

# New Portal Features

## Qualifiers & SubContractors

### A. Summary of Changes

1. Changes apply to the Contacts Screen, Portal Step 5.

The screenshot shows a progress bar with 8 steps: 1. Application Type, 2. Permit Type, 3. Work Items, 4. Location, 5. Contacts (highlighted), 6. Upload Files, 7. Review & Submit, and 8. Submitted. Below the progress bar is the title "Permit Application - Contacts" and the permit ID "TMPPR20230051381". A note states: "Required information is indicated with an asterisk (\*)." Below this are three bullet points:

- You can now add the permit's Primary Contractor/Qualifier and Subcontractors as Businesses/Contacts in this step.
- If you add Subcontractors now, then read and agree to the attestations that load, pages 3 & 4 of the application form are no longer required.
- If you do not add Subcontractors now, you can add them later through Conditions.

Type	Contact
Property Owner	O'HARE, ROBERT J & DOREEN, Address:417 COLONIAL AVE
Applicant	Amy Kuperman, Address:2800 Horseshoe Drive N

At the bottom, there is a button labeled "Add Business From Address Book".

2. When an applicant clicks the *Add Business from Address Book* button, they will see the new Contact Types:

The screenshot shows a dialog titled "Address Book" with a close button (X) in the top right. Below the title is the text: "Required information is indicated with an asterisk (\*)." A dropdown menu is open for "Contact Type:\*" with the following options:

- Primary Contractor
- Private Provider
- SubContractor: Electrical
- SubContractor: Low Voltage Elec
- SubContractor: Mechanical
- SubContractor: Plumbing
- SubContractor: Pool
- SubContractor: Roofing
- SubContractor: Septic
- Wireless Provider - ROW

3. Changes in Contact Types:
  - 3.1. "Contractor" has been replaced with "Primary Contractor".
    - 3.1.1. Selecting a Primary Contractor requires the additional selection of a Qualifier.
    - 3.1.2. The Qualifiers are filtered by the Primary Contractor selection.
  - 3.2. "Contractor: "Trade/License" types have been replaced with SubContractor: "Trade/License"; for example, SubContractor: Electrical.

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### B. Process Flow

#### 4. Add Primary Contractor and Qualifier:

- 4.1. Click the button Add Business From Address Book
- 4.2. Select the Primary Contractor Contact Type, then choose your business.

The screenshot shows a window titled "Address Book" with a close button (X) in the top right corner. Below the title, it states "Required information is indicated with an asterisk (\*)." There are two input fields: "Contact Type:\*" with a dropdown arrow and "Search for a licensee:\*" with a text input area. Below the search field, a small instruction reads: "Begin typing a name and/or address above and we will search the address book for a matching contact. If the correct name and address appears, please select it from the list." At the bottom right, there is a blue button labeled "Add This Contact".

- 4.3. When you click the Add This Contact button, a new box loads with the Qualifiers associated with the Primary Contractor you have selected. Click the radio button next to the correct Qualifier for the work being permitted.

The screenshot shows a window titled "Required Additional Contact" with a close button (X) in the top right corner. Below the title, it states "This contact requires an additional related contact to be added. Please select the one that you would like to add to this application." There is a table with a dark blue header "Related Contacts". The table has one row with the following text: "MATHAS, BRADLEY JAY , Address:1330 86TH TERRACE NORTH , Phone:(727) 417-5518, Licensee # LCC20200001607". To the right of this row is a radio button and the word "Select". The radio button is highlighted with a red box. Below the table is a button labeled "Add Selected Contact".


- 4.4. You MUST select a Qualifier to continue with the application.
5. Add SubContractors:

**Note:** Applicants are not required to add SubContractors at application, but when required for the permitted work they must be added before the first inspection can be scheduled. If not added at application, then use the current *Upload to Condition* process for adding SubContractors.

- 5.1. Click the button Add Business From Address Book
- 5.2. Choose the type of SubContractor from the drop down list, then choose the business.
- 5.3. Qualifiers are not required for SubContractors.
- 5.4. Repeat to add all necessary SubContractors.
6. At Portal Step 7, Review & Submit:
  - 6.1. Check that you have selected the correct Contractors, Qualifier and SubContractors.
    - 6.1.1. If you find an error, you can scroll to the bottom of the page and use the *Previous Step:* buttons to go back and make corrections.
    - 6.1.2. To complete the submission of your application, you MUST read and agree to the attestations on this screen.

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- 6.1.3. When you agree to these attestations on the Portal, they replace those currently on Pages 3 & 4 of the Application Form. These pages are no longer required as submittal items.
- 6.1.4. If you have selected SubContractors, you will not be required to upload the SubContractor Affirmation form.
7. At Portal Step 8, Submitted:
- 7.1. Applicants are strongly encouraged to use the  feature for a record of the choices you entered in the Portal.
- 7.2. An email is generated notifying the Primary Contractor and all SubContractors that they have been added to the permit. A copy of the email is saved to Documents and Images on the permit.