it** option next.
- e. Forgot your password? Reset it
 - i. Choosing this will prompt you for your email address and will send you a reset link via email.
 - Note that if you request a password reset multiple times, you will be sent multiple emails, each one invalidating the prior. If you click the reset link from a superceded email, you will receive an "invalid token" error message.
 - 2. Note that your password reset email will only be valid for 15 minutes. Please follow through with resetting your email promptly after requesting the reset. If you click the reset link on an expired email, you will receive an "invalid token" error message.
- f. If you do not receive an email within 5-10 minutes:
 - i. Please check your spam folder to see if the email accidentally went there instead of your inbox.
 - ii. You may have originally registered using a different email address. If you have any other email address you'd like to try to check for, use the **Forgot your username? Email it** prompt for that email address as well.

- iii. You might not have completed the process of setting up your account when you first created it. Please follow the steps to register for a new account, and keep an eye out for an <u>"Is this you?"</u> message along the way to connect you to your existing account.
- iv. You might not have an account yet. If you ask for a forgotten username or password but your email address is not affiliated with a login, then no email will send. Please follow the steps to register for a new account.
- v. Note that some organizations have spam filters that might prevent emails from STREAM from reaching your inbox. If you are expecting an email from STREAM and not seeing it, please add stream@a2gov.org to your address book and alert your IT team (if applicable) to ensure this email is not being flagged as spam.
- g. I reset my password but the website still says invalid credentials.
 - i. This likely means that you are now typing the correct password but are not typing the correct username. Please follow the prompt for Forgot your username? Email it to receive a reminder of your username via email.

Applying for a Permit, Plan, or License

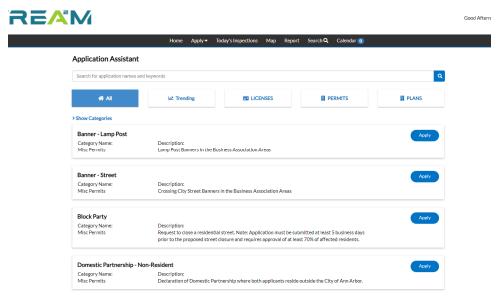
- 1. Access the STREAM website by going to stream.a2gov.org. It is best to log in before you begin your application process.
- 2. You can either click on the Apply tile from the home screen or use the Apply drop-down menu at the top of the page to access the Application Assistant.
 - d. Note: The drop-down menu works best if you know whether you are applying for a license, permit, or plan. The Apply tile will bring you to a general search for all categories if you are unsure.



3. You will now be in a search screen where you can find the application you are interested

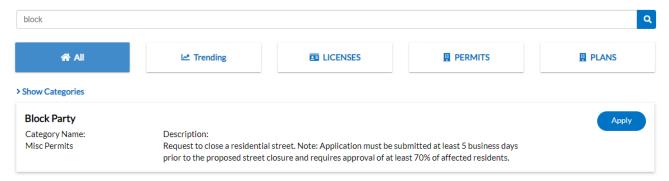
in. You can use the search bar to find your application by keyword, use the category buttons to narrow down the suggested results by category, or click on the "Show Categories" link to expand a sidebar of categories to assist with your search.

d. Generally, the search bar will be the fastest and easiest method to use.

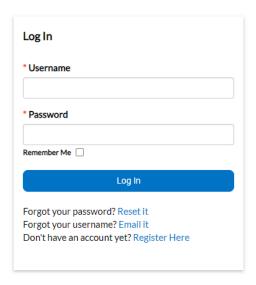


4. Once you have found the application you want to apply for, click on the blue "Apply" button to begin.

Application Assistant



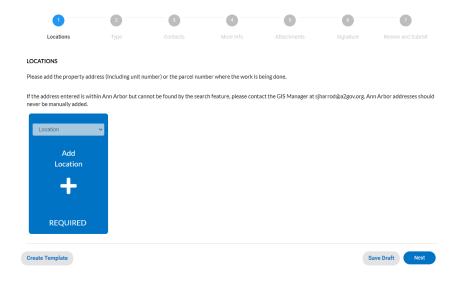
5. If you are not already logged in, you will be prompted to do so now. If you do not already have an account, please click the link to <u>Register Here</u>. If you have forgotten your username or password, <u>follow these steps to troubleshoot</u>.



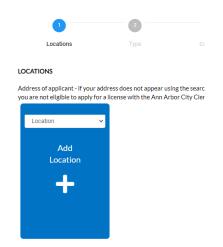
6. **Application Progress Bar.** Once you are logged in, you will be brought to the first step of the application. A progress bar can be found at the top of the screen to show you how far along you are in the application process, with your current step highlighted in blue:



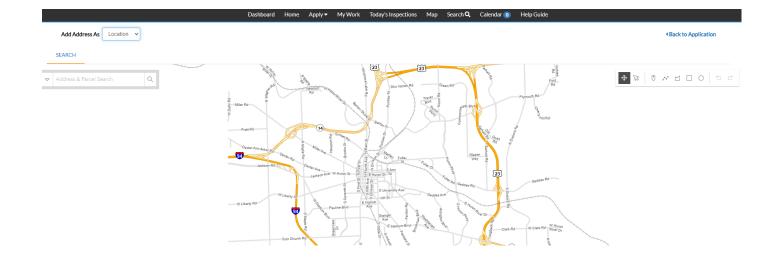
- 7. **Application save options.** At the bottom of the application page, you have three options: Create Template, Save Draft, or Next.
 - d. Save Draft: At any point during your application you can click on the "Save Draft" button in the bottom right corner to save your work and come back later. Your draft will be waiting for you in the "Saved Work" page under your name in the top right corner of the website.
 - e. Create Template: At any point in the application process, you can click on the "Create Template" button in the bottom left corner. This is not recommended at any stage beyond step 2 or it can result in error messages or a frozen application.



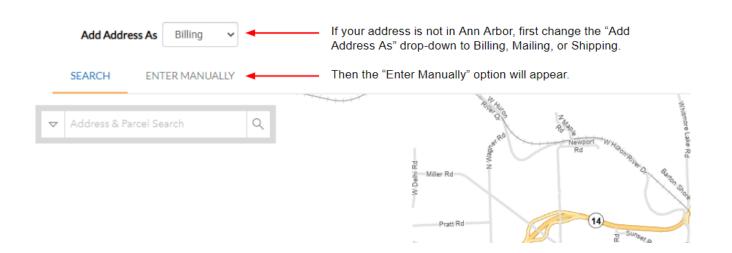
- 8. Add One or More Locations on the Locations step of the application. Please read the instructional text carefully, as some applications require the location of the work to be done while others want the applicant's address, for example.
 - d. When you are ready to add your address, click on the plus (+) sign in the location tile to proceed

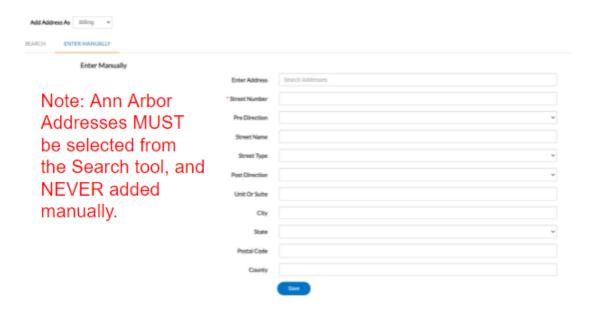


e. Clicking on the plus sign will open a view of the Ann Arbor map. From this page you can either use the search pane to search for your address or parcel, or you can use the map to create a drawing to represent the area of work. Note that not all applications accept map drawings in lieu of an address/parcel.

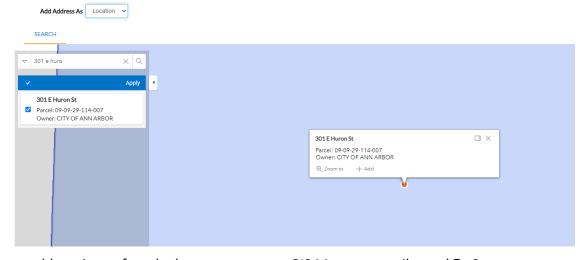


- f. All Ann Arbor addresses should already exist in our search tools. If you are trying to add a non-Ann Arbor business or billing address you must first change the "Add Address As" drop-down menu to Billing, Mailing, or Shipping Address to unlock the manual entry option.
- g. If you cannot find an Ann Arbor address in our system, please contact our GIS manager at sjharrod@a2gov.org.
- h. If your address is not in Ann Arbor, you can manually add an outside address by first editing the "Add Address As" drop-down menu at the top left corner of the map screen to reflect your new address type. Billing, Mailing, or Shipping address types all allow for manual entry.



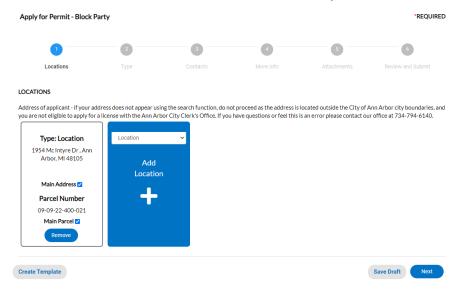


i. Once you click on the magnifying glass to search for your address or parcel, results will appear in the left pane below the search bar, as well as on the map. You can either select "Add" from the map bubble above the address, or check the box next to your address and select "Apply."

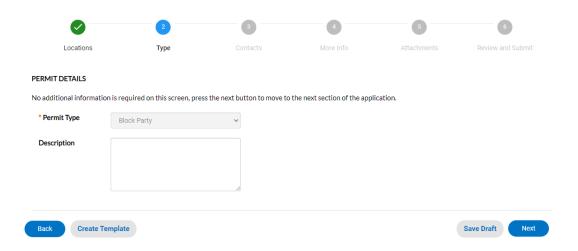


If your address is not found, please contact our GIS Manager at sjharrod@a2gov.org

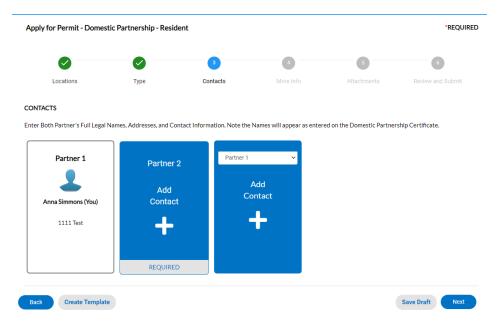
9. Once you've selected "Add" or "Apply" for your address, you will be returned to the Locations step of your application, with that address populated. At this point you can add more locations if needed, or click "Next" to proceed.



10. **Type**: Some, but not all, applications require information at the (step 2) **Type** screen. You only need to fill out fields marked with a red asterisk.

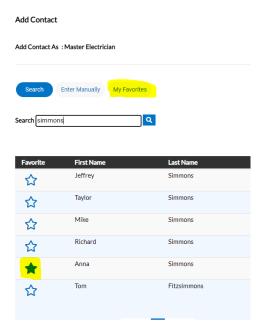


11. **The Contacts page** will contain a tile for every contact type that is required for this application, as well as one at the end for any additional/optional contacts.

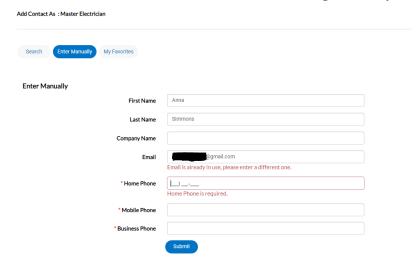


In this example, there are two required contact type. You can use the drop-down menu on the vacant tile to see what other optional contact types may be added if desired.

- a. For most applications, you will automatically be added as an applicant, but if there are additional contacts needed (contractor, electrician, owner, etc) they can be added here.
- b. Use the plus (+) sign button on each contact tile to add that corresponding contact. This will open a search screen where you can either search for an existing record or manually add a new record.
 - The same name may be added for multiple contact types if applicable (i.e. applicant is also the contractor or property owner).
 - Always search for an existing record before adding a new record. For
 example, you already have an account (you are currently logged into it)
 so you should never manually add more copies of yourself. Search for
 and select your name.
 - If you frequently use the same contact/s for your applications, you can star them as a favorite. Once you've starred a contact, you will find them in the "My Favorites" menu for future applications.



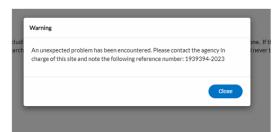
- e. Manually adding a contact, and how to handle "Email is already in use" message
 - After searching for a contact and confirming they do not already have an account, you can go to the "Enter Manually" screen to create their account.
 - When manually adding a contact, you will receive an error message if their email address is already in use. This is your clue to search for them in the search bar rather than manually adding a new account.
 - Manually added contacts require at least one phone number.
 Once you have filled out one of the phone numbers, the other two will no longer be required.



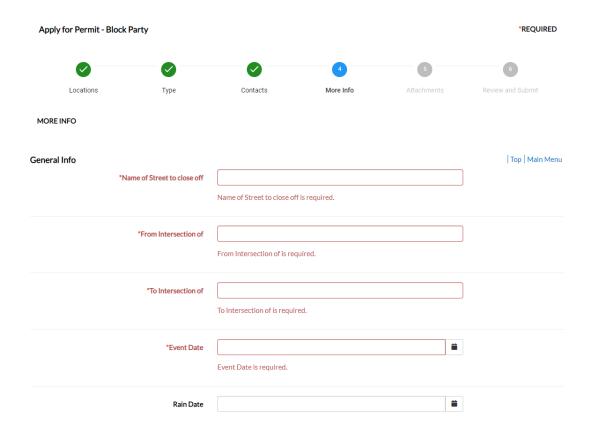
6. In this example, the gmail account entered is already affiliated with a contact. I should return to the search screen to find that existing record rather than creating a new account.

f. Error Messages on the Contacts Page

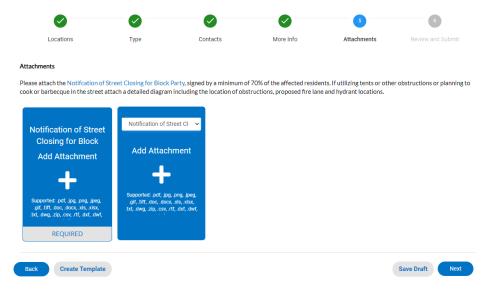
- There are three common errors that could happen from the Contacts step of your application. They are:
 - Contact does not have the required certifications. This means that the permit type you are trying to apply for requires that one or more contact on the application has a certification or license flagged on their account. If you manually added your contacts, that will guarantee this message as manually added contacts are not already in our system and have not yet been verified/flagged. Please ensure you have searched for existing records for all of your contacts. If you are still getting the error, please contact your contractor to ensure that they have completed their Building Servies Registration with our office in order to get their license/s on file.
 - Email is already in use. Please use a different one. This means
 that the contact you are trying to manually add to the system
 probably already has an existing account. Please go to the
 Search page and search for them to find their account rather
 than creating a duplicate record.
 - Warning: An unexpected problem has been encountered. Please contact the agency in charge of this site and note the following reference number. Most often, this error will happen if you are using a draft or template and it is out of date with current application requirements (for example, if you began your draft or template a month ago and we have since updated required contacts for this permit type). It can also happen if you have a contact affiliated with your application who has since been merged. We periodically clear out existing drafts and templates in the system to reduce the risk of these error occurring, but if it happens to you please try the following:
 - Remove all contacts from your case and re-add them.
 - Restart your application without a draft or template.



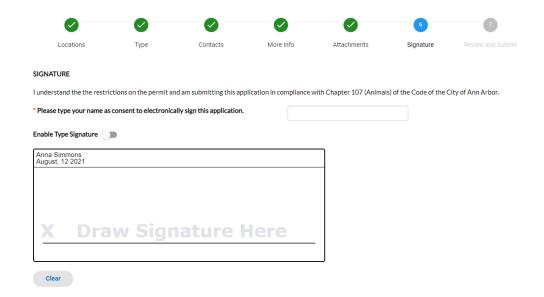
- 12. **Fill out the More Info Page** This page will look very different based on what you are applying for. This is where we collect all fields specifically related to this license/permit/plan type. You must fill out all fields with a red asterisk. Make sure you scroll all the way to the bottom of the page.
 - a. Note: Some of these fields may impact how your fees generate so please ensure that you fill this information out as accurately as possible.



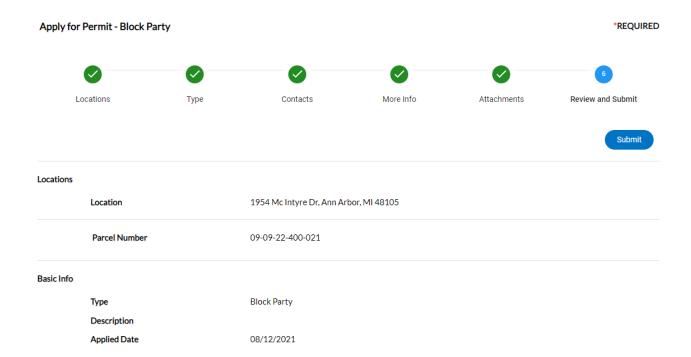
13. **Uploading Attachments:** The Attachments page, like the contacts page, will include a tile for every attachment type that is required, as well as one at the end for any additional/optional attachments.



- 14. **Signature**: Some, but not all, applications require a Signature at this point in the process. This includes an e-signature tool that helps you sign the agreement that accompanies the application.
 - a. Note: You must type your name in the field to consent to electronically sign. You may then draw your signature in the box, OR you can toggle on the "Enable Type Signature" tool, at which point you type your name again to e-sign.



15. **Review and Submit**: This page is your final chance to review your information is accurate before submitting your application:



16. **Success Page**: Once you click Submit, you will be brought to a **Success Page** that your application was submitted, and you can then continue to your application dashboard to view details and track progress:

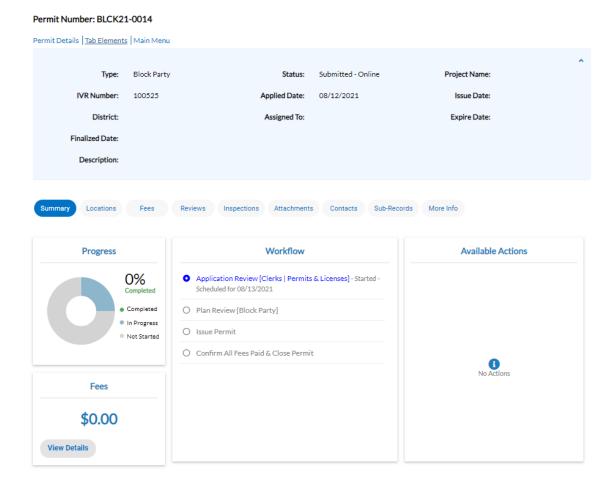


You have Successfully submitted your application through the STREAM portal!

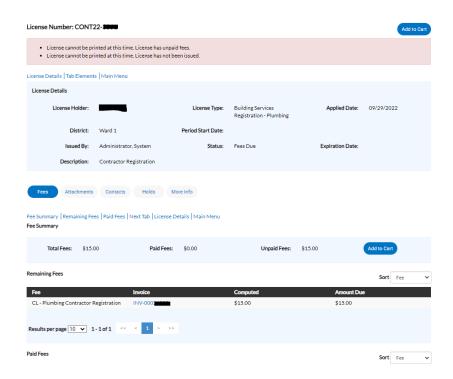
- You will receive an email confirmation of your application, and another once your application is issued.
- You can continue to monitor the status of your application by logging into STREAM and viewing your <u>application dashboard</u>.

By clicking on "continue to permit," you will be brought to your permit dashboard, where you can monitor your review progress and permit status, fees, inspections, and subpermits.

Example Permit Dashboard with no balance due:



Example License Dashboard with fees due:



Paying Fees

17. Use the "Add to Cart" button found at the top right corner of your case dashboard, or from the Fees tab of your case dashboard, to put your fees in your cart and check out

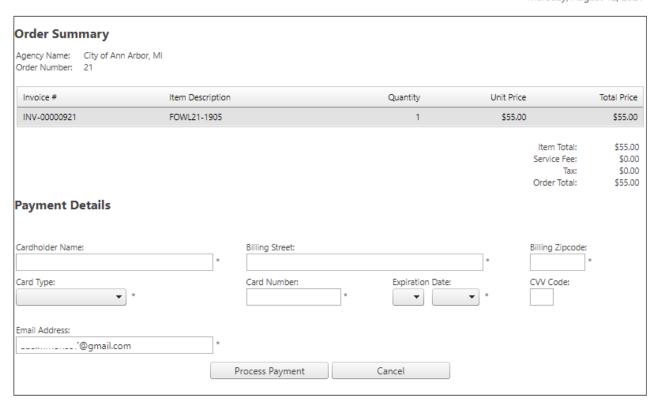


18. The Check Out button will bring you to a secure payment gateway, where you can enter your credit card information and process payment. It should look like this:



Contact Us

Thursday, August 12, 2021

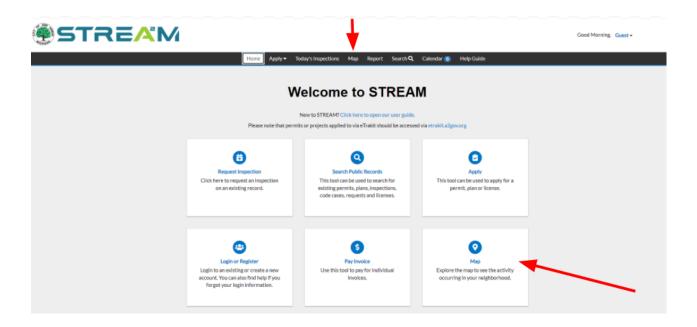


Copyright © 2015 Persolvent (v: 1.1.20.0, dv: 2.2)



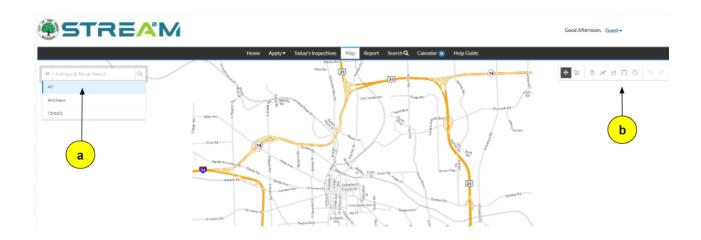
Navigating and Drawing on the Map

- 1. Access the STREAM website by going to stream.a2gov.org. It is best to log in before you begin work.
- 2. You can either click on the Map tile from the home screen, or use the menu bar at the top of the screen to select "Map"

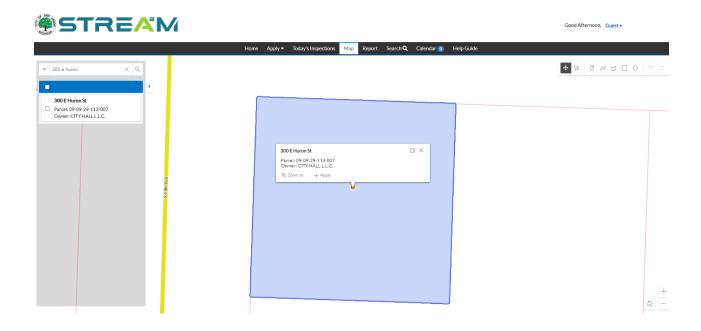


Searching the Map

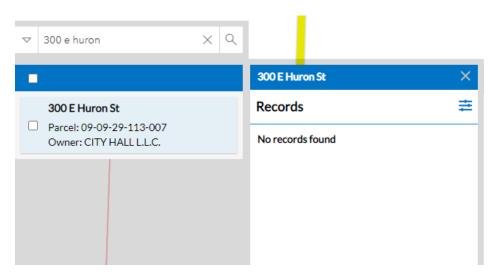
- 3. You will now be inside a fully integrated Ann Arbor GIS map. You can use your mouse to navigate the map or you can type an address or parcel in the Address & Parcel search field in the top left corner (labeled a in the image below). This field will also allow partial information of the address.
 - a. Note: All prefix and suffix info on an address should be abbreviated with NO punctuation. Ex: 123 S Main St Apt 4



4. Click enter on your keyboard, or on the magnifying glass icon with your mouse to begin search. All matching results will be listed in the left pane below the search field. The map will also auto-zoom to the first address in the results.



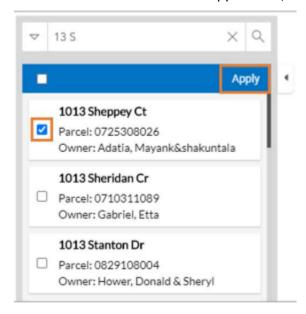
5. To see information related to a specific address or parcel, click on the address in the left pane results bar to expand more info about that address. This will specifically list any records associated with that address or parcel, if any exist.



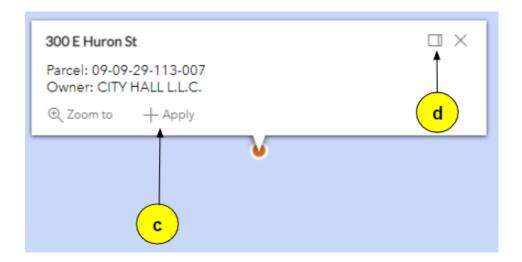
Use the filter icon at the top right of the Records pane to filter the results by date range and record type.

Applying from Address/Parcel Search

6. In the left pane results bar, you can use the checkbox next to any/all address results you want to include in an application, and an Apply button will appear for you to select:



7. To apply for a case from the map view of the address result, click on the "+Apply" button on the address label (labeled c in the image below).



8. If you want to create an application from *multiple* addresses, use the square Dock logo on each address label to dock any/all addresses you need (labeled d in the image above).

Troubleshooting Map Not Rendering:

If you are not seeing the address search results pane, or the bubble on an address to apply, please check your browser's zoom to ensure you are not zoomed in or out, as this can result in these fields not

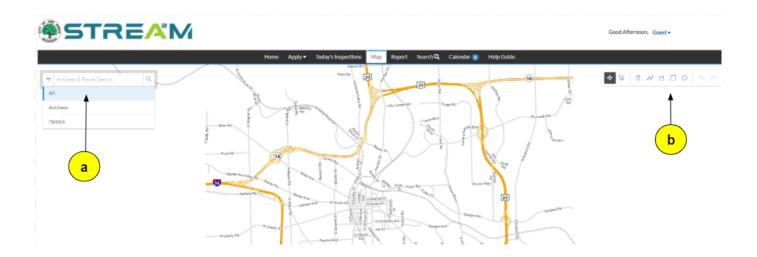
appearing on your screen.

If the map is still not rendering for you, please try clearing the cache on your browser, or open STREAM in a different browser to see if that helps. Browser security settings can sometimes block our map.

Finally, if you are not currently located in the USA, our map will not display for you due to firewall protections. If this is the case, please contact the department for your application and arrange to create your application directly through them via phone or email.

Creating Map Drawings/Spatial Representations

- 9. From the main map screen, use your search tools or mouse to zoom in on the area you plan to work. It is best to locate this area on the map *prior* to drawing.
- 10. Next, hover over the icons in the top right corner to explore your drawing tools (labeled b in the image below)



11. Select the desired tool you'd like to use to draw a point, line, polygon, rectangle, or circle on the map (hover over each icon to see which one is which).

7.



- 12. Once you have selected your drawing tool, you will be able to draw on the map. **Drawing Tips:**
 - a. Any drawings you make during this session will stay on the map as long as you are present in the map, but will not save once you abandon your session.
 - Any parcels that are overlapped or intersected by your drawings will highlight automatically – you will need to de-select the parcel to ensure only your drawing is selected.
 - c. Drawings are made using single-clicks, not click-and-drag. Each single click will create a new anchor point in your shape, and a double-click will complete your

drawing.

- d. If you begin a drawing and need to undo a click, you can use ctrl-z on your keyboard to go back a step. There is also a back-arrow logo in the drawing tools toolbar at the top right of the screen.
- e. If you begin a drawing and need to abandon/start over, use the escape key on your keyboard.
- f. **Transform Tool:** After you've made a drawing, use the transform tool to select your drawing and make adjustments as needed by grabbing and dragging any anchor points.
- g. **Point Tool:** With the point icon selected, you can click on the map to mark the point you need. If that point is on an existing address or parcel, that parcel's information will appear in the left sidebar for you to find associated records and apply from that address. If the point is not associated with an existing address or parcel, you can use the pointer arrow to select the point, and the option to apply with this shape will appear in the top right corner.



h. **Polyline tool:** With the polyline icon selected, you can click on the map to denote the beginning of your line, single clicks for each anchor point, and a double-click to end your line. It is best to only click where you need an anchor point in your line – do not draw by dragging your mouse across the map. For example, the line below was drawn using 3 clicks, then a final double-click to end the drawing:



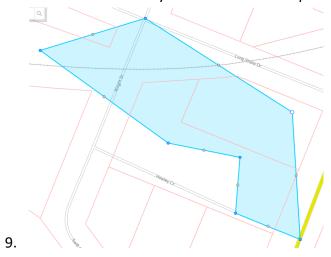
i. Polygon tool: With the polygon icon selected, you can click on the map to denote the first corner of your shape, single clicks for each corner or turning point, and a double-click to end your shape. For example, the black polygon below was drawn with a starting click at Wright & Long Shore Drive, a second click at Long Shore & Pontiac, a third click at Pontiac & Howley, a fourth click at the end of the Howley court dead end, and a 5th click back at the beginning.



Because this shape is overlapping with an existing address/parcel, it has automatically been highlighted in blue so we are aware of this overlap.

j. **Transform Tool:** Once you've drawn your polygon, you can use the transform tool to select your line and make adjustments as needed by grabbing and dragging

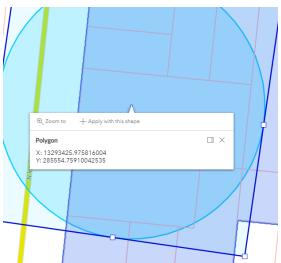
any anchor points (as you transform the shape, more anchor points will automatically be added to the shape to allow you to grab and move them)



- k. Square and Circle tools: The Circle and Square tools can be helpful shortcuts for drawing shapes. With either of these tools selected, single-click on the map where you would like your square or circle to appear. A default sized square or circle will then appear on the map, and will be immediately ready for you to reshape as desired using the anchor points (similar to the transform tool).
 - Depending on how much you transform the shape, you could theoretically create a shape that no longer resembles a square or circle.

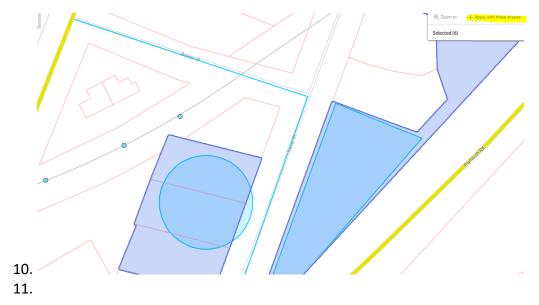
13. Beginning an Application Using your Drawing or Spatial Collection

14. Once your drawing is complete, you can use the transform tool to select your drawing. An "Apply with this shape" option will appear on the screen as a pop-up bubble from your drawing:



15. Multiple disconnected points, lines, or shapes can be selected for a single application, by holding down the Shift key on your keyboard while selecting your desired drawings. In

the case of multiple selections, the "Apply with these shapes" option may appear as a pop-up bubble like above, or may appear in the top-right taskbar (below):



16. Note that not all case types accept map drawings as their location. Most of our applications require a parcel or address. This feature is primarily used for work in the Right-of-Way.

Troubleshooting Common Error Messages During Applications

I am getting "email is already in use" when I try to add a contact to an application

When adding contacts to your application, you will have the ability to search for an existing contact or manually add a new contact record if they are not found in the search. When manually adding a new contact, you may receive a message that "email is already in use" as you fill out the contact information. This is a sign that you should search for the contact instead of manually adding them, as the contact is likely already in our system. Note that the search screen does allow you to search by email address as well as by name.

I am getting an error about missing certifications on the Contacts page

For certain permit types, STREAM will automatically check certifications during the online application process. This automation takes place at the Contacts step of the application and requires that the contractor or architect contact type/s added to the case have any/all required certifications for that case type.

How does STREAM know if the contact is certified? A contractor must already exist in our
system and have the corresponding certification/s flagged on their account before they can be
added to a permit application. In order for a contact to get their certification flagged, they must
submit a "Building Services Registration" application through STREAM, which then gets

- reviewed and flagged in our system by staff. This is not an instant process, so allow for time after submitting your registration before you can then start submitting applications.
- I'm adding a registered contractor, but still getting the error. Please ensure you are searching for the pre-existing contact. If you manually add the contact, then you are not looking for the existing contact in our system who has the certification on their record. See section above for "email already in use.
- I'm searching and adding an existing contractor, but still getting the error.
 - The contractor might not have their certification flagged in our system. Perhaps they only just submitted their and it hasn't been reviewed by staff yet.
 - The contractor might have duplicate accounts in our system when you search for them, are there multiple results? Please try other one to see if it works. City staff try to merge contacts regularly but there are always duplicates we need to manage.
 - o Finally, it is possible that this permit type is looking for a different certification than the one this contractor has, or that their certification might be expired.
 - If none of the above scenarios is applicable please reach out to <u>buildingdept@a2gov.org</u> to ask for staff assistance proofing that this contact is certified correctly in our system.

I am getting an error message with a Reference Number

Most of the error messages on STREAM are vague "An Error Has Occurred," but sometimes you will get one with a reference number. This typically means that you are using a draft or template that was saved with information that has since changed on this application. For example:

- If this error is happening on the Contacts page, you probably have contacts saved on your application who have since been updated or merged in the system. The fix is for them to remove all contacts from their application and re-add them (by searching, please do not manually add more duplicates) or to start over without a draft or template.
- If this error is happening upon Submit, there might be fields on the "More Info" page that have changed since you first started your draft or template. The best solution for this error is to start over without your draft or template so you can fill out the most up-to-date version of the "More Info" page.

If that doesn't work, please reach out to buildingdept@a2gov.org with the reference number so IT can look up the error log for that number.

I am getting "An Error Has Occurred" message upon clicking Submit

Similarly to above, if you get a generic "An Error Has Occurred" message upon clicking "submit," it is most likely due to a corrupted template or draft so the first troubleshooting step would be to recreate your application from scratch without a draft or template.

I have reached the attachments but it won't let me upload attachments

This likely means you are in "Create Template" mode, which is a sign that you clicked the "create template" button at the bottom of the screen at some point during this application. Files cannot be saved in Templates. See the next section for more information about using Templates.

You can either start over without using a Template, or use the buttons at the bottom of the page to save your template. Then go to your name at the top right corner of the screen and navigate to your Saved Work. Under saved work you will find your templates and can use which one to use for an application. Don't forget to delete any drafts and templates you do not plan to use again!

I have reached the end of my application but there is no Submit button

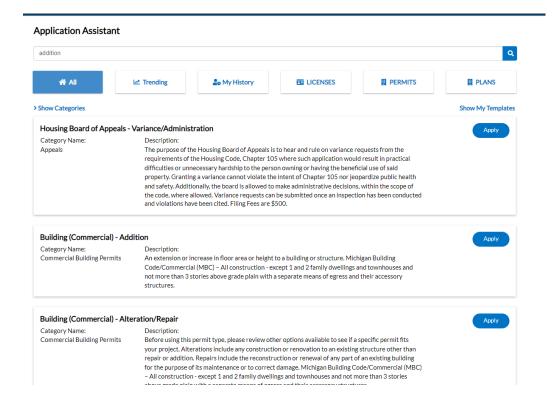
This likely means you are in "Create Template" mode, which is a sign that you clicked the "create template" button at the bottom of the screen at some point during this application. Templates are intended to be created once and then used multiple times, so when you are in "create template" mode the site is waiting for you to save the template before you can use it. See the next section for more information about using Templates.

Use the buttons at the bottom of the page to save your template. Then go to your name at the top right corner of the screen and navigate to your Saved Work. Under saved work you will find your templates and can use which one to use for an application. Don't forget to delete any drafts and templates you do not plan to use again!

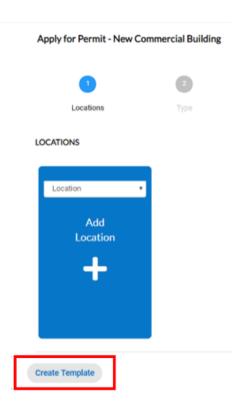
Utilizing Templates for Common Applications

Application Templates are reusable drafts that you may reuse when applying for the same Case Type and Workclass.

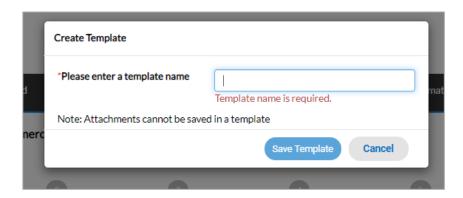
1. Start at the apply screen and choose the application type that you'd like to create a template with. Click "Apply"



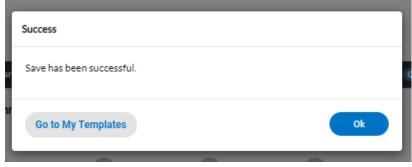
- 2. If you are not already logged into your account, you will be prompted to do so now.
- 3. At the first step of the application (Locations step), click on "Create Template" at the bottom of the page.



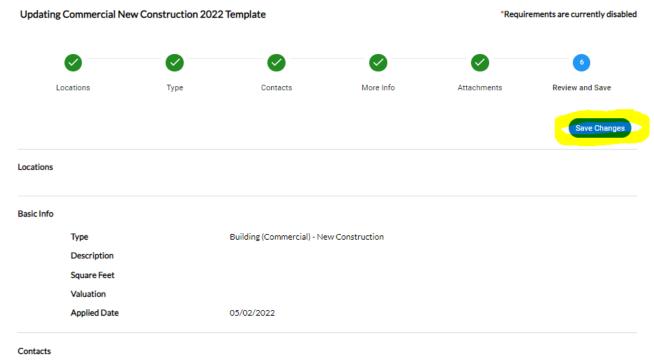
4. A pop-up window will ask you to name your template. This name is for your use only, so give it a descriptive name that will work well for you.



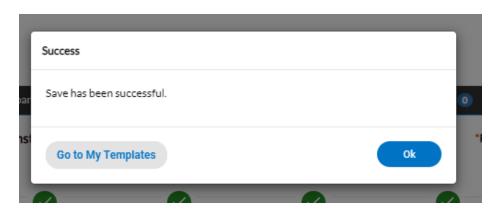
5. Once the Template name has been saved, a popup will appear telling you that your save has been successful and offering to go to your templates. At this stage say "Ok" to continue creating your template.



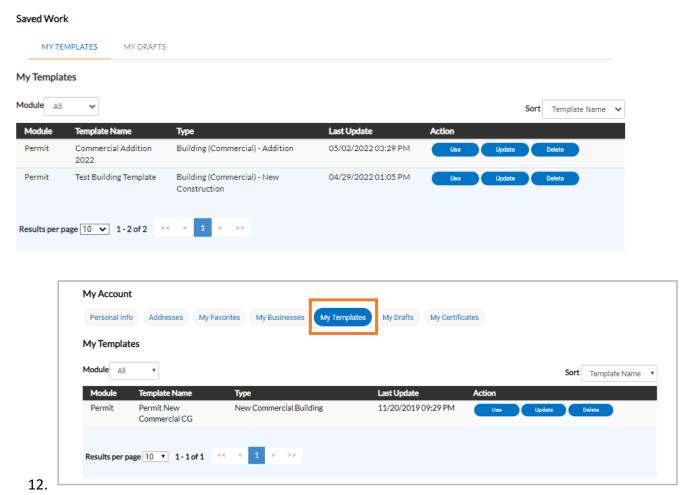
- 6. You will now be able to click through all pages of the application. Unlike a typical application, no fields are required while making a template, so you can skip any/all fields that you do not need on your template.
 - a. Even if a field is red with an asterisk, it will not enforce as required while you are making a template.
 - b. This includes contacts, and attachments are not permitted on templates at all.
- 7. When you reach the final page of the template you will be able to review and save your work. Rather than a Submit button, you are simply saving the template.



8. Once you hit save, you can either navigate to your Templates or hit Ok to stay on this page. At this point you are done with the template creation process and can leave this page.



9. Your saved templates can be found under **My Account > Saved Work** drop down menu at the top right corner, or if you open **My Account** you can navigate to the *My Templates* button.

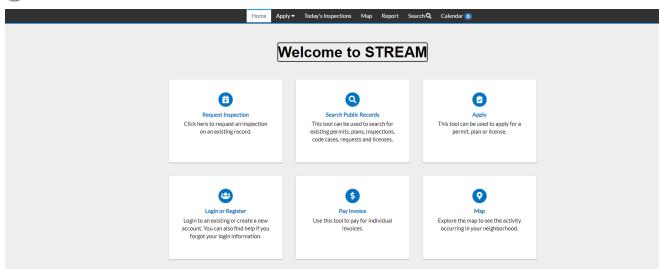


10. From this page, you may **Use, Update or Delete** the template by clicking the applicable button.

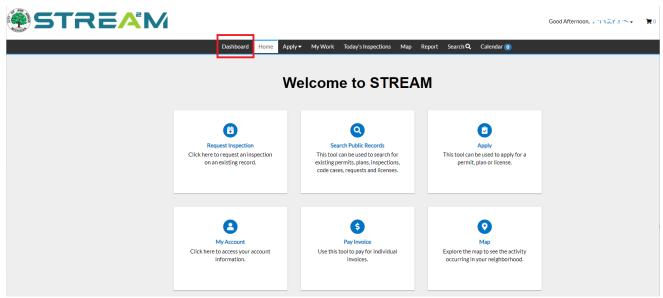
STREAM Dashboard Overview

- 1. Access the STREAM website by going to stream.a2gov.org
- 2. If you are not logged in, you will not see a Dashboard option in the horizontal menu bar:

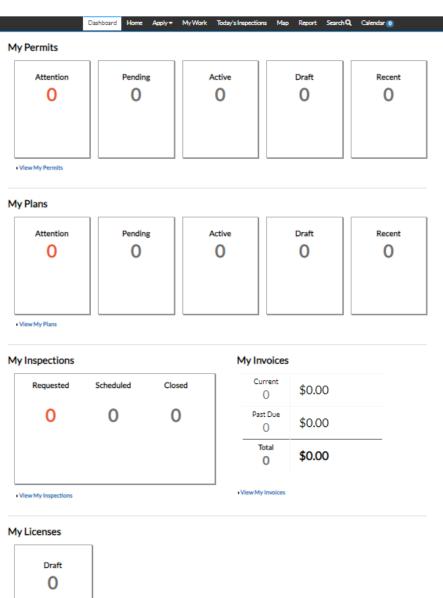




3. Once you log in, the Dashboard option will appear in the menu bar:



- 4. Your Dashboard will include information pertaining to your applications.
 - a. Please note that past applications applied to via our former system, Trakit, can still be found at https://etrakit.a2gov.org/
- 5. The Dashboard page is divided into five main sections: Permits, Plans, Inspections, Invoices, and Licenses:

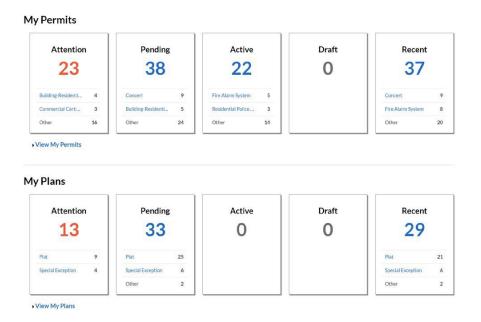


Draft O

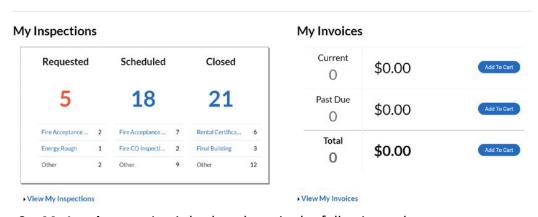
• View My Licenses

- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.

- 6. My Permits and My Plans sections are broken down into the same tiles:
 - a. Attention Permits/Plans that require your attention
 - b. Pending Permits/Plans that have just been applied for, and are still under review
 - c. Active Permits/Plans that have been issued
 - i. You can request inspections on these permits
 - ii. Inspections that may have failed could be found here, also
 - iii. Find your documents that can be printed
 - d. Recent All recent Permits/Plans that you have applied for



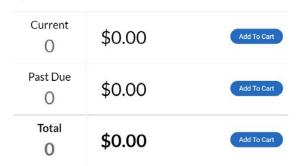
- 7. **My Inspections** section is broken down in the following order:
 - a. Requested Shows all your Inspections that you have requested
 - b. **Scheduled** Once the Inspector has scheduled an Inspection, it will move from the requested section to this section.
 - c. **Closed** Once the Inspection is completed, it will move to this section.



8. **My Invoices** section is broken down in the following order:

- a. Current Invoice amounts that are currently due will show here
- b. Past Due Invoice amounts that are past due will showhere
- c. Total Invoice amounts for both current and past due will show here

My Invoices



- View My Invoices
- 9. **My Licenses** section is for any Professional Licenses that you applied for and is broken down in the following order:
 - i. Each License will be listed out in its own tile. The large number in blue (309) indicates the number of days until the license expires.

My Licenses







View My Licenses

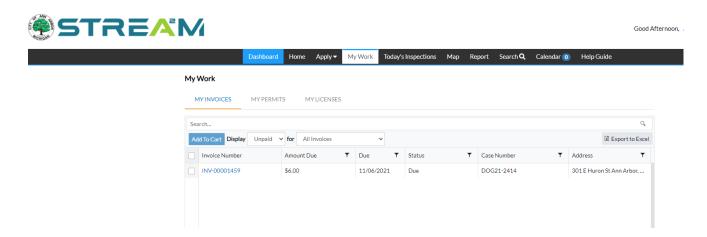
Paying Invoices

- 1. Access the STREAM website by going to stream.a2gov.org
 - a. Invoices must be paid by a logged in registered user:
 - i. If you have a login already, make sure you are logged in.
 - ii. If you do not have a login, you can Register for a new account
 - 1. If your email address is affiliated with a case in our system, please register using the same email address and it will connect your account contents.
 - b. Please note that all online payments are processed through a secure payment processor. All email receipts will come from mygovpay@persolvent.com.

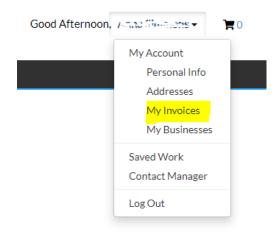
Finding and Paying Invoices that are affiliated with your account

If you are the billing contact for this invoice, you will have a few extra places to search for and pay the invoice once you are logged into STREAM.

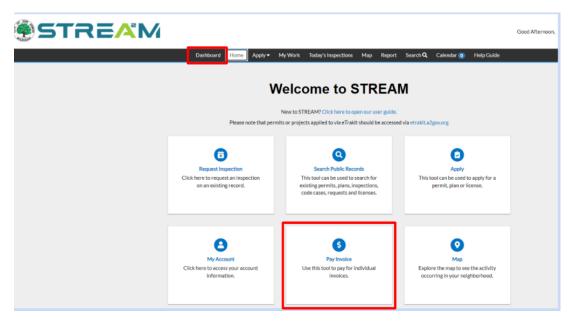
1. MY WORK: On the home screen, you can navigate to the My Work option in the horizontal toolbar. Inside the My Work screen, you will find downloadable lists of your invoices and cases and can filter them by status if needed. From here, you can either navigate to your permit/license that needs payment or open the invoice directly. Note that this screen will only display invoices for which you are the billing contact.



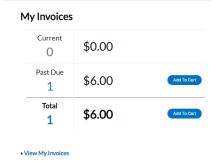
2. YOUR ACCOUNT SCREEN: From any screen in the STREAM website, you can see your account name in the top right corner, with a black drop-down arrow to the right of your name. If you click on that drop-down, you will see all of your options to manage your profile, including "My Invoices." Note that this screen will only display invoices for which you are the billing contact.



3. **YOUR DASHBOARD:** On the home screen, you can navigate to the Dashboard option in the horizontal toolbar, or click on the "Pay Invoices" tile on the home screen. Either way will bring you to your dashboard:



a. Once you are in your dashboard, you can either navigate to your permit/license that needs payment, or you can scroll all the way to the bottom of the screen to find all current/due invoices and add them to your cart:

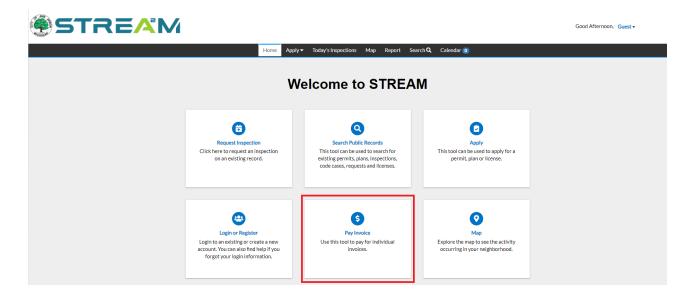


Finding and Paying Invoices that are not on your account

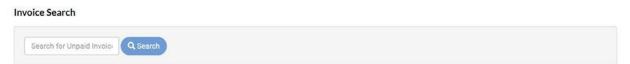
NOTE: To pay an invoice online that is not affiliated with your account, you cannot utilize the My Work, My Invoices, or My Dashboard screens. Below are two recommended methods depending

on whether or not you know the Invoice Number.

- 1. Access the STREAM website by going to stream.a2gov.org
 - a. Invoices must be paid by a logged in registered user:
 - i. If you have a login already, make sure you are logged in.
 - ii. If you do not have a login, you can Register for a new account
 - 1. If your email address is affiliated with a case in our system, please register using the same email address and it will connect your account contents.
- 2. Option 1: You know the Invoice Number:
 - a. Once you are logged in, from the Home Page click the middle tile Pay Invoice



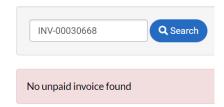
b.Once there, you will be able to enter the entire Invoice Number and click "Search"



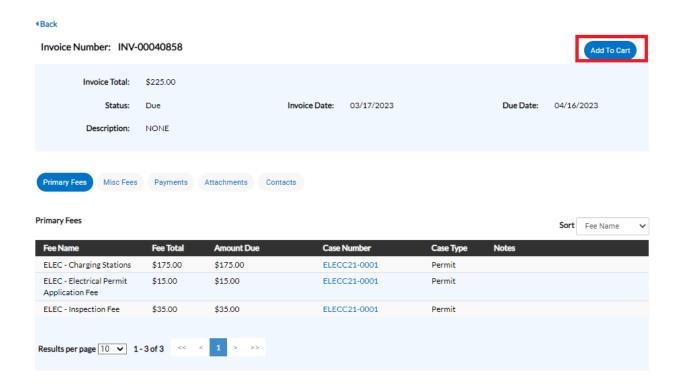
Note: You must type the whole Invoice Number, including the "INV," for example, "INV-000030668."

- c. Once you have entered a valid <u>unpaid</u> invoice number into the search and have clicked on the search icon, you will see your digital invoice. (See below)
 - i. If no unpaid invoice is found, please confirm your invoice number is correct and that it has not already been paid in full.

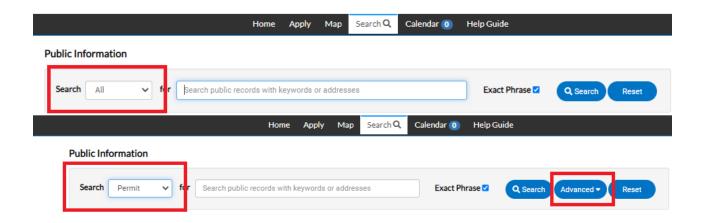
Invoice Search



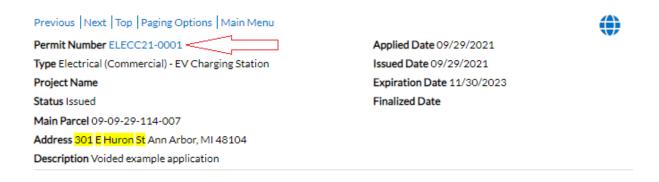
d.If the search has found your invoice, it will open the Invoice summary and you can add it to your cart.



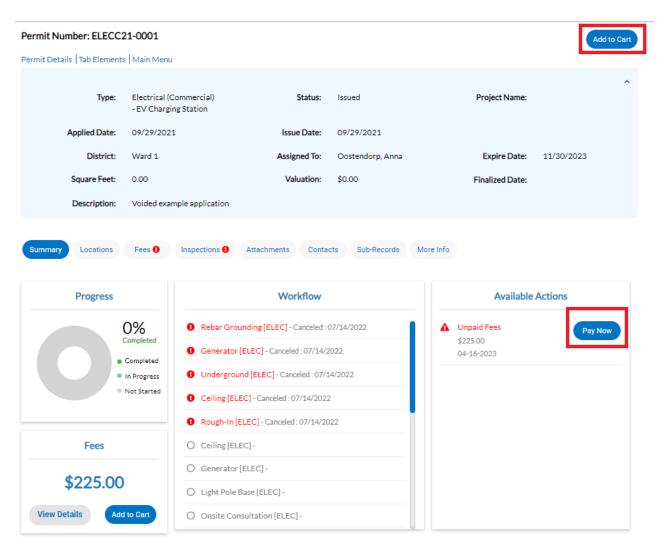
- e. You will be directed to a secure payment page and can then complete your payment.
- 3.
- 4. **Option 2:** You do not know the Invoice Number:
 - a. Once you are logged in, navigate to the Search page by either clicking "Search" in the top navigation bar, or the "Search Public Records" tile from the home page.
 - b. In the Search screen you can search by case number (Permit, License, or Plan Number) or by address.
 - c. If you need to further filter your search results, edit the "All" drop-down menu to narrow your search by case type. Doing so will open a new "Advanced Search" menu that you can use to add more filters to your search:



d. Once you have found your case number, click on the title URL to open the case dashboard.



e. Once you are inside the case dashboard, you will see that there are unpaid fees on the case and can add them to your cart:

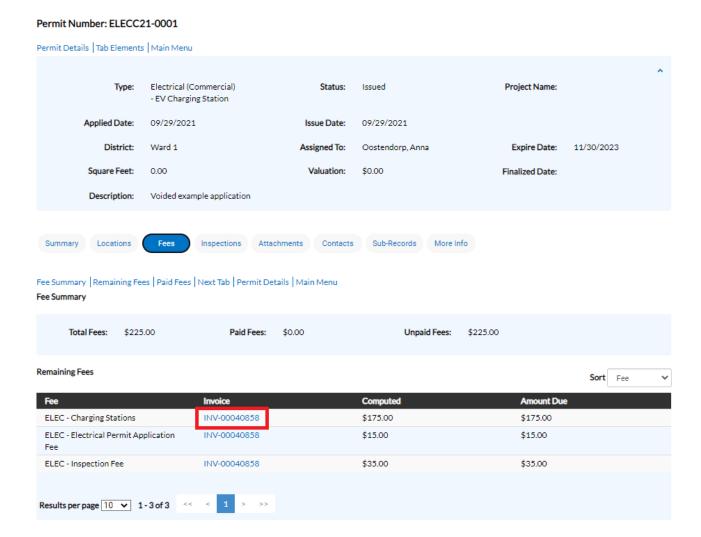


f. You will be directed to a secure payment page and can then complete your payment.

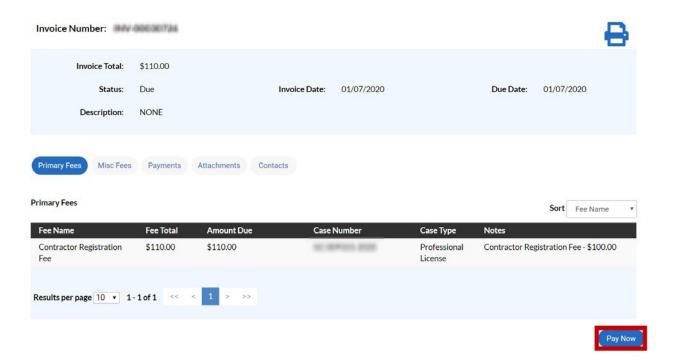
Printing an Invoice

For some businesses, you may need to print a copy of your invoice to submit to accounts payable, for example. To do so, find the invoice using any of the methods above and click on the Invoice Number to open the Invoice Dashboard.

- 1. If you found the invoice from "My Work," "My Invoices," or "Invoice Search," click on the invoice number to jump directly there.
- 2. If you found the invoice from the case number, go to the Fees tab and then click on the invoice number to open the Invoice screen:



3. Once you open the Invoice it will bring you to the invoice screen, where you can use the print icon to print the invoice document, or click on the "Pay Now" button in the bottom right corner to begin payment:



Viewing Your Application Details and Attachments in STREAM

Note that any and all contacts listed on the application should be able to see the application in their STREAM Dashboard, by logging into their STREAM account using the same email address affiliated with the application.

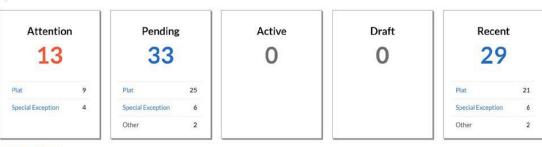
- 1. Ensure you are logged into your STREAM account at stream.a2gov.org
- 2. Click on **Dashboard** in the Navigation menu bar along the top of the page
 - a. Note: You can also go to My Work to find your existing applications, it's just a matter of personal preference which screen is easier for you to navigate.



- 3. In your Dashboard, click on the tile that corresponds to the application type and status that matches the application you want to look at today (i.e. is it a recent or active application?)
 - a. Note, you can also open the full list of all of your Permits, Plans, or Inspections using the "View My Permits/Plans/Inspections" links below each section's tiles.

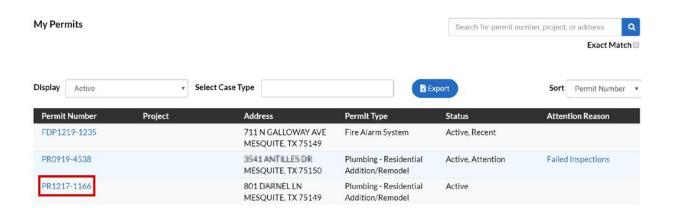
My Permits



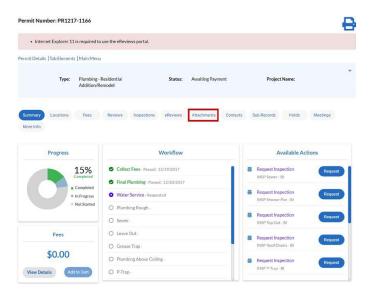


View My Plans

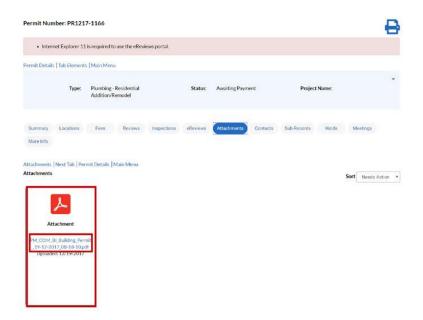
4. Once you've opened the list of applications, you can click on the permit/plan number to open that application.



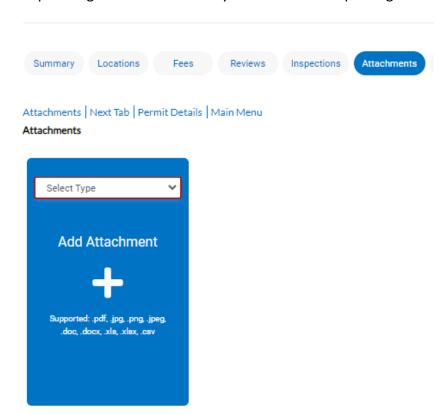
5. After you have clicked on the **Permit Number**, you will be launched into the Permit dashboard screen. This is where you will see all of your application's current details including status, fees due, inspection information, and attachments.



- 6. Under **Attachments**, you will be able to see all attachments that are available for online view.
 - Note that some attachments are not visible online by default until reviewed by staff and flagged for online visibility.
 - b. Plans under review will not be visible online until all reviewers have completed their review, at which point the applicant can see any markups made on the plans, respond to markups, and resubmit a new plan if need be. See (Review Comments and Resubmit Information" for more details.
 - c. To open the attachment, click on the Blue Document Name on theattachment

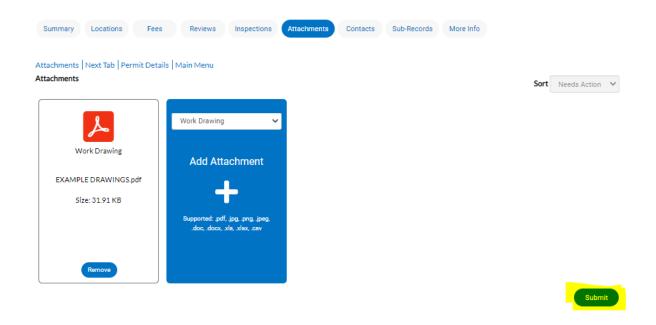


If this application type allows for you to add more attachments, you will see a blue tile that allows you to do so. Note that you must use the drop-down menu to select what type of attachment you are uploading before it will allow you to click on the plus-sign to add a file.



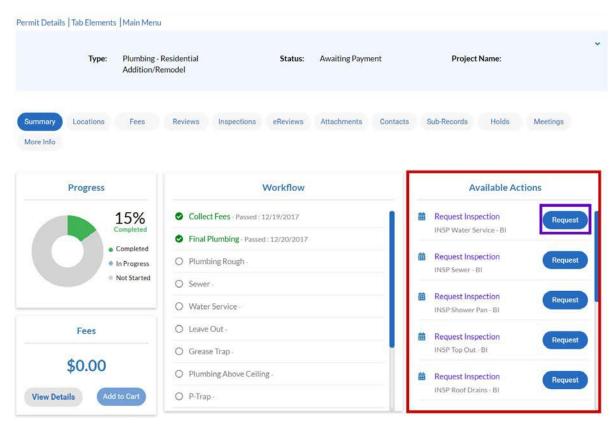
Once you've added a file to this page, a "Submit" button will appear in the bottom right corner of

the page. Please make sure to click on that button or the new attachment will not save to the application.

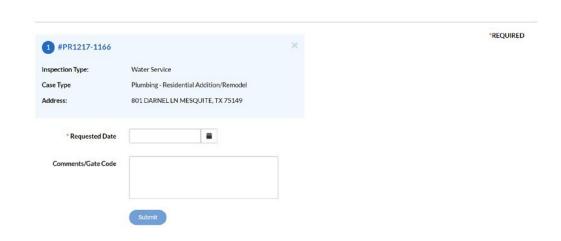


Request an Inspection in STREAM

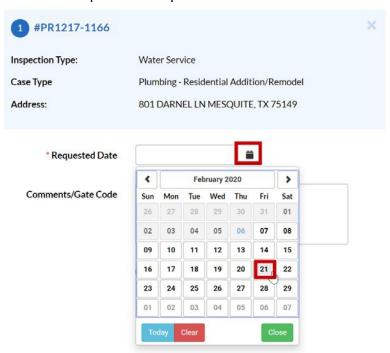
- 1. Use the directions above to access your application Dashboard in STREAM
- 2. In the **Available Actions** section of the Permit Dashboard screen, you will see a list of inspections that you are able to request



- 3. Once you have located the Inspection you need to Request, click on the **Request** button to the right of the Inspection
- 4. After the page loads, it will launch you into the **Request Inspection** area Request Inspections (1)



5. Click on the **Calendar** to the right of the **Requested Date** section and choose the date you want the inspection completed on.



- 6. If you have any Comments/Gate Code, please place those in the comment section, these fields are not required.
- 7. Click on the **Submit** button Submit
- 8. Once you have hit submit, you will receive a confirmation screen that your request was



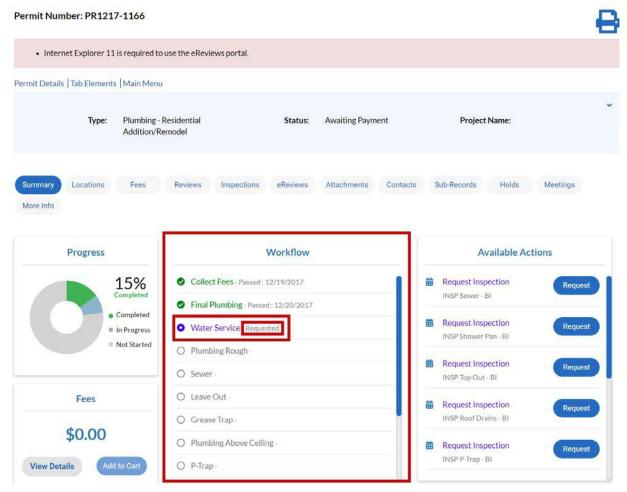
completed.

9. At the point, you can close out or hit the **Back** button at the top of the Request Inspection area to return to the Permit Dashboard.



Request Inspections (1)

10. Back to the Permit dashboard screen, you can see that the Inspection you requested is no longer in the **Available Action** section, and in the Workflow, the Inspection is now **Blue** and says "Requested."



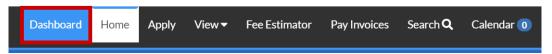
20.

Troubleshooting Inspection Request Issues Online

- 1. **Inspection cannot be requested due to prerequisites.** This means that there are steps of the review process or workflow that must be completed before the inspection may be requested. For some inspection types, such as Final inspections, you must complete all other inspections before you may request your final. If you believe this message is being displayed in error please contact your case contact.
- 2. **A hold exists on the permit.** Certain holds may prevent inspections from being allowed. Please proceed to the Holds tab of your permit to read hold information.
- 3. **Fees are due.** Inspections require that the permit is already in an issued status and fully paid. If fees are due, they must be paid before any new inspections may be requested. Note that the fees due may be fees for prior inspections that must be paid before you may request subsequent inspections.
- 4. **You are not a case contact.** This means that you are either not a contact on the case, OR you might not be logged into your account. Please look at the top right corner of your STREAM screen to see if you are currently logged in or if the site is viewing you as "Guest." If you are not logged in, please log in and then try again.

Review Comments and Resubmit Information

- 1. Ensure you are logged into your STREAM account at stream.a2gov.org
- 2. Click on Dashboard

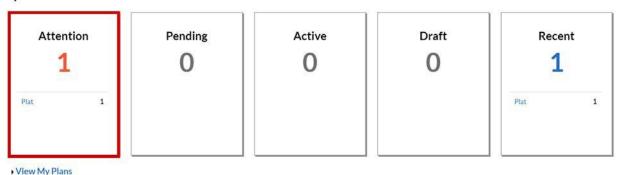


- 3. In your Dashboard, click on the tile that corresponds to the application type and status that matches the application you want to look at today (i.e. is it a recent or active application?)
 - a. Note, you can also open the full list of all of your Permits, Plans, or Inspections using the "View My Permits/Plans/Inspections" links below each section's tiles.
 - b. *Attention—Permits/Plans that currently require your attention will be copied to the Attention section for easy access (i.e., resubmittal, failed inspection.)

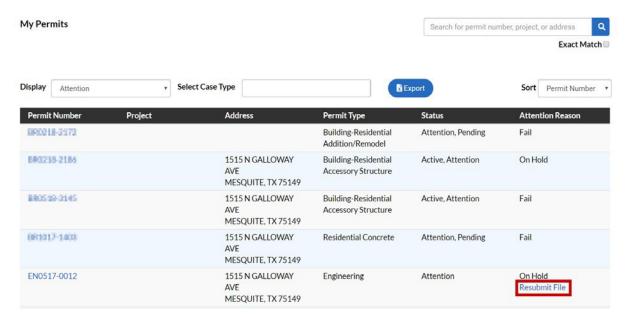
My Permits



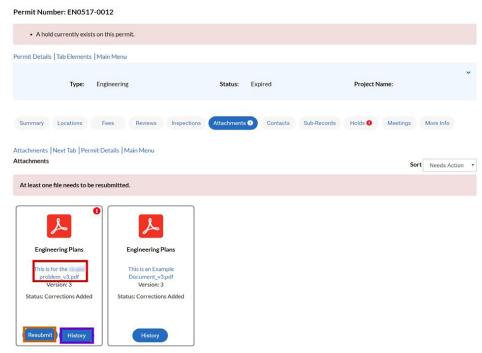
My Plans



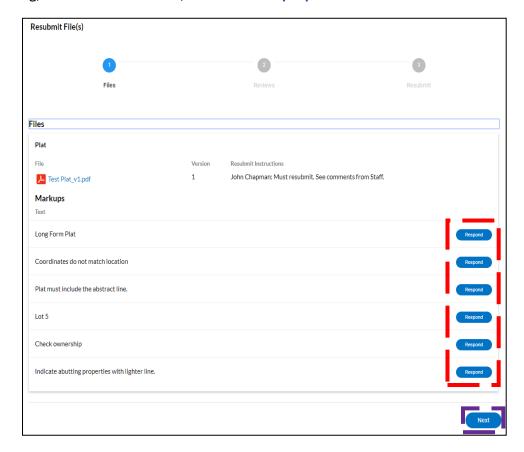
4. Once you open your list of Permits/Plans, you will see the status of each and can click on the permit number to open the full permit dashboard. However, if the application has been flagged to have a file resubmitted, you can jump directly to that screen by clicking on the **Resubmit File** link in the red square:



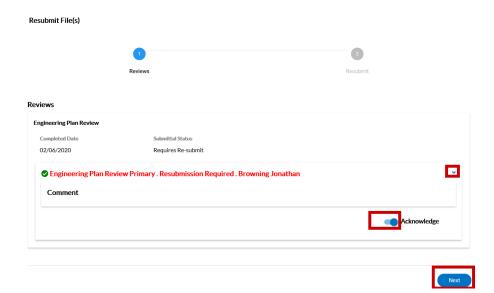
- 5. This resubmit file link will jump you to the Attachments screen in the Permit dashboard. If the file has been flagged for resubmit, you have a few options for next steps:
 - To download a copy of the file with Staff comments, click the blue file name, as highlighted by the red square
 - b. To resubmit files, click the **Resubmit** button, as highlighted by the **orange square**
 - c. If there are previous versions of the document click on the **History** button, as highlighted by the **purple square**



- 6. After clicking the **Resubmit** button, you may be asked to respond to staff markup notes
 - a. To respond to a markup, click the Respond button, seen below in red
 - i. A text box will appear under the markup where you may enter a response
- 7. After responding, click the **Next** button, seen below in **purple**



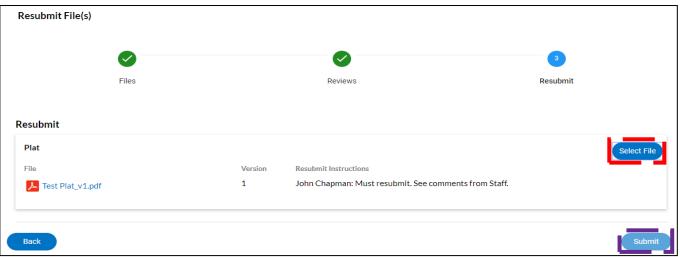
- 8. Once you have clicked Next, you will have a chance to see who reviewed your Permit/Plan
- 9. Click the blue arrow
- 10. Click Acknowledge, then Next



11. Click Select File button

- a. A file browser will open
 - i. Locate the new file on your computer, click **Open** on the file browser
- 12. After selecting the new file to upload, click the Submit button

21.



Troubleshooting Resubmitting File Issues Online

- 1. **The option to resubmit files is not visible.** This often means that you are either not a contact on the case, OR you might not be logged into your account. Please look at the top right corner of your STREAM screen to see if you are currently logged in or if the site is viewing you as "Guest." If you are not logged in, please log in and then try again.
- 2. The option to resubmit is visible but fails when I try to upload the new file. This might mean that there is a problem with the file you are uploading please make sure that it is not the exact same file name as the prior file, and ensure the file name does not have any special characters in it. If this does not resolve the issue, reach out to your case contact as this may be an issue we need to resolve on our end.

Don't see your issue? Contact us for help!

For any questions not addressed in the user help guide above, please contact us for assistance. Please note that the appropriate contact information depends on your application type so please use the table below to find your match.

Application Type	Department	Phone Number	Email Address
Annexation	Planning Department	734-794-6265	planning@a2gov.org
Auctioneer	Clerks Office	734-794-6140	CityClerk@a2gov.org
Banner Permits	Clerks Office	734-794-6140	CityClerk@a2gov.org
Block Party Permits	Clerks Office	734-794-6140	CityClerk@a2gov.org
Building Board of Appeals	Building Services	734-794-6263	Building@a2gov.org
Building Permits	Building Services	734-794-6000 x48162	Building@a2gov.org
Building Services Registration/ Contractor Certifications	Building Services	734-794-6263	Building@a2gov.org
Certificate of Occupancy	Building Services	734-794-6263	Building@a2gov.org
Certified Rental	Rental Housing Services	734-794-6264	RentalHousing@a2gov.org
Charitable Solicitation	Customer Service	734-794-6320	Customerservice@a2gov.org
Code Cases	Chris MacFarland	734-794-6000 x42657	cmacfarland@a2gov.org
Commercial Applicator of Pavement Sealant	Clerks Office	734-794-6140	CityClerk@a2gov.org
Commercial Quadricycle	Clerks Office	734-794-6140	CityClerk@a2gov.org
Demolition Permits	Building Services	734-794-6263	Building@a2gov.org
Design Review Board	Hank Kelley	734-794-6000 x42605	hkelley@a2gov.org
Dog Licenses	Clerks Office	734-794-6140	CityClerk@a2gov.org
Dog Park Licenses	Clerks Office	734-794-6140	CityClerk@a2gov.org
Domestic Partnership	Clerks Office	734-794-6140	CityClerk@a2gov.org
Electrical Permits	Building Services	734-794-6263	Building@a2gov.org
Fowl Permit	Clerks Office	734-794-6140	CityClerk@a2gov.org
Going out of Business	Clerks Office	734-794-6140	CityClerk@a2gov.org
Grading/Soil Erosion Permits	Building Services	734-794-6263	Building@a2gov.org
Historic District Certificate of Appropriateness	Planning Department	734-794-6265	hdc@a2gov.org
Housing Board of Appeals	Debra Williams	734-794-6000 x42198	dewilliams@a2gov.org
Land Division	Planning Department	734-794-6265	planning@a2gov.org

Manufactured Fertilizer	Clerks Office	734-794-6140	CityClerk@a2gov.org
Marijuana Facility – All types	Clerks Office	734-794-6140	CityClerk@a2gov.org
Mechanical Permits	Building Services	734-794-6263	Building@a2gov.org
MESA Permits	Building Services	734-794-6263	Building@a2gov.org
Noise	Clerks Office	734-794-6140	CityClerk@a2gov.org
Precious Metal Dealer	Clerks Office	734-794-6140	CityClerk@a2gov.org
Plumbing Permits	Building Services	734-794-6263	Building@a2gov.org
Portable Sign Permits	Customer Service	734-794-6320	Customerservice@a2gov.org
Public or Charter School	Planning Department	734-794-6265	planning@a2gov.org
Reserve Parking Lane	Right of Way Inspector	734-794-6415	BNollar@a2gov.org
Rezoning	Planning Department	734-794-6265	planning@a2gov.org
Right of Way Inspections	Brian Nollar	734-794-6415	BNollar@a2gov.org
Right of Way Permits	Customer Service	734-794-6320	Customerservice@a2gov.org
Sidewalk Occupancy Licenses	Customer Service	734-794-6320	Customerservice@a2gov.org
Sign Permits	Julia Shake	734-794-6000 x42611	jshake@a2gov.org
Site Plans	Planning Department	734-794-6265	planning@a2gov.org
Short Term Rental	Rental Housing Services	734-794-6264	ShortTermRentals@a2gov.org
Small Cell Permits	Engineering	734-794-6415	rightofway@a2gov.org
Special Event Permit	Community Services	734-794-6000 x 42198	dewilliams@a2gov.org
Street Vacation	Planning Department	734-794-6265	planning@a2gov.org
U of M Projects	Engineering	734-794-6415	rightofway@a2gov.org
Wetland Use Approval	Customer Service	734-794-6320	Customerservice@a2gov.org
Zoning Compliance Permits	Jon Barrett, Zoning Coordinator	734-794-6000 x42654	jbarrett@a2gov.org
Zoning Board of Appeals	Jon Barrett, Zoning Coordinator	734-794-6000 x42654	jbarrett@a2gov.org
Zoning Report Request	Planning Department	734-794-6265	planning@a2gov.org
· · · · · · · · · · · · · · · · · · ·	<u> </u>	•	