INDOT Electronic Permit System

INTERNAL USERS

Version 1.0

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Last Updated
8/23/2017

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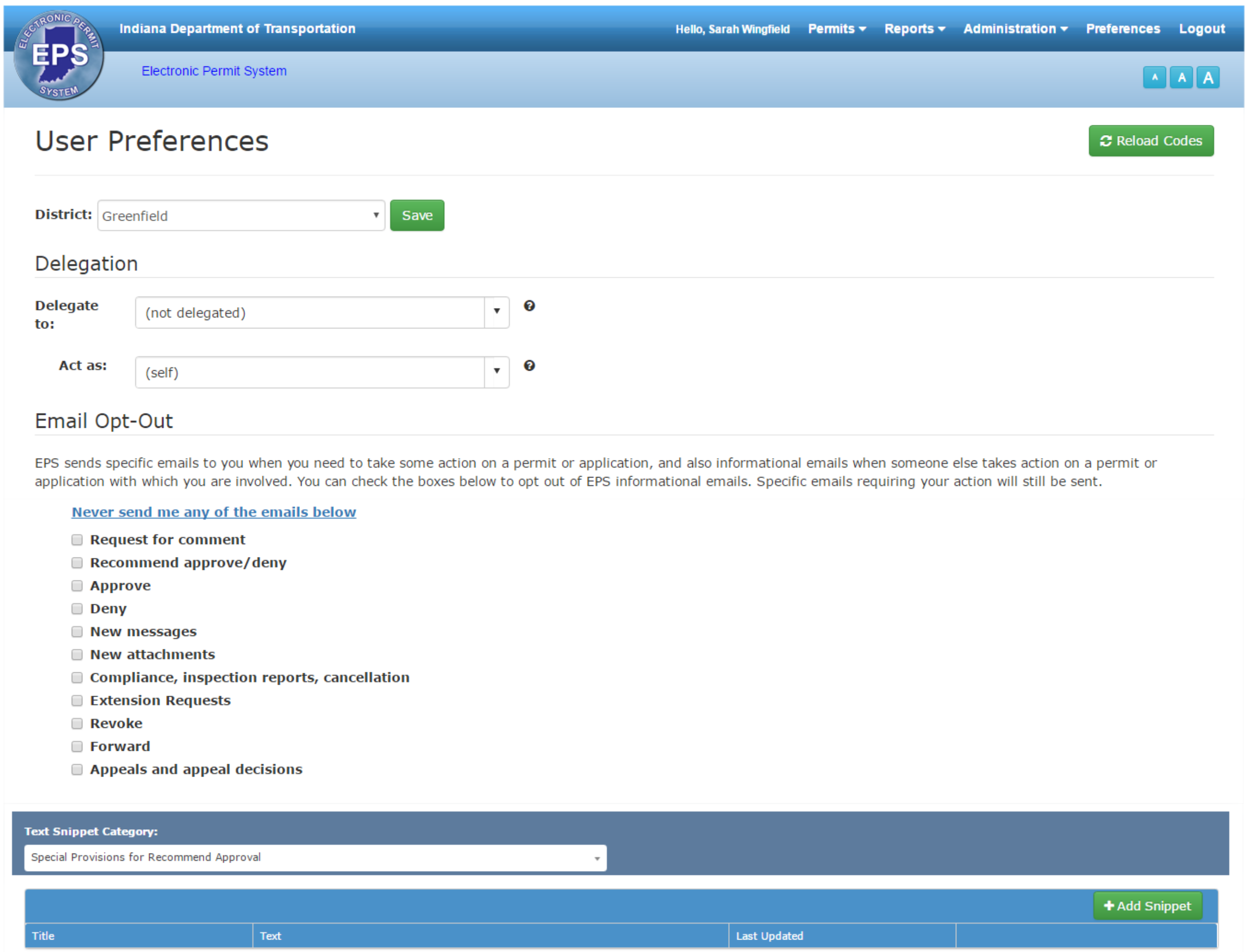
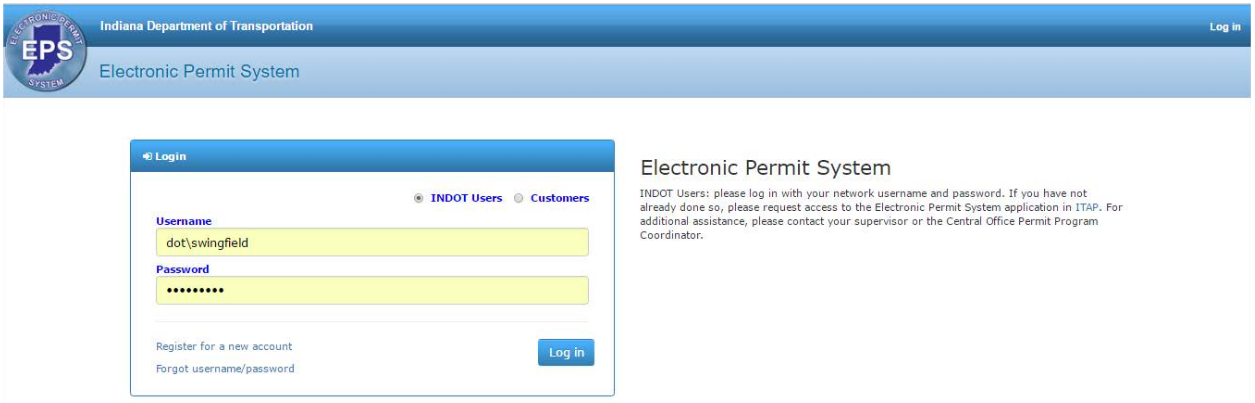

Indiana Department of Transportation
Hello, Sarah Wingfield
Permits
Reports
Administration
Preferences
Logout
EPS
ELECTRONIC PERMIT SYSTEM
Electronic Permit System
A A A
User Preferences
Reload Codes
District: Greenfield
Save
Delegation
Delegate to: (not delegated)
Act as: (self)
Email Opt-Out
EPS sends specific emails to you when you need to take some action on a permit or application, and also informational emails when someone else takes action on a permit or application with which you are involved. You can check the boxes below to opt out of EPS informational emails. Specific emails requiring your action will still be sent.
Never send me any of the emails below
Request for comment
Recommend approve/deny
Approve
Deny
New messages
New attachments
Compliance, inspection reports, cancellation
Extension Requests
Revoke
Forward
Appeals and appeal decisions
Text Snippet Category:
Special Provisions for Recommend Approval
Add Snippet
Title
Text
Last Updated

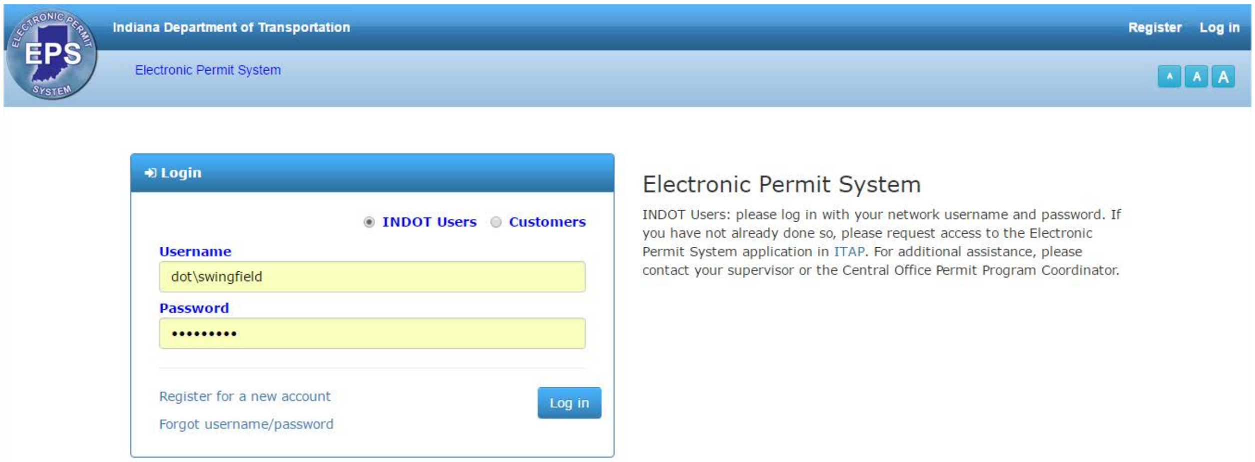
System Set Up

Logging In

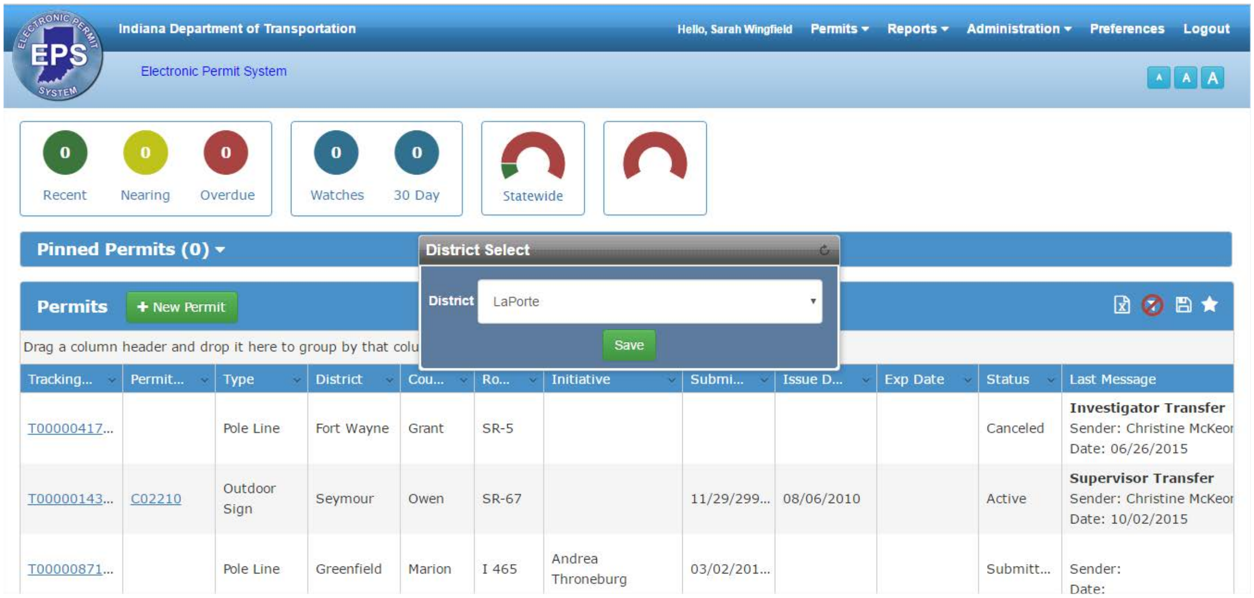
To log in to EPS, go to http://eps.indot.in.gov. Both INDOT Employees and INDOT Customers use the site; select the type of User in the upper right corner of the Log In box by clicking in the radio button next to INDOT Users.



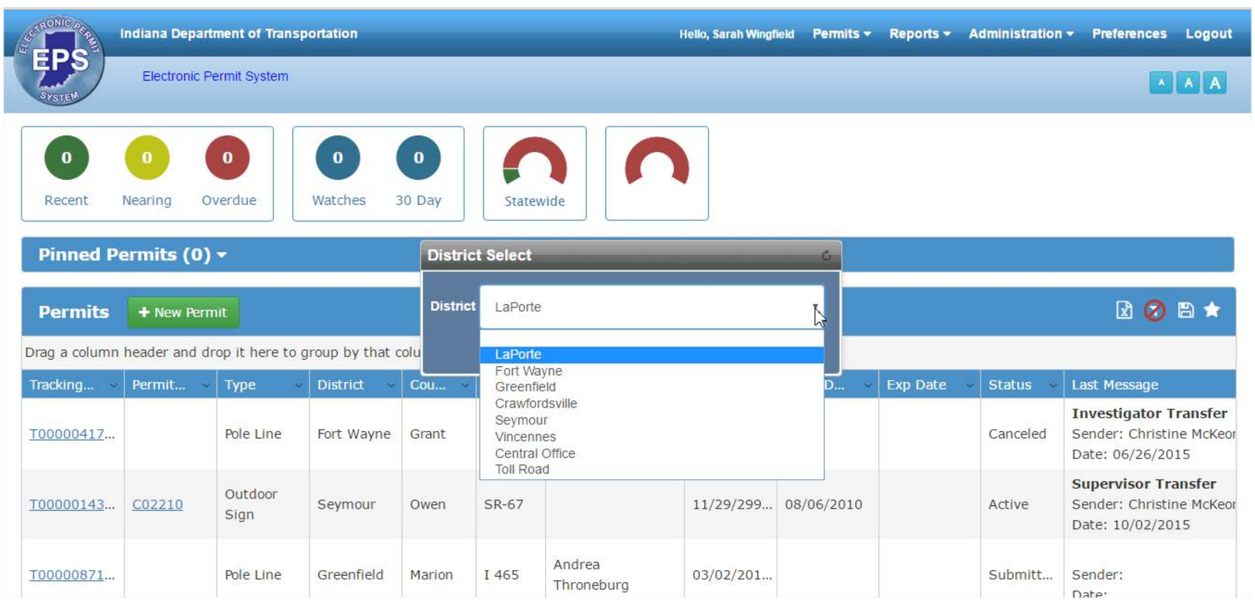
INDOT Employees or any customers already enrolled in ITAP (http://itap.indot.in.gov) should enter their state network Username and Password. Please request the EPS application in ITAP if you have not already done so.



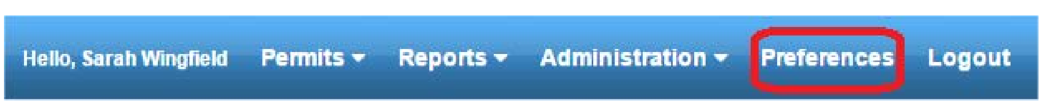
INDOT Employees are prompted to select a District upon the first log in.



Select a District from the dropdown and click **Save**.



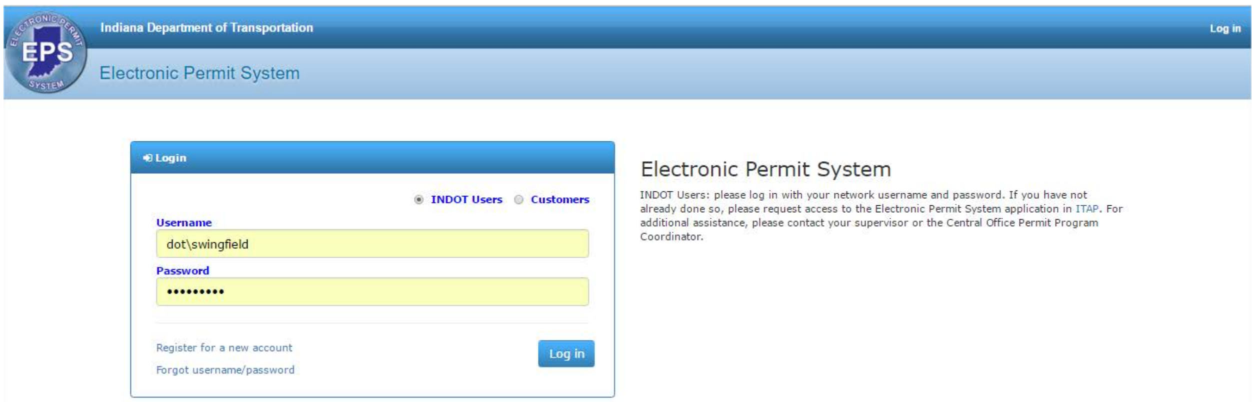
To change the selected District, click on **Preferences** in the right corner of the screen and select a new District as necessary.



Logout

To log out of the system, click on the **Logout** text in the upper right corner of the screen. The **Logout** text turns blue when the cursor moves over the text.

The User is taken to the Login screen.

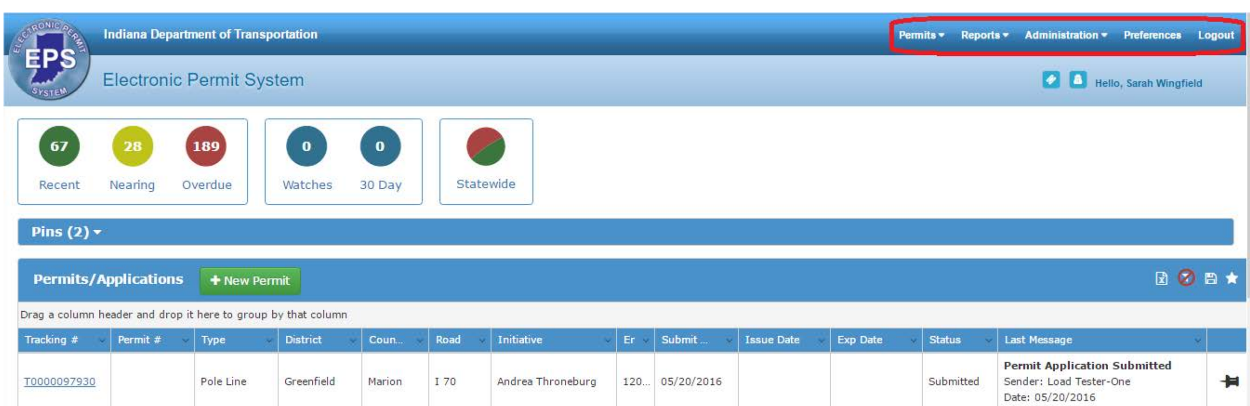


Roles and Permissions

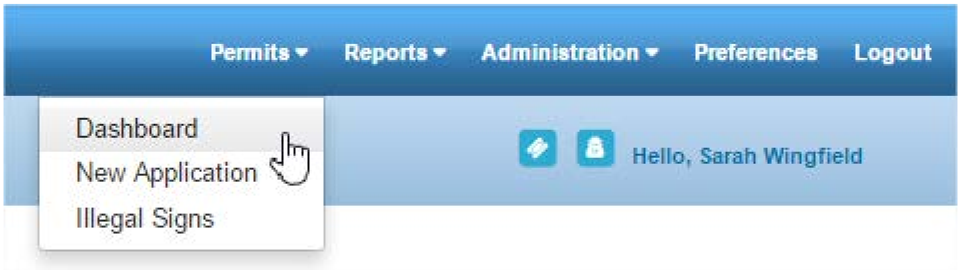
Users are assigned Roles and Tokens, giving them permissions to certain site features. Users without permissions to certain features see grayed out records and options (or no options/icons at all) on those screens.

Menu

The features of EPS are separated into categories and can be accessed by using the menus at the top of the screen. The menus are available from any page in EPS. Menu options vary based on roles and permissions.

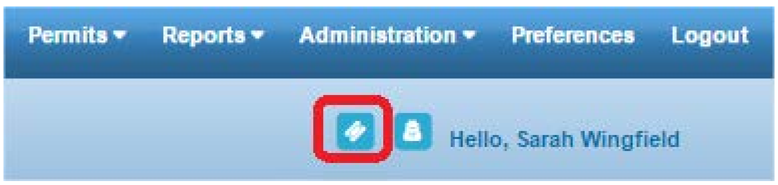


Click on a menu or hover over it to display any submenus. Click on a submenu option to display that section of EPS.

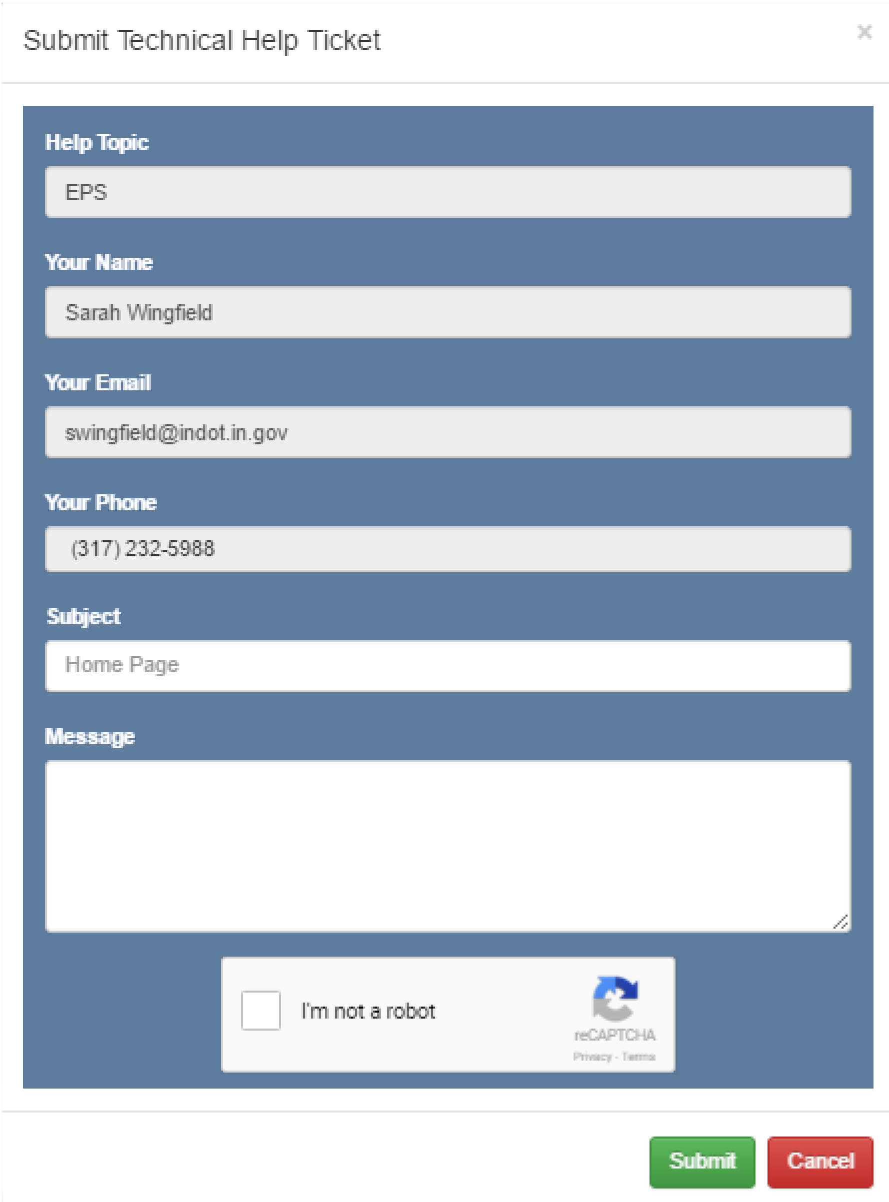


Submit Ticket

For issues or questions with the technical function of the website, click on the **Submit Ticket**  icon. Please DO NOT use this feature for questions about business processes or permit specific questions.



Complete the information as necessary on the Technical Help Ticket form and click **Submit** to submit the ticket or **Cancel** to return to EPS without submitting a ticket.



Submit Technical Help Ticket

Help Topic

EPS

Your Name

Sarah Wingfield

Your Email

swingfield@indot.in.gov

Your Phone

(317) 232-5988

Subject

Home Page

Message

I'm not a robot

reCAPTCHA

Privacy - Terms

Submit Cancel

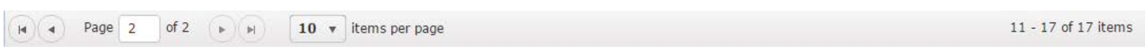
Table Tools

Certain features are the same any time a table is used in EPS. These include navigating using Panel Pages, the Items on a Panel Page, Hyperlinks, Sorting, Columns, Filtering, Grouping Columns and Exporting to Microsoft Excel.

Panel Pages

Use the **Next**  and **Previous**  buttons to navigate to subsequent pages or click the **End**  or **Beginning**  buttons to jump to the very last or very first page.

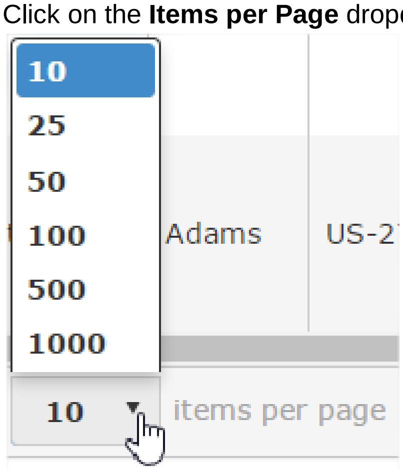
The Status Bar changes depending on what Panel page is displayed. For example, the Status Bar below displays on Page 2 and shows Items 11-17 of 17.



Items on each Panel Page

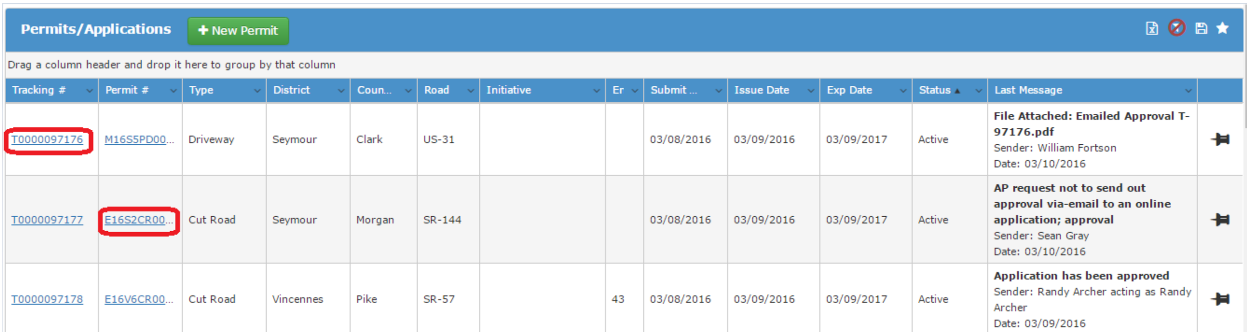
By default, Panels display 10 Items per Page. However, this may be changed.

Click on the **Items per Page** dropdown and select 10, 25, 50, 100, 500 or 1000 from the list.



Hyperlinks

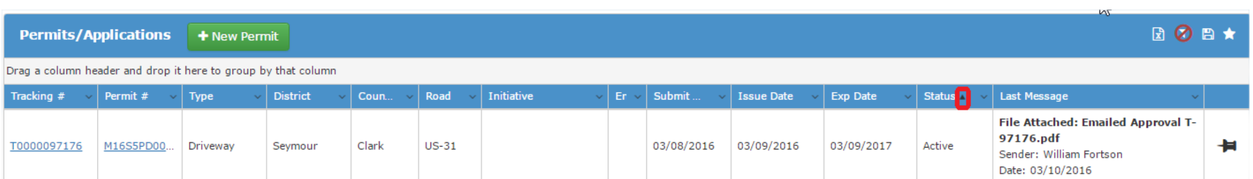
Text in the columns, such as the Tracking # or Permit #, sometimes displays as blue. Clicking on the text will take the User away from the table and open up the Permit application.



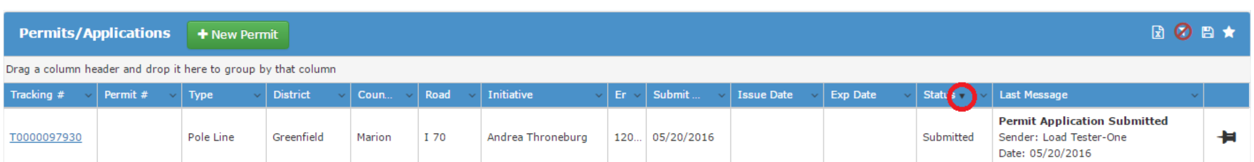
Sorting

Data in Panels may be sorted in ascending or descending order numerically (smallest to largest or largest to smallest), alphabetically (A to Z or Z to A) or by date and time (oldest to newest or newest to oldest).

Click on the column heading of the field to be sorted. In the example below, the list of Permits is sorted by the Status (ascending) by clicking once on the Status column heading. A triangle indicating the direction of the sort appears next to the column heading.



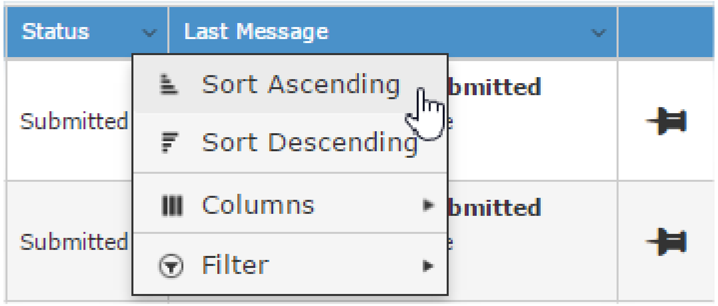
To res-sort (descending), click again on the column heading.



By default, Panels display sorted by the first column.

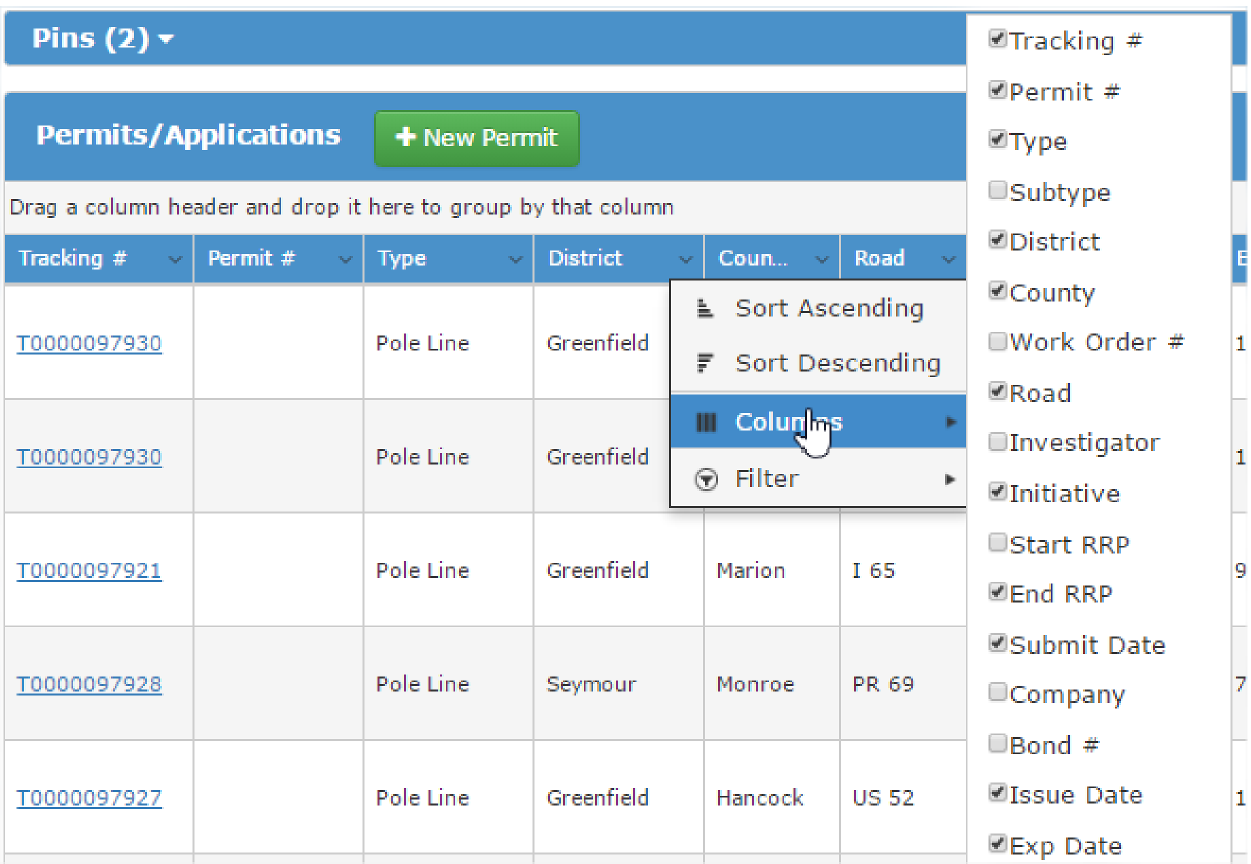
Sorts are not saved. The next time the Panel is opened, it is sorted by the first column.

Columns can also be sorted by clicking on the small arrow in the far right of the column to display the dropdown menu. Select to **Sort Ascending** or **Sort Descending**. Click on the arrow again to display the menu again and change the sort.



Columns

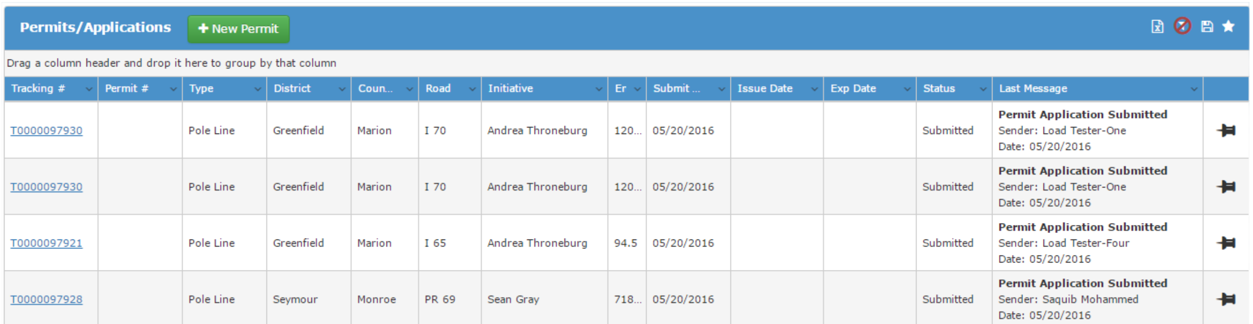
Users can control which columns display in a table by clicking on any of the column headings. Hover over **Columns** submenu to display a list of all available columns to display for a Table. Any columns currently on display have a check mark in the check box to the left of the column name. Click in an empty check box to make the column visible. Click in any box with a check mark to remove the check mark and hide the column.



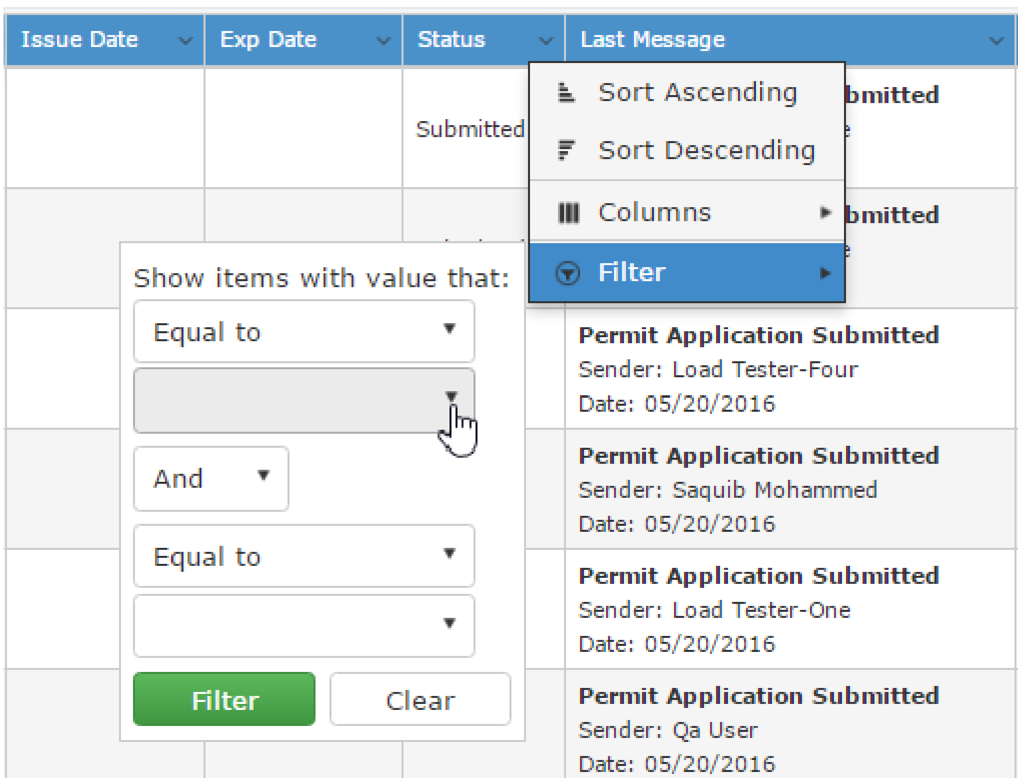
Column display selections are not saved. The next time the Panel is opened, all default columns display.

Filtering Information

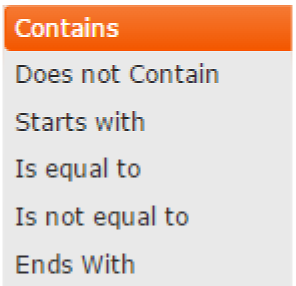
Data in Panels may be filtered so only particular content displays. For example, the **Permits** table below shows that there are 62284 items. A filter may be applied so that only those Permits with a **Status = "Submitted"** are shown in the list.



Users can filter information in a table by clicking on any of the column headings. Hover over **Filter** submenu to display the filter fields.

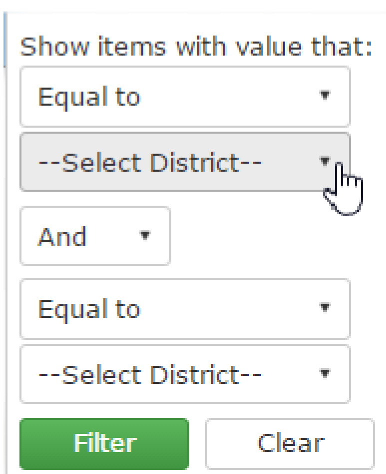


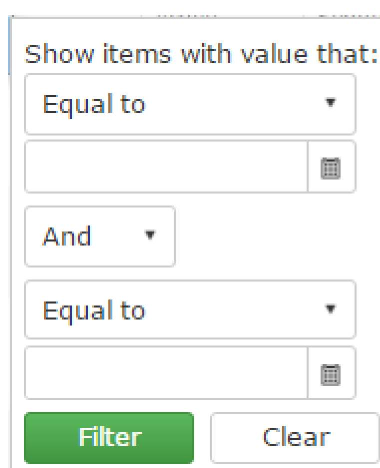
Select the **operator** “Is equal to” from the dropdown menu and select **value** “Submitted” from the dropdown list. A list and description of available operators is below.



Operator	Description
Contains	Enter any character(s) or number(s) in the value to include in the results (no wildcards). For example, Type Contains “crash” would return all records with the word “crash” as their Type.
Does not Contain	Enter any character(s) or number(s) in the value to exclude from the results. For example, Type Does not Contain “crash” would return all records that do not have the word “crash” as their Type.
Is equal to	Enter the exact value to include in the results
Is not equal to	Enter the exact value to not include in the results
Ends With	

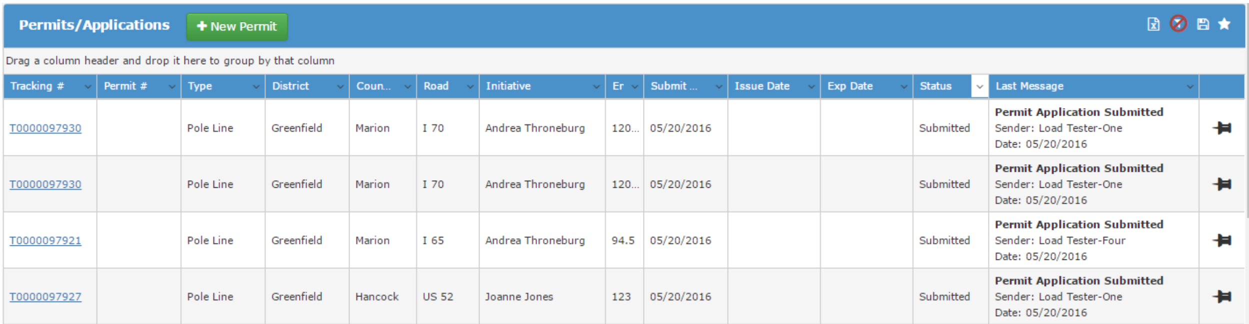
Depending on the type of field, the filter might be a text box, selecting a value from a dropdown (like **District** or **Status**), or a date field with a calendar.



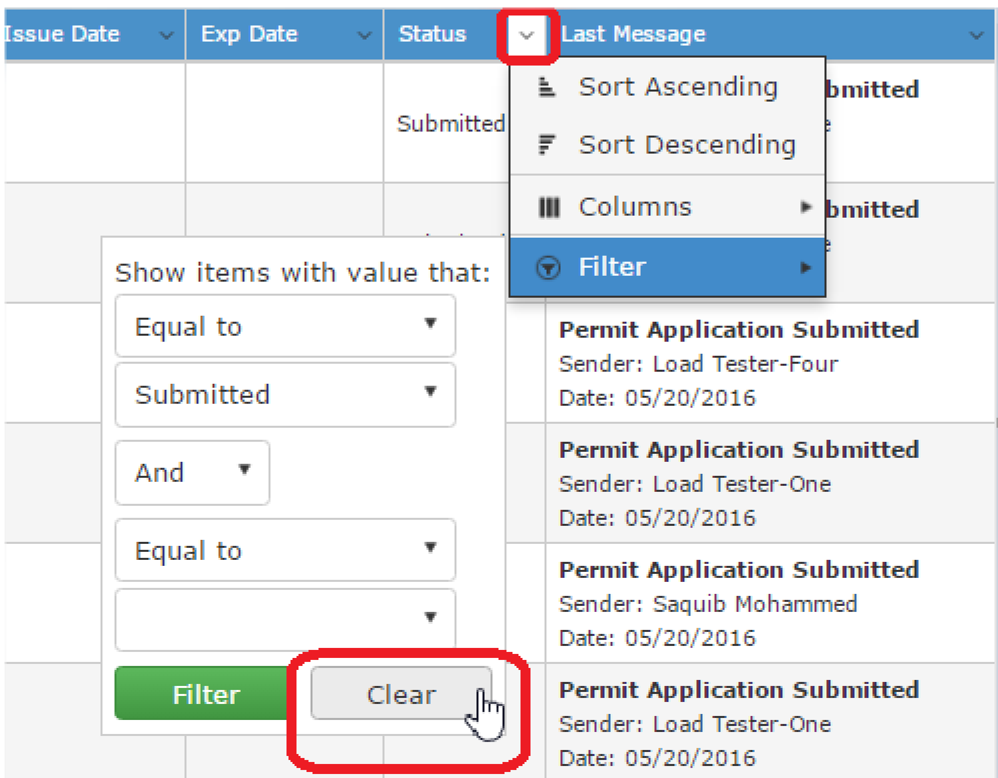


To apply a second filter, select “And” or “Or” from the dropdown and complete a second filter. Click **Filter** to filter the table, or click **Clear** to return to the table without applying the filter. To apply additional filters to the filtered list, click on the **Filter** submenu in the additional column to filter.

The filtered list of 161 records displays.

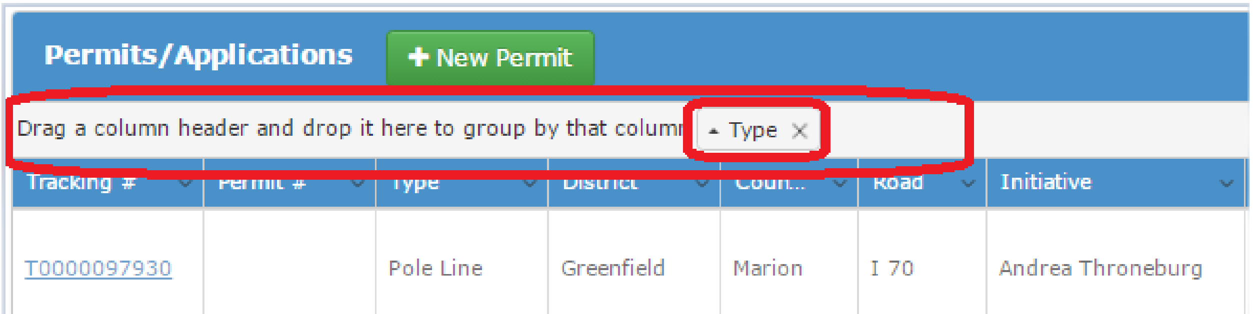


The column menu icon will have a white box around it once a filter is applied. To remove the Filter, click on the column name and select the **Filter** submenu. Click **Clear** to remove any filters on the column.



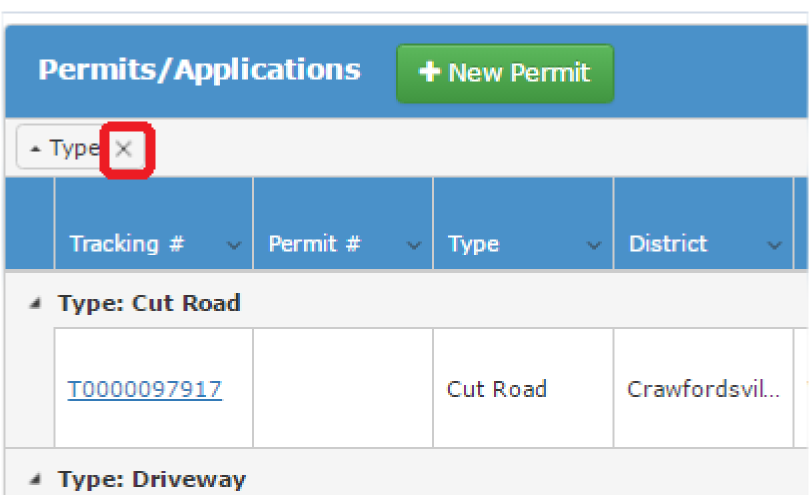
Grouping Columns

To group columns quickly, click on the column name and drag the column to the area just above the column headers.



The table will be grouped according to the columns selected.

To remove a selection, click on the **X** next to the column name.



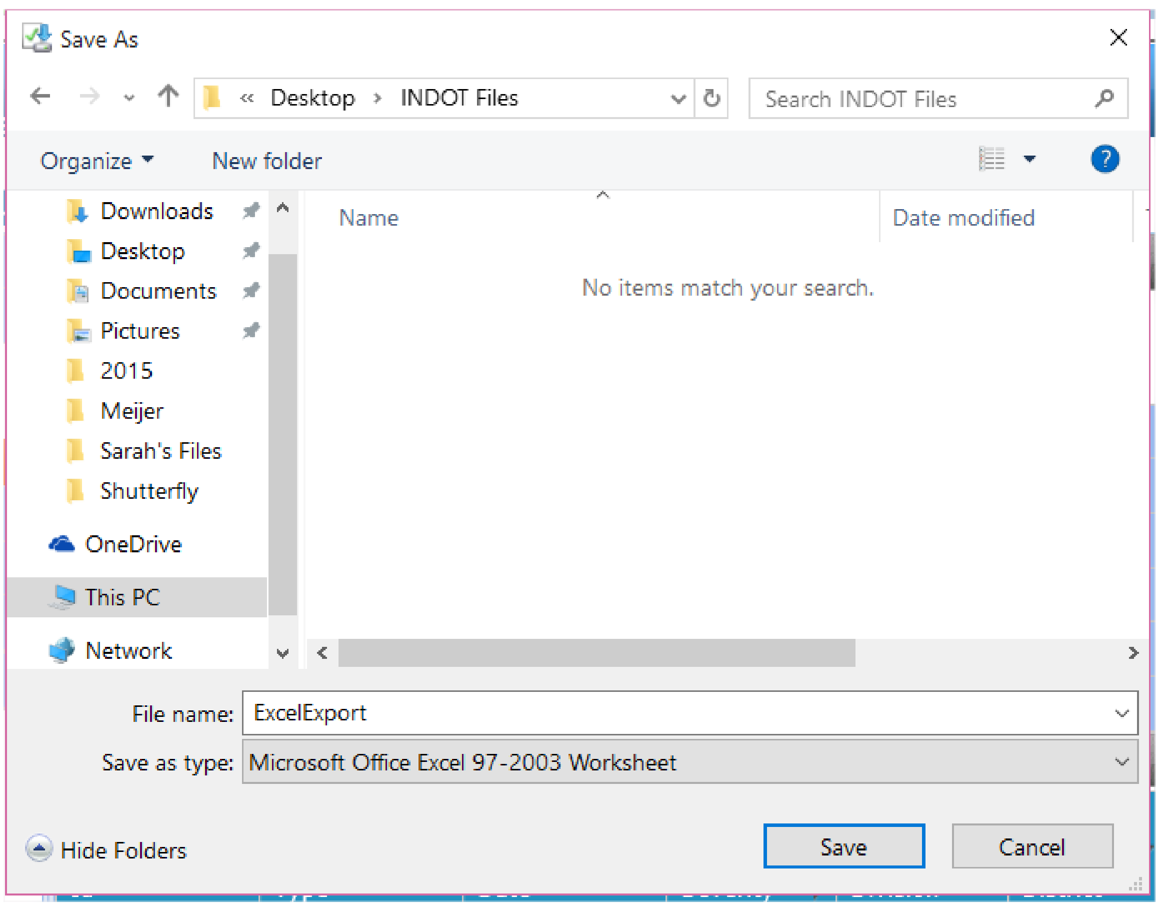
Export to Microsoft Excel

Information in Panels may be exported to Excel by clicking on the **Export to Excel**  icon in the title bar of the Panel.

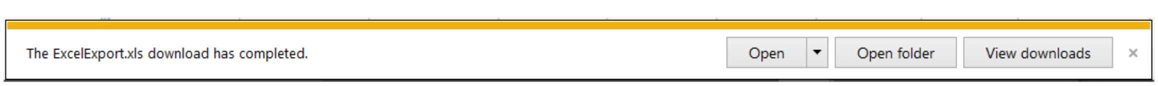
At the File Download dialog box, click on the **Open** button to view the data in Excel or click the **Save** button to save the data in an Excel file.

If saving, choose the location to store the file and click on the **Save** button.

By default, the file type is Microsoft Excel 97-2003 Worksheet.



The download's progress displays in a dialog box, as shown below. When complete, click on the **Open** button to view the data in Excel or click on the **Open Folder** button to open the file's location.



Whether viewing or opening from a saved file, the data displays in Microsoft Excel.

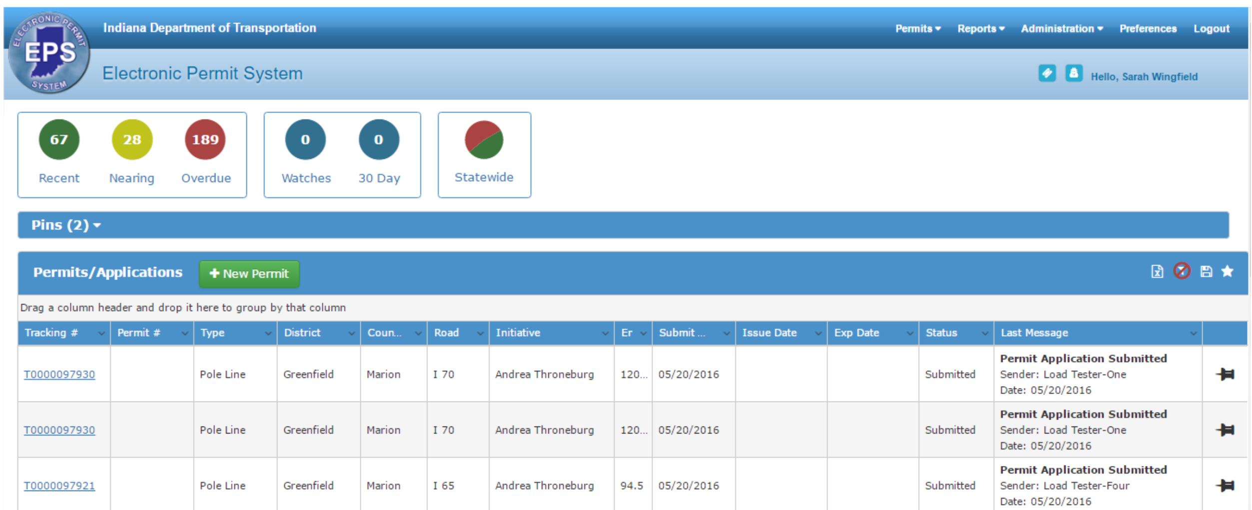
Unless a Filter has been applied, every record in the list is exported.

Permits

The Permits menu provides access to the Permit Dashboard, starting a New Application and viewing Illegal Signs.

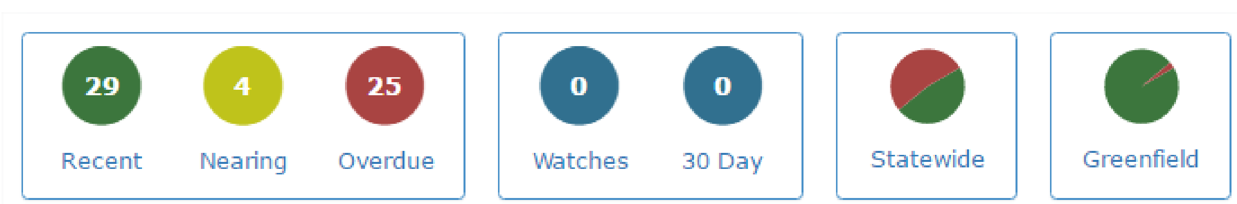
Permit Dashboard

The Permit Dashboard provides quick access to any Permit applications.



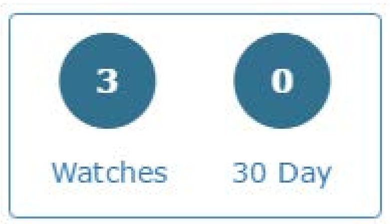
At-a-Glance Indicators

At the top of the screen are quick status indicators for permits related to the User (or across the state for Administrators).

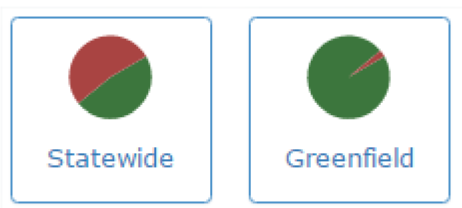


The **Recent/Nearing/Overdue** circles display the number of permits that have recent activity, are **Nearing** their metric deadline or those that are **Overdue**. Click on any of the circles to go to the **Aging Report** for additional details; the Aging Report will display results for all permits.

The **Watches/30 Day** circles display the number of Watches and the number of permits within 30 days that are associated with the User's Role.

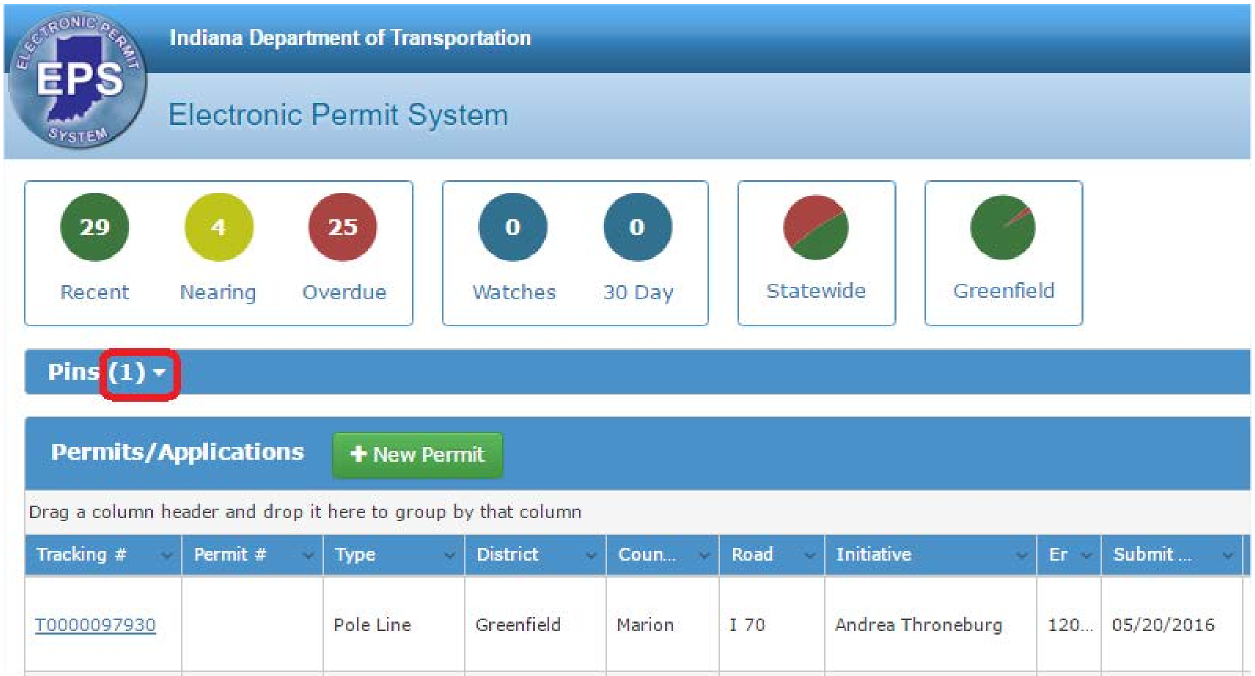


The **Statewide/District** circles display the Billboard Inventory progress for the State and the User's selected district. Click on the circle to go to the Billboard Inventory for the State.

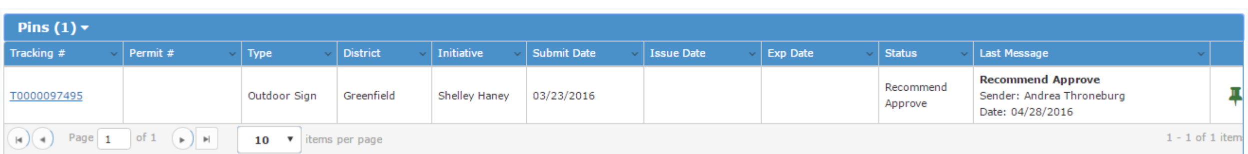


Pins

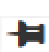
The **Pins** section provides quick access to selected records. The number of currently pinned permits displays in parenthesis next to the title.

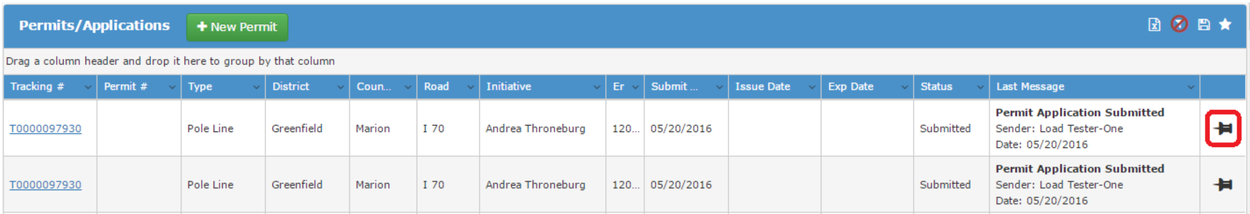


Click on the **Pins** header to expand the section and view the pinned permits.



The green pin  indicates the permit is pinned. Click on the pin to remove the pin (it will turn red when hovered over). Once clicked, the record is removed from the **Pinned Permits** table.

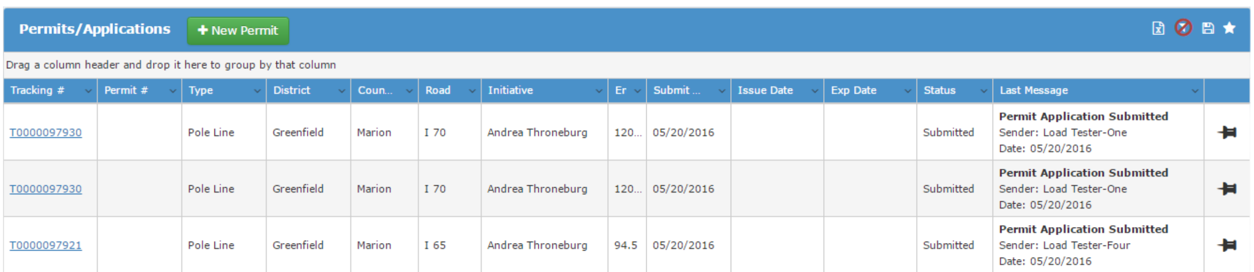
Click on the **Pin Permit**  icon in the **Permits** table to pin a record to the **Pinned Permits** section for quick access in the future.



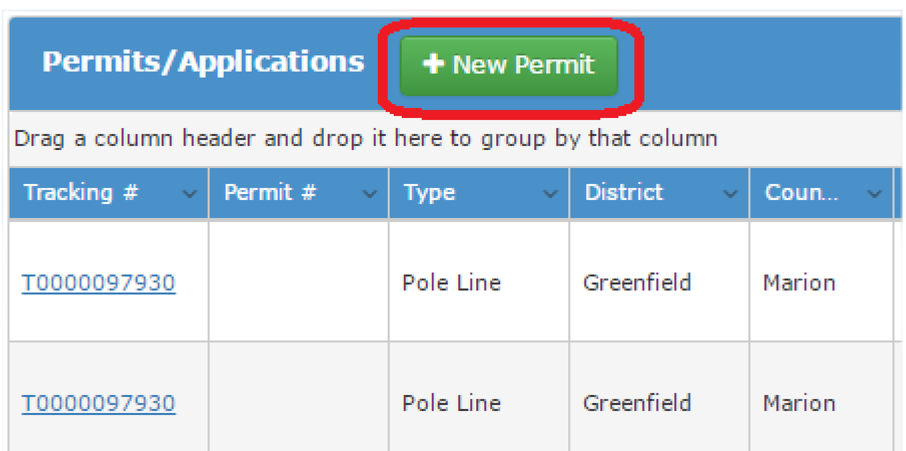
Once the record is pinned, the icon turns green  in the Permits table to indicate it's pinned. Click on the green pin again to unpin the record.

Permits/Applications

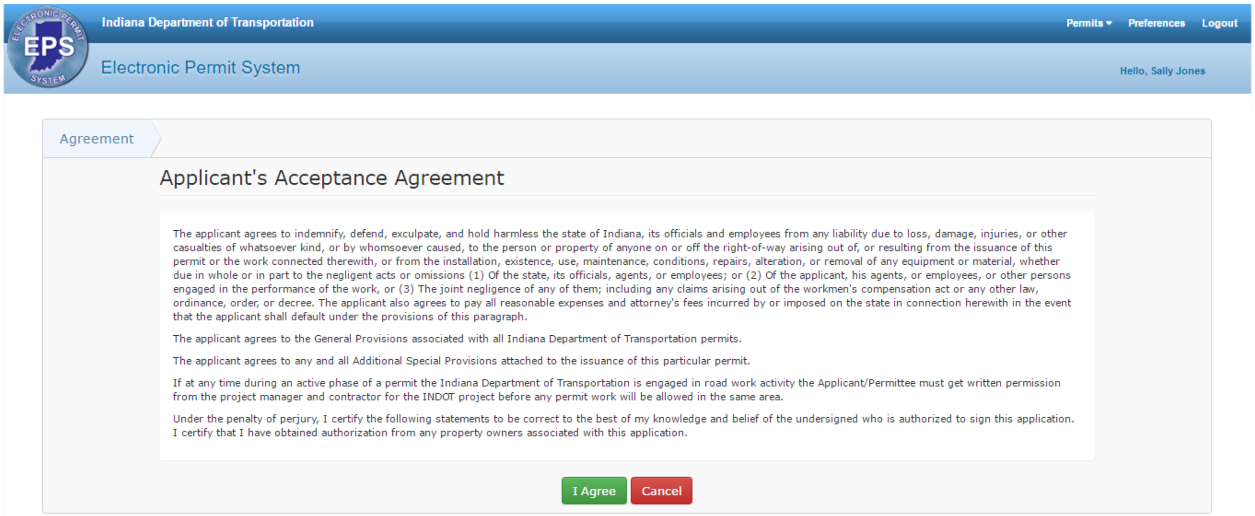
The **Permits/Applications** section allows Users to add, view and edit permit applications. All of the permits in the system are visible to INDOT users, but action items allowed on each permit depend on the User's role.



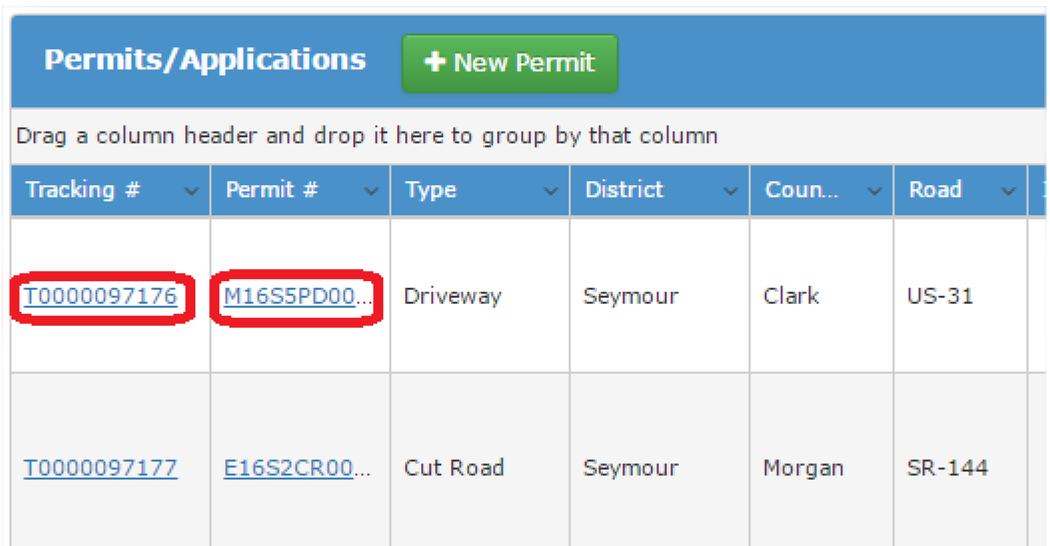
To add a new permit application, click on the **New Permit** button in the **Permits** table header.



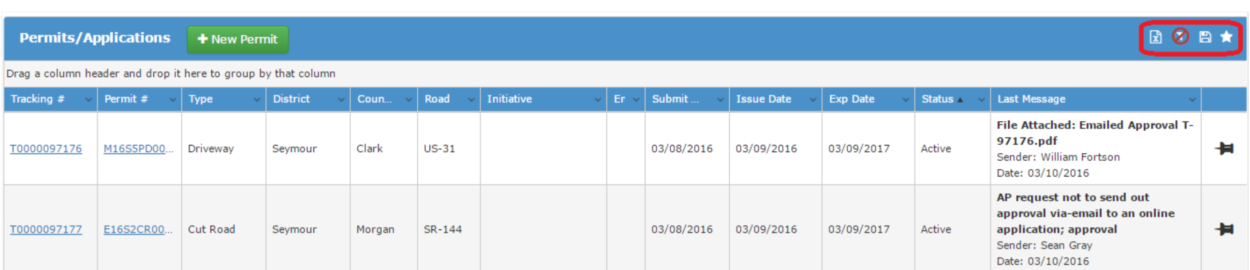
The screen will refresh and display the beginning of the permit application.



To edit or view an existing permit or permit application, click on the blue tracking # (or permit # once issued) to open the record.



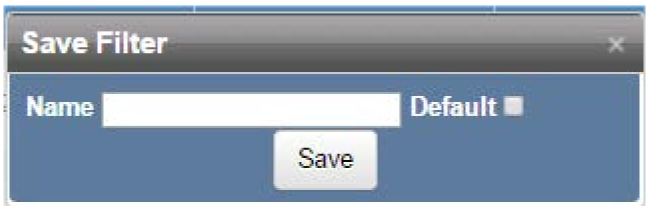
In the Permits table header, there are four icons that allow users to **Export to Excel**, **Clear Filter**, **Save Filter** and **Apply Saved Filters**.



Click on the **Export to Excel**  icon to export the Permits table to Excel.

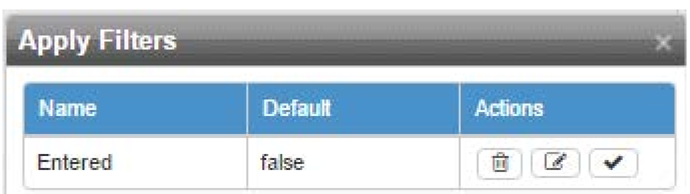
Click on the **Clear Filter**  icon to clear any filters applied to the table.

Click on the **Save Filter**  icon to save the current filters and column selections/order for future use. Enter a name for the group of filters and check the **Default** check box if this filter should be used by default each time the table is displayed.

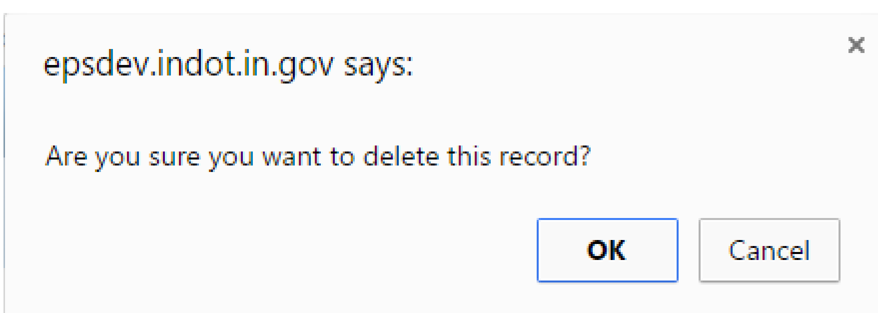


If no filters have been applied to the table, there is no filter to save.

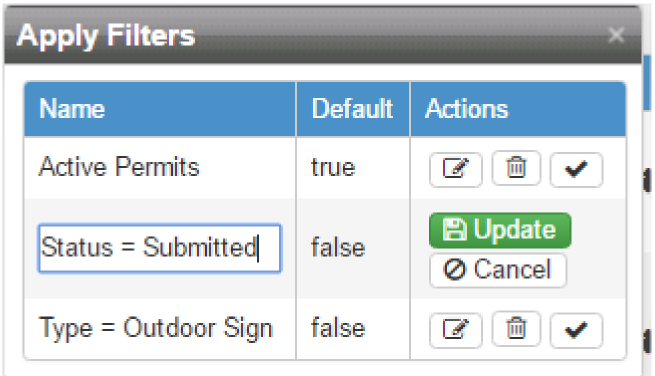
Click on the **Apply Saved Filters**  icon to apply a saved filter to the Permits table. The list of saved filters displays. The filter selected as the Default filter has **true** in the Default column; all others have **false** in the Default column. Users can **Delete** , **Edit**  or **Apply**  saved filters.



Click **Delete**  to delete a saved filter. Click **OK** at the confirmation message to delete the record, or click **Cancel** to return to the table without deleting the record.



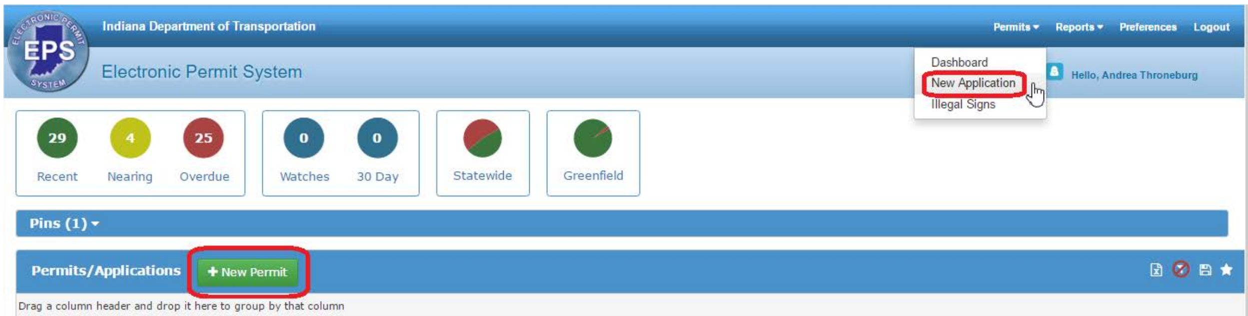
Click **Edit** to edit the name of a saved filter. Make any necessary changes and click **Update** to save the changes or click **Cancel** to return to the **Apply Filters** table without making changes.



Click **Apply** to apply a saved filter. The **Permits** table will update to display records matching the saved filter.

New Permit Application/Entered Permit Application

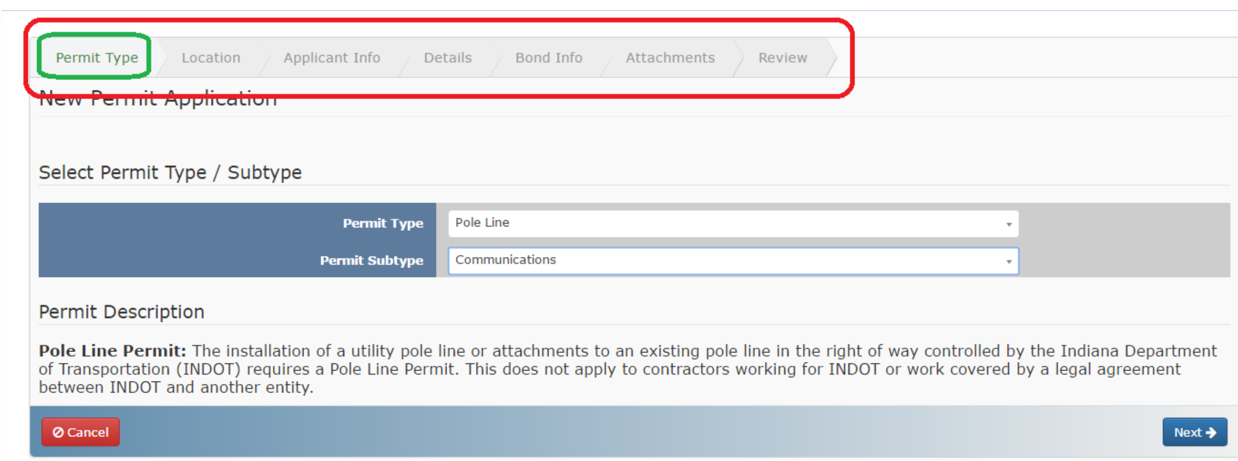
To start a new permit application, either select **New Application** from the **Permits** menu or click **New Permit** on the Permit Dashboard screen.



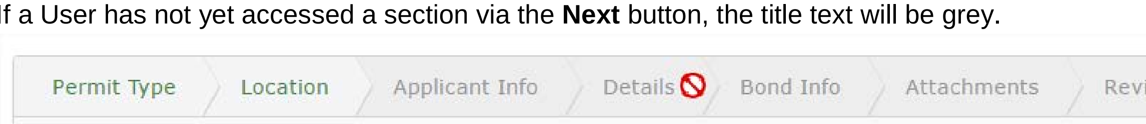
A Permit Application is divided into sections; each section is explained below. Each application requires basic information and certain Permit Types require special informational sections, which are noted in the headers below.

Progress Bar, Next/Save, Required Fields, Back, and Cancel

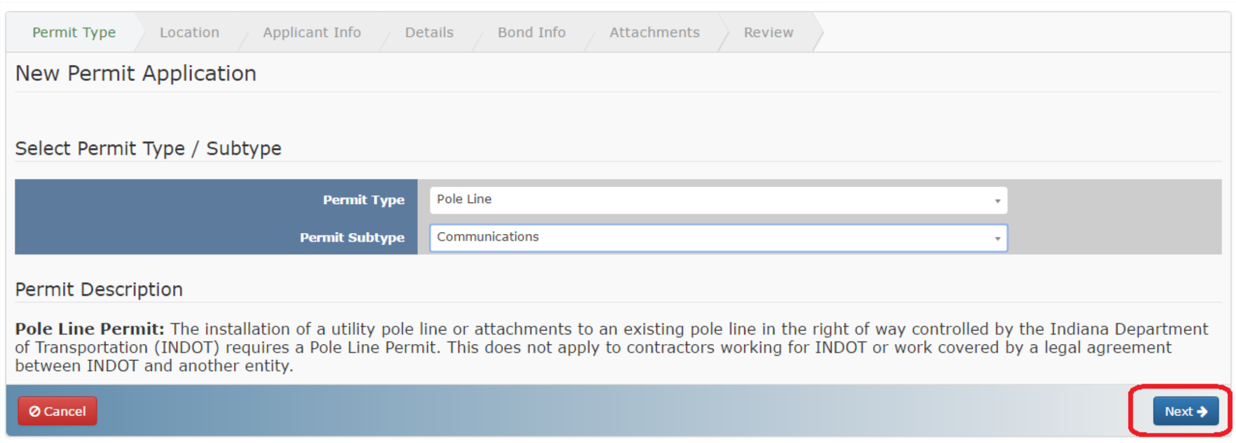
At the top of the screen, the **Progress Bar** displays the different steps in the Permit Application process and where the User is in that process.



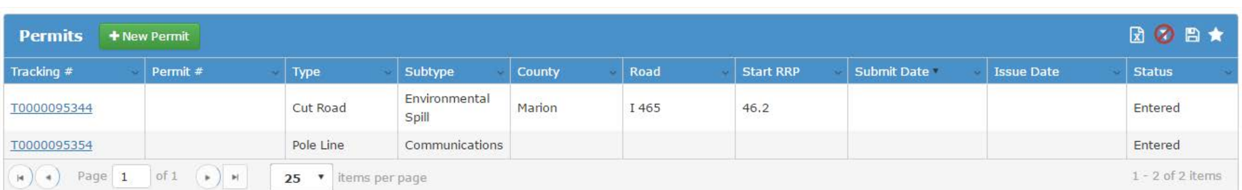
If a User has not yet accessed a section via the **Next** button, the title text will be grey.



Click the **Next** button to progress to the next screen in the application process. Each time the **Next** button is clicked, the application data is saved.

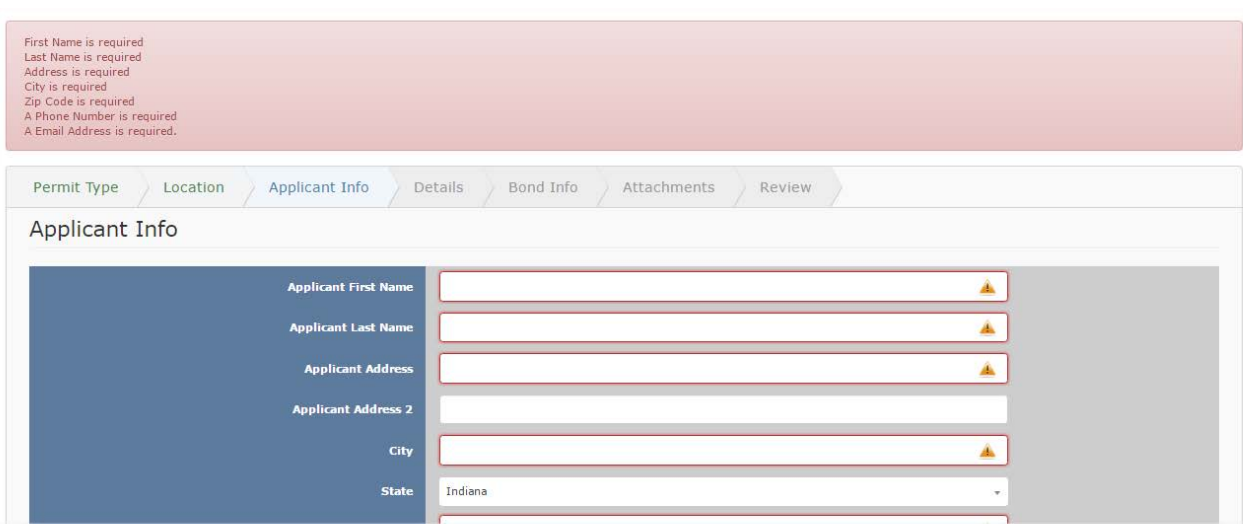


After clicking the **Next** button on the Permit Type screen the Permit is assigned a Tracking Number and is given the permit status as **Entered**. If you leave the Permit Application screen by any way except clicking **Cancel** the application will be saved and displayed in the Permit Dashboard Permit table. Click on the **Tracking Number** to open the Application on the screen last saved/visited.



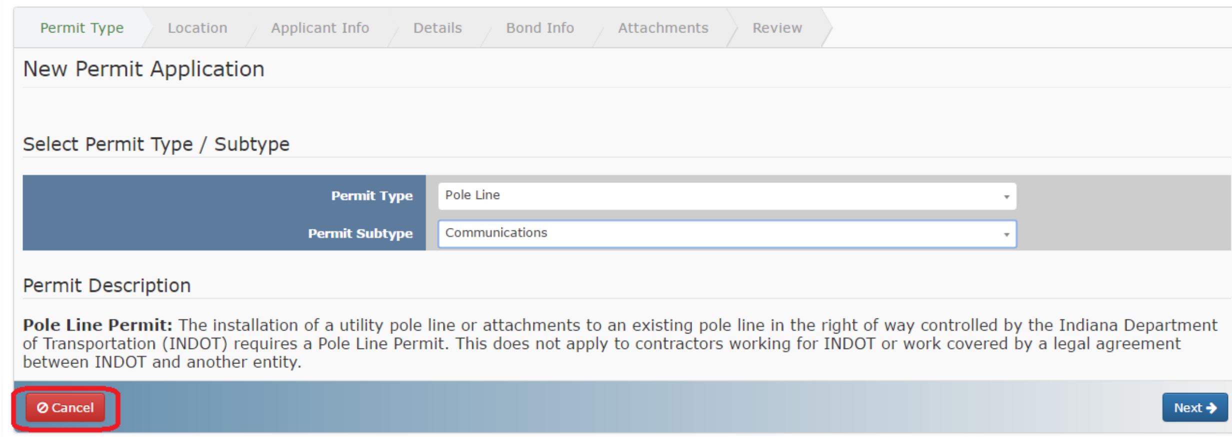
Tracking #	Permit #	Type	Subtype	County	Road	Start RRP	Submit Date	Issue Date	Status
T0000095344		Cut Road	Environmental Spill	Marion	I 465	46.2			Entered
T0000095354		Pole Line	Communications						Entered

Each screen has required fields that must be completed before moving to the next section. If a required field is not completed when the **Next** button is clicked, a warning message will alert the User which fields are incomplete and a warning icon displays by the incomplete field. Once all required fields are complete the **Next** button will take the User to the next section.

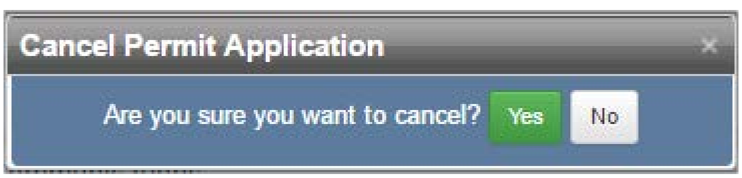


To return to a previous application screen, click the **Back** button.

To **Cancel** a permit application, click on the **Cancel** button at the bottom left of the screen.

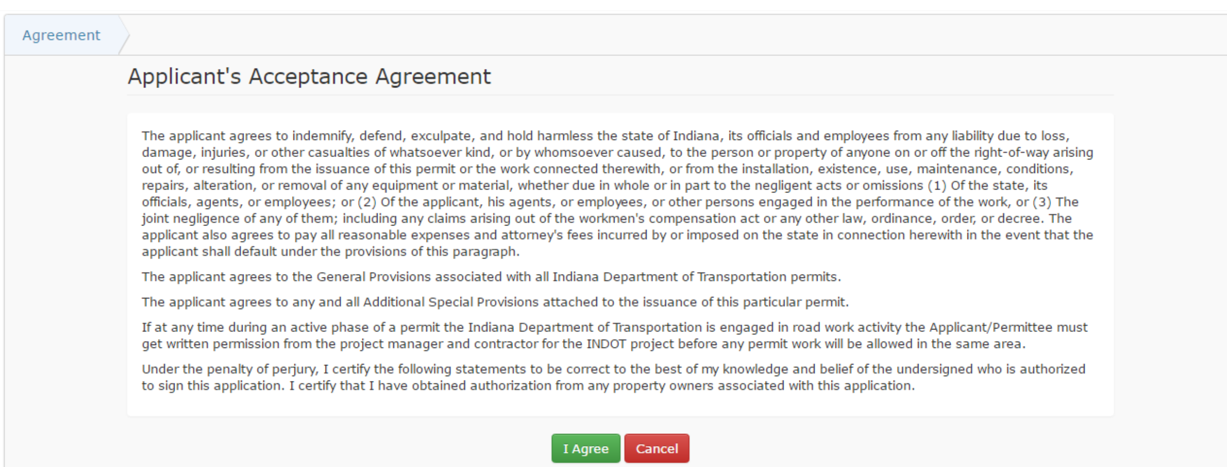


At the confirmation window, click **Yes** to cancel the application and delete it from the system, or click **No** to return to the permit application without removing the application.



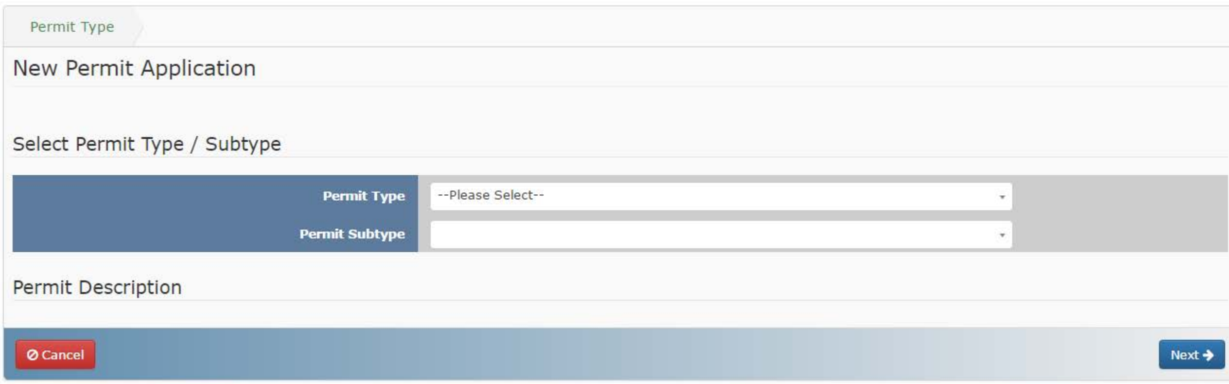
Agreement – ALL PERMIT TYPES

Read the terms and click **I Agree** to accept the terms and start the application or **Cancel** to stop the application creation process.



Permit Type – ALL PERMIT TYPES

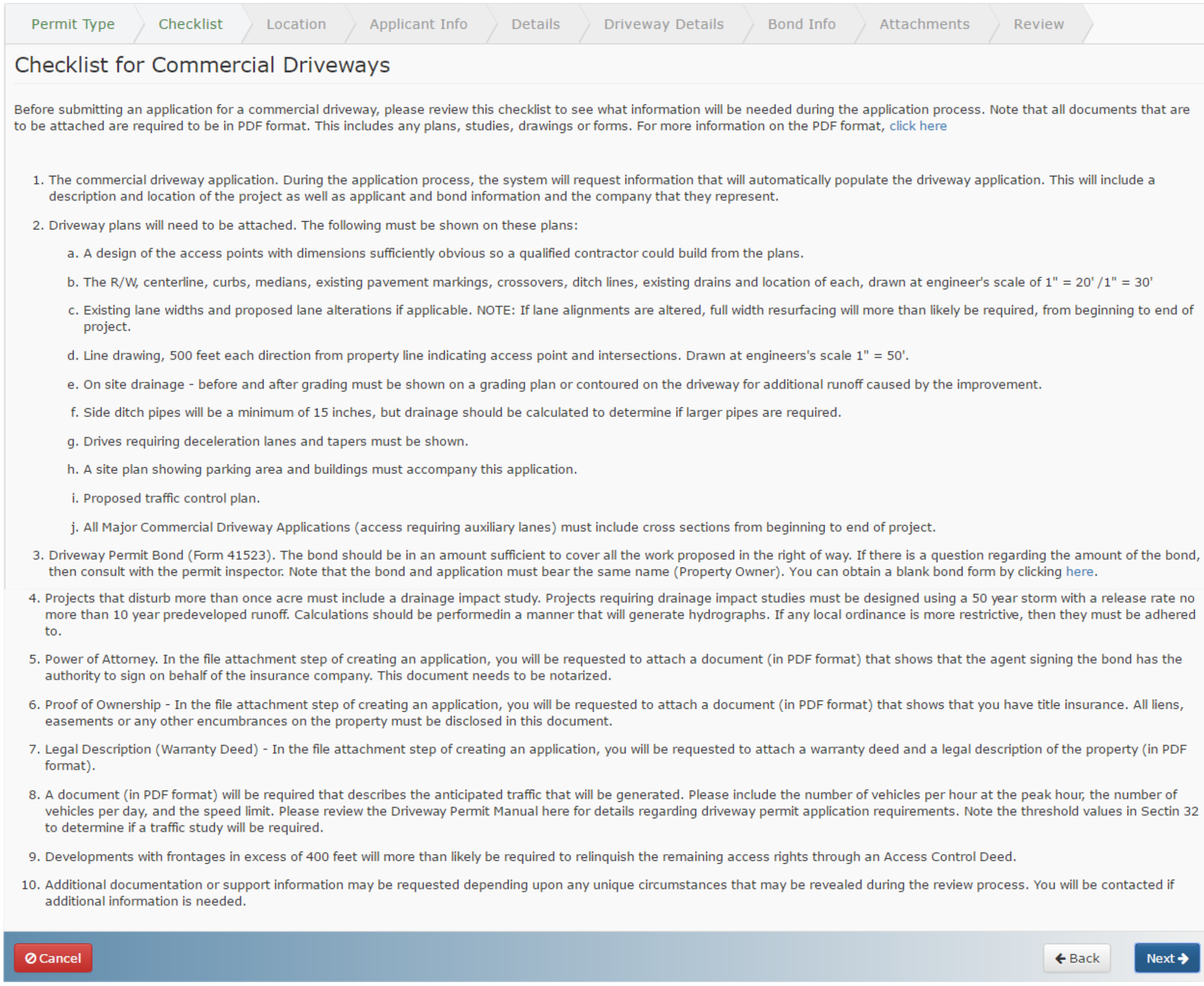
Select the **Permit Type** from the Permit Type dropdown. The **Permit Subtype** dropdown menu options change based on the selected Permit Type. Once the Permit Type and Permit Subtype are selected, click **Next** to continue the permit application process or click **Cancel** to return to **Permit Dashboard** without creating a permit application.



Once a Permit Type and Subtype are selected and the **Next** button is clicked, the Permit Type and Subtype cannot be changed. In order to change the Permit Type or Subtype the original permit application must be **Cancelled** and then a new application needs to be created.

Checklist – Only for All Driveway Subtypes EXCEPT Private

The Checklist section displays a listing of the information needed to submit a Commercial Driveway permit application. Click on the blue **Click here** links to open PDFs of information as necessary. Once the User has all required documentation, proceed to the next section by clicking on the **Next** button.


Permit Type | Checklist | Location | Applicant Info | Details | Driveway Details | Bond Info | Attachments | Review

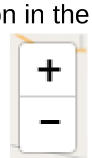
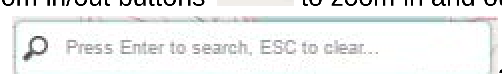
Checklist for Commercial Driveways

Before submitting an application for a commercial driveway, please review this checklist to see what information will be needed during the application process. Note that all documents that are to be attached are required to be in PDF format. This includes any plans, studies, drawings or forms. For more information on the PDF format, click here

1. The commercial driveway application. During the application process, the system will request information that will automatically populate the driveway application. This will include a description and location of the project as well as applicant and bond information and the company that they represent.
2. Driveway plans will need to be attached. The following must be shown on these plans:
   a. A design of the access points with dimensions sufficiently obvious so a qualified contractor could build from the plans.
   b. The R/W, centerline, curbs, medians, existing pavement markings, crossovers, ditch lines, existing drains and location of each, drawn at engineer's scale of 1" = 20' /1" = 30'
   c. Existing lane widths and proposed lane alterations if applicable. NOTE: If lane alignments are altered, full width resurfacing will more than likely be required, from beginning to end of project.
   d. Line drawing, 500 feet each direction from property line indicating access point and intersections. Drawn at engineers's scale 1" = 50'.
   e. On site drainage - before and after grading must be shown on a grading plan or contoured on the driveway for additional runoff caused by the improvement.
   f. Side ditch pipes will be a minimum of 15 inches, but drainage should be calculated to determine if larger pipes are required.
   g. Drives requiring deceleration lanes and tapers must be shown.
   h. A site plan showing parking area and buildings must accompany this application.
   i. Proposed traffic control plan.
   j. All Major Commercial Driveway Applications (access requiring auxiliary lanes) must include cross sections from beginning to end of project.
3. Driveway Permit Bond (Form 41523). The bond should be in an amount sufficient to cover all the work proposed in the right of way. If there is a question regarding the amount of the bond, then consult with the permit inspector. Note that the bond and application must bear the same name (Property Owner). You can obtain a blank bond form by clicking here.
4. Projects that disturb more than once acre must include a drainage impact study. Projects requiring drainage impact studies must be designed using a 50 year storm with a release rate no more than 10 year predeveloped runoff. Calculations should be performedin a manner that will generate hydrographs. If any local ordinance is more restrictive, then they must be adhered to.
5. Power of Attorney. In the file attachment step of creating an application, you will be requested to attach a document (in PDF format) that shows that the agent signing the bond has the authority to sign on behalf of the insurance company. This document needs to be notarized.
6. Proof of Ownership - In the file attachment step of creating an application, you will be requested to attach a document (in PDF format) that shows that you have title insurance. All liens, easements or any other encumbrances on the property must be disclosed in this document.
7. Legal Description (Warranty Deed) - In the file attachment step of creating an application, you will be requested to attach a warranty deed and a legal description of the property (in PDF format).
8. A document (in PDF format) will be required that describes the anticipated traffic that will be generated. Please include the number of vehicles per hour at the peak hour, the number of vehicles per day, and the speed limit. Please review the Driveway Permit Manual here for details regarding driveway permit application requirements. Note the threshold values in Sectin 32 to determine if a traffic study will be required.
9. Developments with frontages in excess of 400 feet will more than likely be required to relinquish the remaining access rights through an Access Control Deed.
10. Additional documentation or support information may be requested depending upon any unique circumstances that may be revealed during the review process. You will be contacted if additional information is needed.

Cancel | Back | Next

Location – FOR ALL PERMIT TYPES

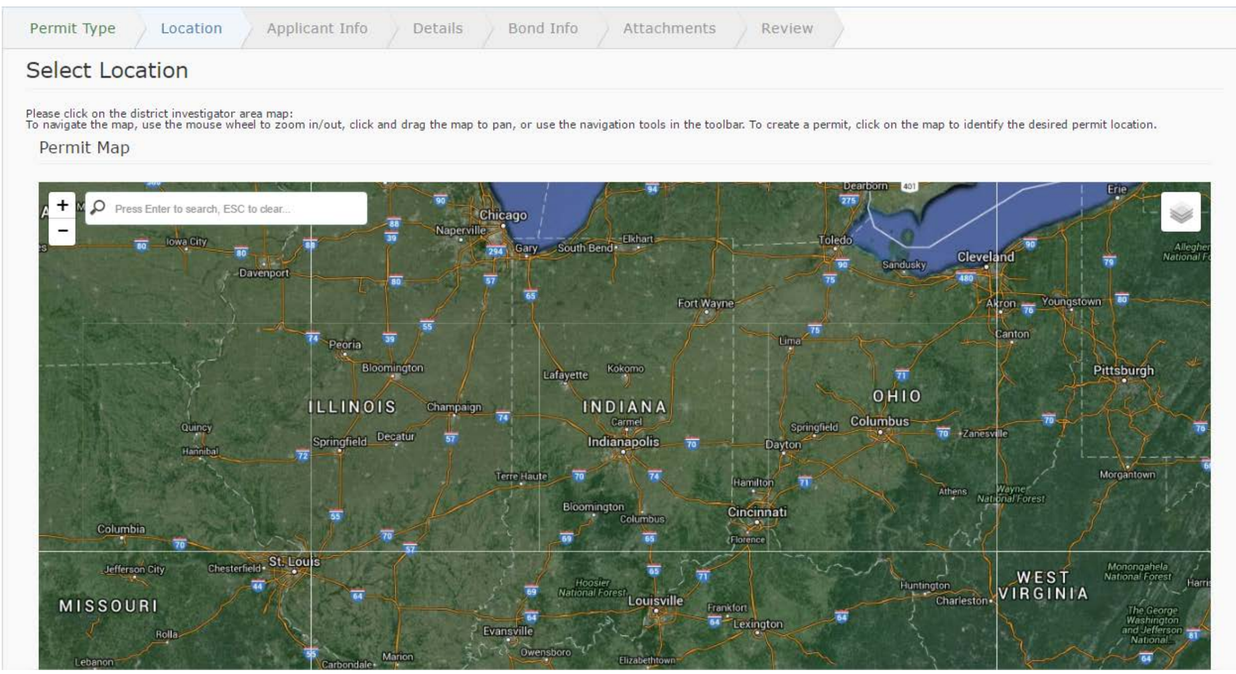
Indicate the location associated with the permit application in the **Location** section. Use the mouse scroll wheel to zoom in and out, or use the zoom in/out buttons  to zoom in and out. Enter an address, city, intersection, etc in the **Search box** 

and click **Enter** to zoom to a specific area on the map. Click and drag to move the map if necessary. Click the **Layer Selector**

 in the upper right corner of the map to select the map display from Hybrid to another selection (grayscale, streets, aerial) 

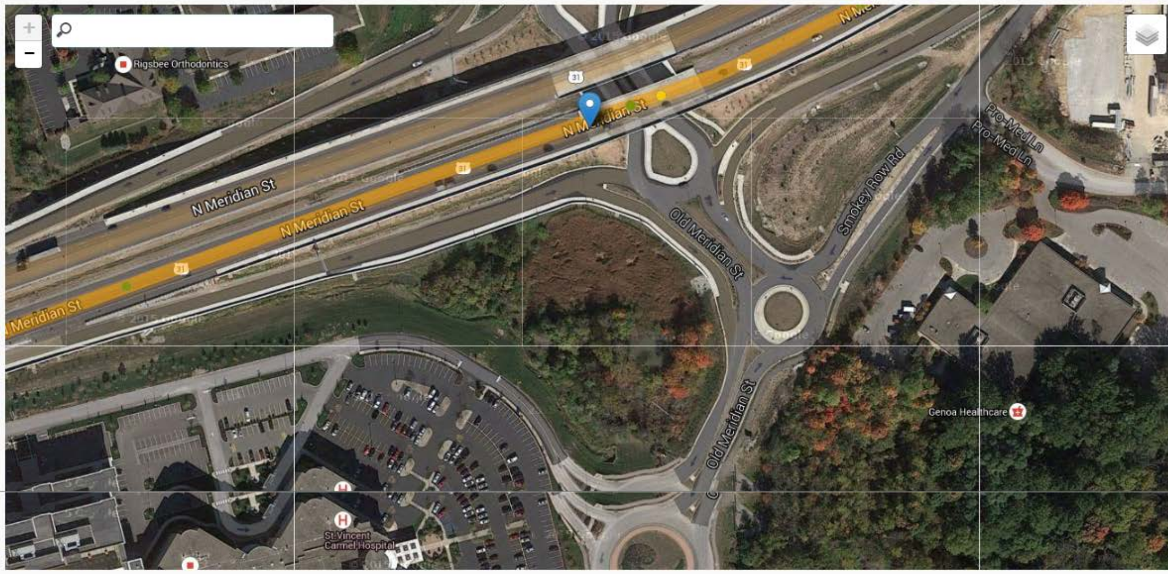
.

The initial map is zoomed out to display the state of Indiana and the Permit Details fields are blank.



Click on the map in the exact location of the desired permit application. A blue pin will appear on the map to indicate the permit application location. If the permit application location pin is in the wrong location, click on the map again in the correct location to move the pin. The Permit Description fields will automatically populate based on the location of the pin.

Permit Map



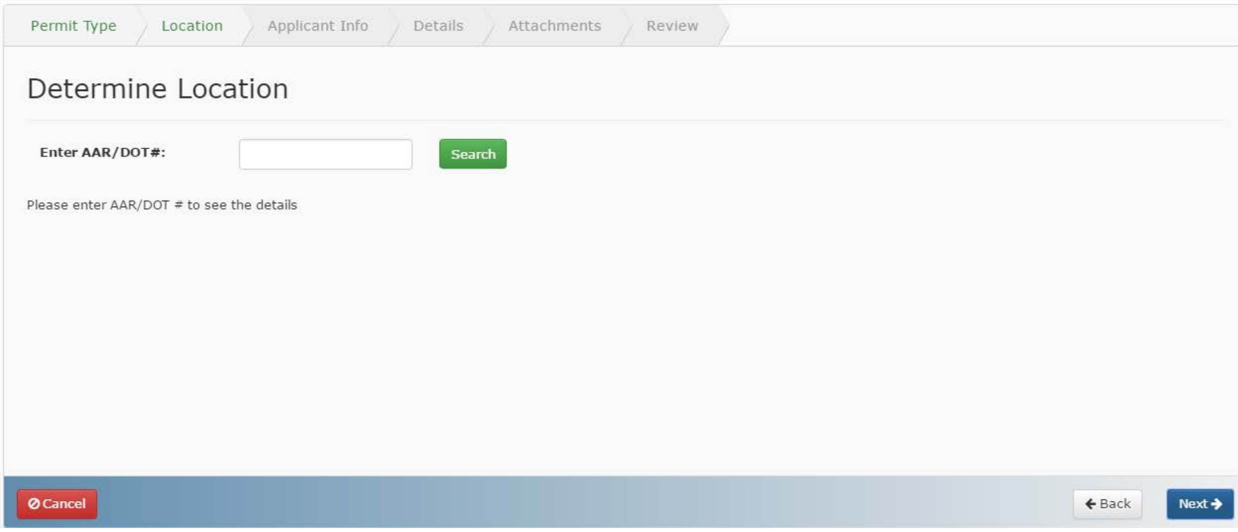
Permit Description

District	GREENFIELD
County	HAMILTON
Investigator	Sandy Landrum
Investigator Phone	(W)765-675-7402-Ext.6 (C)317-402-1823
Road	US 31
Start RRP	127.69
Longtitude	-86.14202629777084
Latitude	39.98444128252372

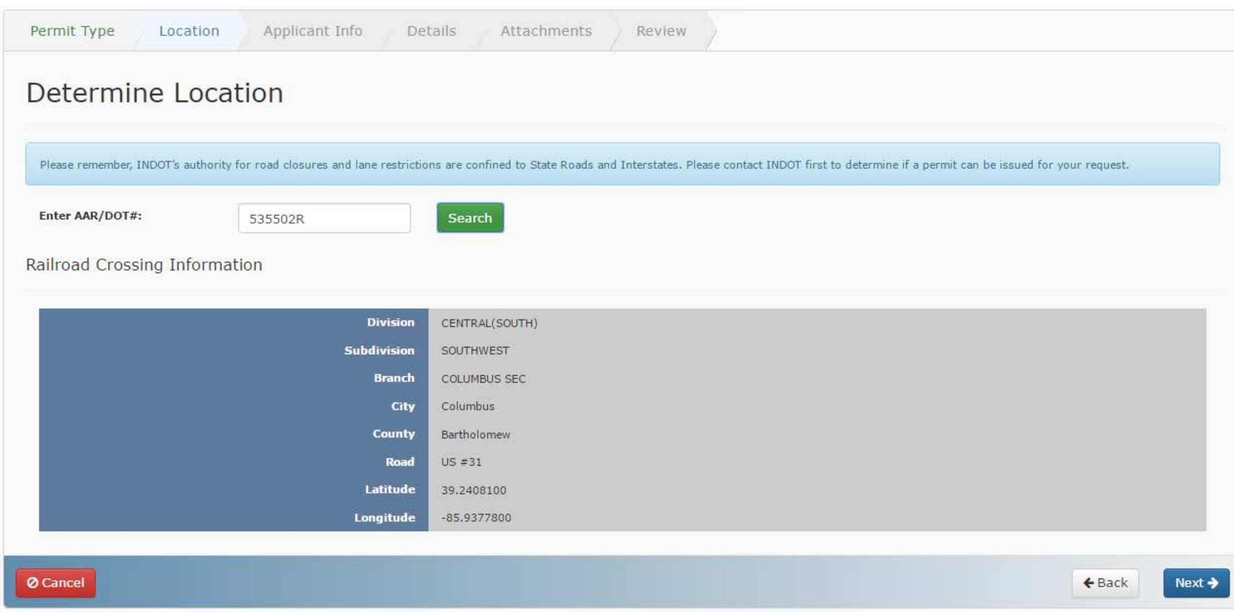
Cancel Back Next

Location – Railroad

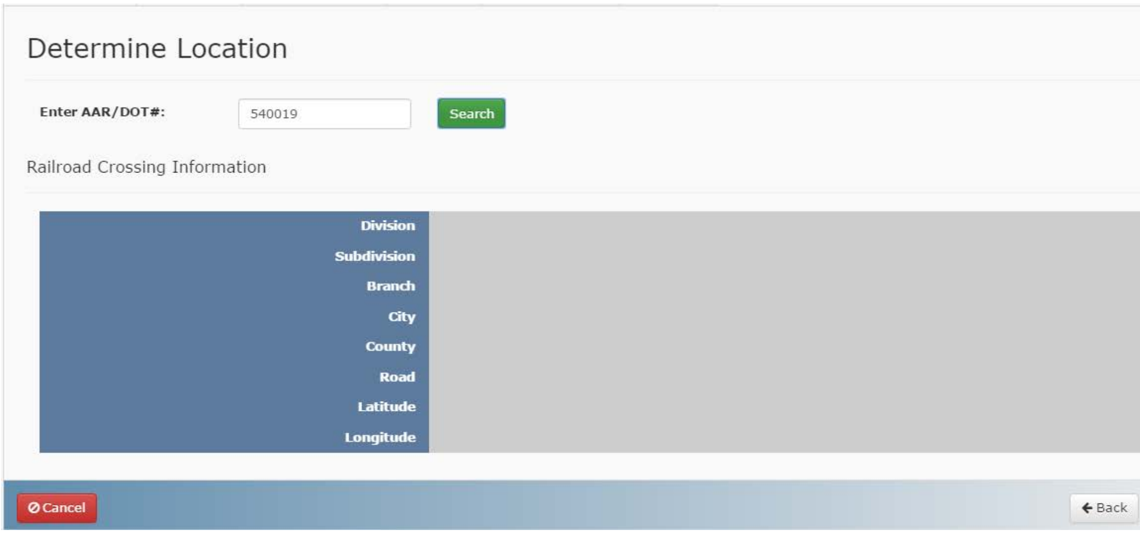
For Railroad permit applications, the Location section begins by asking for the AAR or DOT#. Enter the AAR or DOT# in the box and click **Search** to view more details.



The Railroad Crossing information displays based on the entered value, and is not editable.

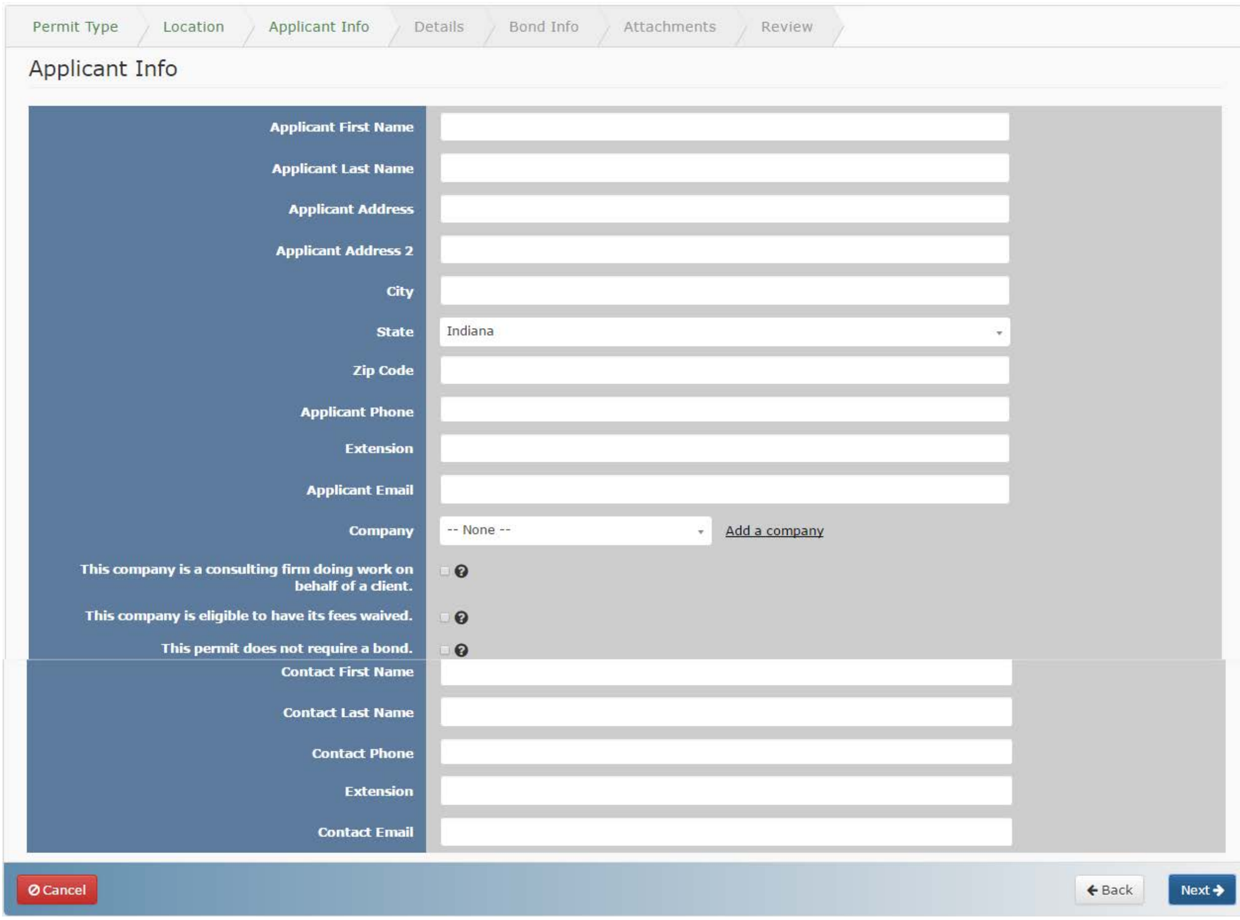


If an invalid number is entered, the search results will be blank. The permit application cannot move forward until a valid AAR/DOT# is entered.

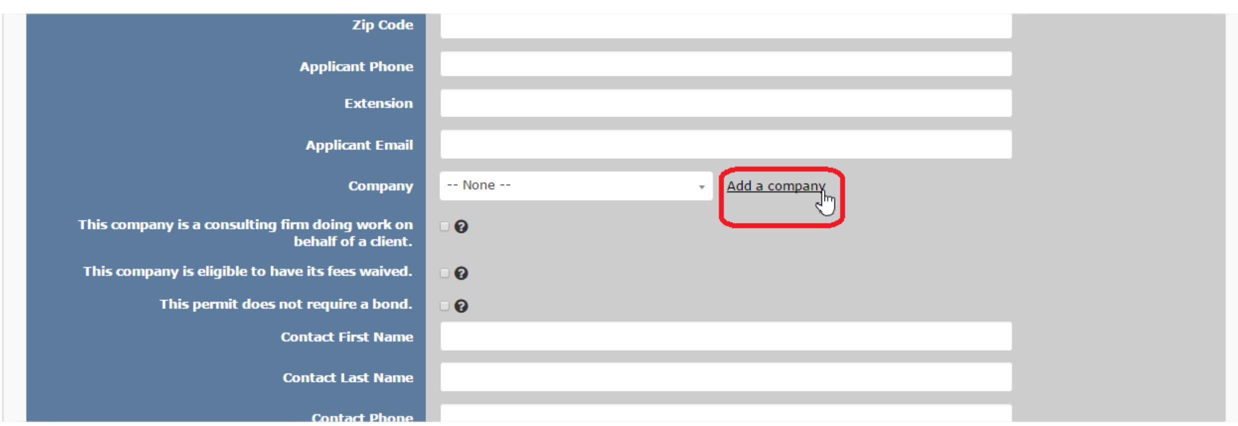


Applicant Info – FOR ALL PERMIT TYPES except Railroad

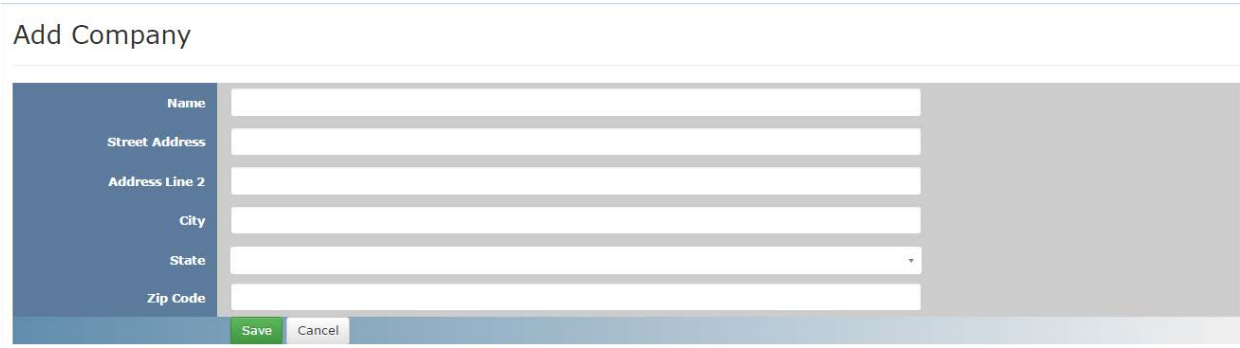
Fill out the Applicant Information as requested. Click on the black question mark next to select fields for more information on the specific field.



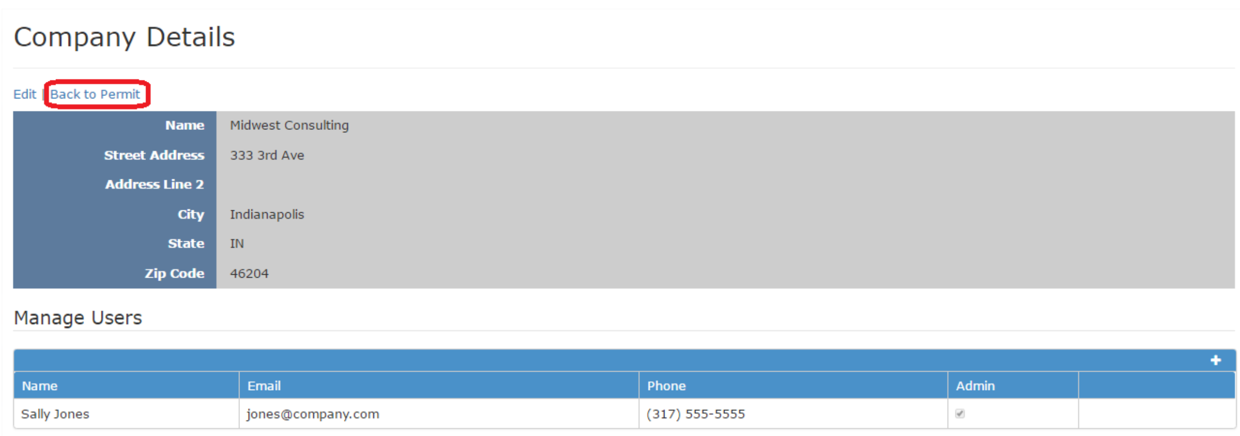
If the company is not already in the **Company** dropdown, click on the **Add a company** link.



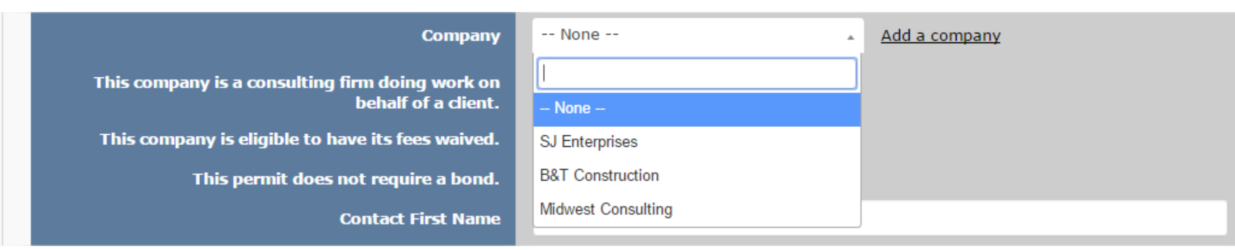
The **Add Company** screen opens. Enter information as necessary and click **Save** to save the company information or click **Cancel** to return to the permit application without adding a company.



After saving the new company information, the **Company Details** screen displays the company information. See Companies for more information on managing users and editing company details. Click on **Back to Permit** to return to the permit application and resume entering Applicant Info.



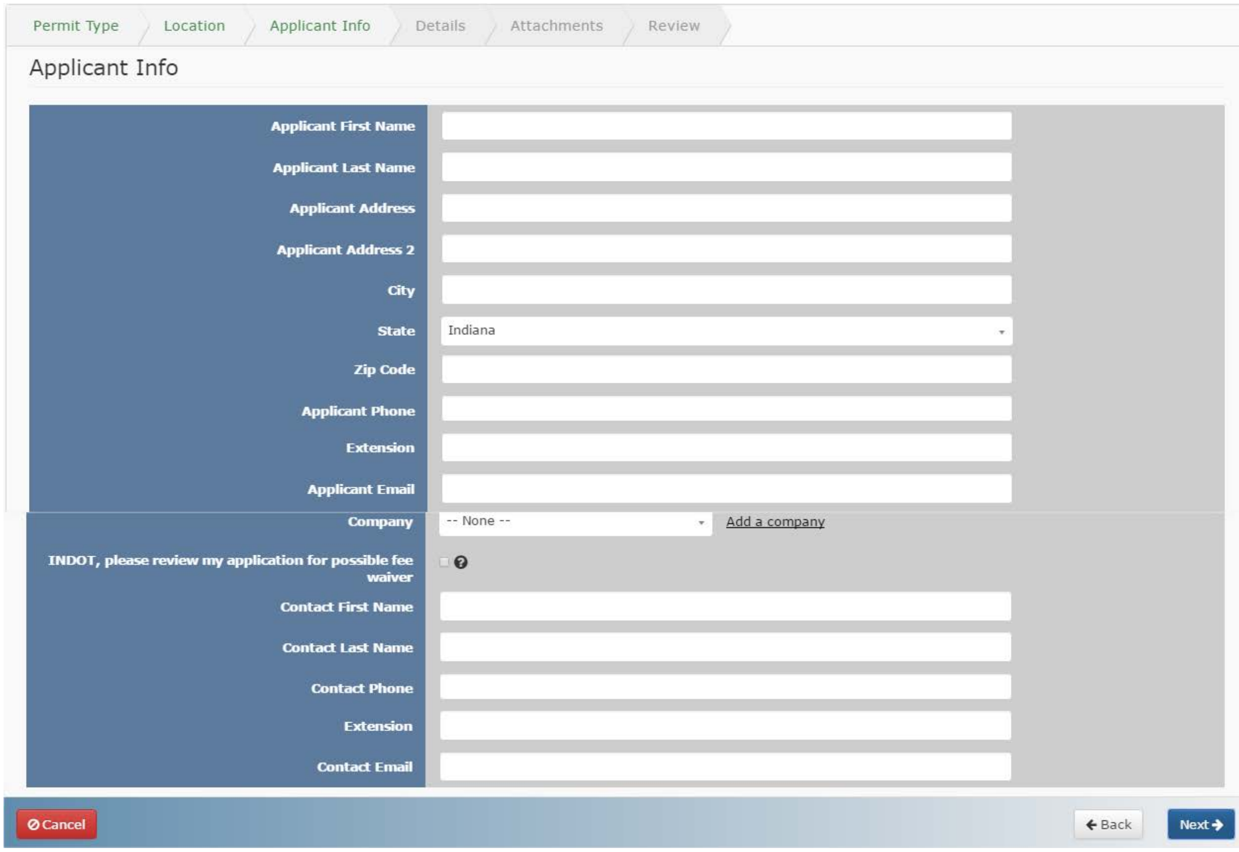
The newly added company displays in the **Company** dropdown.



If the Applicant is a consulting firm doing work on behalf of a Client, click in the check box **This company is a consulting firm doing work on behalf of a client**. Clicking in this box adds a new section to the permit application – Client Info. See Client Info for more information.

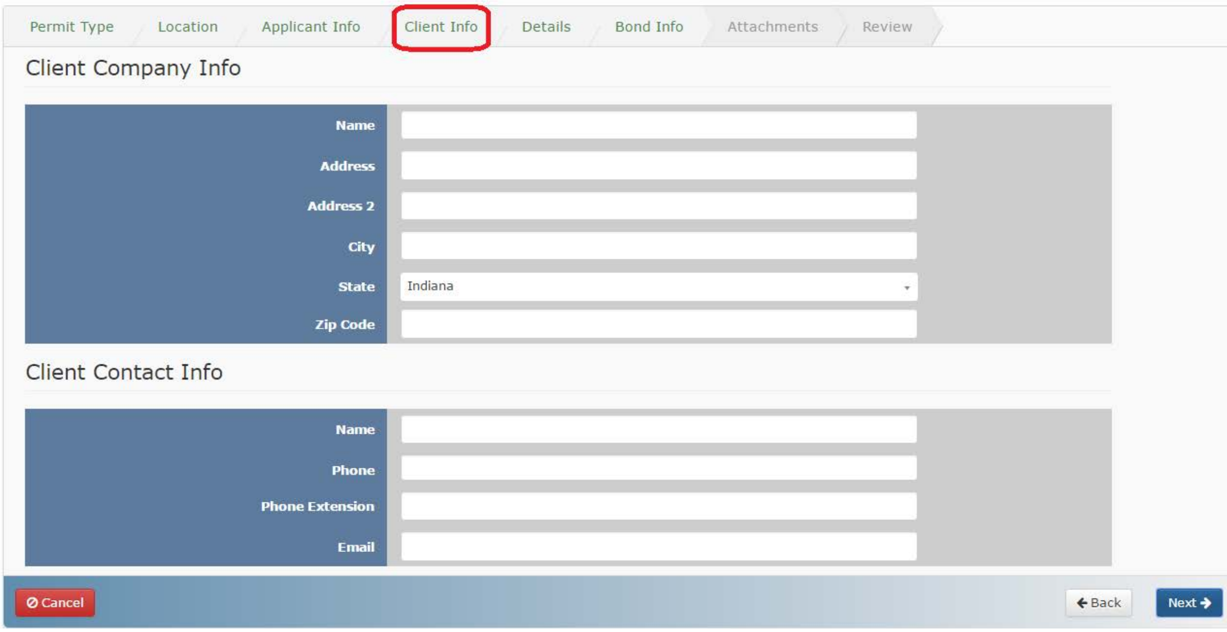
Applicant Info – Railroads

Fill out the Applicant Information as requested. Click on the black question mark next to select fields for more information on the specific field.



Client Info – Only for Consulting firms doing work on behalf of a Client

For Consulting firms doing work on behalf of a client, an additional Client Info section is added to the Permit Application.



Fill out the Client Company Info in the **Client Company Info** section. See the chart below for information on what information to fill out in the Client Info sections:

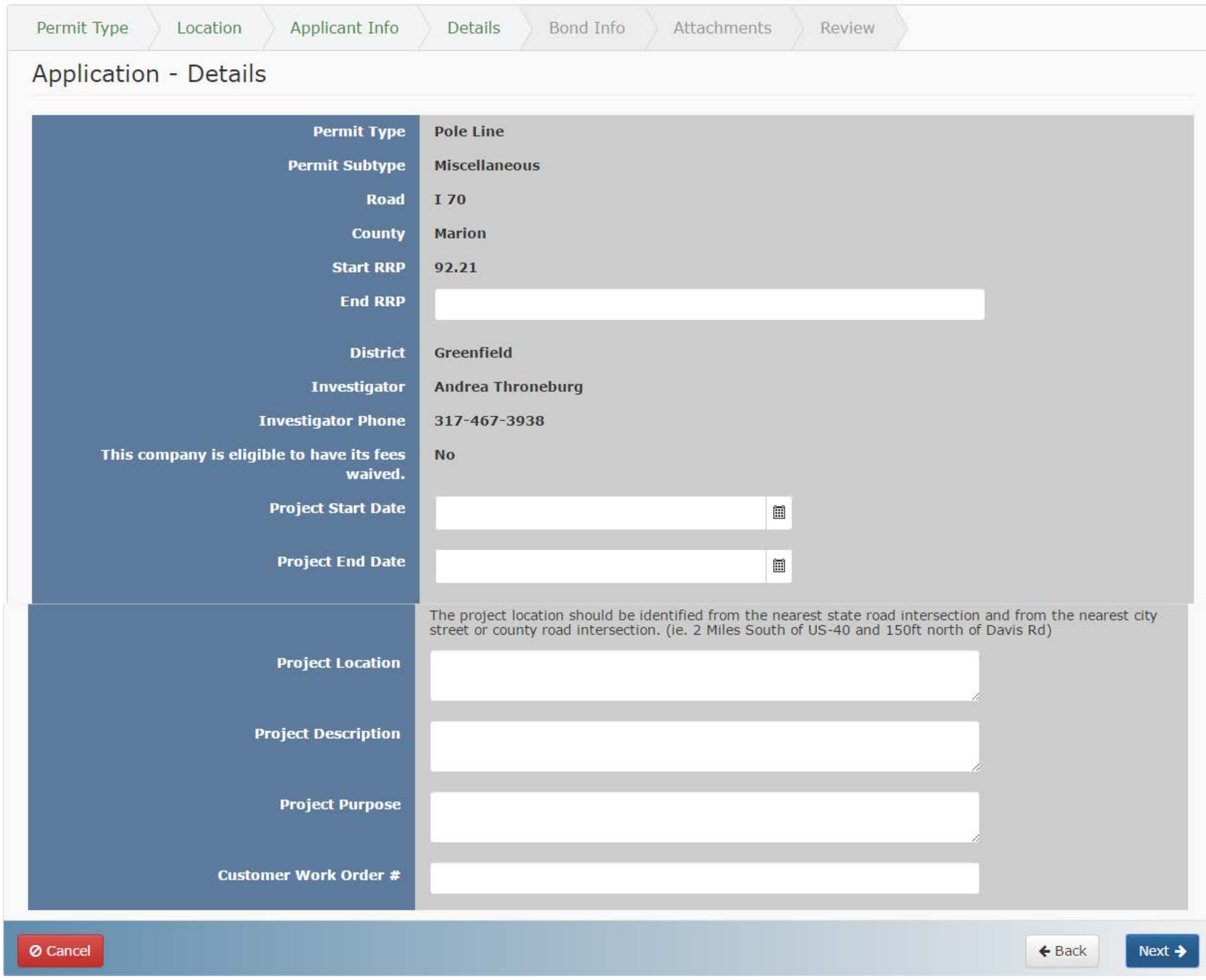
Permit Type	Client Company Info
Cut Road, Pole Line and Miscellaneous	Owner of Utility
Driveway	Owner of Property
Outdoor Sign	Owner of Billboard

Fill out the Client Contact Info with the information of the contact person at the Client Company.

Consultants will also have to fill out and attach the Consultant Consent form in the **Attachments** section.

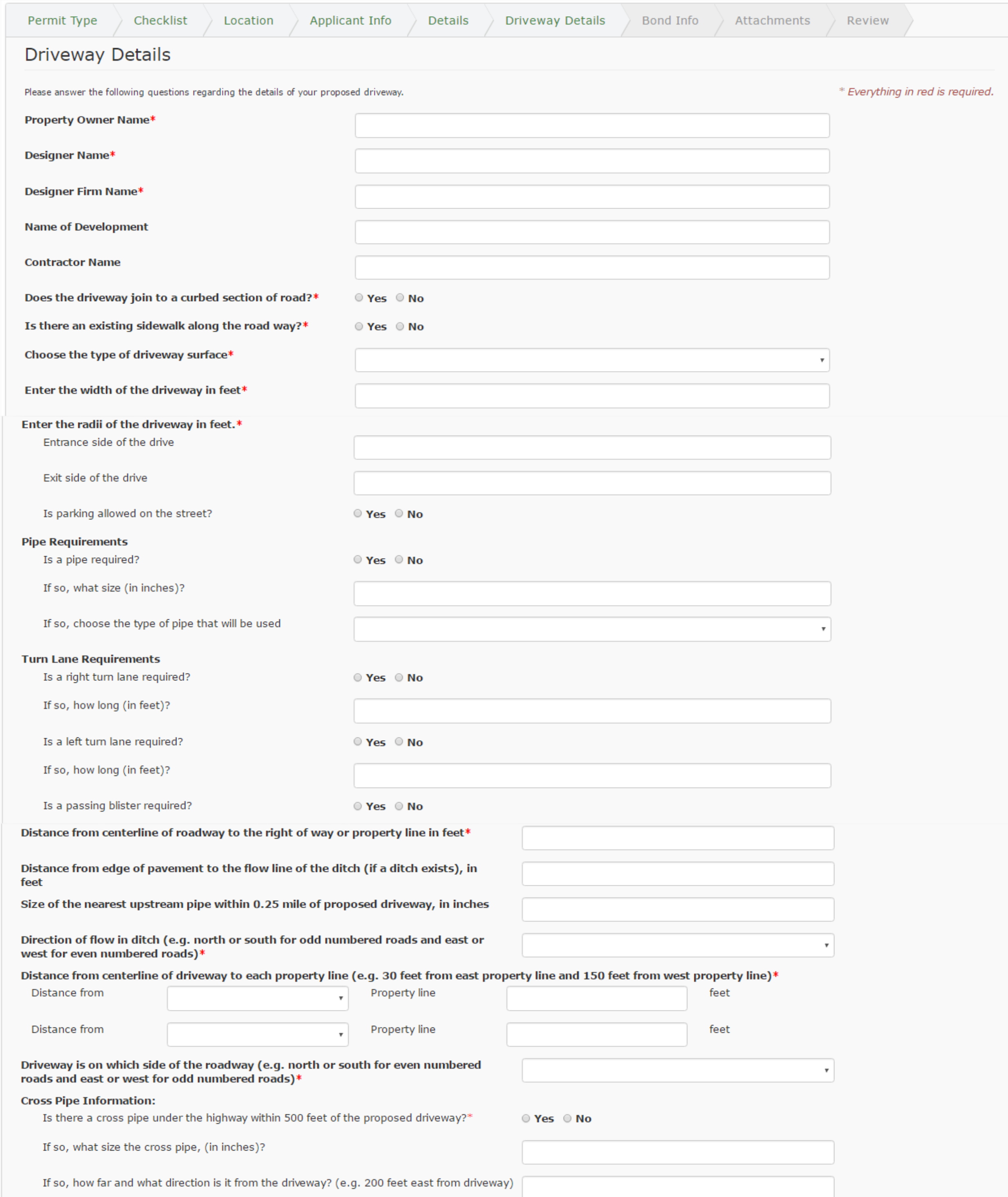
Details – FOR ALL PERMIT TYPES

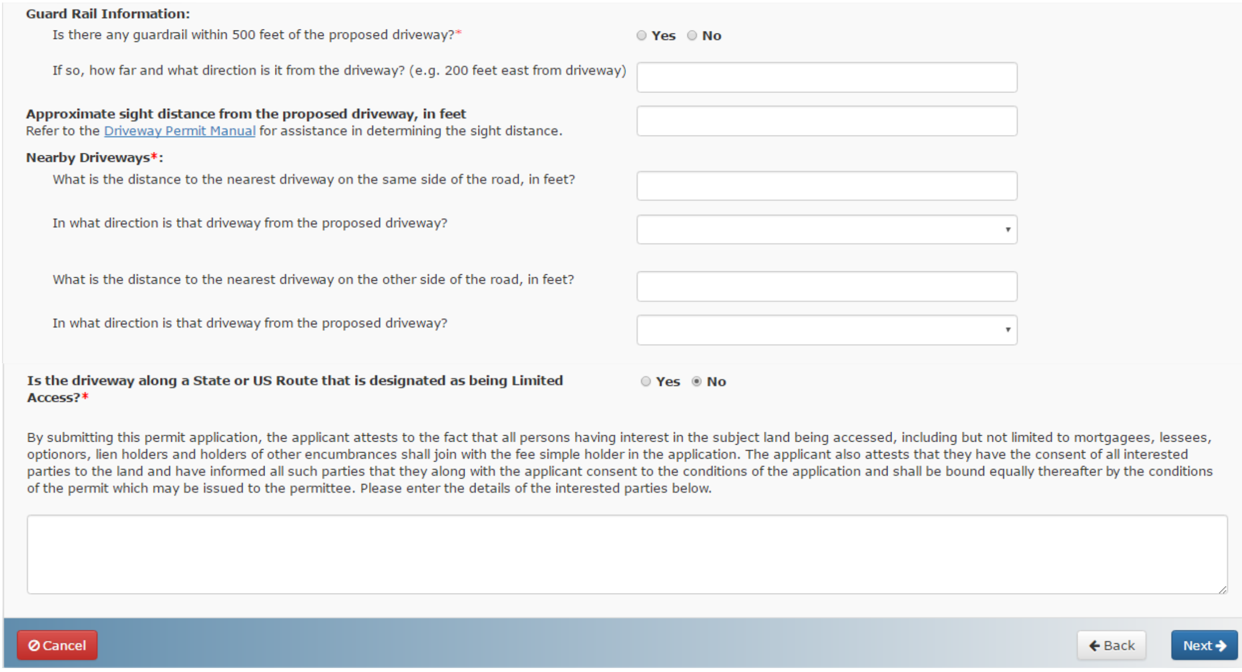
Complete the details as necessary. Many of the fields are pre-populated based on the Permit Type and Location information entered earlier in the application process. Additional (or fewer) fields may display based on the type of Permit.



Driveway Details – Only for All Driveway Subtypes

Complete the fields on the Driveway Details screen as necessary. Many fields are required and need to be completed in order to move forward with the permit process or save. Review the questions and ensure all the answers are readily available before starting to fill in the screen.





Guard Rail Information:

Is there any guardrail within 500 feet of the proposed driveway?* Yes No

If so, how far and what direction is it from the driveway? (e.g. 200 feet east from driveway)

Approximate sight distance from the proposed driveway, in feet
Refer to the Driveway Permit Manual for assistance in determining the sight distance.

Nearby Driveways*:

What is the distance to the nearest driveway on the same side of the road, in feet?

In what direction is that driveway from the proposed driveway?

What is the distance to the nearest driveway on the other side of the road, in feet?

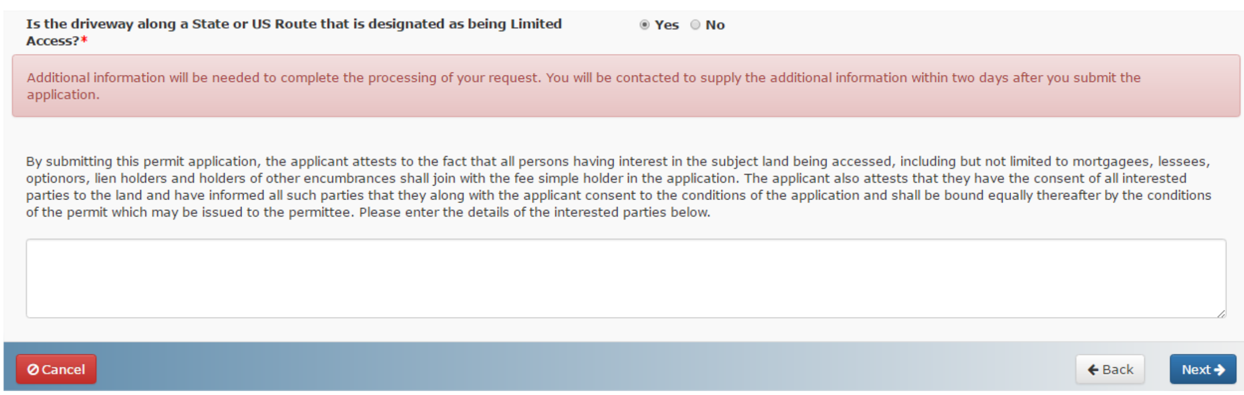
In what direction is that driveway from the proposed driveway?

Is the driveway along a State or US Route that is designated as being Limited Access?* Yes No

By submitting this permit application, the applicant attests to the fact that all persons having interest in the subject land being accessed, including but not limited to mortgagees, lessees, optionors, lien holders and holders of other encumbrances shall join with the fee simple holder in the application. The applicant also attests that they have the consent of all interested parties to the land and have informed all such parties that they along with the applicant consent to the conditions of the application and shall be bound equally thereafter by the conditions of the permit which may be issued to the permittee. Please enter the details of the interested parties below.

Cancel Back Next

If the driveway is along a State or US Route that is designated as being Limited Access, then a warning message displays alerting the User that additional information will be required.



Is the driveway along a State or US Route that is designated as being Limited Access?* Yes No

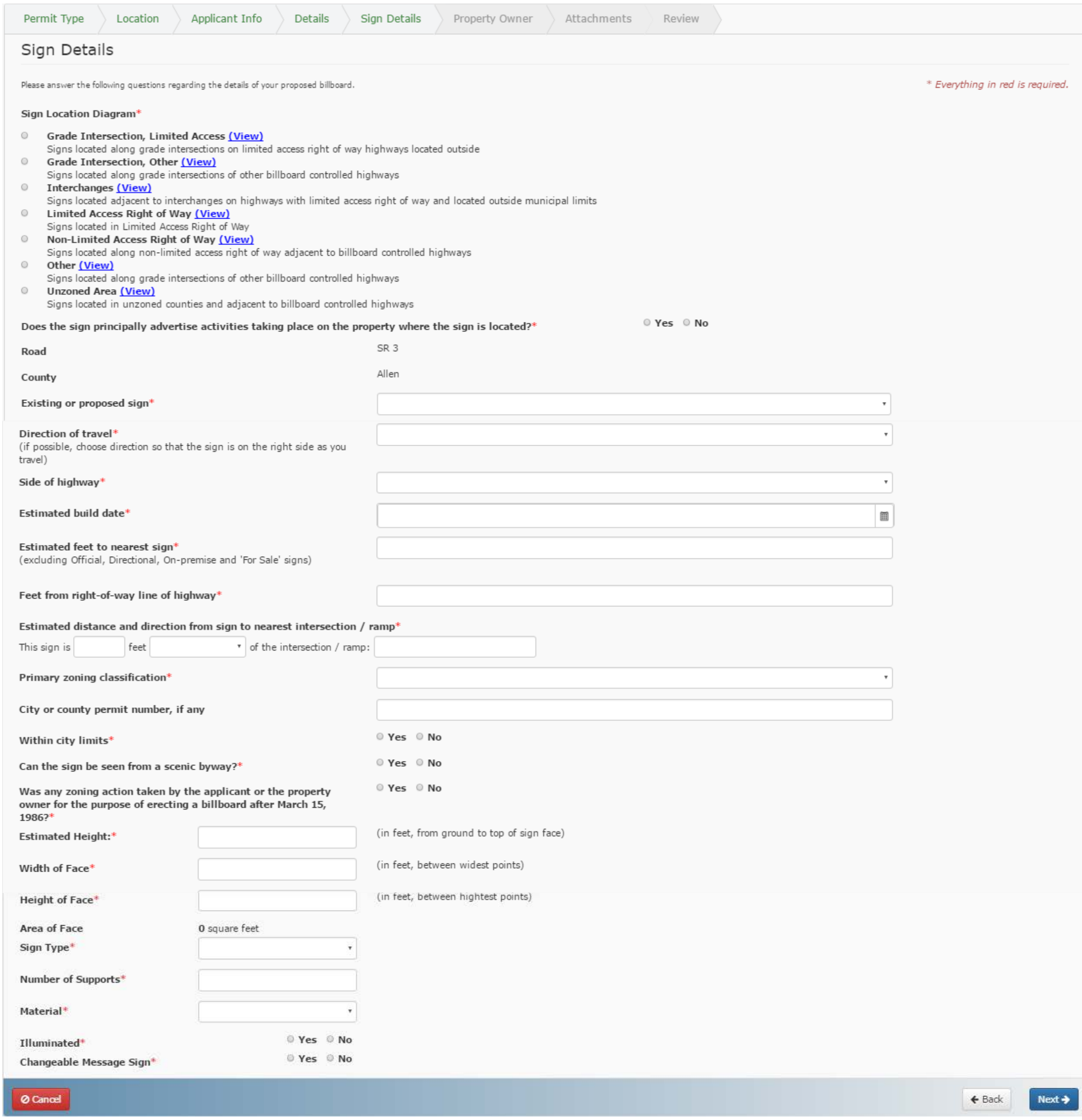
Additional information will be needed to complete the processing of your request. You will be contacted to supply the additional information within two days after you submit the application.

By submitting this permit application, the applicant attests to the fact that all persons having interest in the subject land being accessed, including but not limited to mortgagees, lessees, optionors, lien holders and holders of other encumbrances shall join with the fee simple holder in the application. The applicant also attests that they have the consent of all interested parties to the land and have informed all such parties that they along with the applicant consent to the conditions of the application and shall be bound equally thereafter by the conditions of the permit which may be issued to the permittee. Please enter the details of the interested parties below.

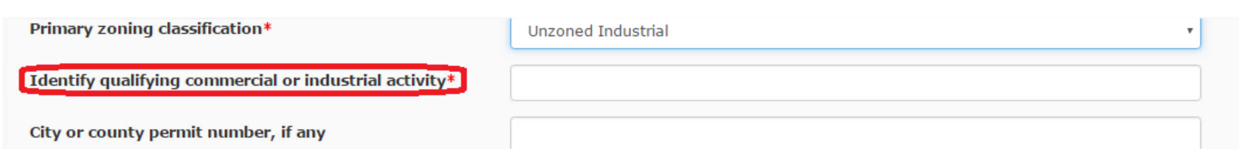
Cancel Back Next

Sign Details – Only for Outdoor Signs

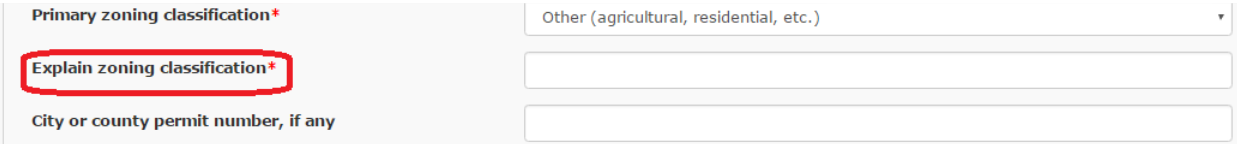
Complete the fields on the Sign Details screen as necessary. Many fields are required and need to be completed in order to move forward with the permit process or save. Review the questions and ensure all the answers are readily available before starting to fill in the screen.



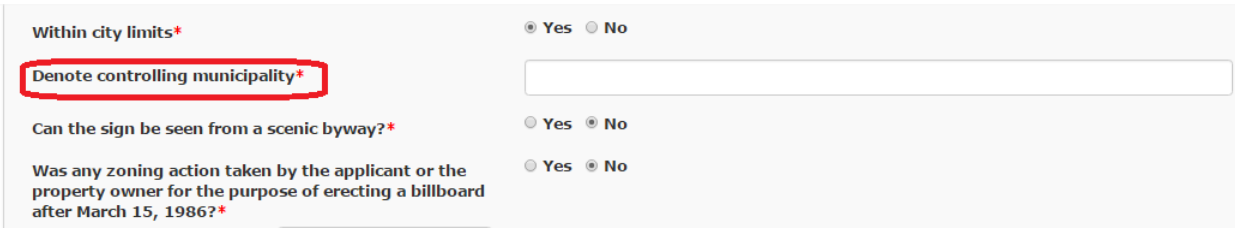
If the zoning classification is **Unzoned Industrial** or **Unzoned Commercial**, an additional dropdown field needs to be completed.



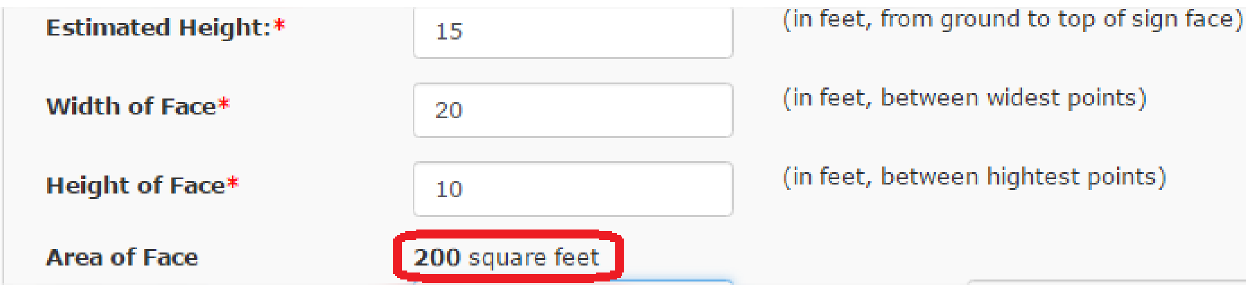
If the zoning classification is **Other** a text box appears for additional explanation.



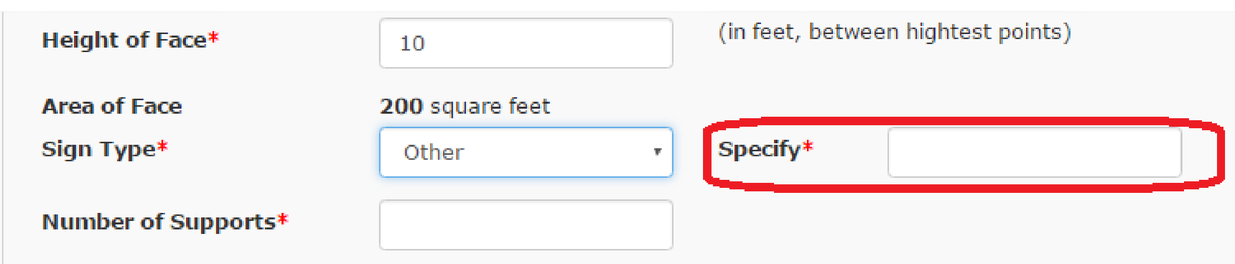
If the outdoor sign is within city limits a text box appears to denote the controlling municipality.



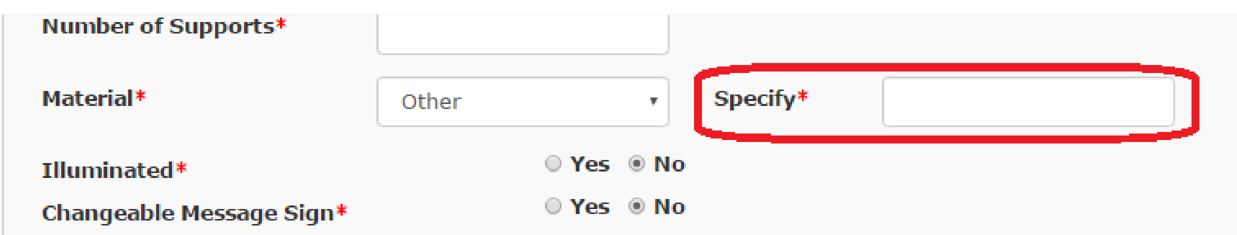
The Area of the sign is automatically calculated based on the entries for height and width of face.



If the **Sign Type** is selected as Other a text field appears to specify the sign type.

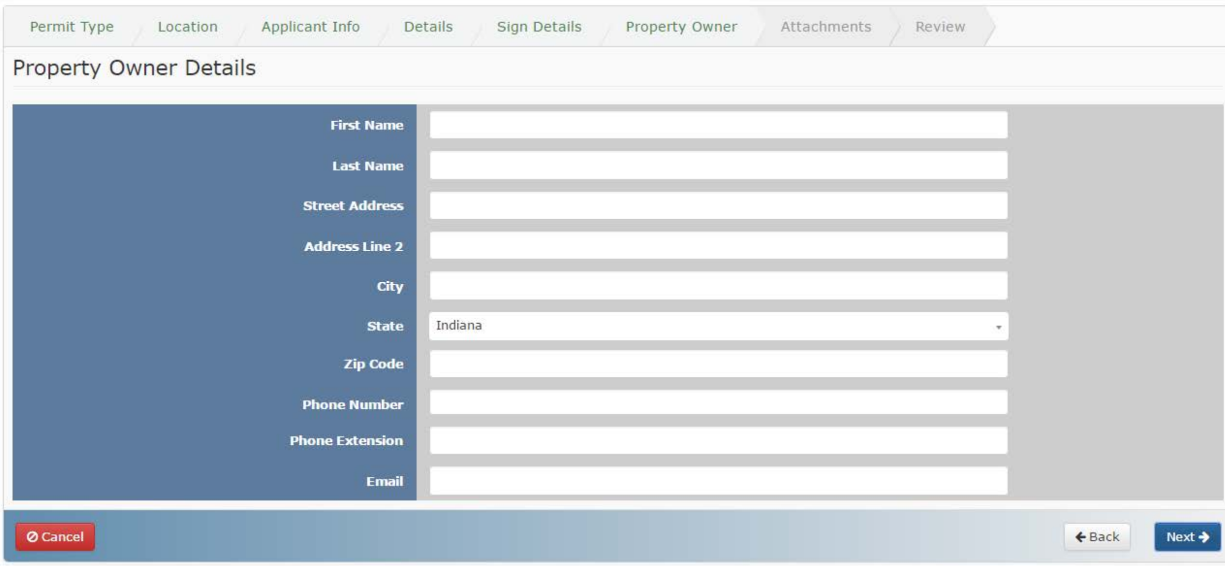


If the **Material** is selected as Other a text field appears to specify the material type.



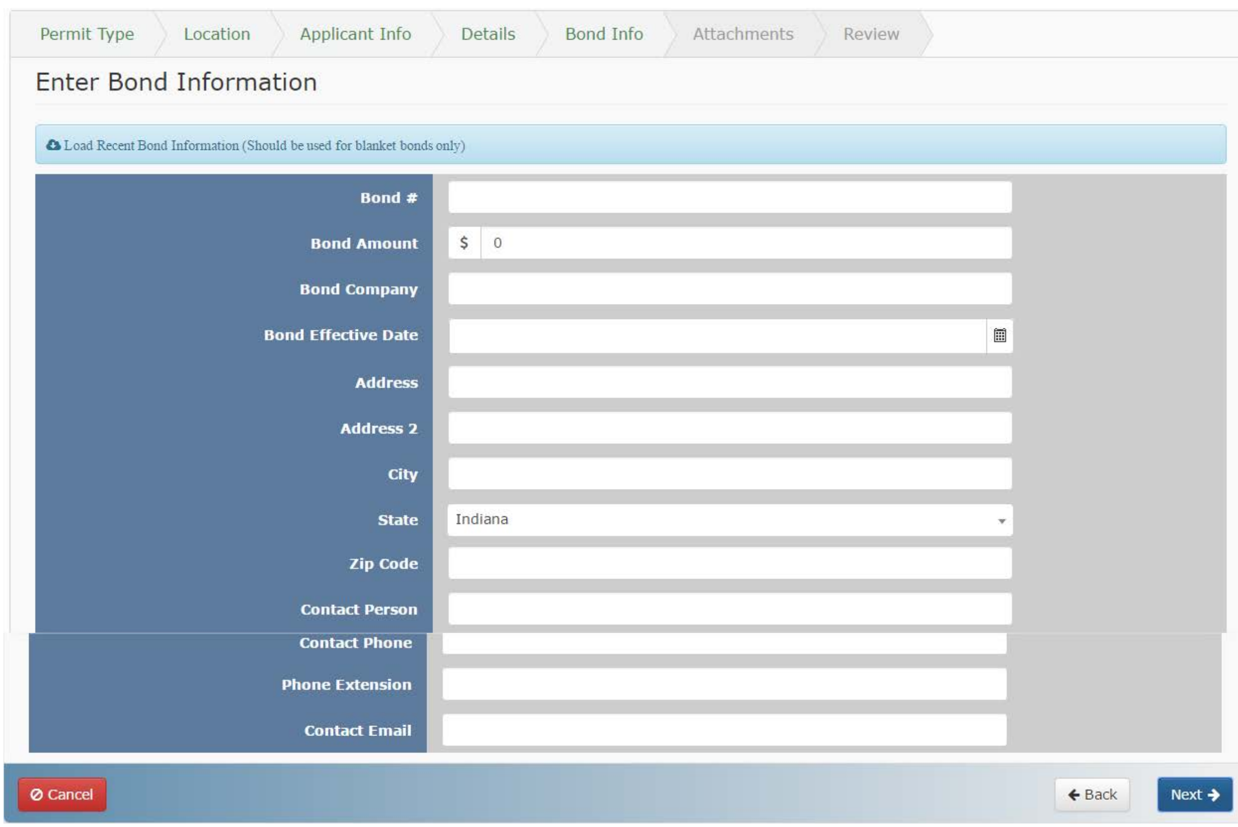
Property Owner – Only for Outdoor Signs

Complete the Property Owner details as necessary.



Bond Info – FOR ALL PERMIT TYPES except Outdoor Signs

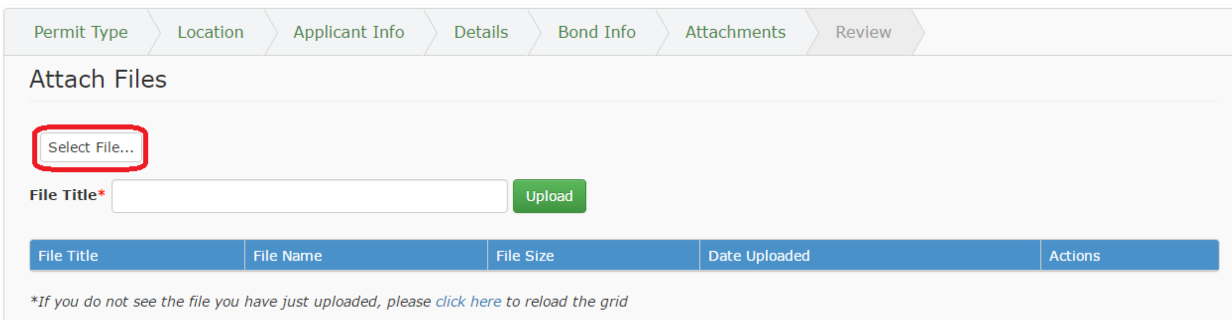
Enter the Bond information as necessary.



Click on the **Load Recent Bond Information** text to load the most recent bond information. This option should be used for blanket bonds only. If no previous bond information exists the screen will refresh but none of the fields will populate.

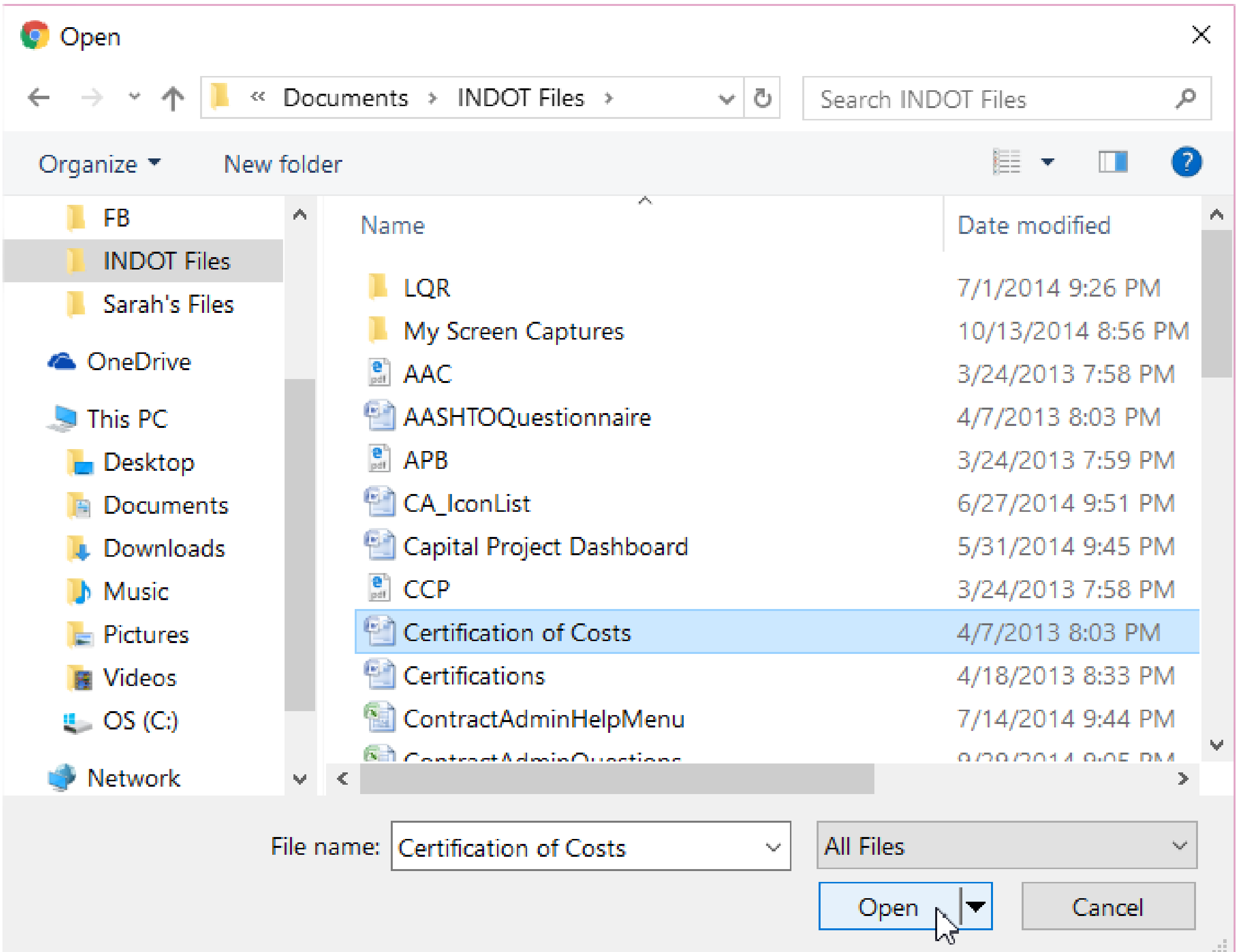
Attachments – FOR ALL PERMIT TYPES

Add any necessary files to the Permit Application on the **Attachments** screen. Click on the **Select File…** button to select the file to upload.

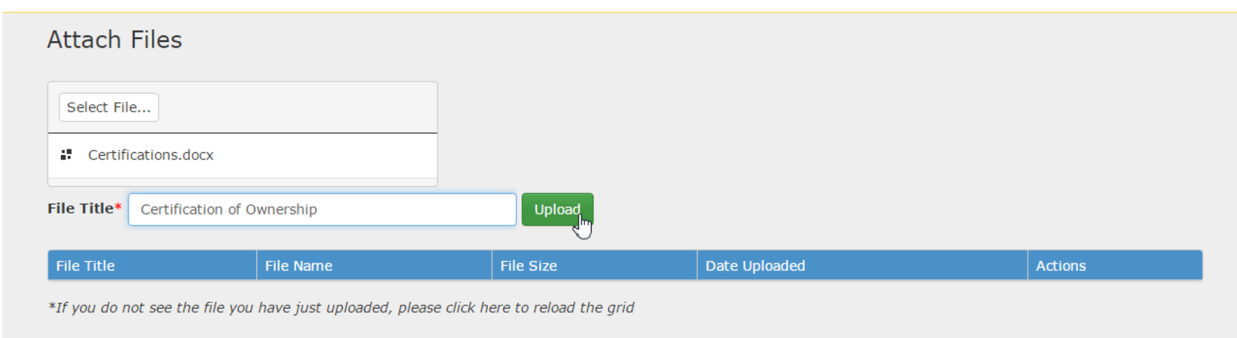


Multiple files can be added as attachments but they must be uploaded one at a time.

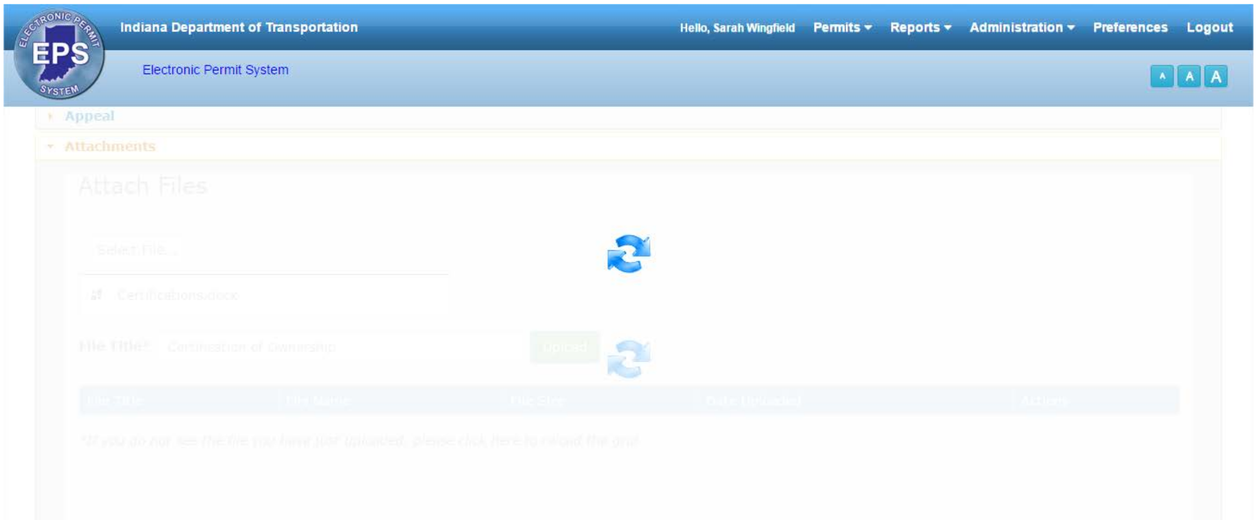
Navigate to the document location on your computer. Click on the document to upload. Click **Open** to add the document to the queue.



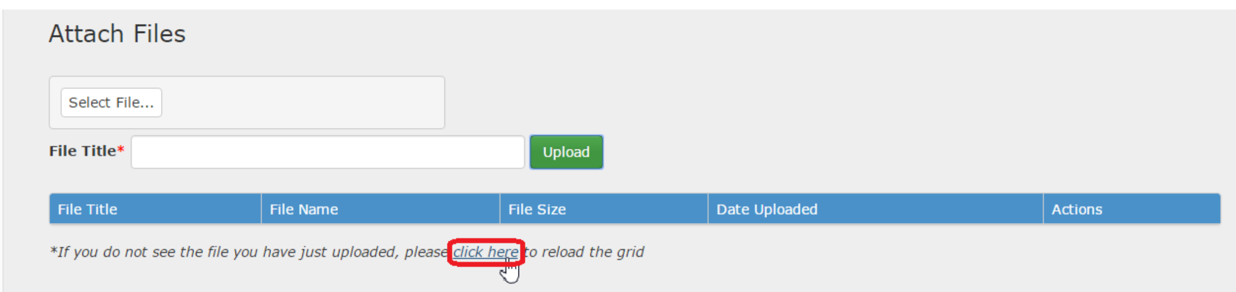
Enter the title of the document and click on the **Upload** button to begin uploading the document.



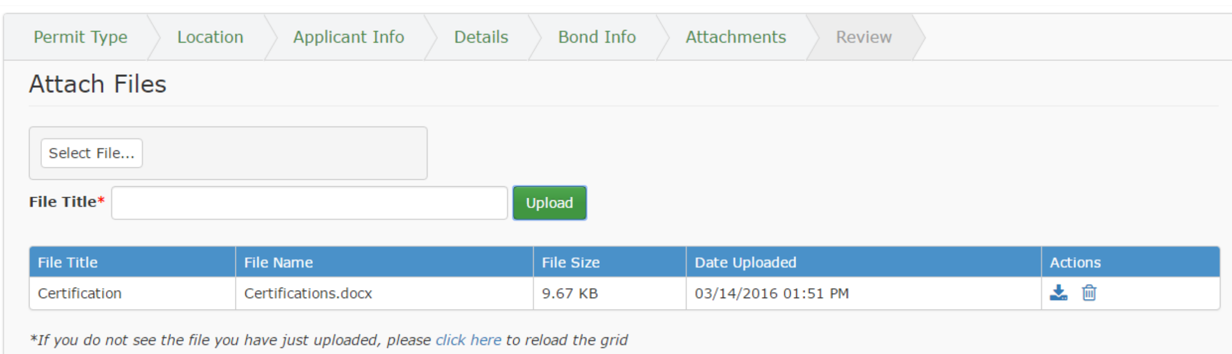
While the document is uploading the screen might display a rotating working arrow. Once the upload is complete the arrows will disappear.



If the document is not visible in the table after the arrows disappear then click on the text that says “click here” to reload the table. The document should display after clicking **click here**.



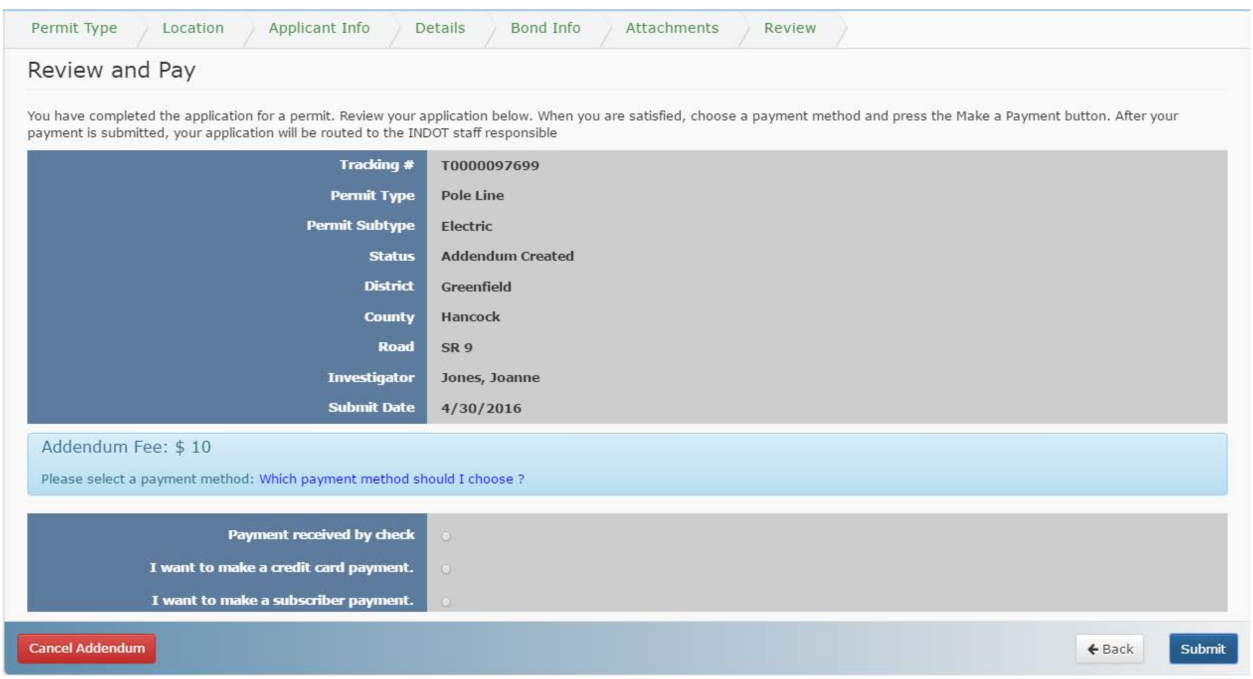
Continuing uploading files as necessary. Click on the **Download Document** icon to download and view a copy of the document. Click on **Delete** to remove the attachment from EPS.



For Consultants filling out applications on behalf of a client, the **Consultant Consent** form must be filled out and attached to the permit application. Click on the blue consultant_consent.pdf link, complete the form and upload as described above.

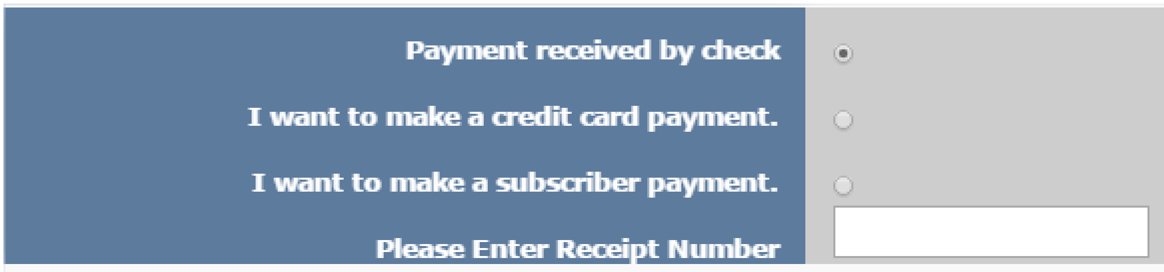
Review – FOR ALL PERMIT TYPES

Review all the entered information and pay for the permit application on the **Review** screen. Select the permit application payment method by clicking in the check box next to the desired choice – via instant access or subscriber payment. Click **Submit** to submit the permit application and proceed to the payment screen.



For more information on the payment types, hover or click on the **Which payment method should I choose?** text. Descriptions on each of the types of payment options should help clarify which payment type to choose.

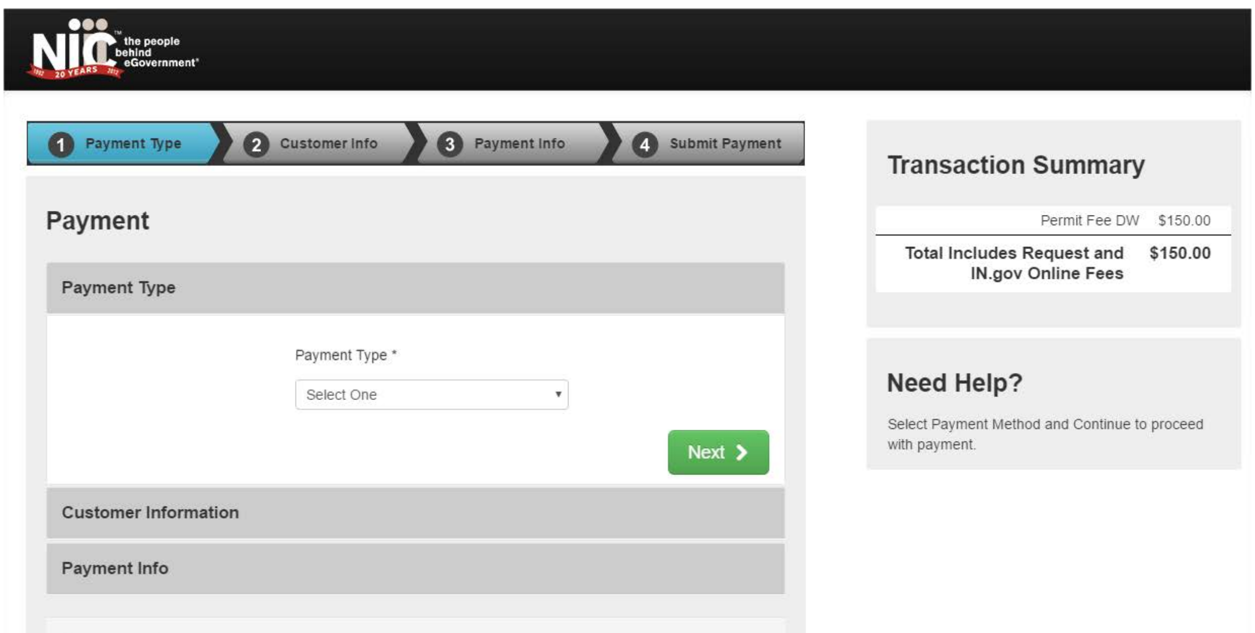
The user is taken to the payment screen. Only INDOT users can mark payment as received by Check. When that option is selected, an additional text field appears for the Receipt Number.



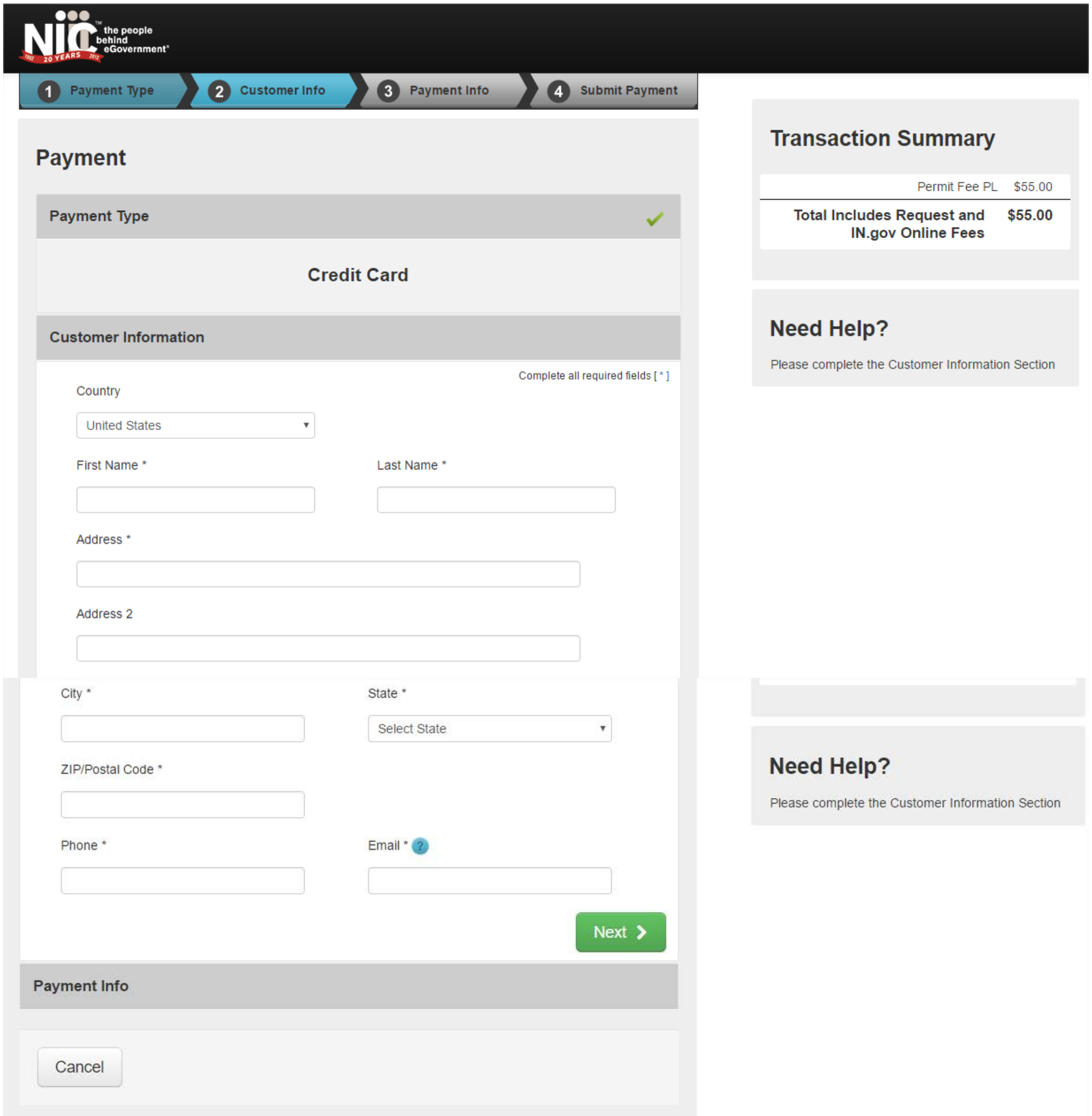
If paying by credit card or Subscriber, the user is taken to the payment screen.

Credit Card Payment

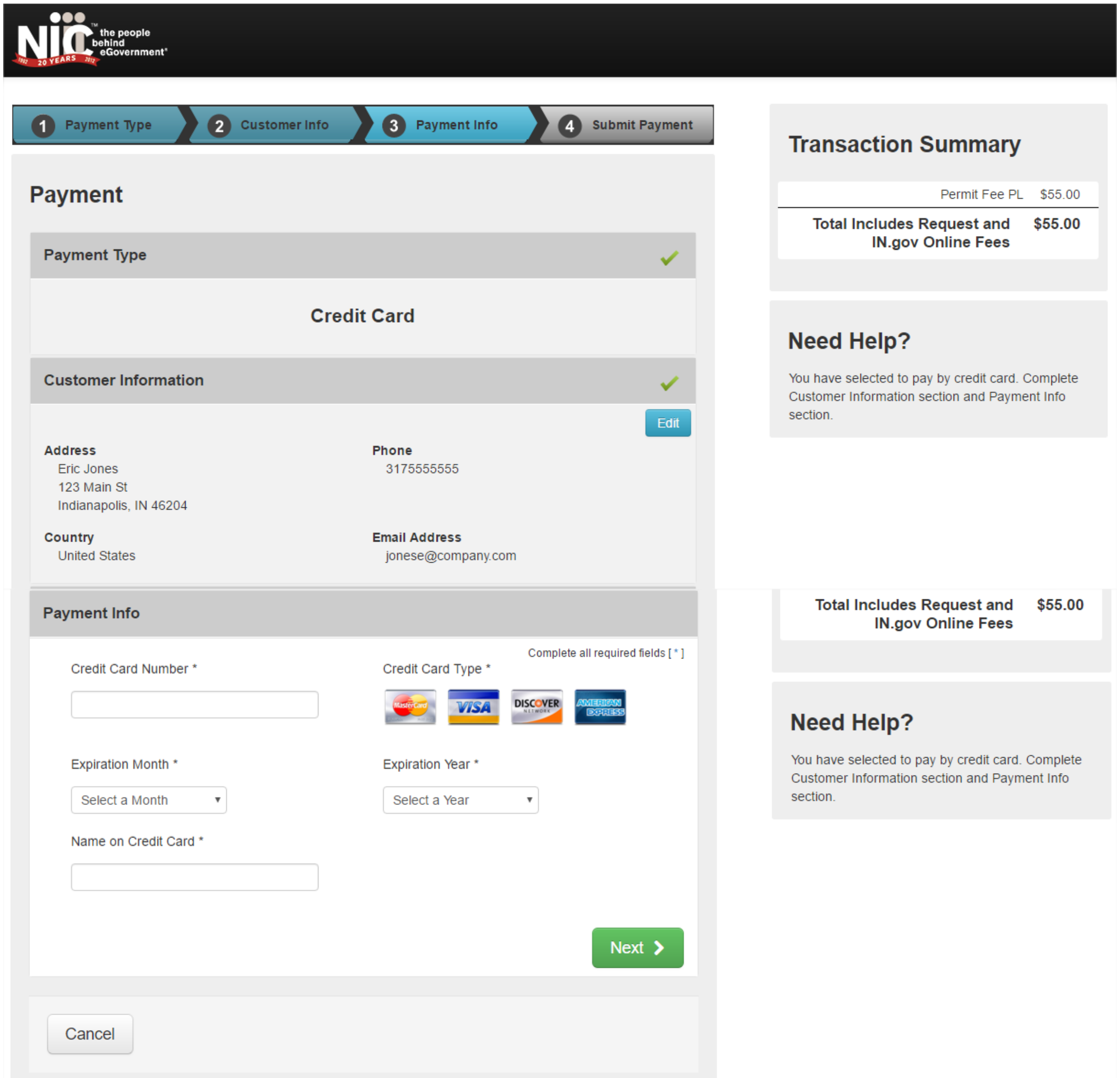
If paying by credit card, select payment type from the dropdown and click **Next**.



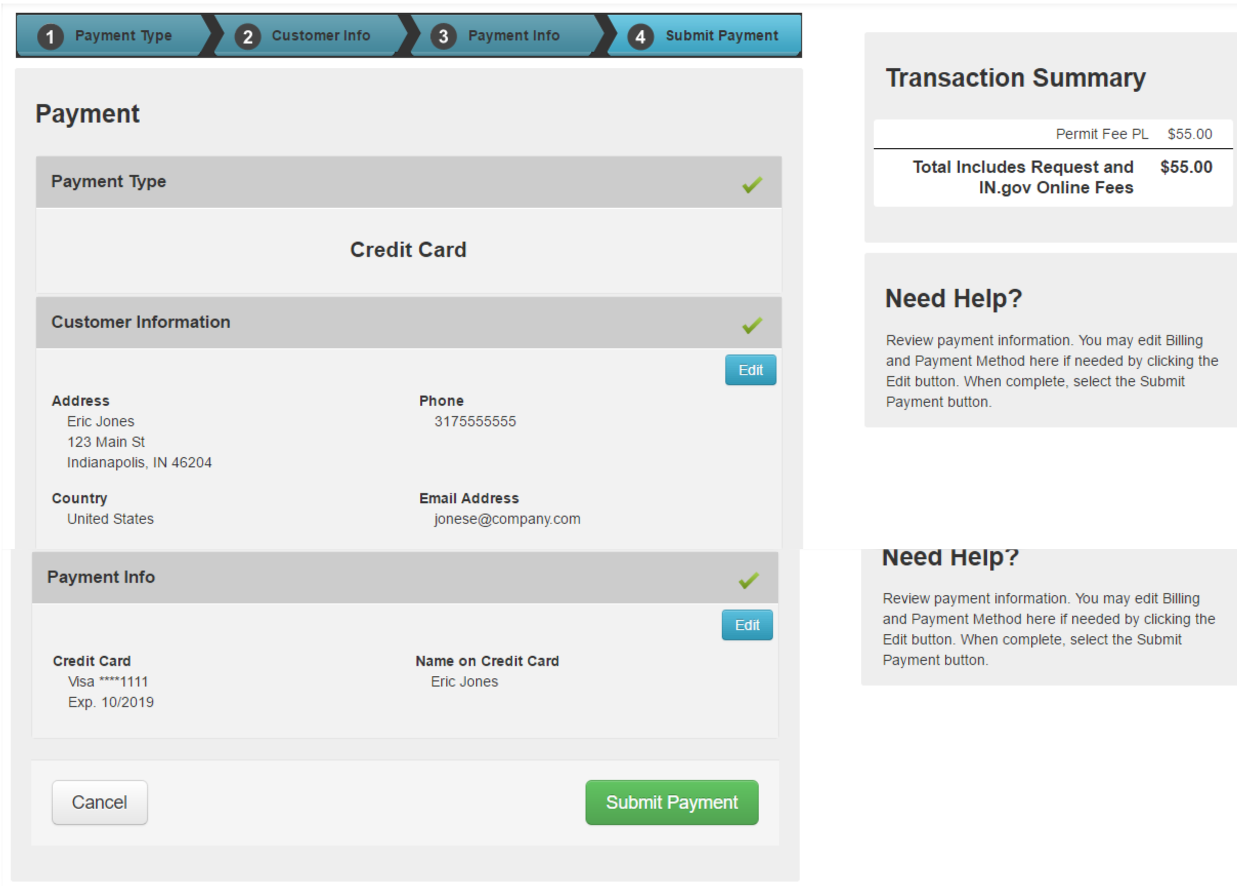
Enter the customer information and click Next to continue or click Cancel to return to the Permit Application without submitting payment.



Click **Edit** to edit the entered customer information. Enter the credit card information as required and click **Next** to complete the transaction.

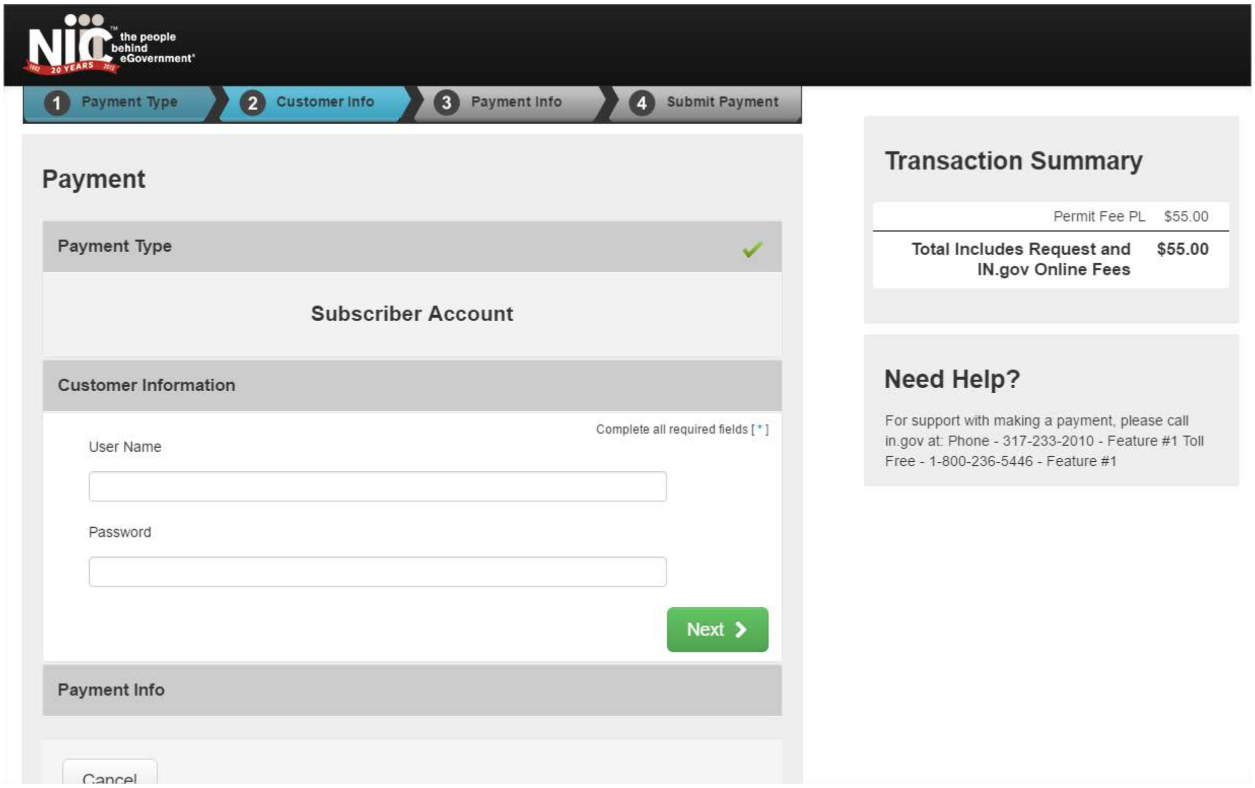

the people behind eGovernment
1 Payment Type
2 Customer Info
3 Payment Info
4 Submit Payment
Payment
Payment Type
Credit Card
Customer Information
Edit
Address
Eric Jones
123 Main St
Indianapolis, IN 46204
Phone
3175555555
Country
United States
Email Address
jonese@company.com
Payment Info
Complete all required fields [*]
Credit Card Number *
Credit Card Type *
Expiration Month *
Select a Month
Expiration Year *
Select a Year
Name on Credit Card *
Next
Cancel
Transaction Summary
Permit Fee PL $55.00
Total Includes Request and IN.gov Online Fees $55.00
Need Help?
You have selected to pay by credit card. Complete Customer Information section and Payment Info section.
Total Includes Request and IN.gov Online Fees $55.00
Need Help?
You have selected to pay by credit card. Complete Customer Information section and Payment Info section.

Click the **Edit** button in either the Customer Information or Payment Info sections to edit the entered information. When ready, click **Submit Payment** to submit the payment.

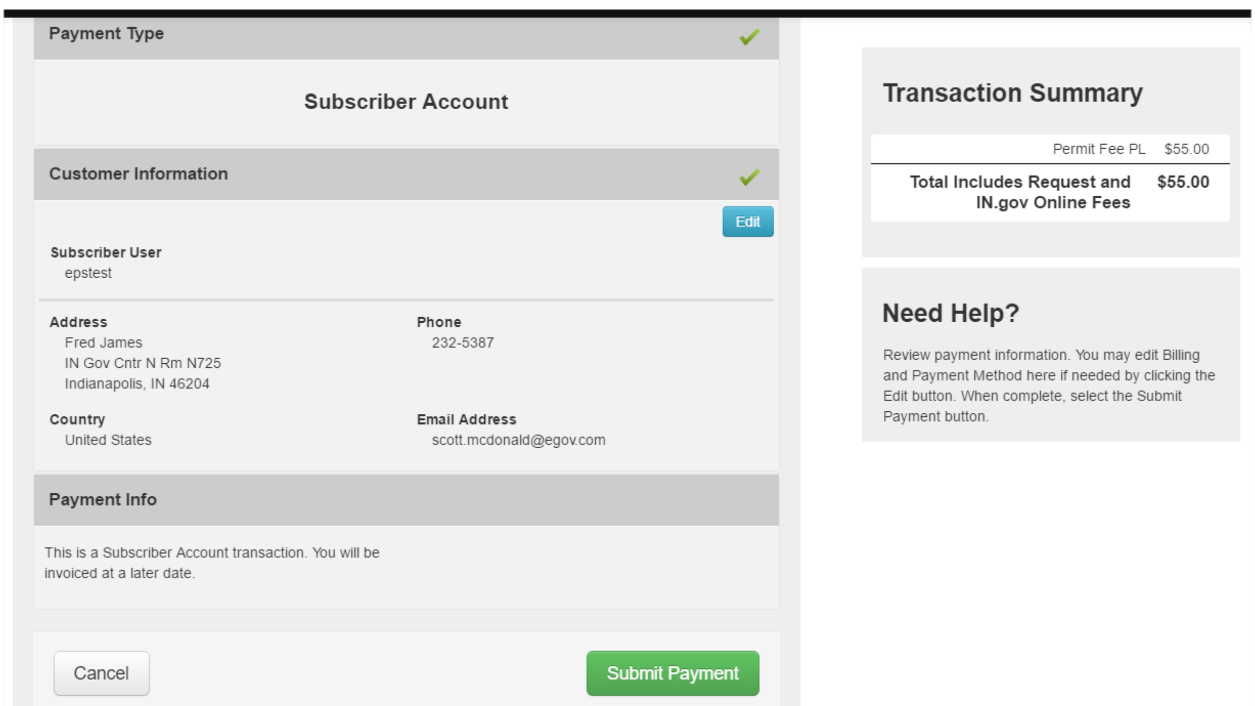


Subscriber Payment

If paying as a Subscriber, enter the subscriber Username and Password and click **Next**.



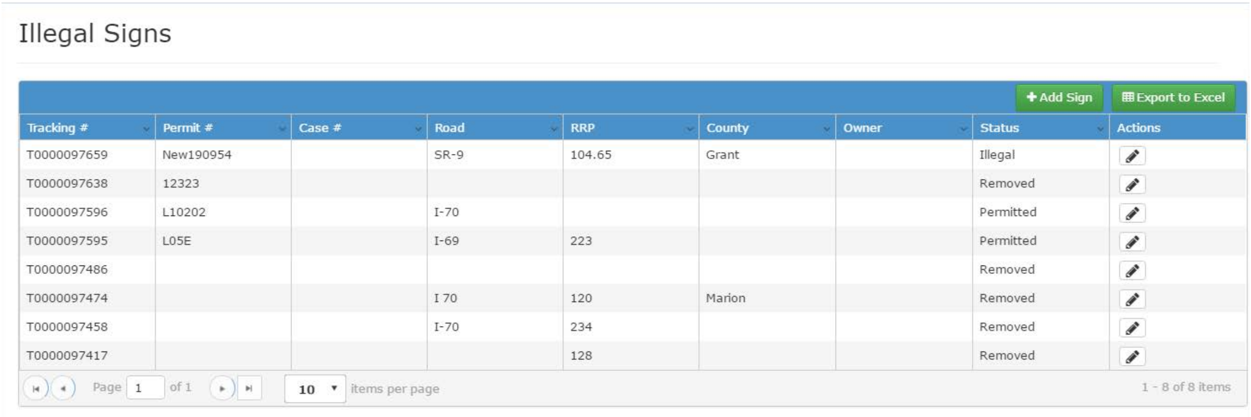
The information associated with the account displays. Click **Submit Payment** to have fees invoiced at a later date.



Once submitted (the method does not matter), the Review screen displays with a confirmation message that the Permit was successfully submitted. Click **Done** to return to the Permit Dashboard.

Illegal Signs

The **Illegal Signs** table displays any records marked as Illegal.

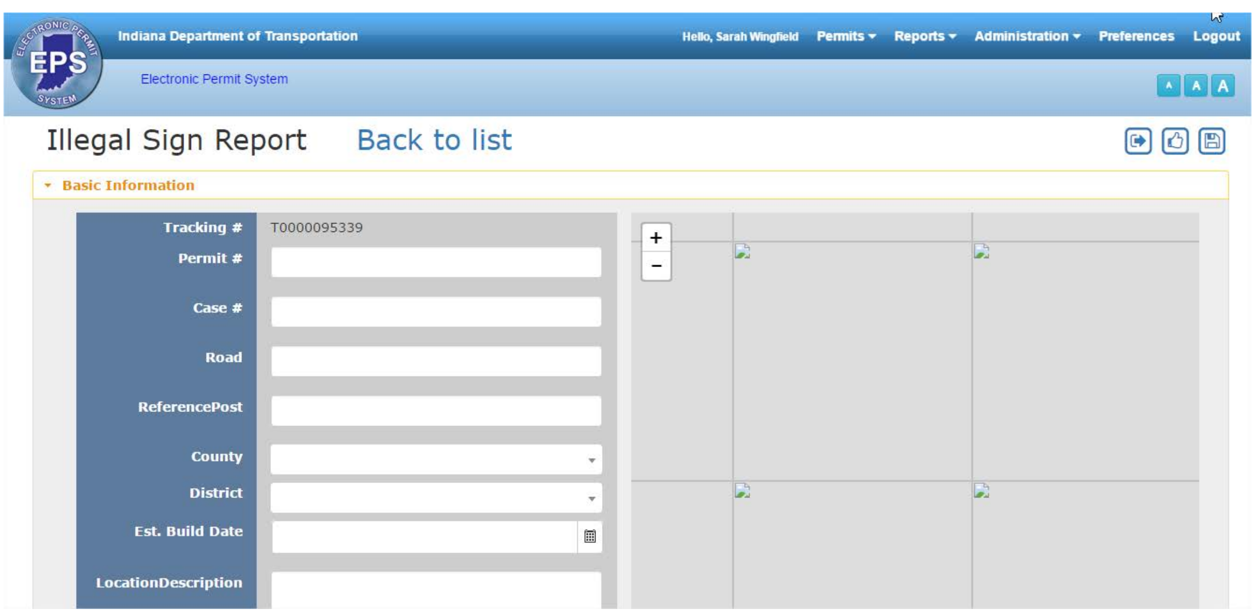


Tracking #	Permit #	Case #	Road	RRP	County	Owner	Status	Actions
T0000097659	New190954		SR-9	104.65	Grant		Illegal	
T0000097638	12323						Removed	
T0000097596	L10202		I-70				Permitted	
T0000097595	L05E		I-69	223			Permitted	
T0000097486							Removed	
T0000097474			I 70	120	Marion		Removed	
T0000097458			I-70	234			Removed	
T0000097417				128			Removed	

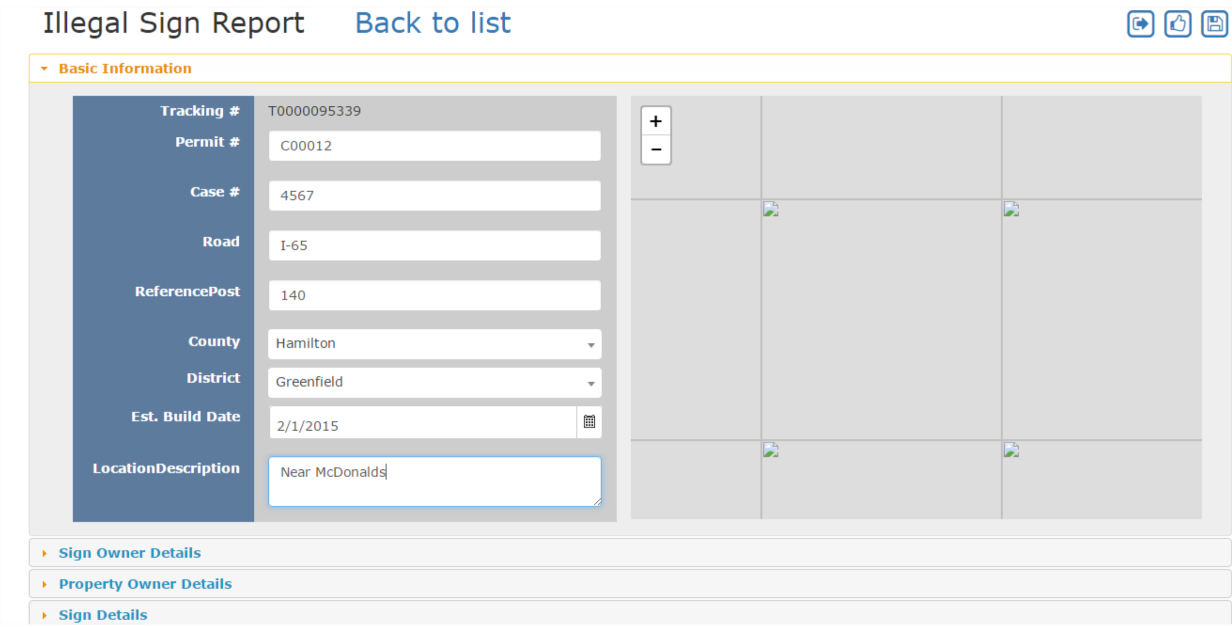
Add an Illegal Sign

To add an Illegal Sign, click the **Add Sign** button. Additionally, Illegal Signs can be added when marked **Illegal** on the [Reconcile Inventory](#) report screen.

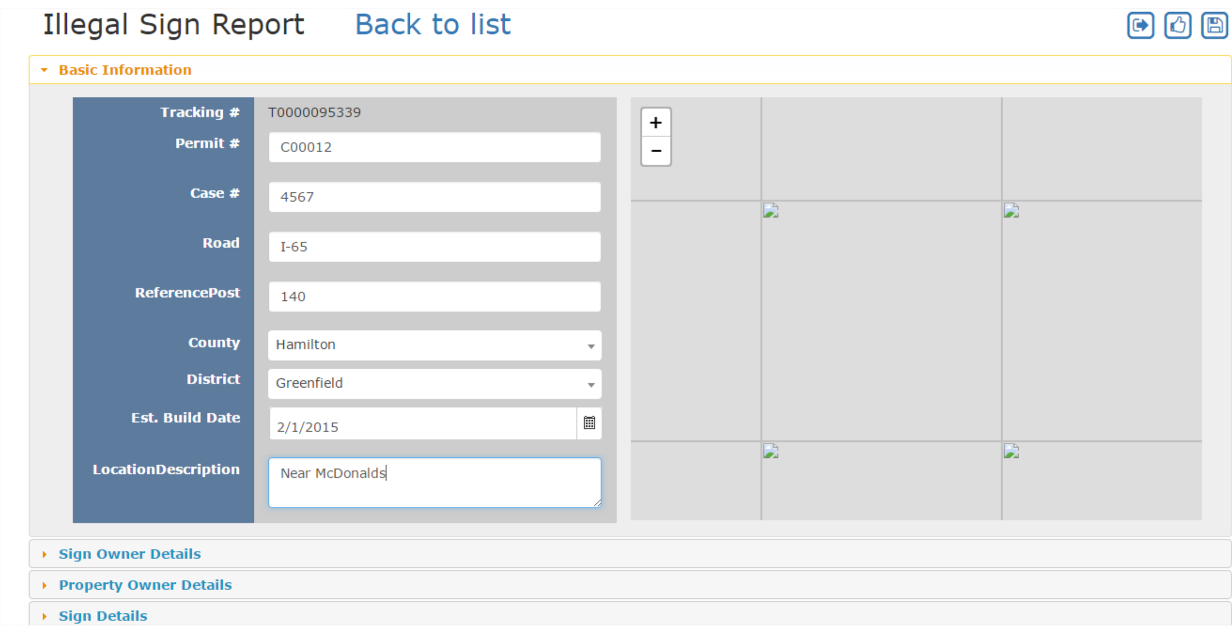
The screen displays the Illegal Sign add screen. Enter the information as necessary. Click **Save**  to save work without taking an action on the Illegal Sign. Once a record is saved, it displays in the Illegal Report table. Click the blue **Back to List** text at the top of the screen to return to the Illegal Sign table.



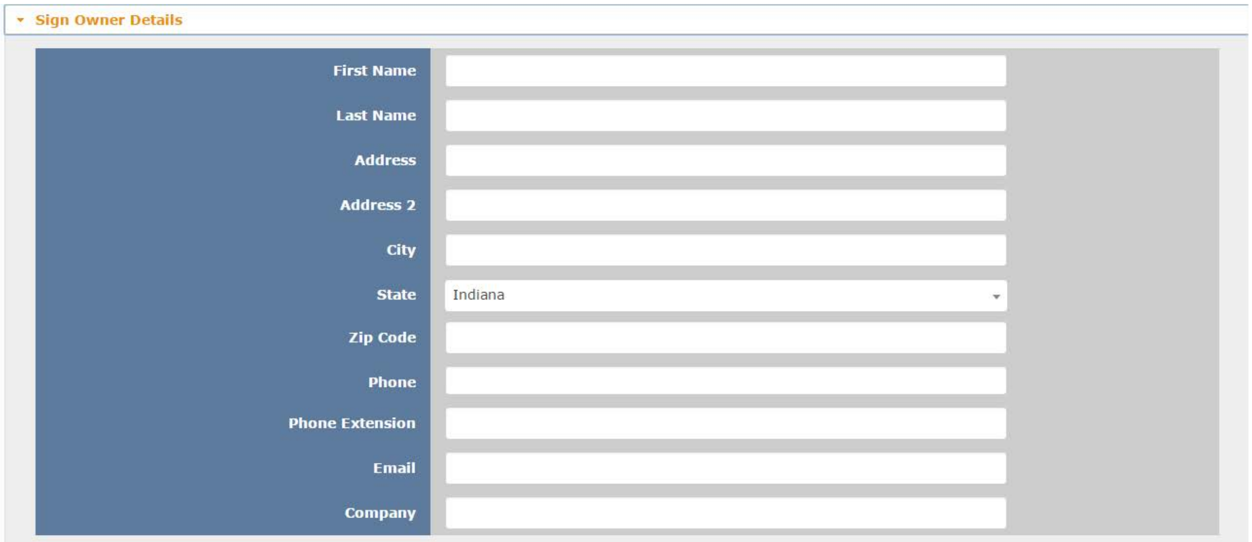
There are multiple sections of the Illegal Sign Report to complete, however the sections are collapsed when the record is opened; only the **Basic Information** section is expanded initially. To expand additional sections, click on the section header name. To collapse the section, click on the section header name again. Only one section can be expanded at a time so as soon as one section is opened the other opened section will be collapsed.



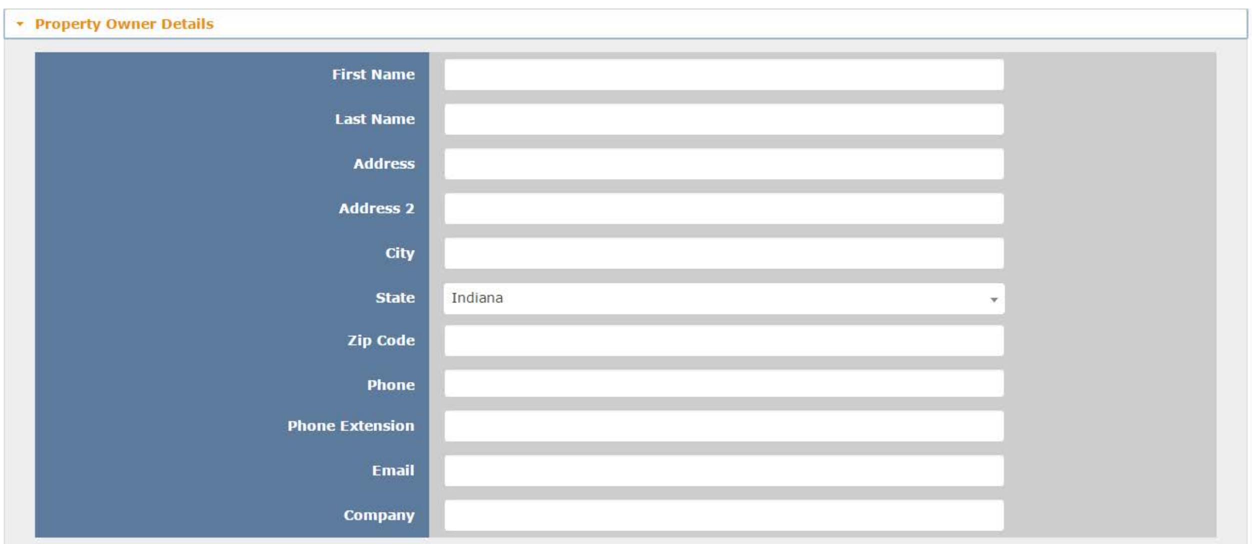
In the Basic Information section, the Tracking # and Permit # are view only. The other fields are either text fields or dropdown menus. Complete the information and indicate the position of the illegal sign on the map.



In the **Sign Owner Details** section, complete the text fields with information on the Sign Owner.



In the **Property Owner Details** section, complete the text fields with information on the Property Owner.



In the **Sign Details** section, complete the fields as indicated.

Sign Details

Sign Details

Please answer the following questions regarding the details of your proposed billboard.

Direction of travel
(if possible, choose direction so that the sign is on the right side as you travel)

Side of highway

Estimated feet to nearest sign
(excluding Official, Directional, On-premise and 'For Sale' signs)

Feet from right-of-way line of highway

Estimated distance and direction from sign to nearest intersection / ramp

This sign is feet of the intersection / ramp:

Primary zoning classification

City or county permit number, if any

Within city limits Yes No

Can the sign be seen from a scenic byway? Yes No

Was any zoning action taken by the applicant or the property owner for the purpose of erecting a billboard after March 15, 1986? Yes No

Estimated Height: (in feet, from ground to top of sign face)

Width of Face (in feet, between widest points)

Height of Face (in feet, between hightest points)

Area of Face **0** square feet

Sign Type

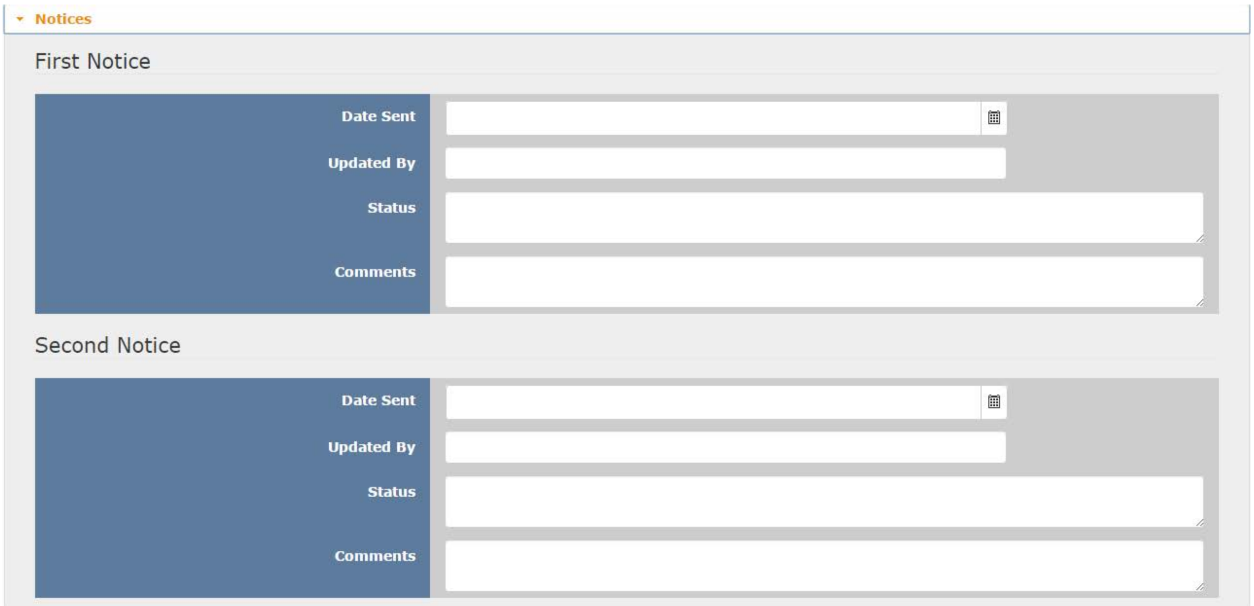
Number of Supports

Material

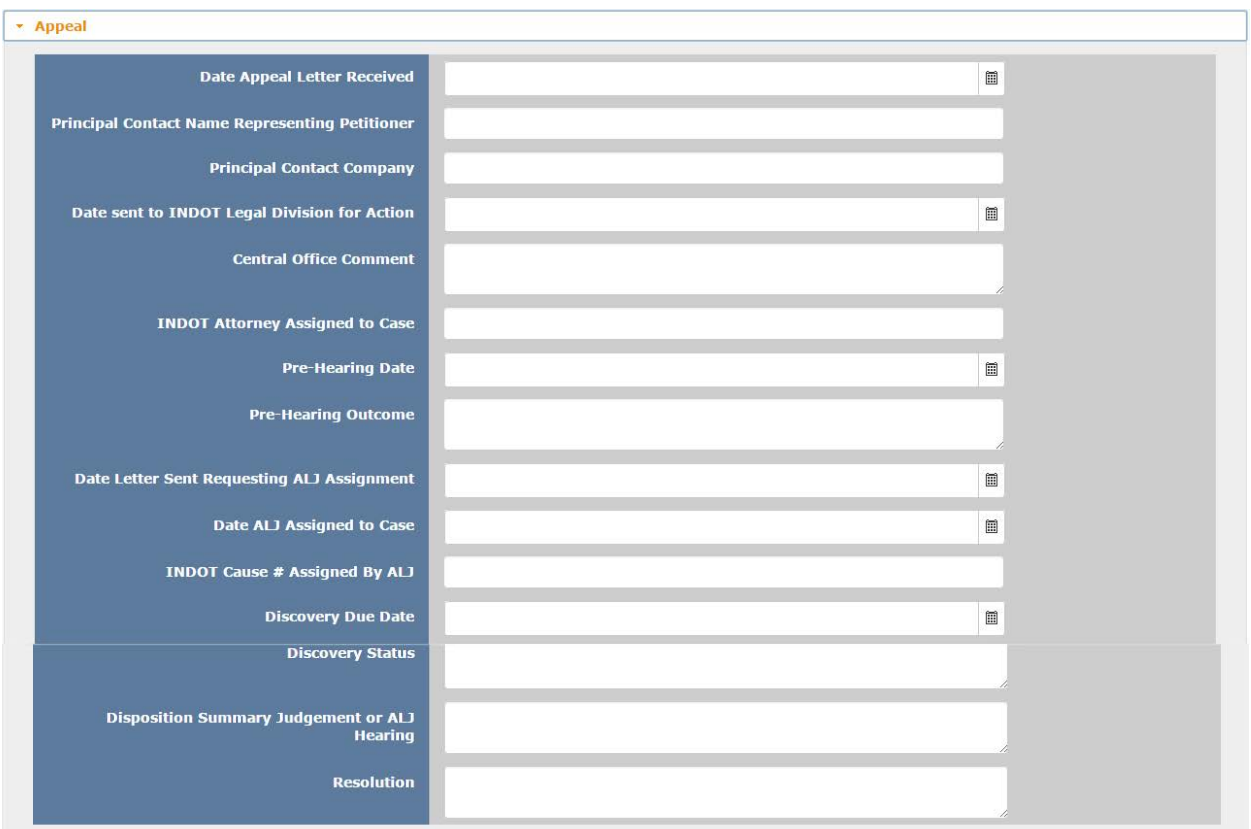
Illuminated Yes No

Changeable Message Sign Yes No

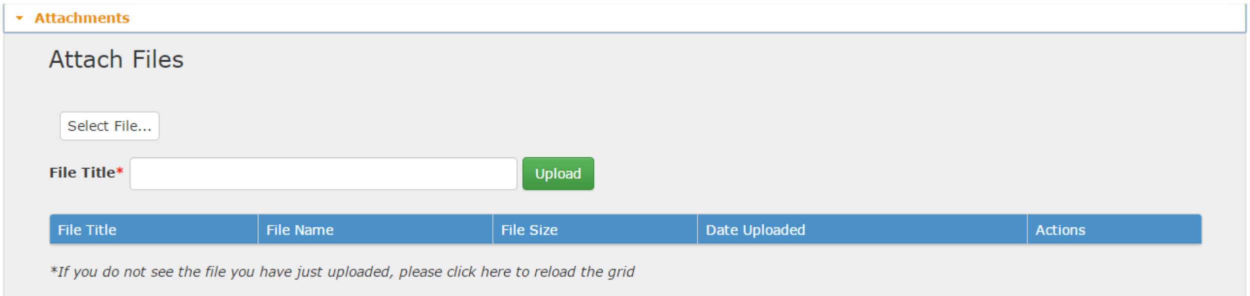
In the **Notices** section, indicate when notices were sent to the sign/property owner. Enter any comments or status updates in the text fields.



When applicable, enter information in the **Appeals** section. Include dates, contact information and any comments. Continue updating the Appeal fields as the Illegal Sign moves through the appeal process.

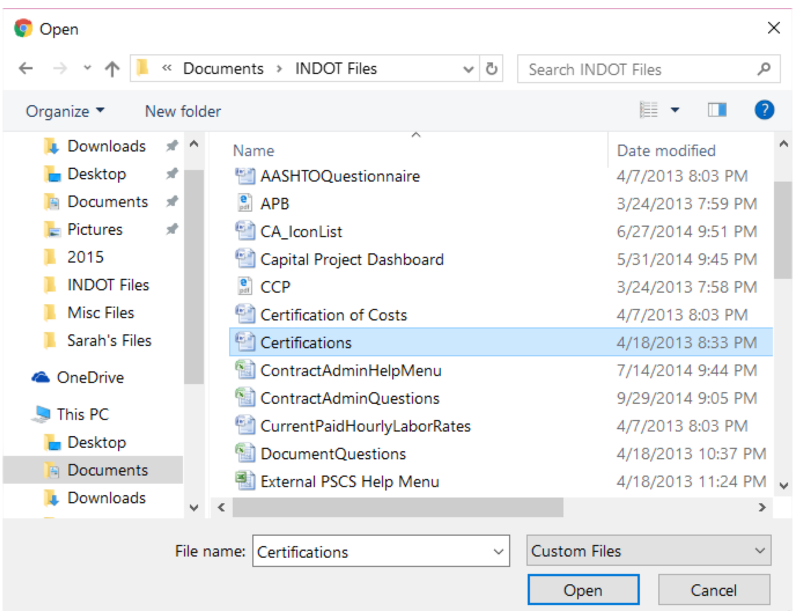


Upload any relevant files to the Illegal Sign in the **Attachments** section. Click on the **Select File…** button to select the file to upload.

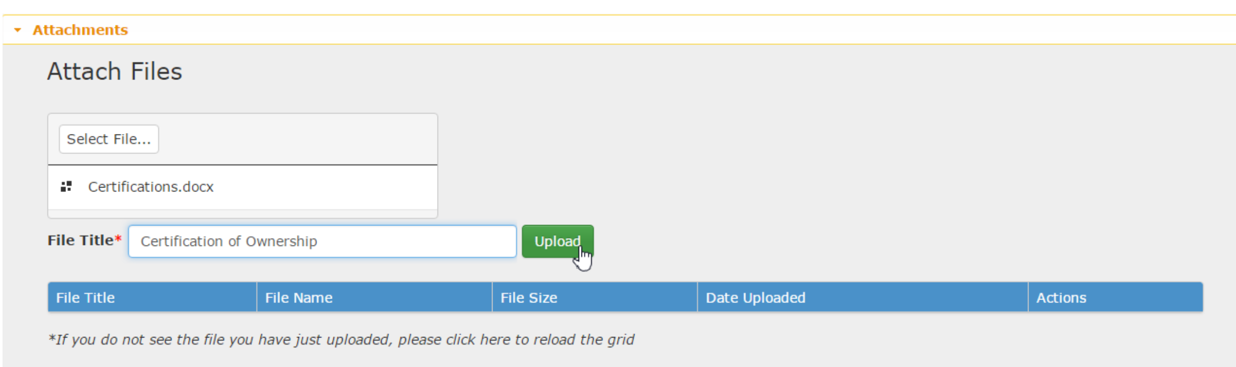


Multiple files can be added as attachments but they must be uploaded one at a time.

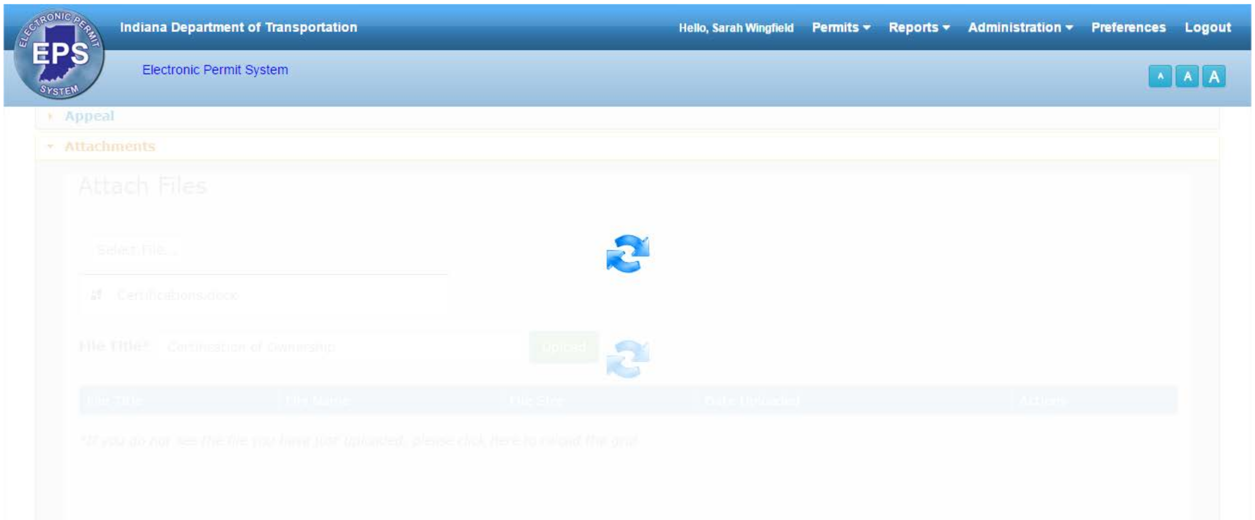
Navigate to the document location on your computer. Click on the document to upload. Click **Open** to add the document to the queue.



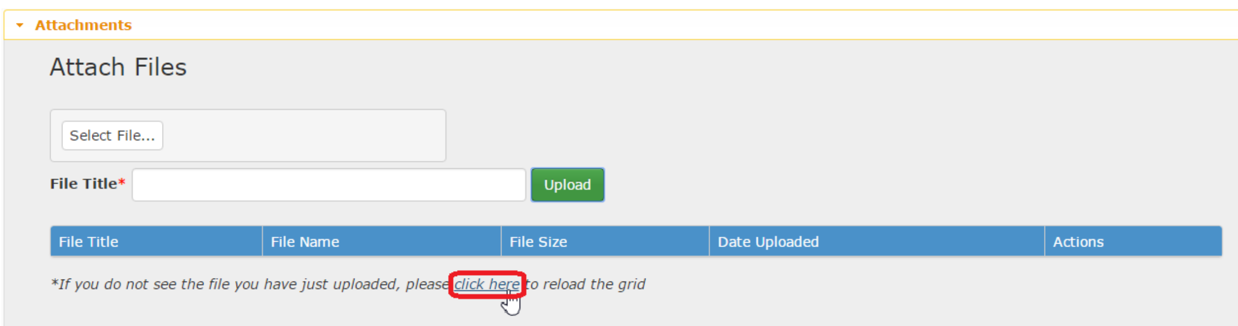
Enter the title of the document and click on the **Upload** button to begin uploading the document.



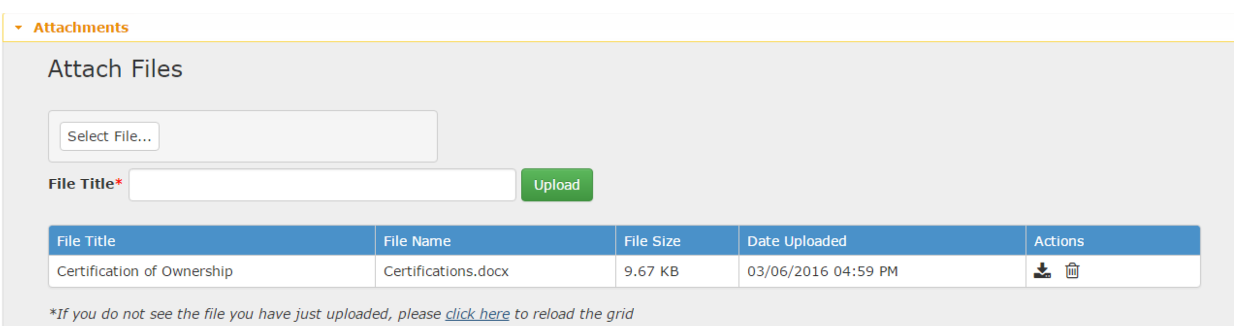
While the document is uploading the screen might display a rotating working arrow. Once the upload is complete the arrows will disappear.



If the document is not visible in the table after the arrows disappear then click on the text that says “click here” to reload the table. The document should display after clicking **click here**.

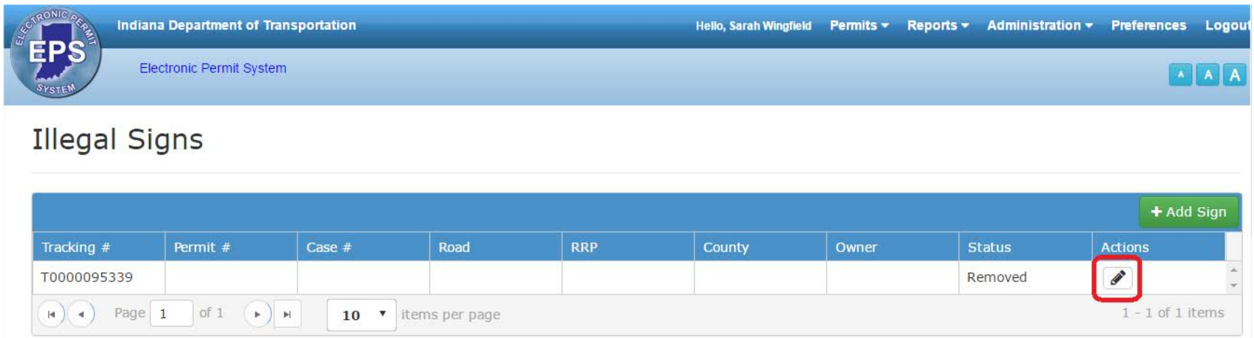


Continuing uploading files as necessary. Click on the **Download Document** icon to download and view a copy of the document. Click on **Delete** to remove the attachment from EPS.

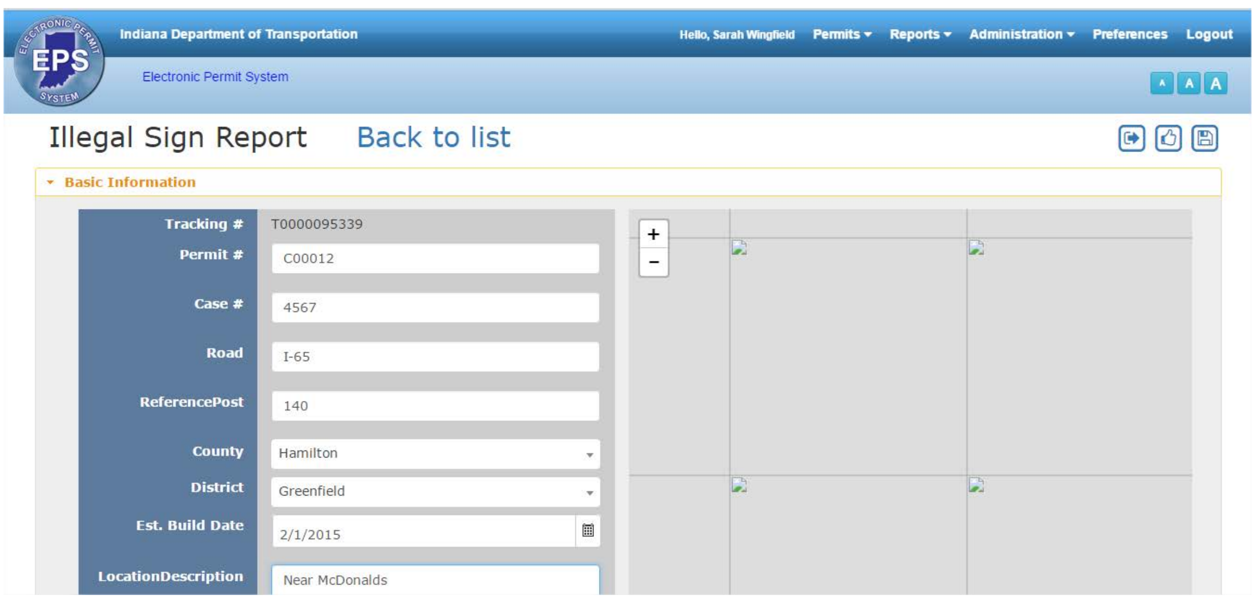


Edit an Illegal Sign

To edit an existing Illegal Sign record or make updates to its status, click on the **Edit**  icon in the **Illegal Signs** table.

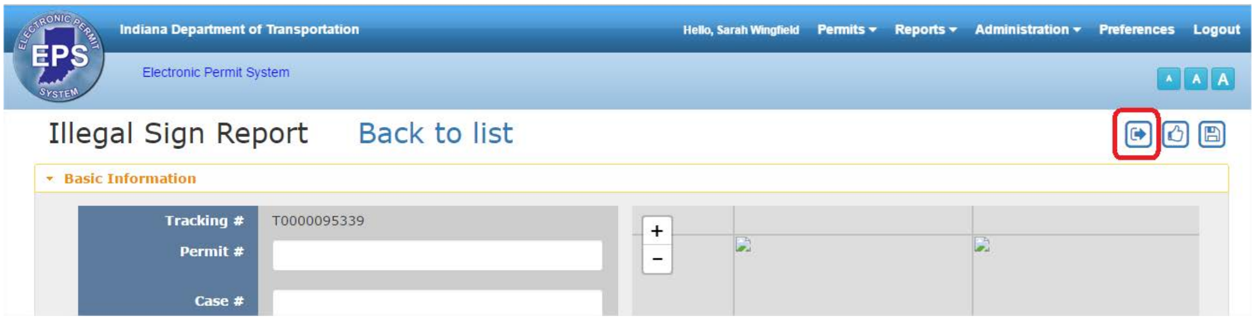


When the record opens, make updates/changes as necessary and click **Save**  to save updates.

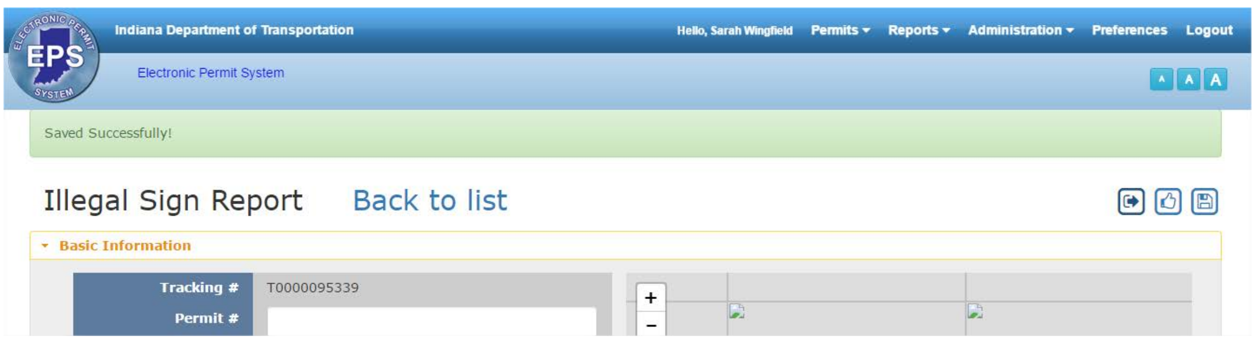


Mark Sign as Removed

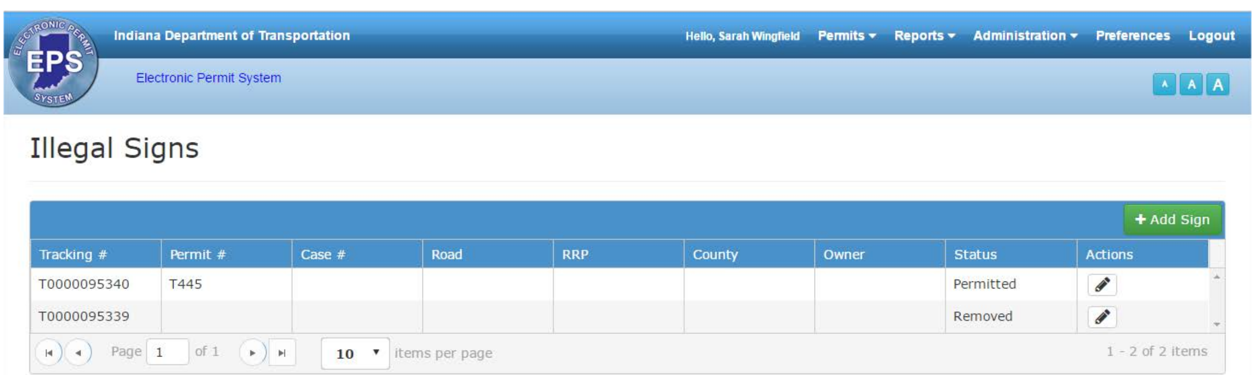
When a sign is marked as Illegal, its status is changed to **Illegal**. After external reviews are complete and the sign is determined to be removed, mark the sign removed in the system by clicking on the **Mark Removed**  icon.



A **Saved Successfully** notification displays in green at the top of the page.

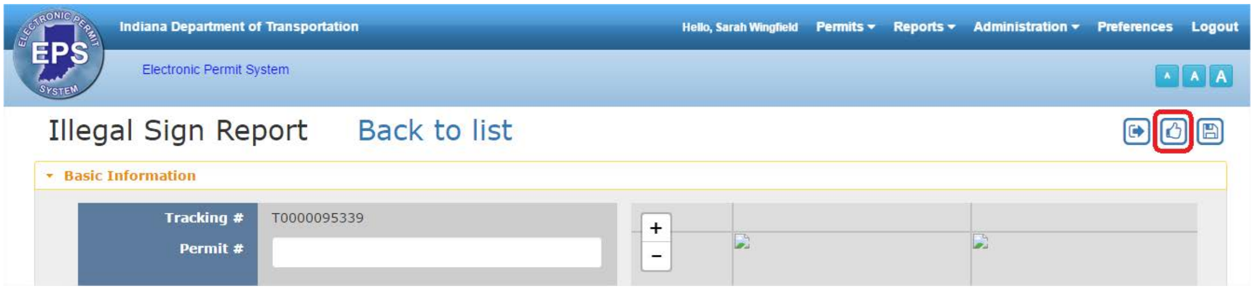


The sign's status changes from **Illegal** to **Removed** in the Illegal Sign table.



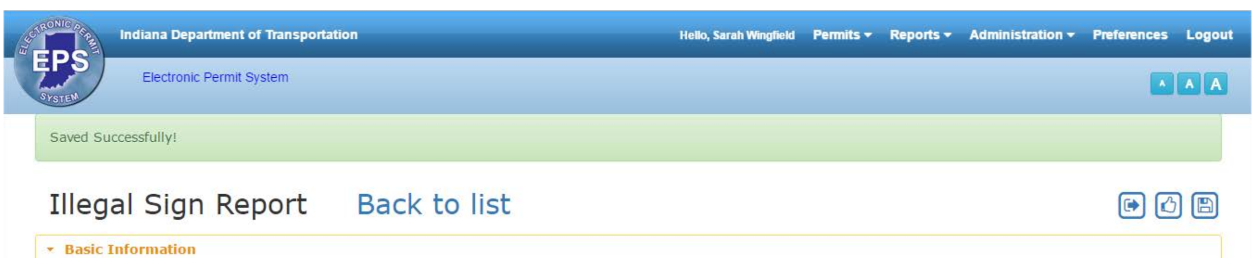
Mark Sign as Permitted

When a sign is marked as Illegal, its status is changed to **Illegal**. After external reviews are complete and the sign is determined to be permitted, mark the sign permitted in the system by clicking on the **Mark as Permitted**  icon.

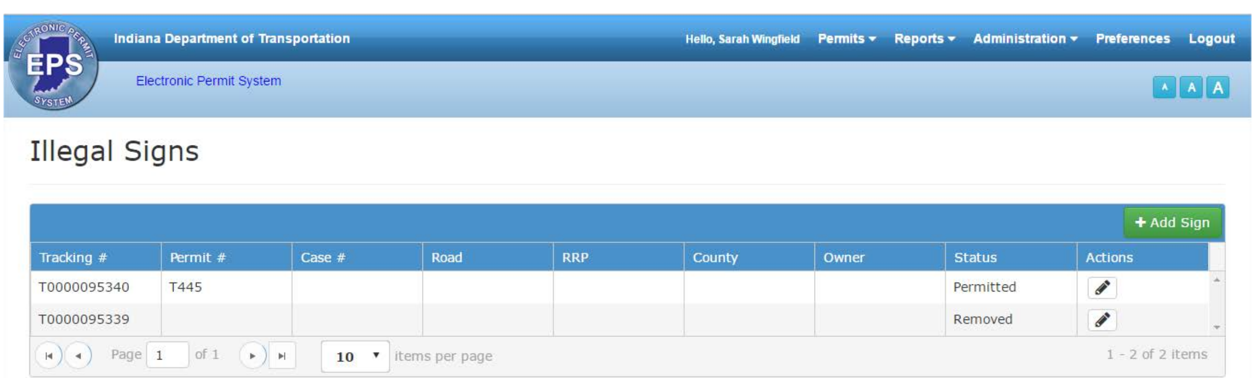


At the confirmation message, enter the sign's plate number and click **Save** to mark the sign as permitted, or click on the grey **X** to close the window without marking as permitted.

If the plate number is entered and saved a **Saved Successfully** notification displays in green at the top of the page.

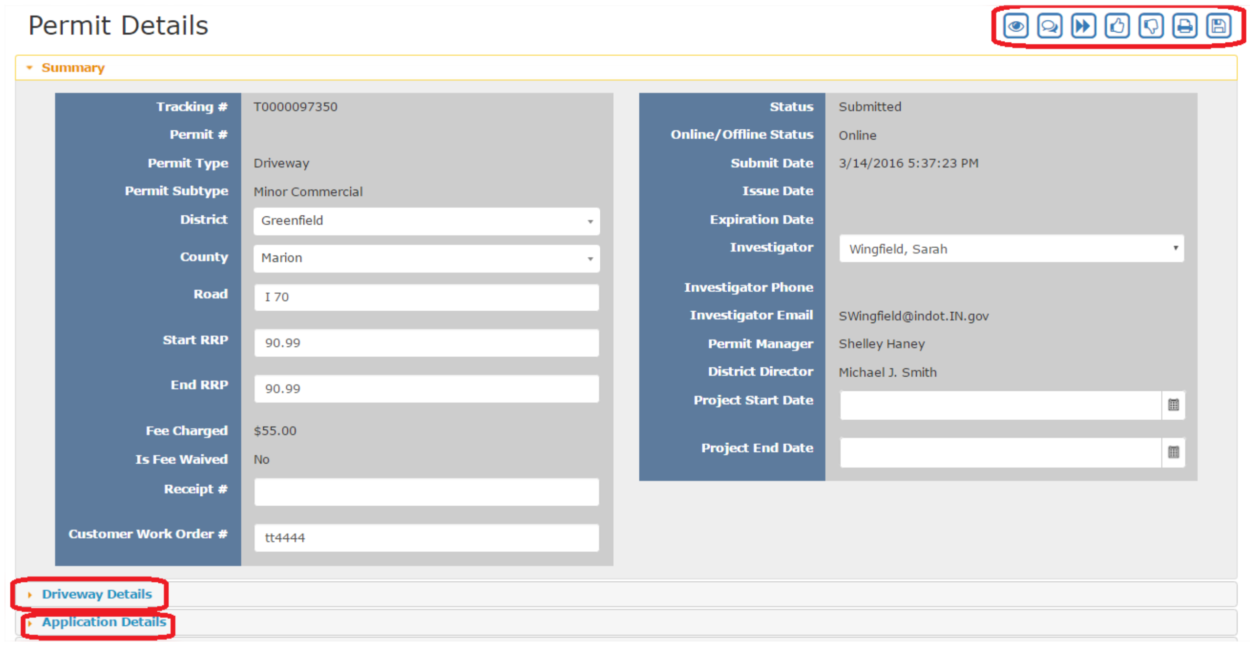


The sign's status changes from **Illegal** to **Permitted** in the Illegal Sign table.



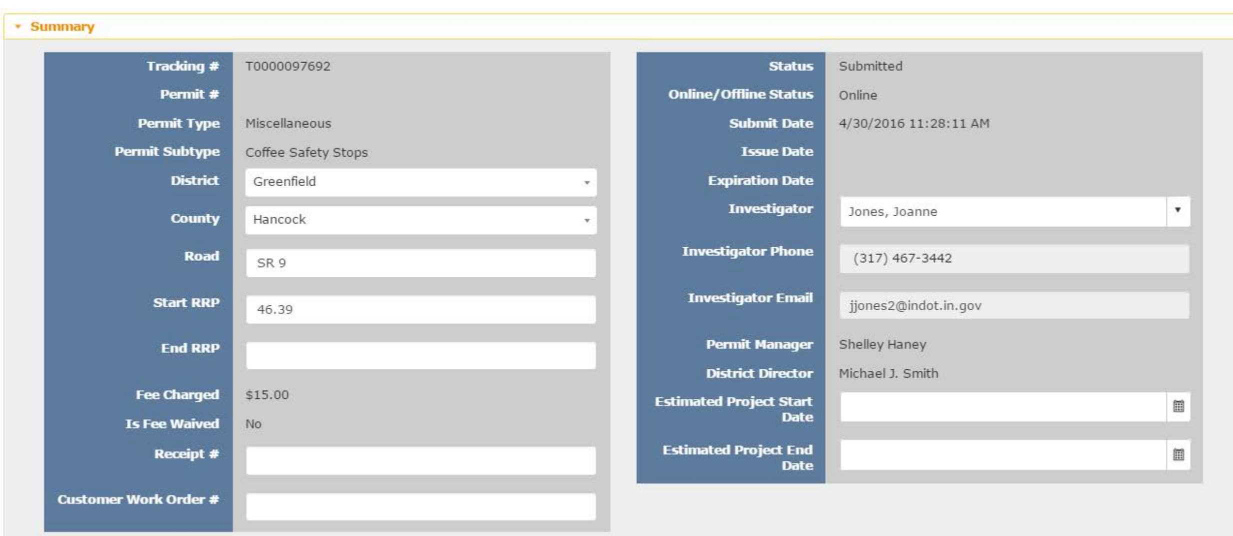
Submitted Permit Application

Once a permit application is submitted, an email will be sent to the assigned Investigator. The application can be viewed and printed, but not edited by the permit applicant. Click on the blue section headers to expand the section and view more details on the entered information, or edit the information. Action icons display in the upper right corner and change depending on the role of the user and status of the application/permit.



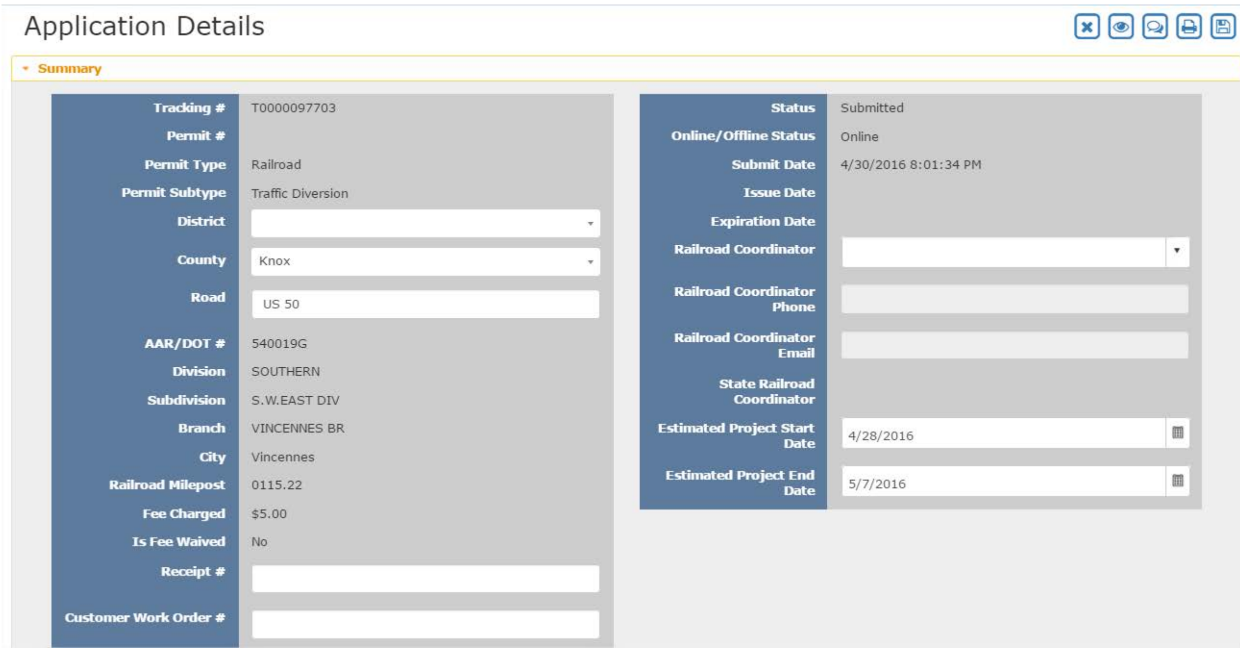
Summary

The **Summary** section displays basic information about the permit application. By default it is expanded upon opening an application and stays expanded unless minimized. Investigators, Permit Managers and Administrators can change certain information such as the District or the Investigator assigned to the permit by clicking in the editable fields, making changes and clicking **Save** .



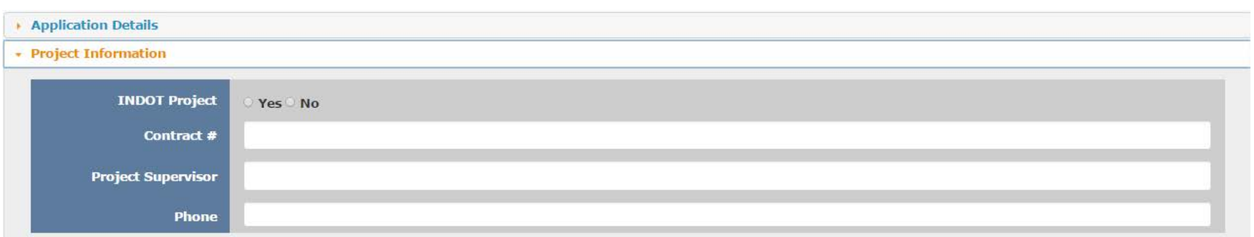
Summary – Railroad Applications

The **Summary** section for Railroad applications is the spot to indicate who the Railroad Coordinator will be for the project. Select the Coordinator from the dropdown; the appropriate phone and email information will populate based on the selected coordinator. Click **Save** to save changes.



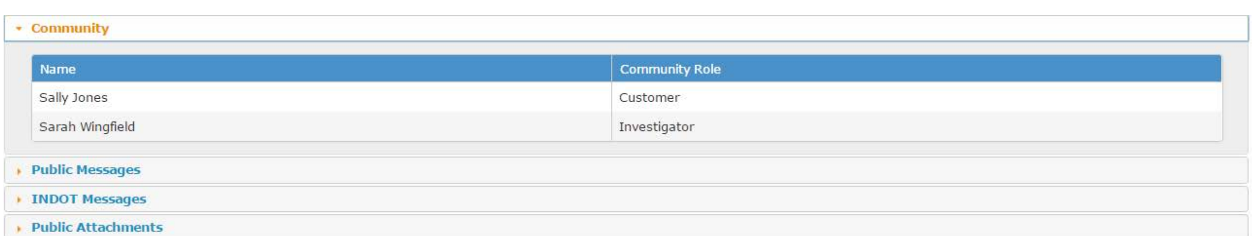
Project Information

The **Project Information** section displays some project information. Indicate if the project is an INDOT project by clicking in the Yes/No buttons where applicable.



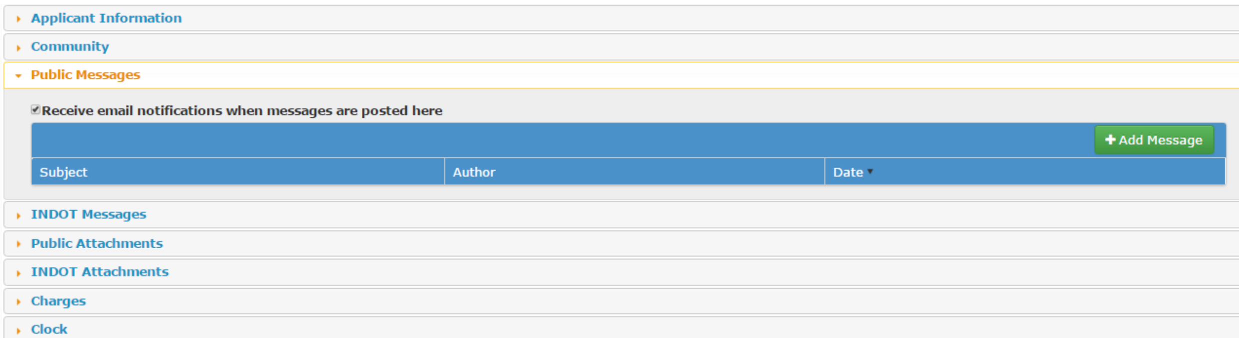
Community

The **Community** section displays the members of the permit application community.



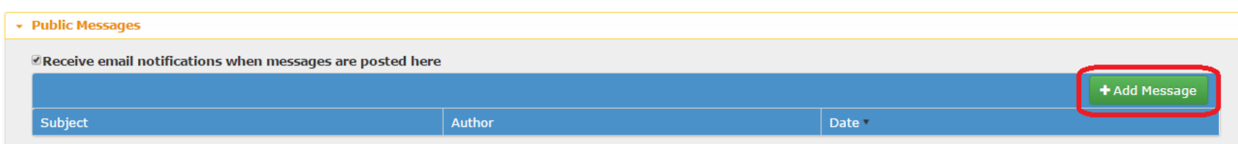
Public Messages

Any messages visible to the public (both INDOT and external customers) display in the **Public Messages** section. Members of the Permit Application's Community see a check box and the text **Receive email notifications when messages are posted here**. By default the check box is checked. Click in the check box to remove the check and NOT receive email notifications (not recommended).

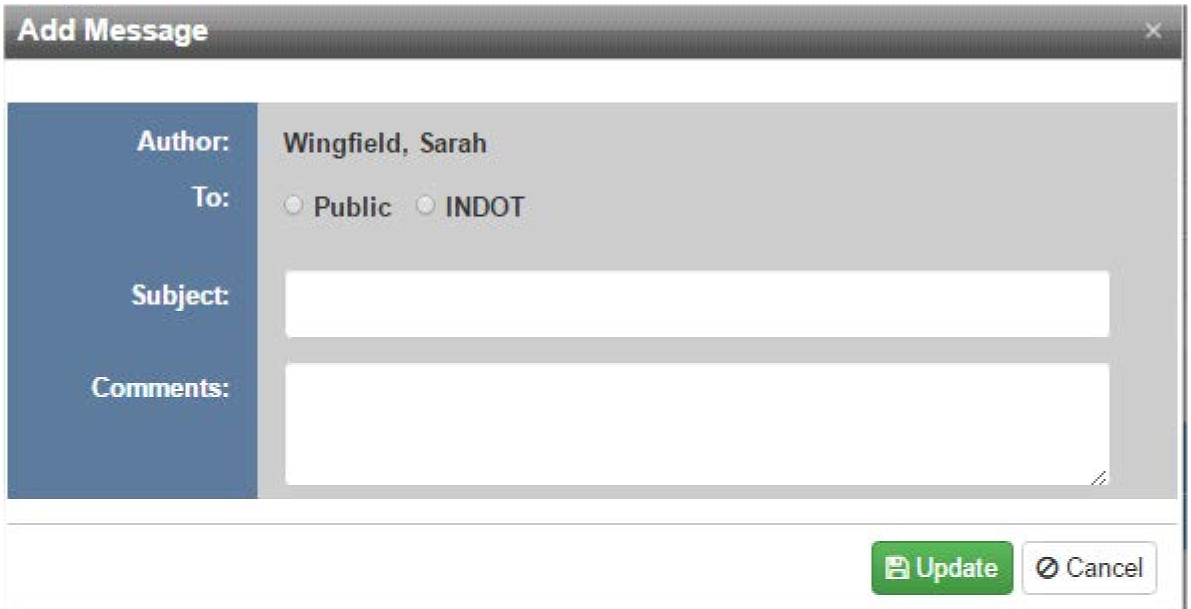


Control the types of messages received and opt out of only select types of messages by controlling preferences on the **Preferences** menu.

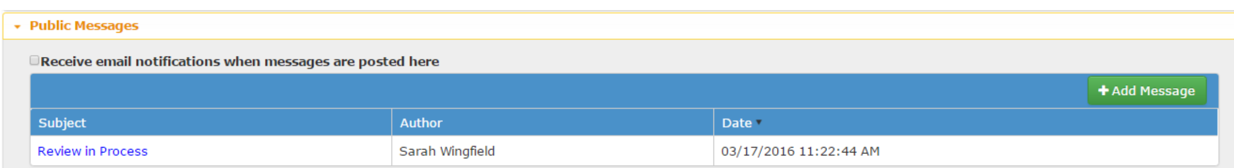
To add a public message the User must be in the Community, an EPS Admin, a State Permit Manager or a Permit Manager. Click on the **Add Message** button to add a new message.



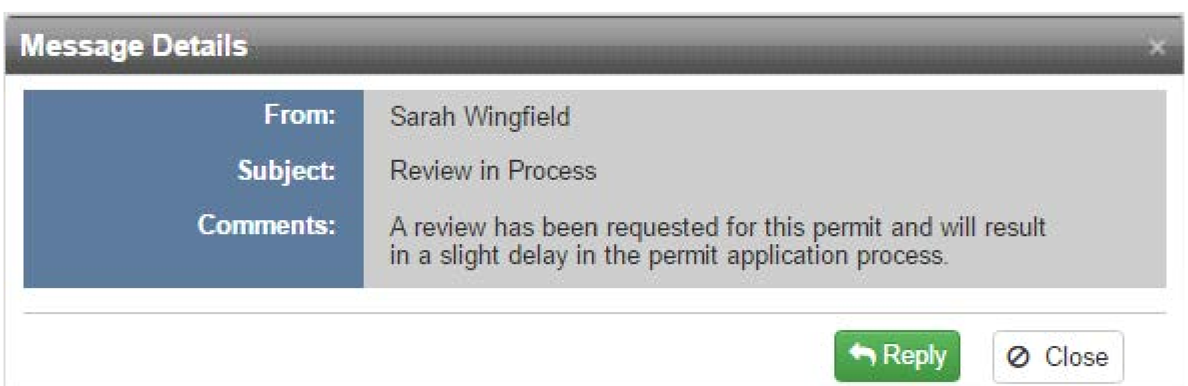
Enter information as requested on the Add Message screen. Select if the message will be visible to the **Public** or to **INDOT**. Remember that Public messages will be visible to the Customers (public) and INDOT Users. INDOT messages are visible to only INDOT Users. Enter the Submit of the message and the comments and click **Update** to send the message or click **Cancel** to return to the Public Messages table without adding a message.



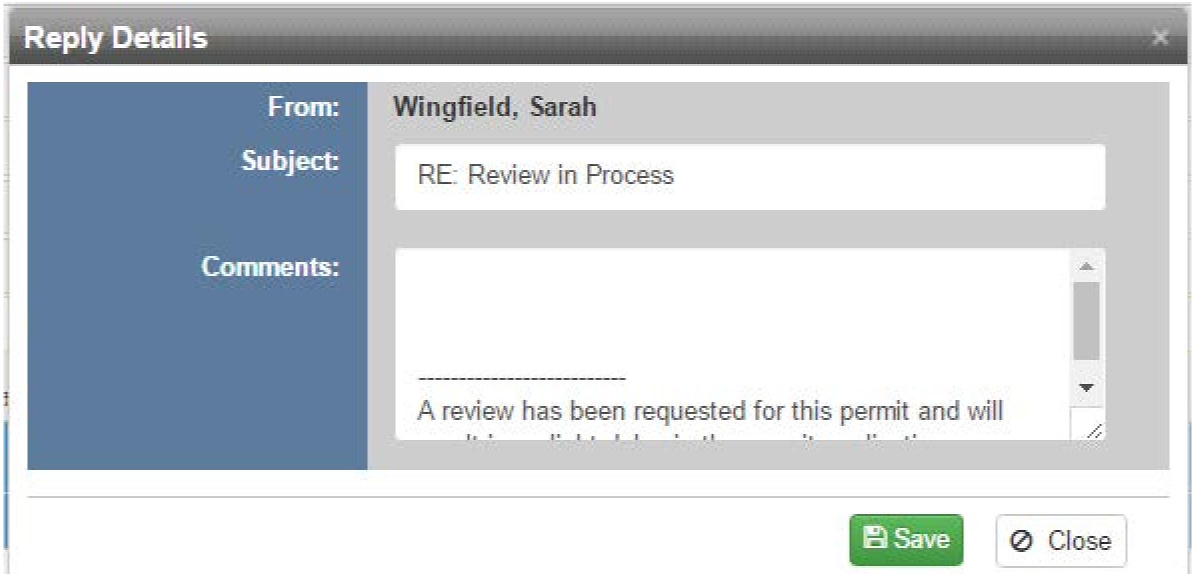
If added, the message displays in the Public Messages table. Click on the blue Subject text to view the message.



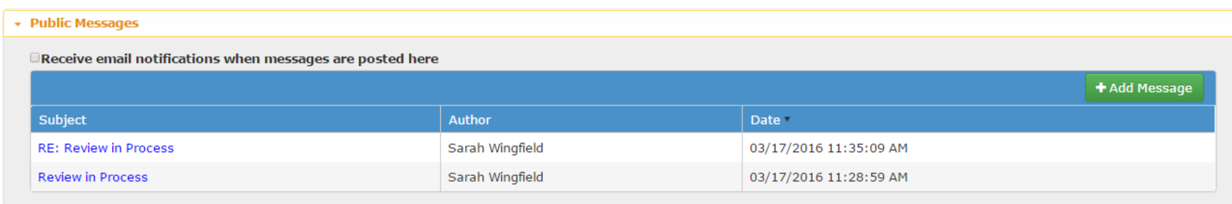
To reply to a message, click on the **Reply** button.



The previous message will automatically appear at the bottom of the comment section. Edit the subject as necessary and then enter the new text and click **Save** to send a reply to the message or click **Close** to close the window without sending a response.



The reply displays in the Public Messages table.

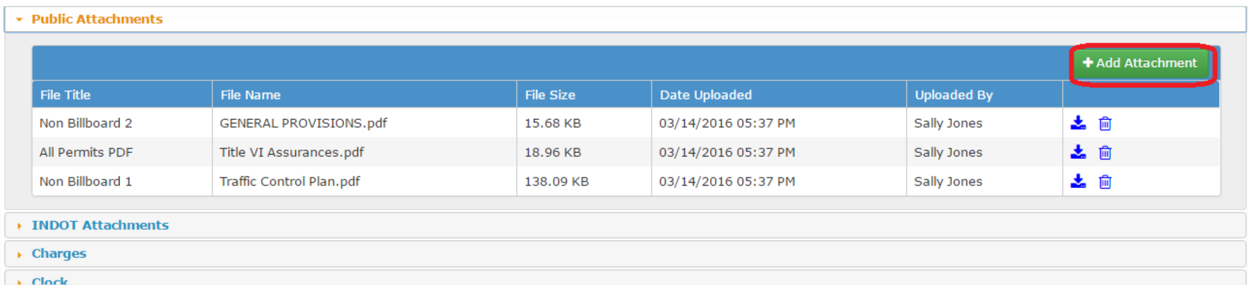


INDOT Messages

Messages specifically visible only to INDOT employees display in the **INDOT Messages** section. The ability to add, receive, reply and delete messages operates exactly the way the **Public Messages** operates; the only difference is that these messages are specifically for INDOT users. See **Public Messages** for more details.

Public Attachments

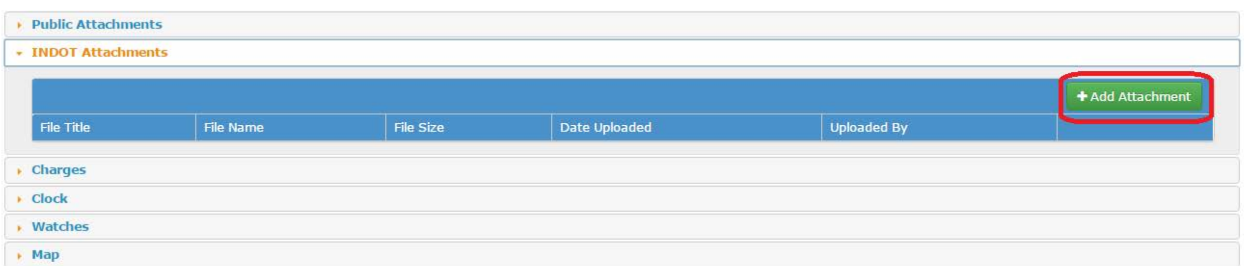
Attachments visible to the public (both INDOT and external customers) display in the **Public Attachments** section. Click **Add Attachments** to add additional attachments. See Attachments for more information on uploading, viewing and deleting attachments.



Certain attachments will be added automatically when the permit application is submitted; the specific attachments depend on the type of permit.

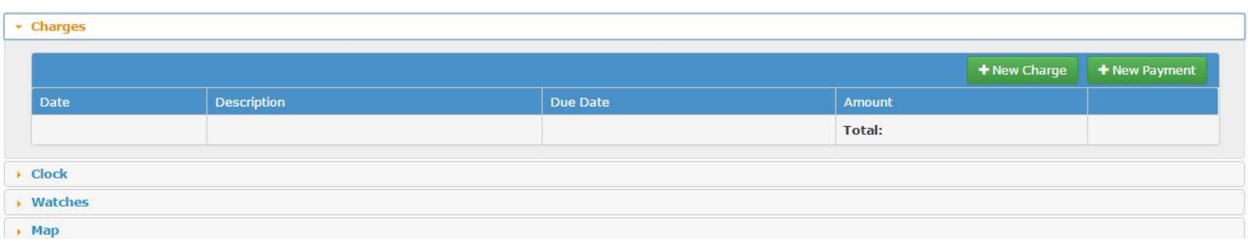
INDOT Attachments

Attachments specifically visible only to INDOT employees display in the **INDOT Attachments** section. Click **Add Attachments** to add additional attachments. See Attachments for more information on uploading, viewing and deleting attachments.

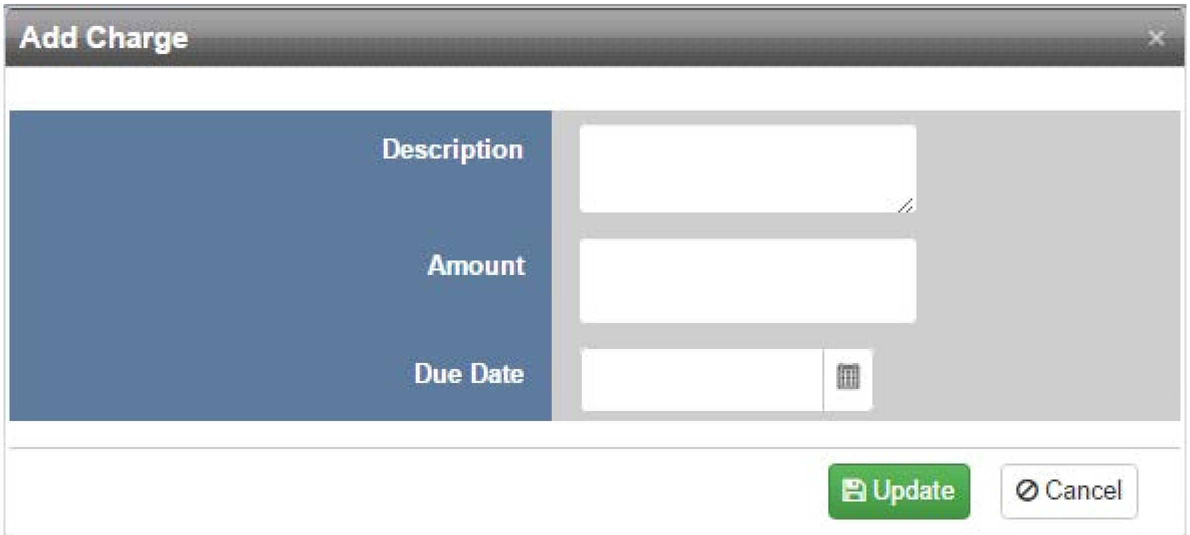


Charges

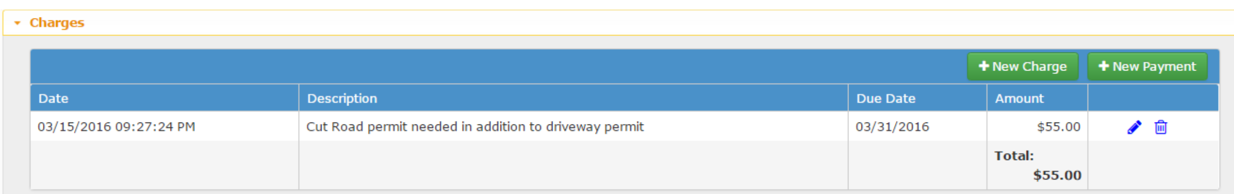
Add a new charge or a new payment in the **Charges** section.



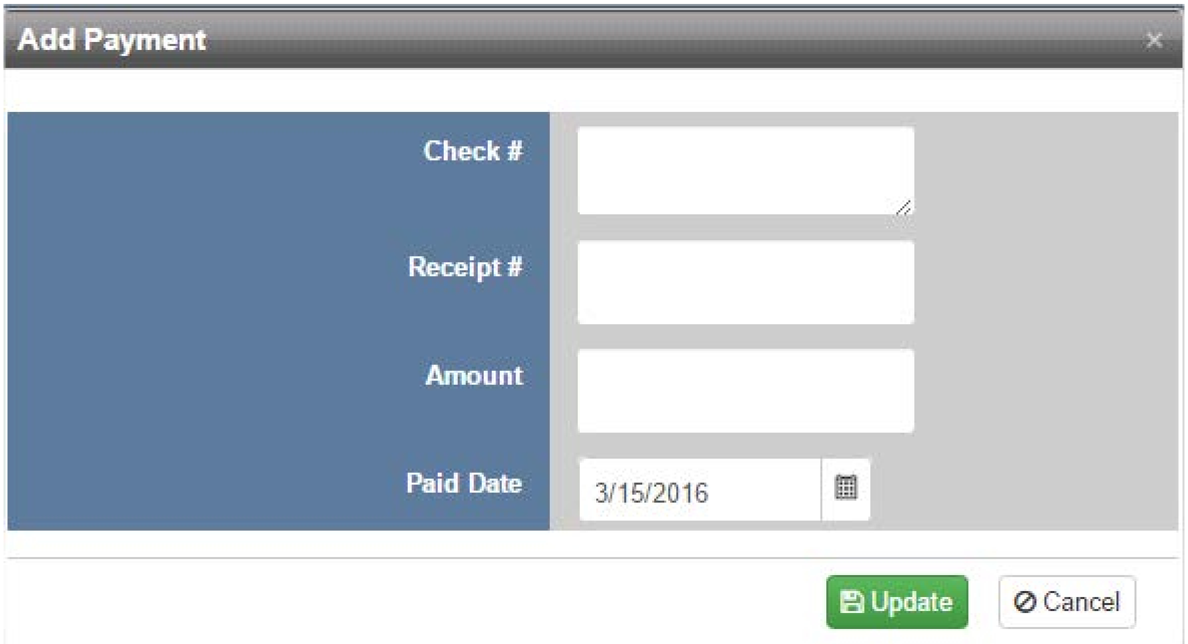
Click **New Charge** to add a new charge. Enter in the charge information in the pop up window and click **Update** to update the record or click **Cancel** to return to the permit application without adding a new charge.



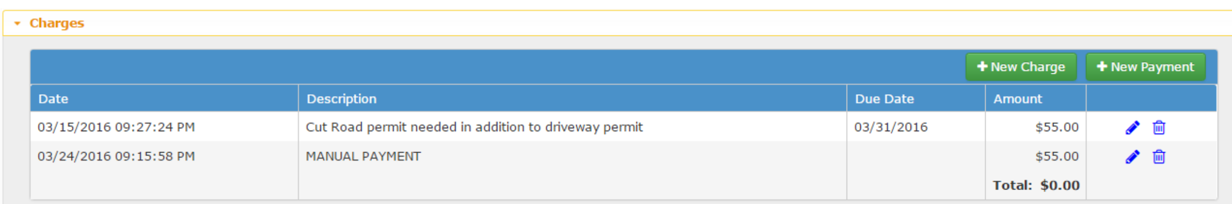
The new charge displays in the table, along with the ability to **Edit** or **Delete** the charge.



Click **New Payment** to enter a new payment. Enter in the payment information in the pop up window and click **Update** to update the record or click **Cancel** to return to the permit application without adding a new payment.

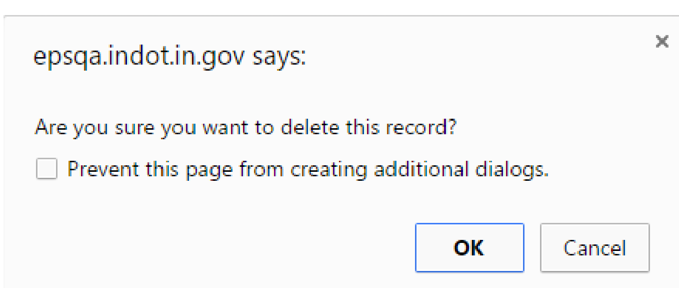


The new payment displays in the table, along with the ability to **Edit** or **Delete** the payment.



Click **Edit** to edit the entered charge/payment. Update information as necessary and click **Update** to save changes or click **Cancel** to return to the application without making updates.

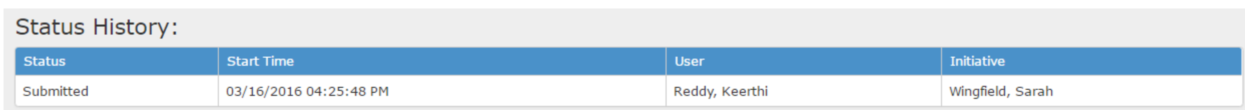
Click **Delete** to delete the entered charge/payment. Click **OK** at the confirmation window to delete the record, or click **Cancel** to return to the application without deleting the record.



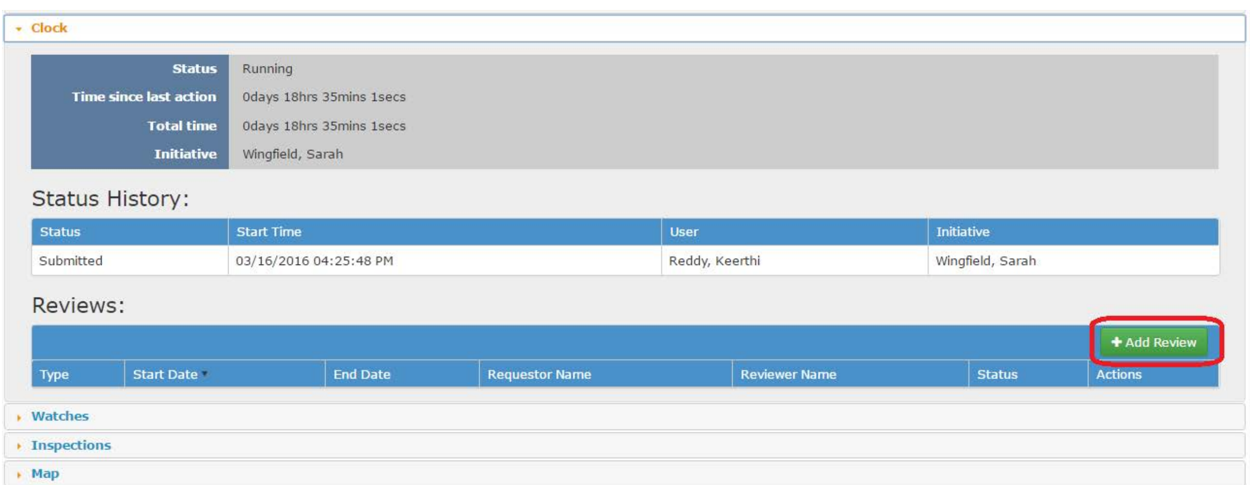
Clock/Status History/Review

The **Clock** section keeps track of the amount of time the permit application takes to get from submission to approval/denial/cancellation. The "clock" begins running the moment the permit application is submitted by a user. The **Initiative** indicates the person who is responsible for making the next move/taking the next step to move the application along in the application process.

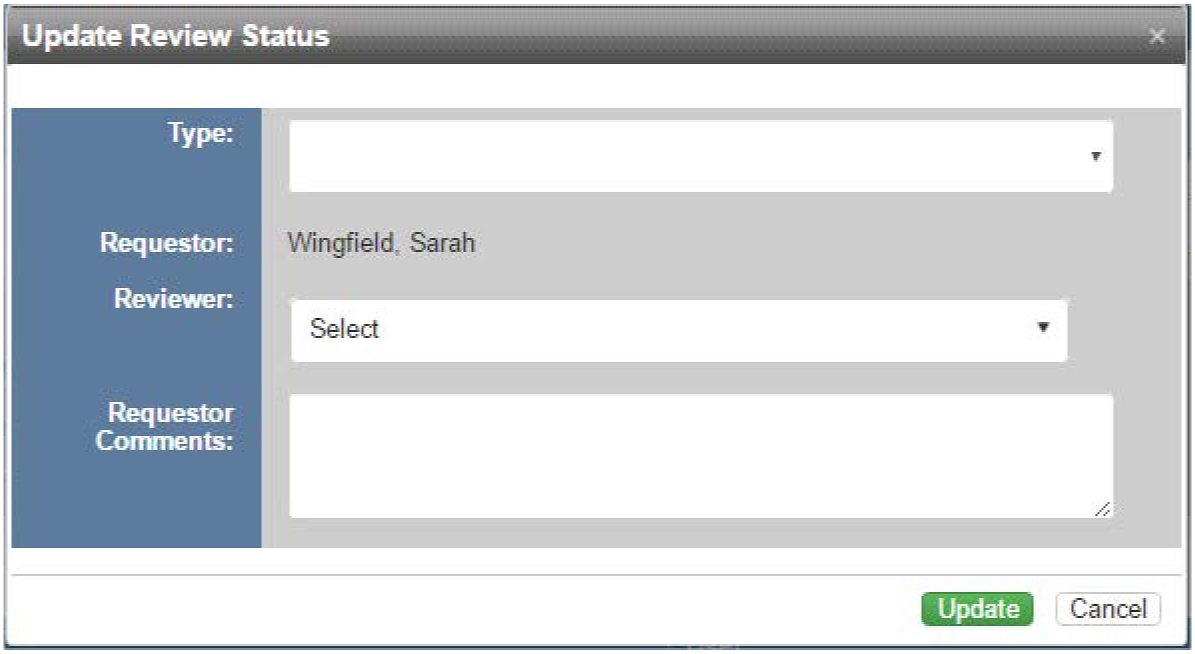
The Status History table displays updates automatically each time an action is taken on the permit application.



The Review table displays information on any application Reviews. The Investigator and Permit Manager assigned to the permit application can send an application out for Review when the status is **Submitted**. Click on the **Add Review** button to add a review.



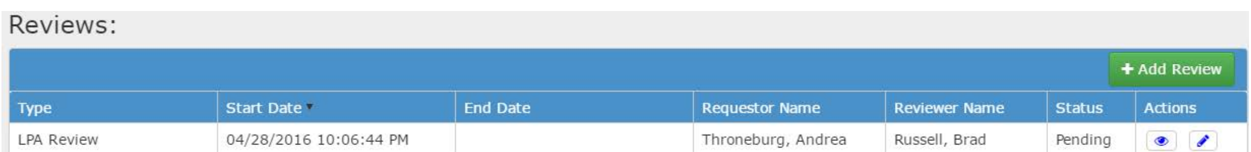
On the Add screen, select the Type of review from the Type dropdown. Select the Reviewer and enter any comments. Click **Update** to send the request for review, or click **Cancel** to return to the permit application without adding a Review.



If the permit is sent out for review, the Clock status is “Out for Review” and the clock is “stopped”. When the review is completed the clock “starts” again.

The Review displays in the Reviews table. The Investigator can **View Details** or **Edit** the review. An email will be sent to the person designated as a Reviewer alerting them to the review request.

When the Reviewer accesses the **Clock** section, there will be an **Edit** icon.

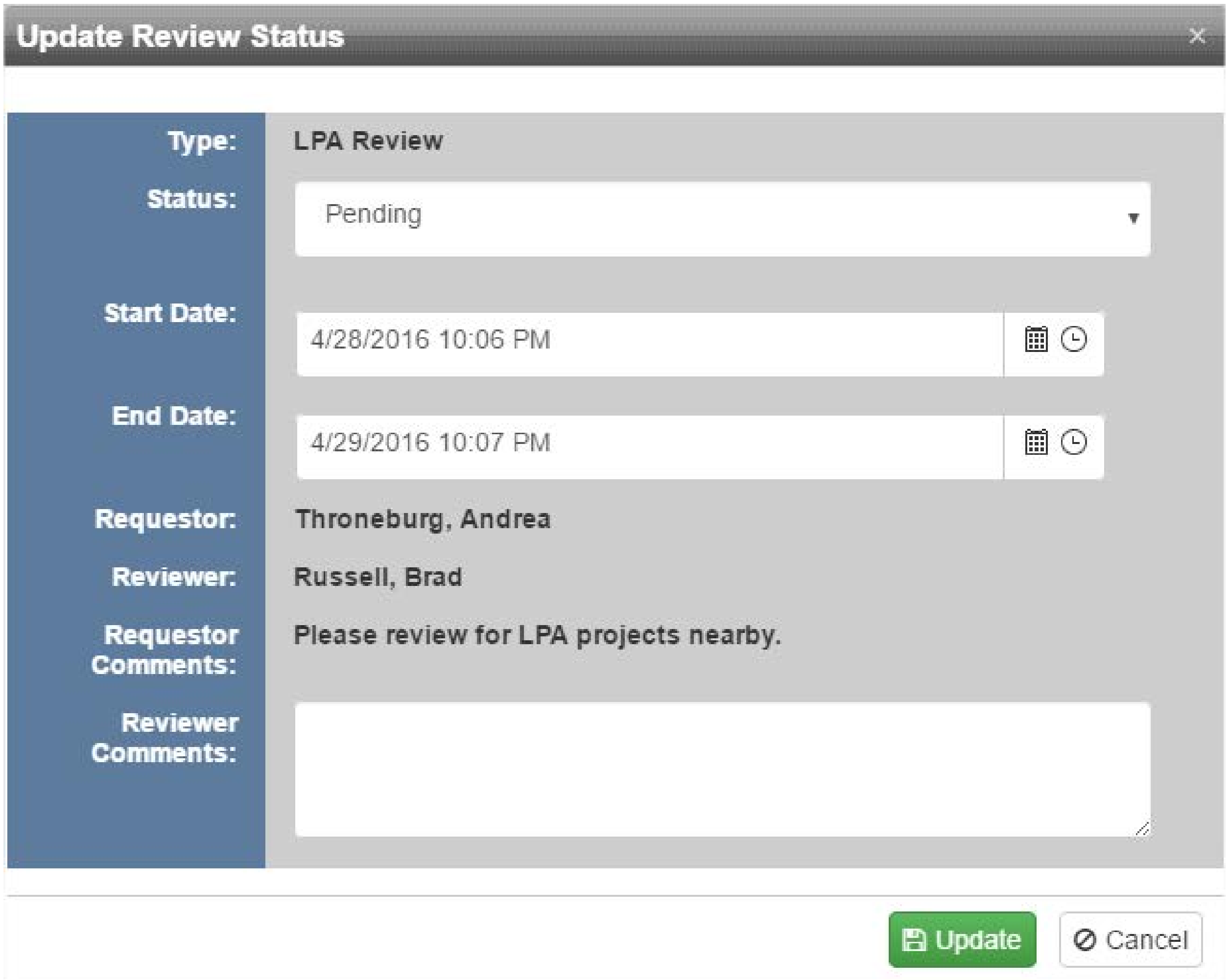


Reviews:

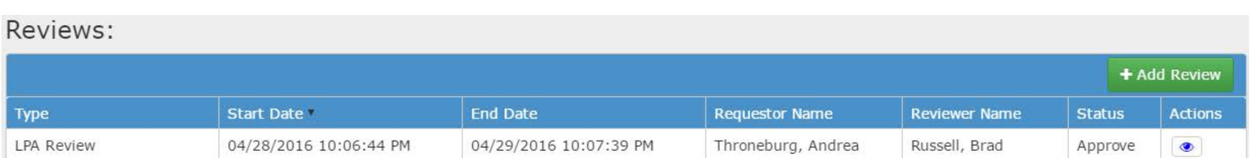
+ Add Review

Type	Start Date	End Date	Requestor Name	Reviewer Name	Status	Actions
LPA Review	04/28/2016 10:06:44 PM		Throneburg, Andrea	Russell, Brad	Pending	

The **Edit** icon opens the Update Review Status window. Change the status as necessary, enter comments in the **Comments** field and click **Update** to update the review status or click **Cancel** to return to the Reviews table without making changes.



The updated status displays in the review table, and the Clock restarts.



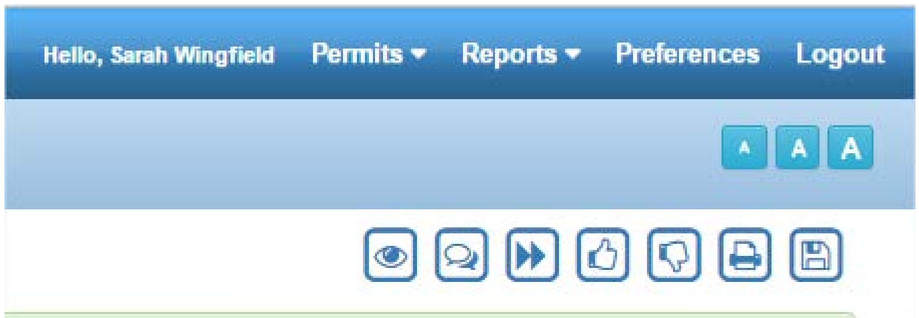
Watches

The **Watches** section displays any active Watches setup by the Community on the application.

Watches

Start Date	End Date	Days Between	Next Reminder	Community Role	Subject	Text	Created By	
03/15/2016	03/29/2016	4		Investigator	Reminder Email	Look at the permit and make any changes!	Sarah Wingfield	

Click the **Add Watch** icon in the header to add a new Watch.

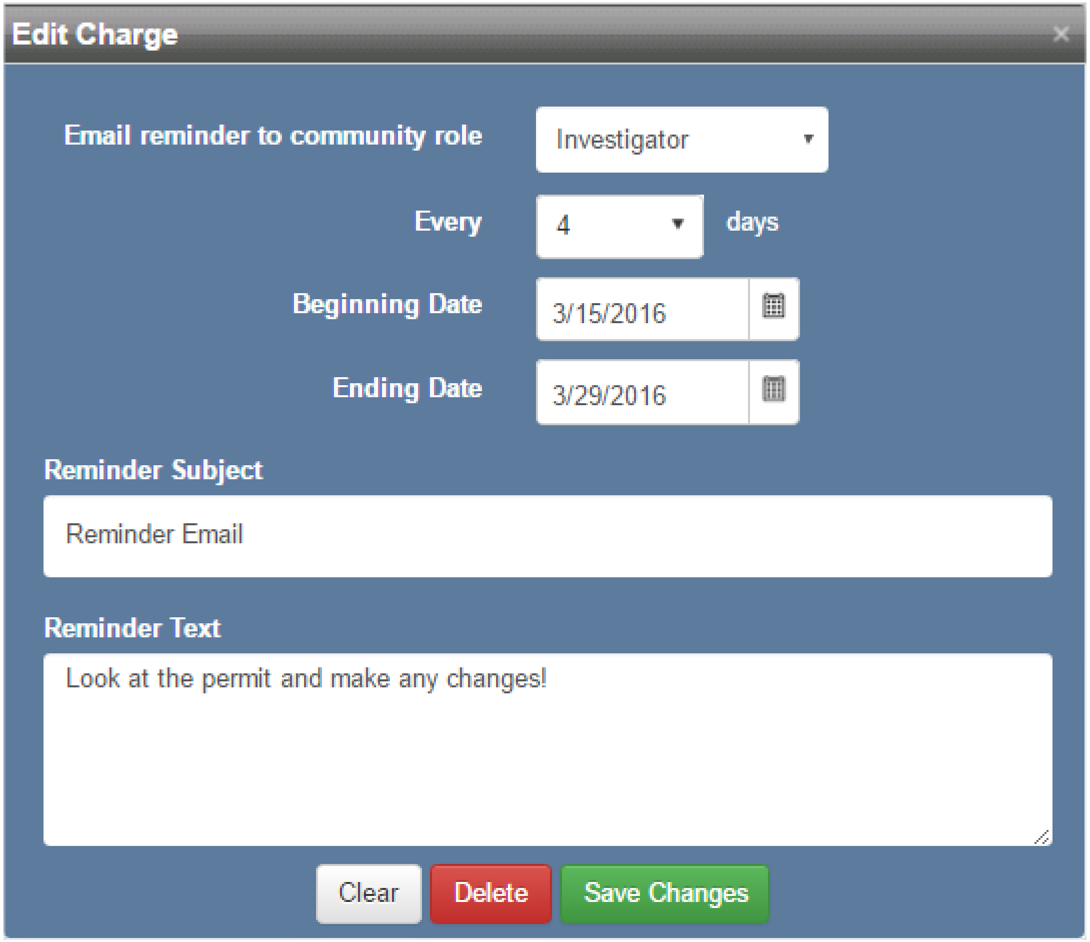


The Watch creator can view the **Edit** and **Delete** icons in the Watch table.

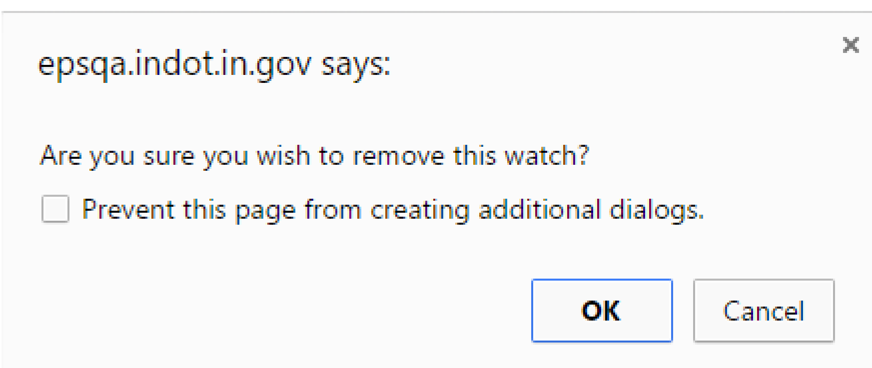
Watches

Start Date	End Date	Days Between	Next Reminder	Community Role	Subject	Text	Created By	
04/28/2016	04/30/2016	3	05/01/2016	Investigator	Reviews	Remember to follow up on any outstanding reviews.	Andrea Throneburg	

Click **Edit** to edit an existing Watch. Update the information as necessary and click **Save Changes** to update the Watch; click **Clear** to clear any existing information; click **Delete** to delete the Watch or click the grey to return to the application without updating the record.



Click **Delete** to delete a Watch. Click **OK** at the confirmation message to delete the Watch, or click **Cancel** to return to the application without deleting the Watch.

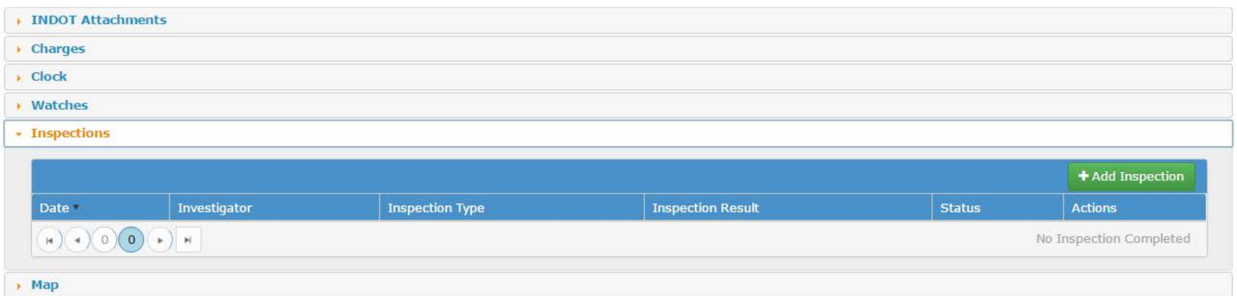


Inspections

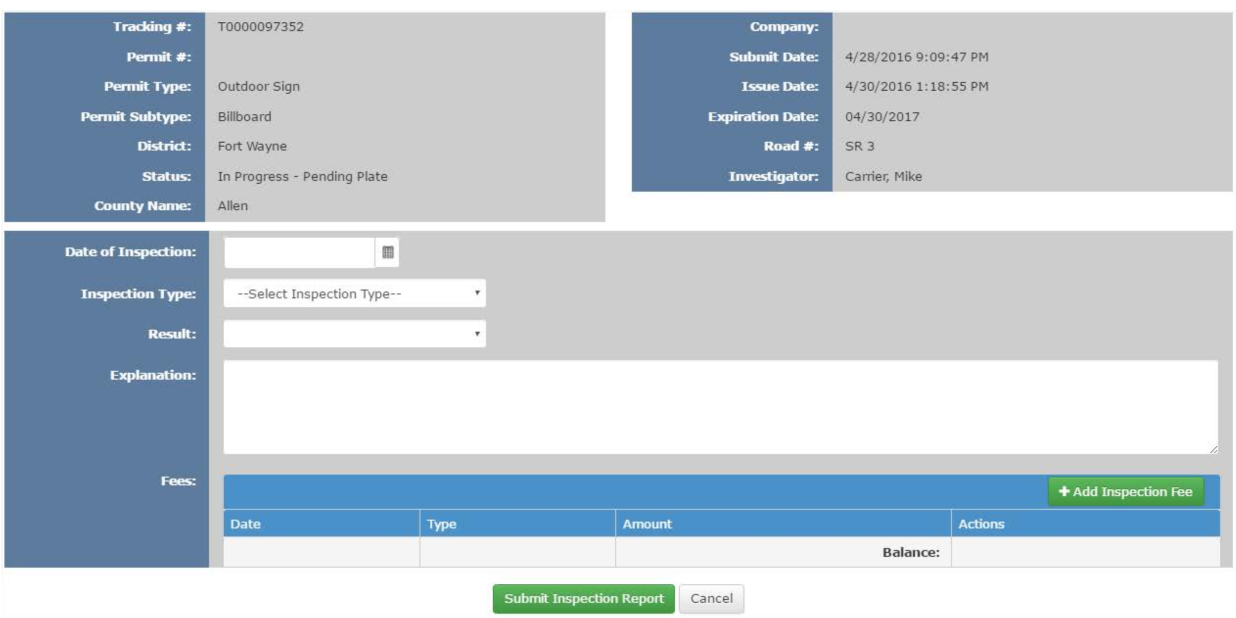
The Inspections section provides an area to add and approve/reject inspections.

Add an Inspection

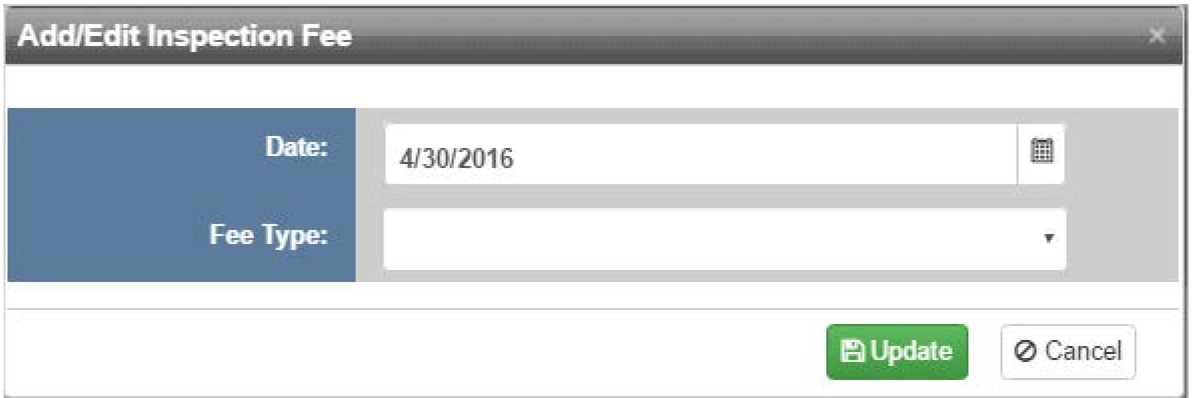
Only the Investigator can add an investigation. Click **Add Investigation** to add an investigation.



Enter inspection report information as requested. As the permit moves through the process, the **Inspection Type** and **Result** dropdowns will change based on what step the Permit is in, but the basic functionality of the Inspection Report remains the same. Click **Submit Inspection Report** to submit the report, or click **Cancel** to return to the Permit without submitting the report.

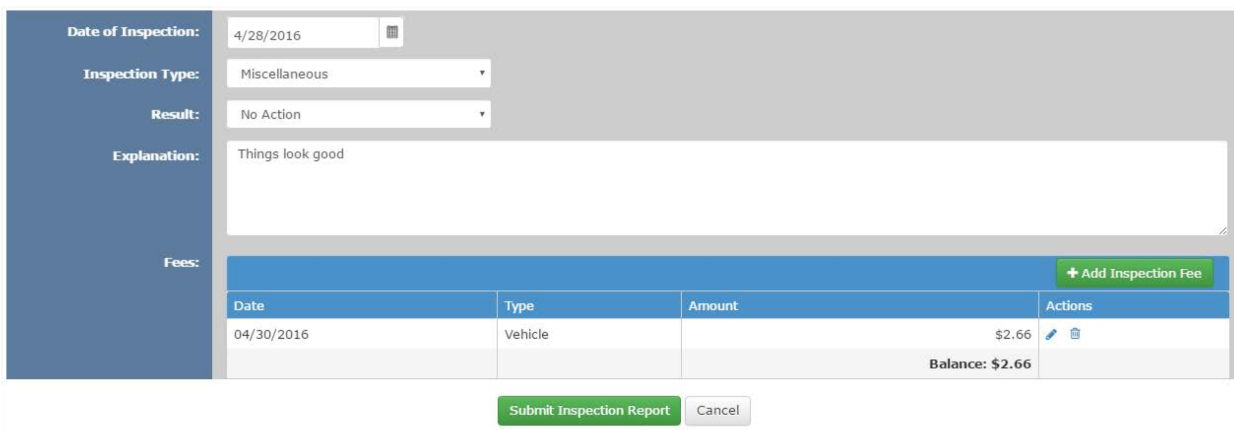


If an Inspection Fee is necessary, click the **Add Inspection Fee** button. Select the date and fee type; additional fields will display based on the Fee Type. Complete all fields and click **Update** to add the Inspection Fee or click **Cancel** to return to the Inspection Report without adding a fee.



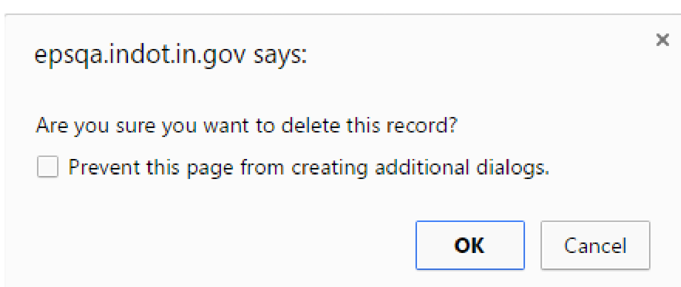
Any fees added on the Inspection Report appear in the **Charges** section. See Charges for more information on managing charges/payments.

The added fee displays in the Fee table, along with the ability to **Edit** or **Delete** the fee.

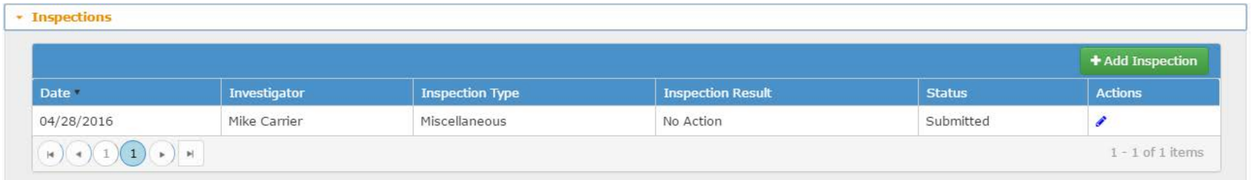


Click **Edit** to edit the entered fee. Update information as necessary and click **Update** to save changes or click **Cancel** to return to the Fee table without making updates.

Click **Delete** to delete the entered fee. Click **OK** at the confirmation window to delete the record, or click **Cancel** to return to the table without deleting the record.



Once the **Submit Inspection Report** button is clicked, the new Inspection report appears in the Inspections section. Click **Edit** to edit the submitted Inspection report. Once a report has been approved it cannot be edited.



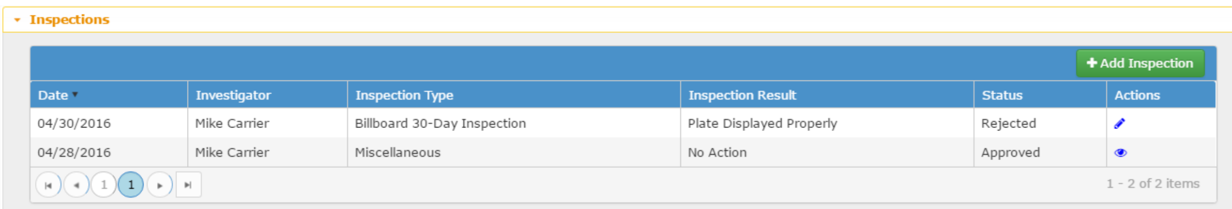
Inspections

+ Add Inspection

Date	Investigator	Inspection Type	Inspection Result	Status	Actions
04/28/2016	Mike Carrier	Miscellaneous	No Action	Submitted	

1 - 1 of 1 items

If a submitted report is Rejected, the **Edit** icon is visible. Click the **Edit** icon to update the report and resubmit for approval.



Inspections

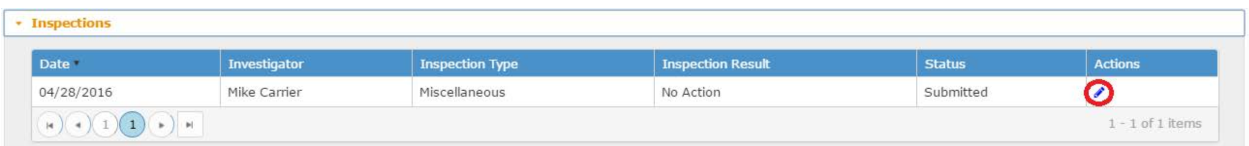
+ Add Inspection

Date	Investigator	Inspection Type	Inspection Result	Status	Actions
04/30/2016	Mike Carrier	Billboard 30-Day Inspection	Plate Displayed Properly	Rejected	
04/28/2016	Mike Carrier	Miscellaneous	No Action	Approved	

1 - 2 of 2 items

Approve/Reject an Inspection Report

Once an inspection report is entered by the Investigator, the Permit Manager approves or rejects the Inspection Report by going to the Inspection Report section for the permit and clicking on the **Edit** icon.

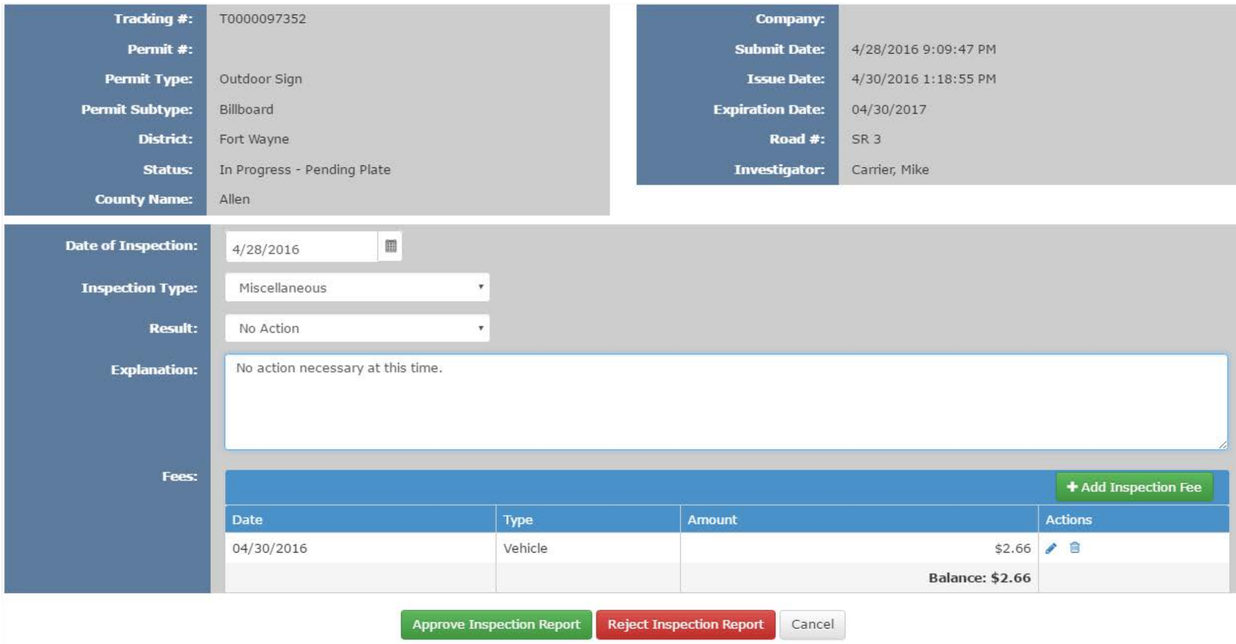


Inspections

Date	Investigator	Inspection Type	Inspection Result	Status	Actions
04/28/2016	Mike Carrier	Miscellaneous	No Action	Submitted	

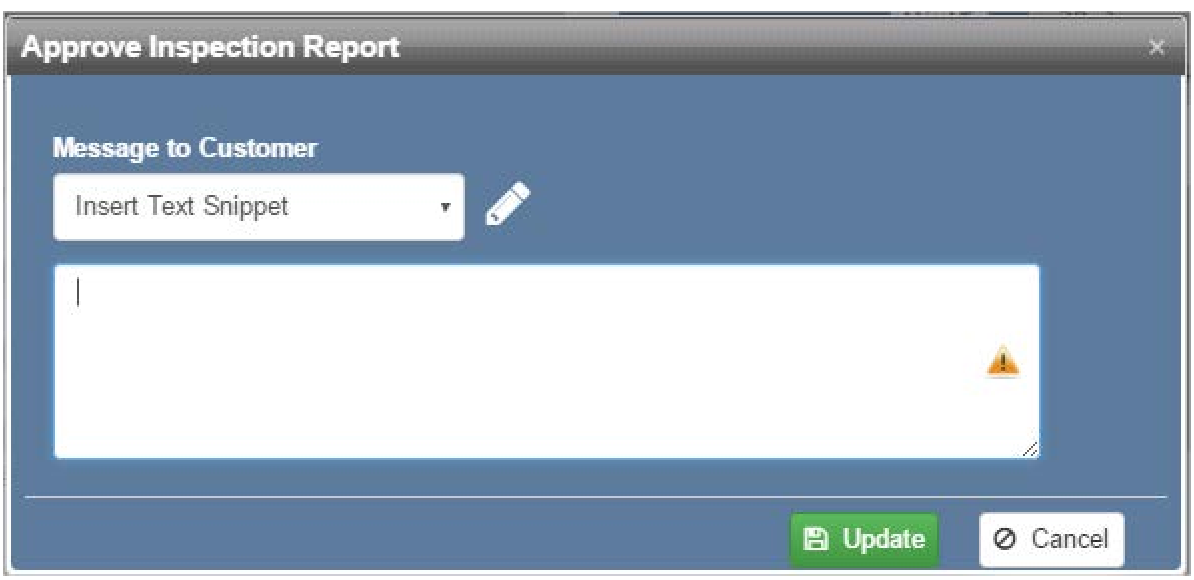
1 - 1 of 1 items

Review the Inspection Report and make any necessary changes.



Once the review is complete, click **Approve Inspection Report** to approve the report, **Reject Inspection Report** to reject the report or **Cancel** to return to the permit without taking action on the report.

If the report is approved, an email is sent to the Customer. Enter text for the email (or select a pre-entered Text Snippet) and click **Update** to send the email or click **Cancel** to return to the Inspection Report.



The Inspection section shows the report approved and the **View Details** icon is visible. Click **View Details** to view the report.

Inspections

Date	Investigator	Inspection Type	Inspection Result	Status	Actions
04/28/2016	Mike Carrier	Miscellaneous	No Action	Approved	

1 - 1 of 1 items

If the report is rejected, an email is sent to the Inspector. Enter text for the email and click **Update** to send the email or click **Cancel** to return to the Inspection Report.

The Inspection section shows the report rejected and the **View Details** icon is visible. Click **View Details** to view the report.

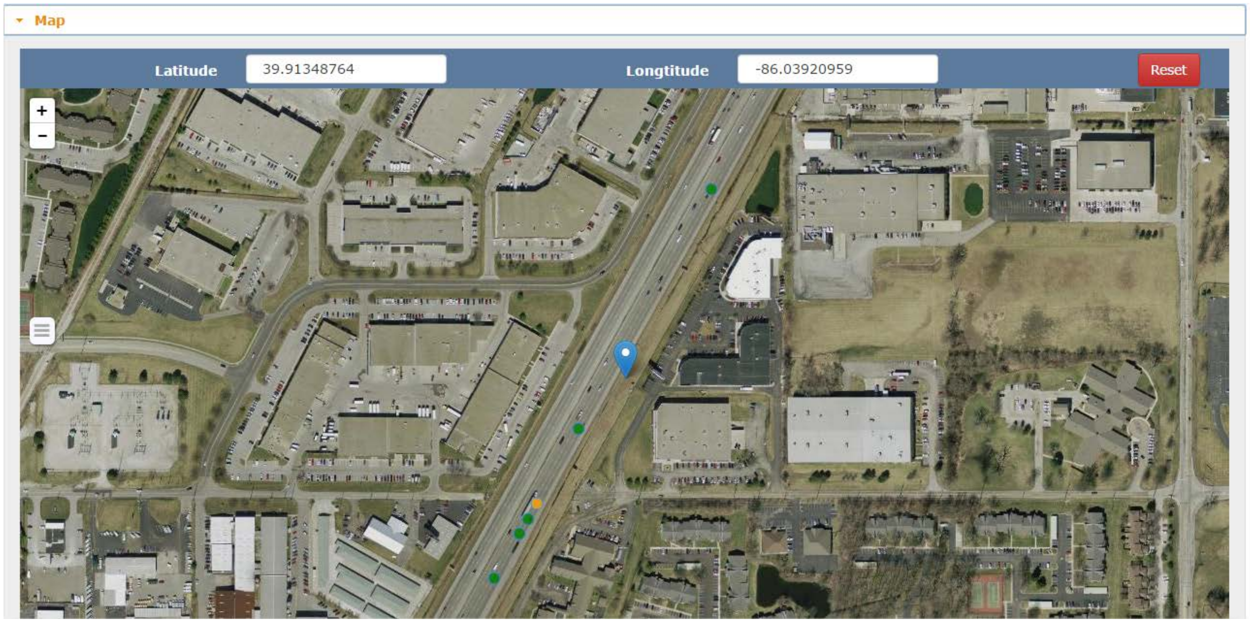
Inspections

Date	Investigator	Inspection Type	Inspection Result	Status	Actions
04/30/2016	Mike Carrier	Billboard 30-Day Inspection	Plate Displayed Properly	Rejected	
04/28/2016	Mike Carrier	Miscellaneous	No Action	Approved	

1 - 2 of 2 items

Map

The **Map** displays the location of the project on the map as well as the Latitude and Longitude. Click on the pin and drag it to move the location of the project. Click **Reset** to return to the originally submitted Latitude and Longitude.



Permit Action Icons

The icons in the upper right corner of a permit/permit application change based on the User and where the status of the permit. The sections below explain the different actions Users can take on an application.

Investigator Actions

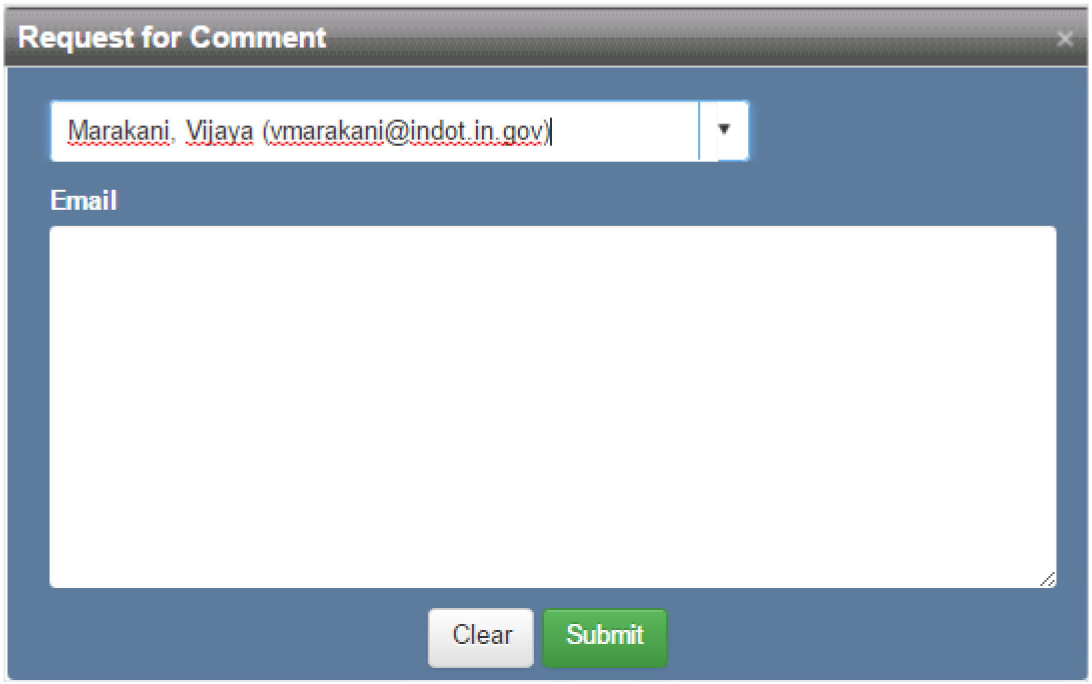
The Investigator assigned to the application can take the following actions: **Add Watch** , **Request for Comment** , **Forward** , **Recommend Approve** , **Recommend Deny** , **Print** and **Save** .

Add Watch

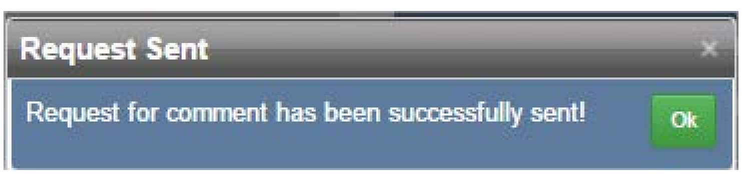
Click **Add Watch** to add a watch to the Application. A watch is a way to email reminders to select members in specific Roles. The creator sets the start and end dates, frequency, email subject line and text. See Watches for more information about adding, editing and deleting Watches.

Request for Comment

Click **Request for Comment** to send the application out for comment. It is available to the Investigator, Permit Manager and District Director assigned to the permit application, EPS Admin and State Permit Manager, and only when the application status is everything EXCEPT Entered. Select the recipient from the dropdown list and enter the email text. Click **Submit** to send the request, click **Clear** to clear any entered information or click the grey to close the window and return to the permit application.



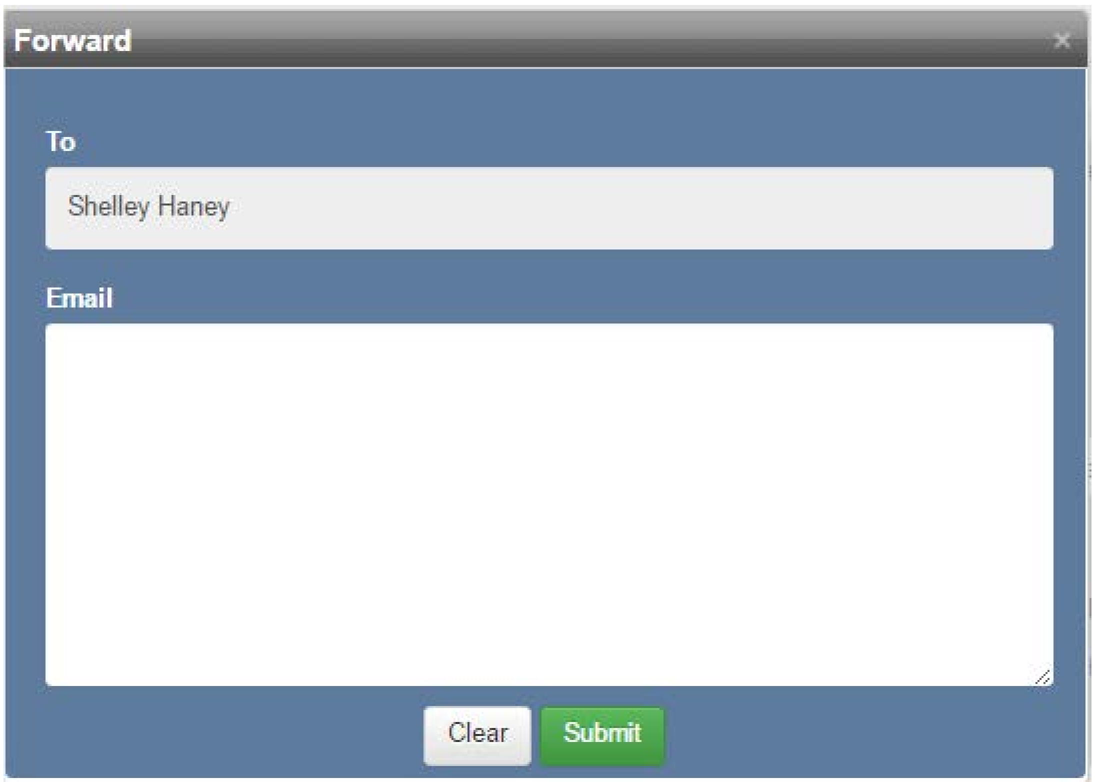
Click **OK** at the confirmation message.



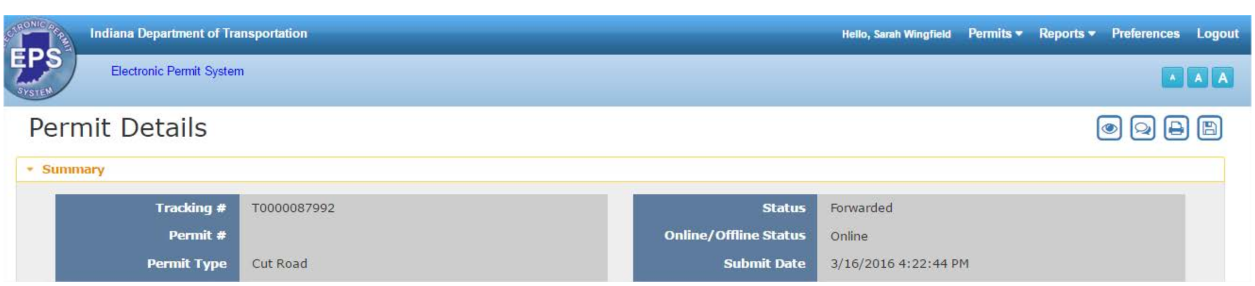
The Request for Comment displays in the **INDOT Messages** section. The recipient can click on the subject text to reply to the comment. See Public Messages for more information on viewing and replying to messages.

Forward

Click **Forward** to forward the permit application. The **Forward** icon allows the Initiative owner (Investigator or Permit Manager) to continue moving the application through the process without making an approve/deny decision. It is only available to the Investigator and Permit Manager assigned to the application, and only when the application status is **Submitted**. The **To** field is automatically populated with the Permit Manager's name when created by the Investigator and the District Director's name when created by the Permit Manager, and cannot be changed. Enter the text for the body of the email in the **Email** section. Click **Submit** to forward the Permit, click **Clear** to clear any entered data, or click the grey to return to the permit application without forwarding the application.

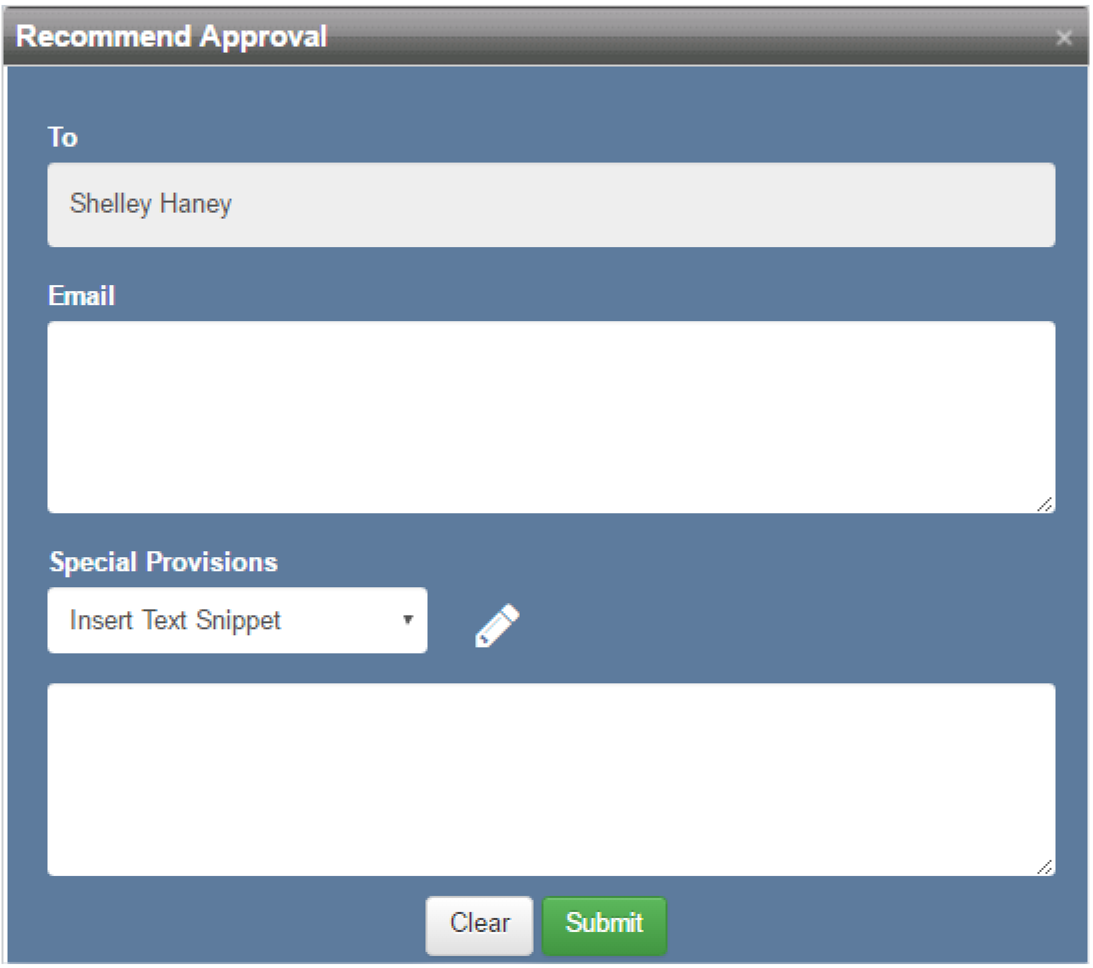


Click **OK** at the confirmation message. Once forwarded, the status changes to **Forwarded** Internally (shows as **In Progress** to the customer) and the only options are **Add Watch**, **Request for Comment**, **Print** and **Save**.



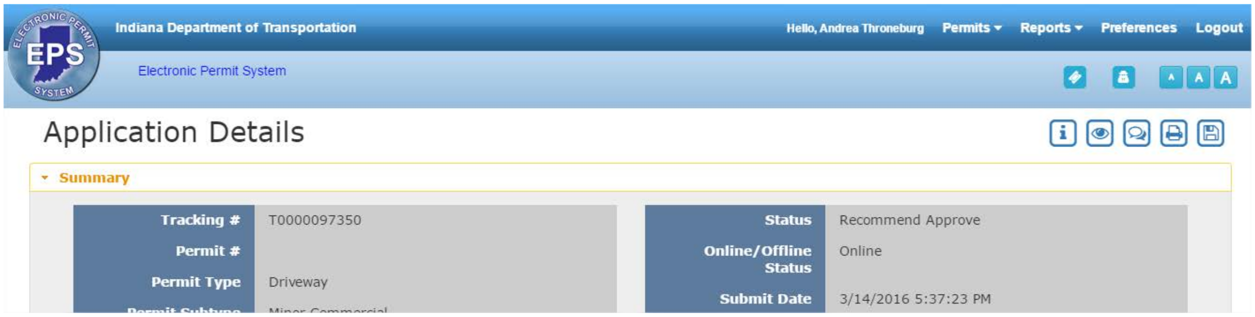
Recommend Approve

Click **Recommend Approve** to recommend approving the permit application. It is only available to the Investigator assigned to the application, and only when the application status is **Submitted**. The **To** field is automatically populated with the Permit Manager's name when created by the Investigator and cannot be changed. Enter the text for the body of the email in the **Email** section. If any Custom Text Snippets were entered in the **Preferences** page they can be selected from the dropdown. The text will display in the text box, but can be edited as desired. Click **Submit** to recommend the Permit for approval, click **Clear** to clear any entered data, or click the grey to return to the permit application without recommending approval.



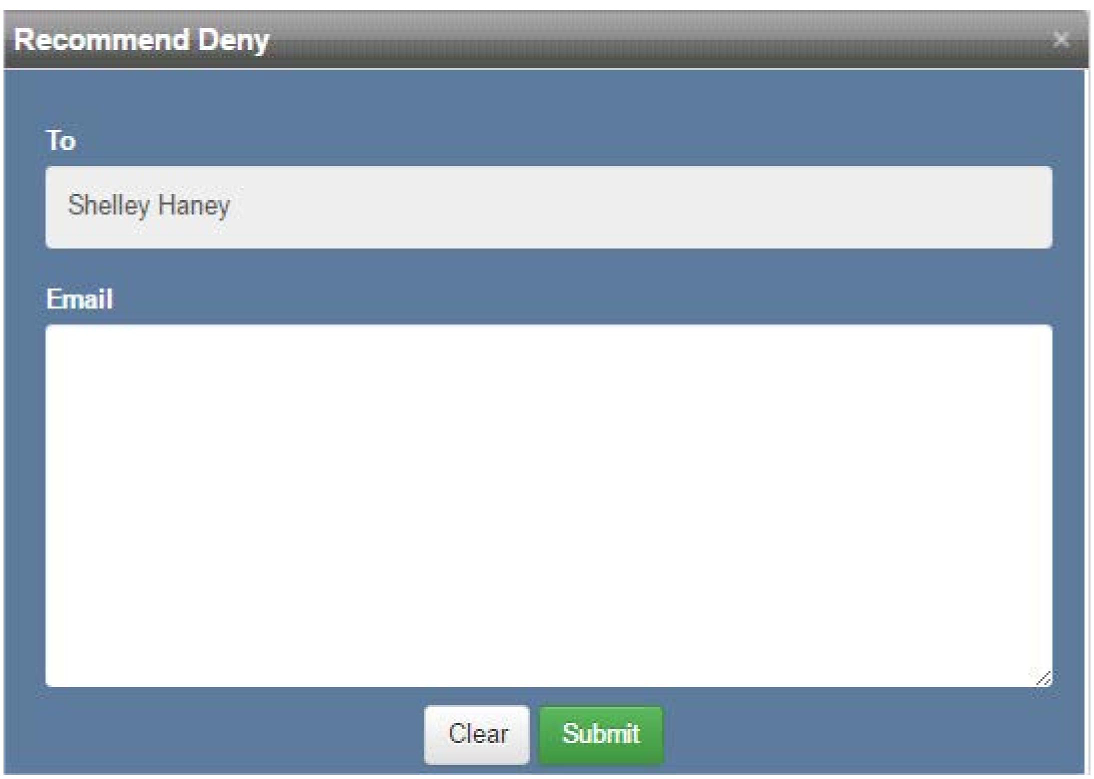
Click on the **Custom Text Snippets** icon to view, edit and add Custom Text Snippets. See the Preferences section for more details on Custom Text Snippets.

Click **OK** at the confirmation message. An email will be sent to the Community noting the recommendation. Once recommend for approval, the status changes to **Recommend Approve** Internally (shows as **In Progress** to the customer) and the action icons are **Request Further Information**, **Add Watch**, **Request for Comment**, **Print** and **Save**.

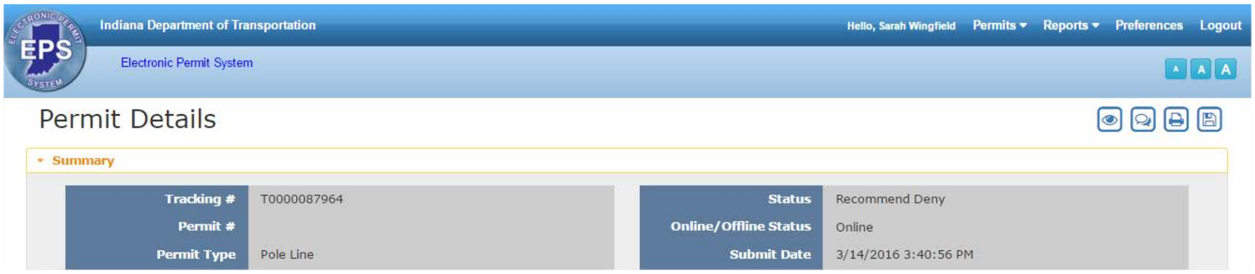


Recommend Deny

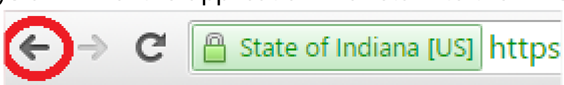
Click **Recommend Deny**  to recommend denying the permit application. It is only available to the Investigator and Permit Manager assigned to the application, and only when the application status is **Submitted**. The **To** field is automatically populated with the Permit Manager when created by the Investigator and the District Director's name when created by the Permit Manager. Enter the text for the body of the email in the **Email** section. Click **Submit** to recommend the Permit for denial, click **Clear** to clear any entered data, or click the grey  to return to the permit application without recommending denial.

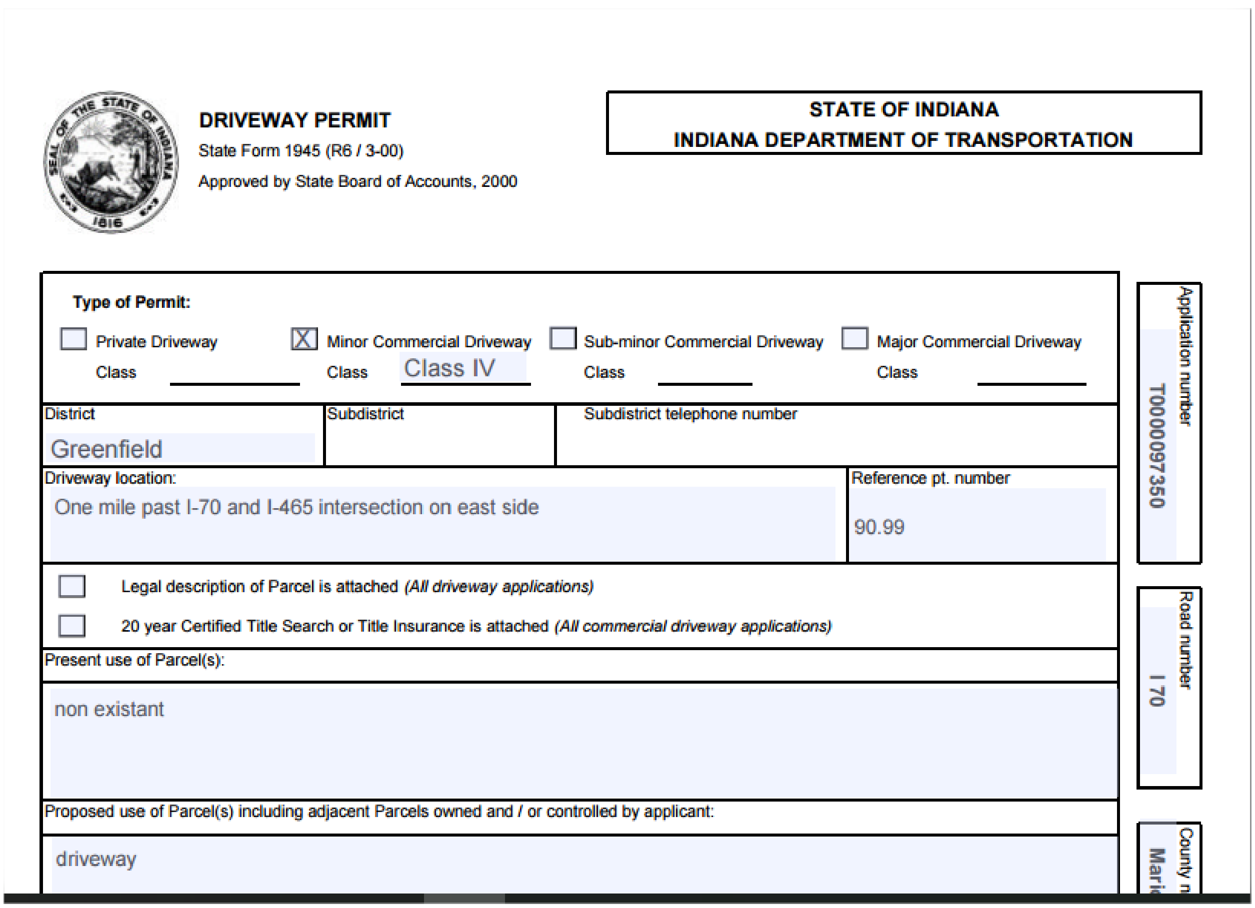


Click **OK** at the confirmation message. An email will be sent to the Community noting the recommendation. Once recommend for denial, the status changes to **Recommend Deny** Internally (shows as **In Progress** to the customer) and the only action icons are **Add Watch**, **Request for Comment**, **Print** and **Save**.



Print

Click **Print** to print a copy of the permit application. When **Print** is clicked, the screen refreshes and displays a PDF of the application. To return to the EPS website application, click on the browser Back button .



DRIVEWAY PERMIT
State Form 1945 (R6 / 3-00)
Approved by State Board of Accounts, 2000

STATE OF INDIANA
INDIANA DEPARTMENT OF TRANSPORTATION

Type of Permit:

☐ Private Driveway Class ______ ☒ Minor Commercial Driveway Class Class IV ☐ Sub-minor Commercial Driveway Class ______ ☐ Major Commercial Driveway Class ______

District	Subdistrict	Subdistrict telephone number
Greenfield		

Driveway location:	Reference pt. number
One mile past I-70 and I-465 intersection on east side	90.99

☐ Legal description of Parcel is attached *(All driveway applications)*
☐ 20 year Certified Title Search or Title Insurance is attached *(All commercial driveway applications)*

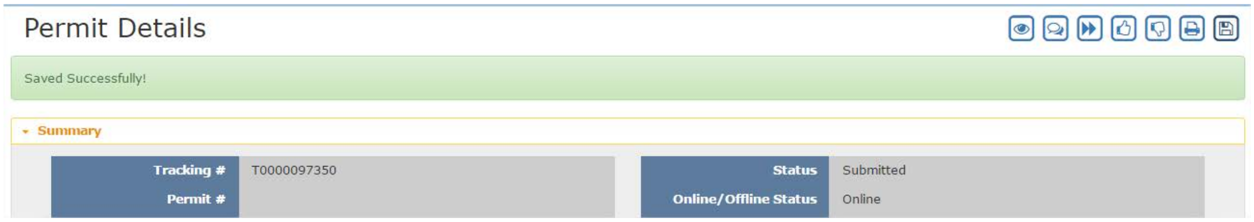
Present use of Parcel(s):
non existant

Proposed use of Parcel(s) including adjacent Parcels owned and / or controlled by applicant:
driveway

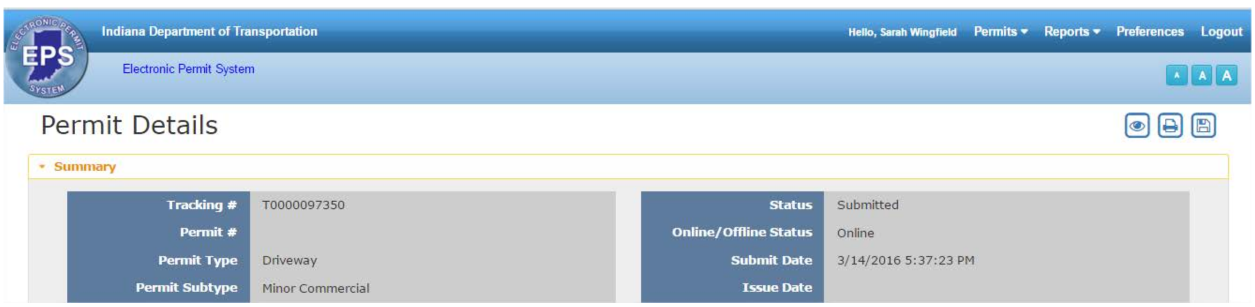
Application number T0000097350
Road number I 70
County n... Mari...

Save

Click **Save** to save any updates or changes to the permit application. If there are any required fields left empty, the application cannot be saved; enter information as required and then try saving again. A notification message displays at the top of the screen when the save is successful.



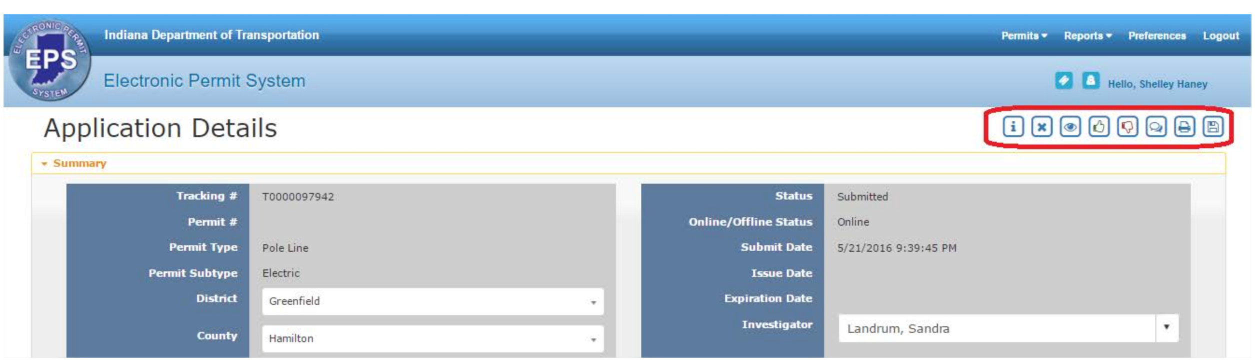
Investigators not assigned to the application can **Add a Watch** , **Print** and **Save** changes to an application.



Permit Manager Actions

Many of the Permit Manager action icons are as described above in the Investigator Actions section.

Request Further Information , **Cancel** , **Approve** and **Deny** are unique to the Permit Manager role.

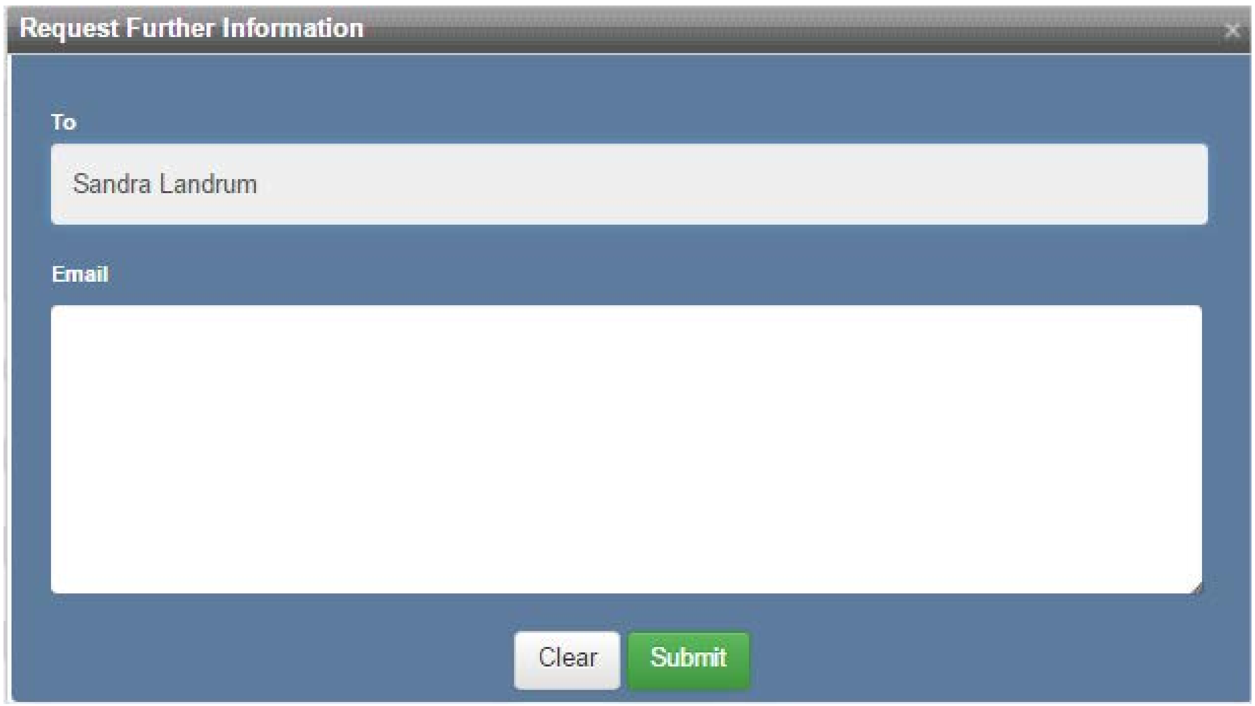


Recommend Approve and **Recommend Deny** are available when the initiative is with the Permit Manager.

Recommend Approve and **Recommend Deny** do not apply to Railroad Permits.

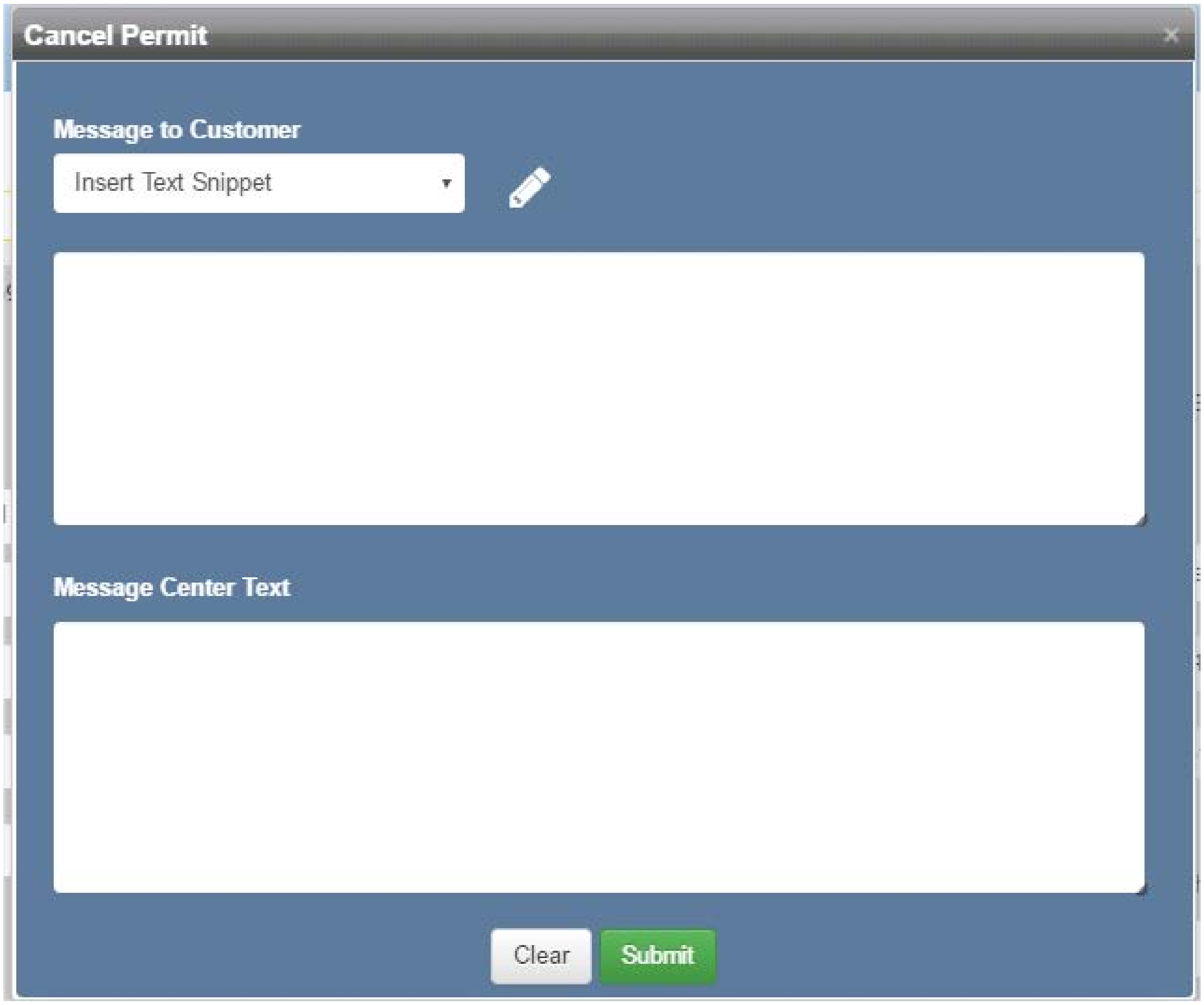
Request Further Information

Click **Request Further Information** to request additional information from the Permit Investigator. The investigator's name is pre-populated. Enter text to include in the email and click **Submit** to send the email, click **Clear** to clear any entered data, or click the grey to return to the permit application without requesting additional information.

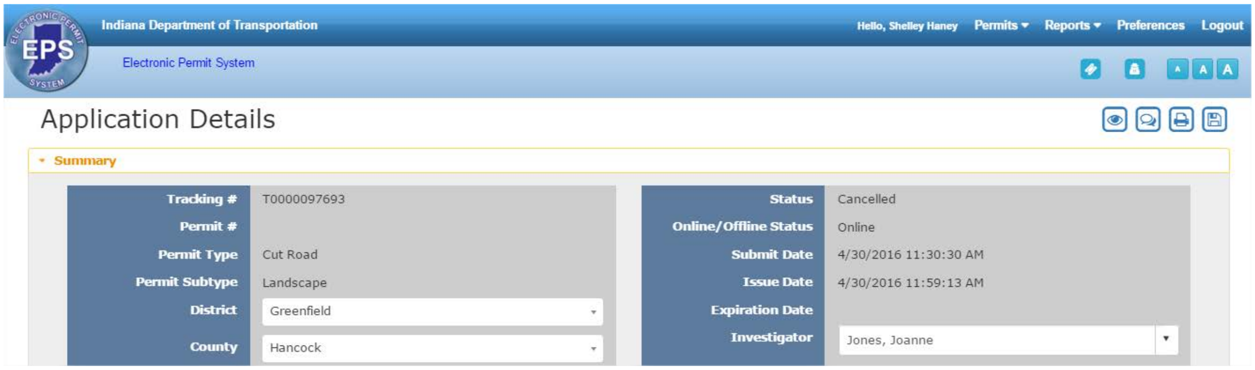


Cancel

Click **Cancel** to Cancel an application. The **Cancel** icon is only visible to the Permit Manager assigned to the application. Enter a message to the customer and a message to the Message Center. If any Custom Text Snippets were entered in the **Preferences** page, they can be selected from the appropriate dropdown. The text will display in the text box, but can be edited as desired. Click **Submit** to Cancel the Permit, click **Clear** to clear any entered data, or click the grey to return to the permit application without cancelling.

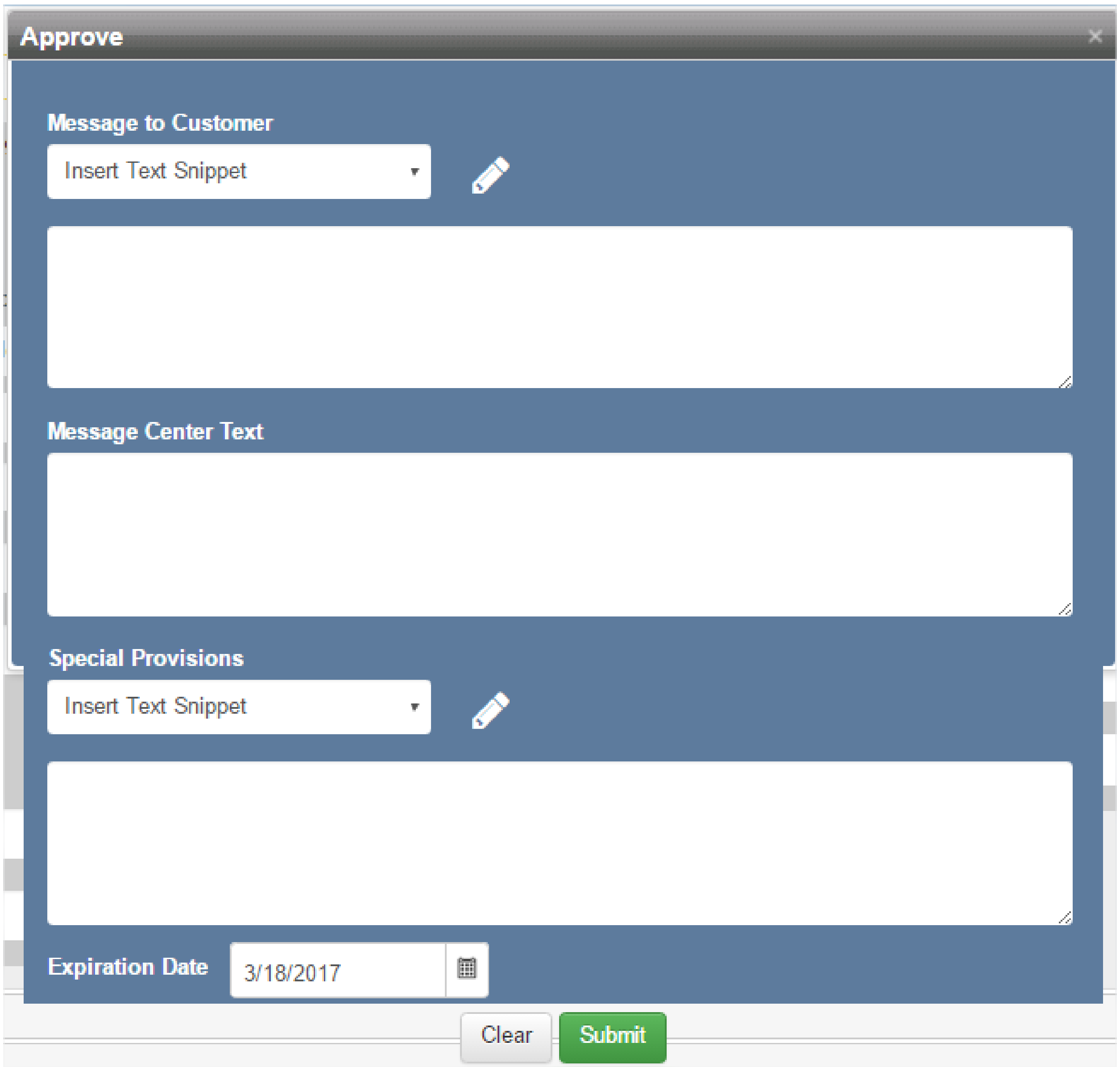


Once cancelled, the status changes to **Cancelled** and only action icons are **Add Watch**, **Request for Comment**, **Print** and **Save**.



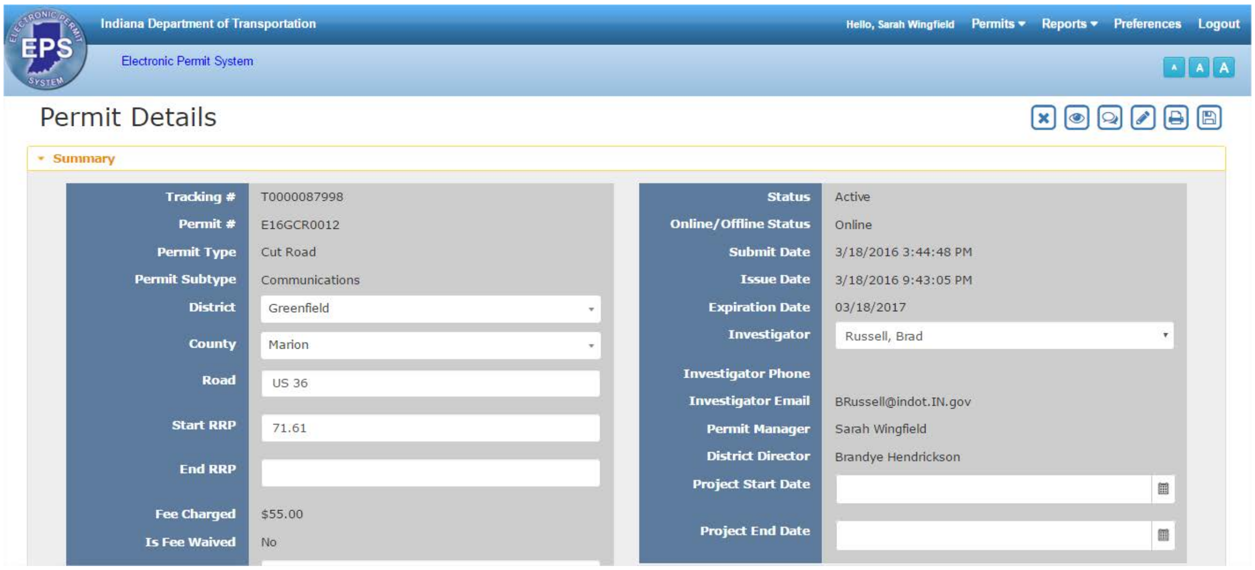
Approve

Click **Approve** to approve an application. The **Approve** icon is only visible to the Permit Manager assigned to the application. Enter a message to the customer and a message to the Message Center. Enter Special Provisions as necessary. If any Custom Text Snippets were entered in the **Preferences** page, they can be selected from the appropriate dropdown. The text will display in the text box, but can be edited as desired. Finally, enter an expiration date for the permit; a date one year from the current date is the field by default. Click **Submit** to approve the Permit, click **Clear** to clear any entered data, or click the grey to return to the permit application without approving.



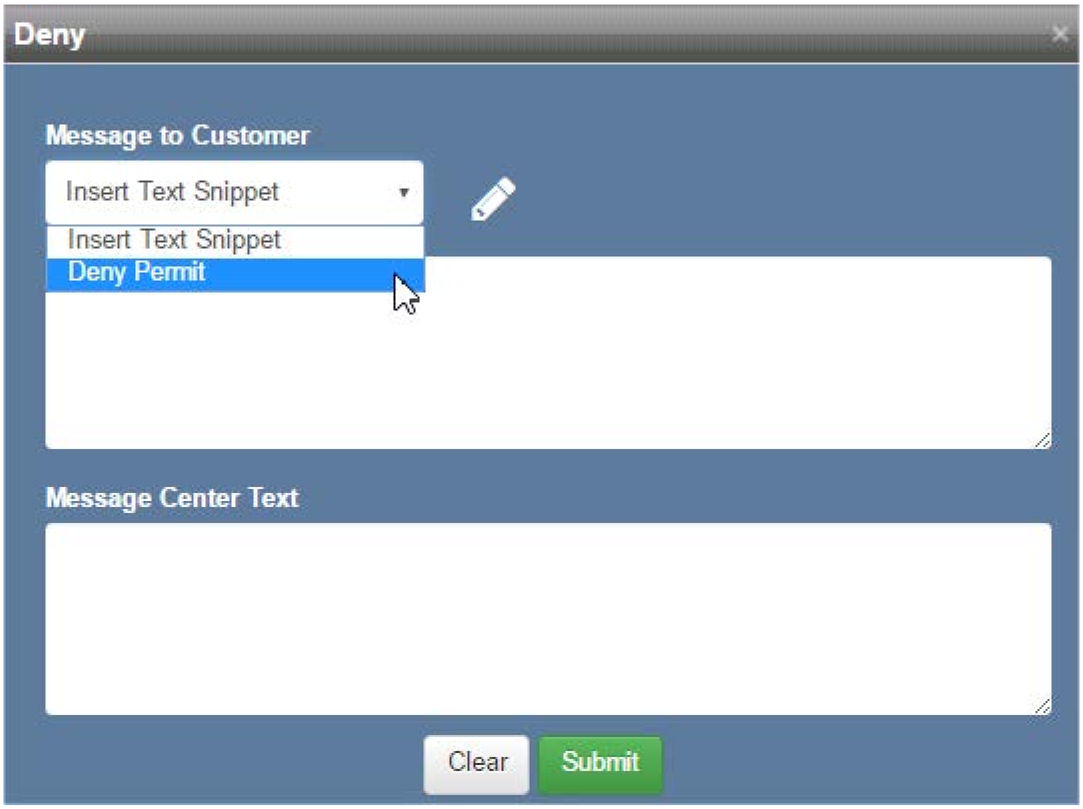
Click on the **Custom Text Snippets** icon to view, edit and add Custom Text Snippets. See the Preferences section for more details on Custom Text Snippets.

On approval the status changes to **Active** and the **Cancel** and **Addendum** icons are added as options.

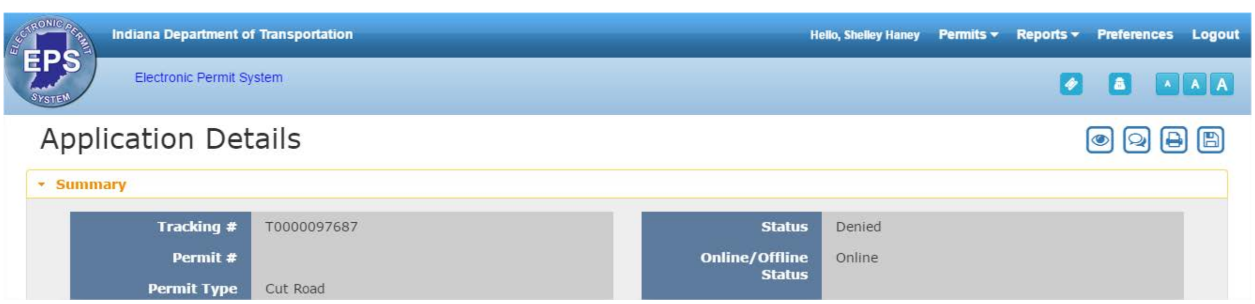


Deny

Click **Deny** to deny an application. The **Deny** icon is only visible to the Permit Manager assigned to the application. Enter a message to the customer and a message to the Message Center. Enter Special Provisions as necessary. If any Custom Text Snippets were entered in the **Preferences** page, they can be selected from the appropriate dropdown. The text will display in the text box, but can be edited as desired. Finally, enter an expiration date for the permit; a date one year from the current date is the field by default. Click **Submit** to approve the Permit, click **Clear** to clear any entered data, or click the grey to return to the permit application without approving.



Upon denial, the status changes to **Denied** and only action icons are **Add Watch**, **Request for Comment**, **Print** and **Save**.

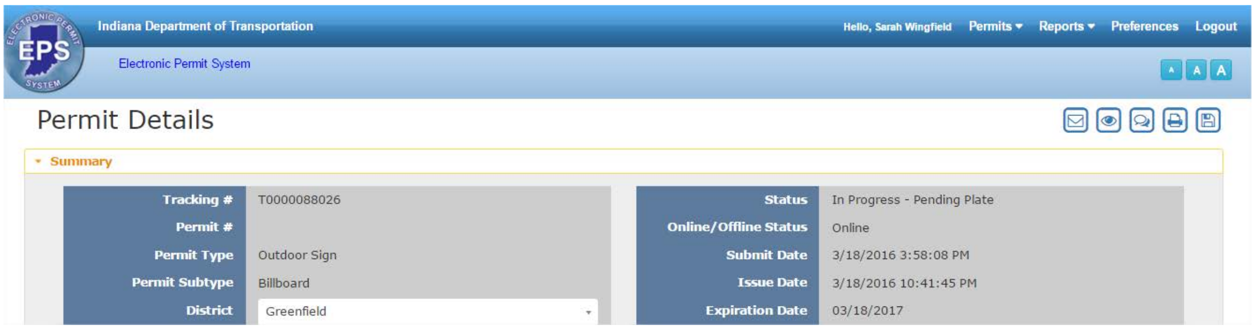


Outdoor Sign Actions

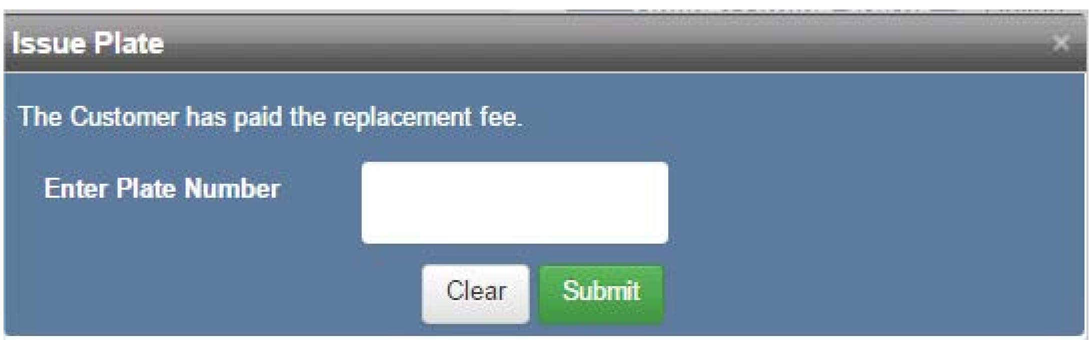
Some actions are applicable only to Outdoor Signs/Billboards. They are: **Issue Plate**, **Remove Sign**, **Restore Sign** and **Revoke Sign**.

Issue Plate

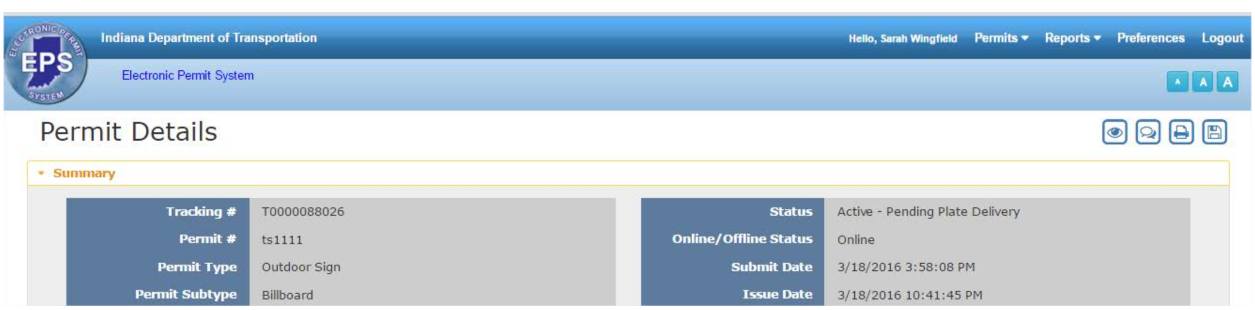
When a submitted Outdoor Sign permit is approved, the status changes to **In Progress – Pending Plate**.



Click **Issue Plate** once the plate is ready to issue. Issuing a plate acknowledges that the customer has paid the plate fee. Enter the Plate Number and click **Submit** to issue the plate, click **Clear** to clear any entered data or click the grey to close the window and return to the permit application.



After issuing the plate, the status changes to **Active – Pending Plate Delivery**.



Once an Inspection Report is approved, the status changes to **Active** with the options to **Remove Sign** , **Restore Sign**  and **Revoke Sign** .

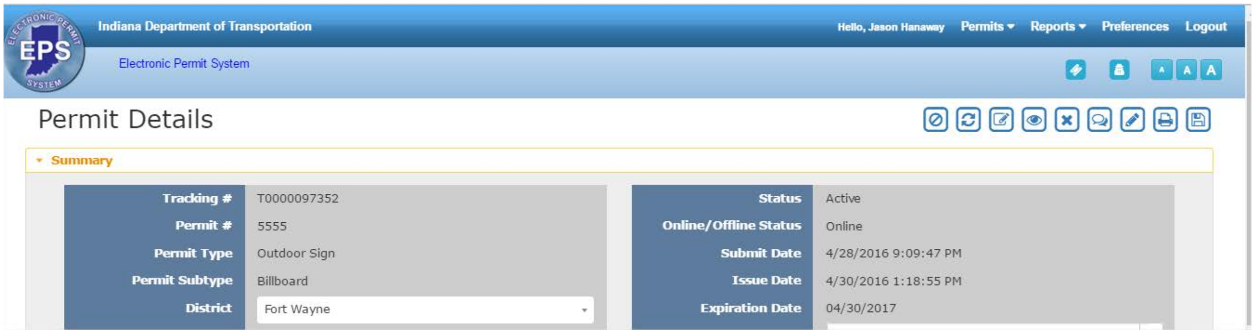
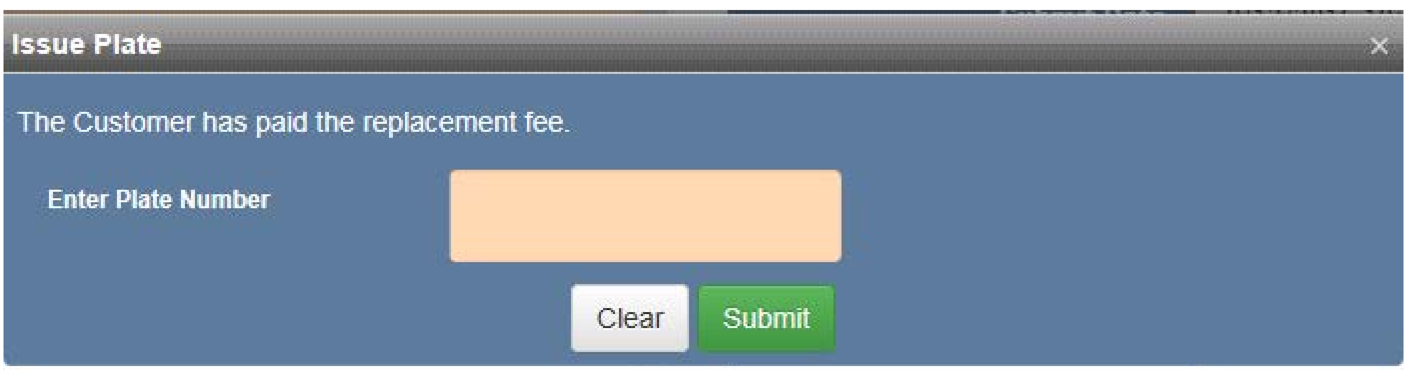


Plate Assignment

1. Assign a new plate.

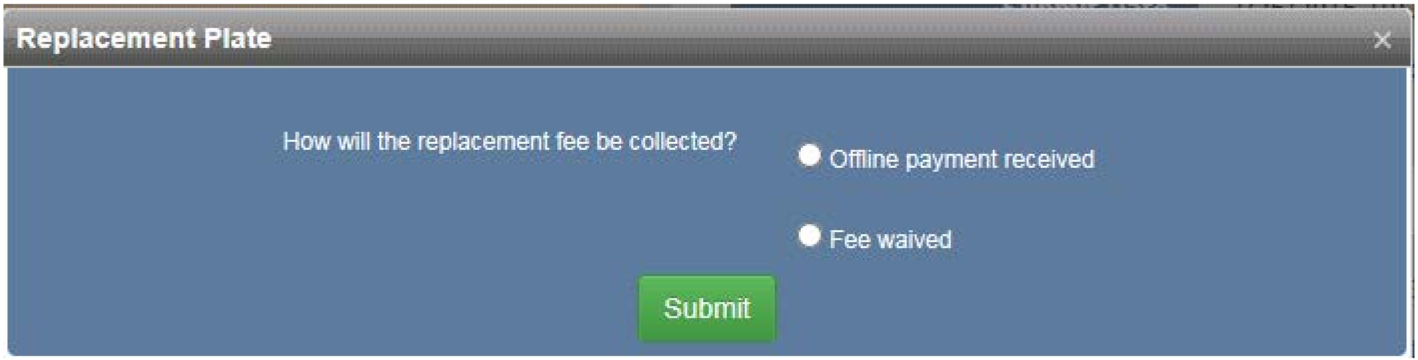
   This includes newly approved billboards that have never been plated. Open the application. The application will be in pending plate status. Click the envelope icon at the top right hand corner of the screen. When the cursor is held over the button it says “issue plate”. At this point, payment has been received so just the plate number needs to be entered. A plate will be selected out of the bulk plate stock and be documented as being issued. A small box will pop up when the issue plate icon is clicked so the plate number can be entered and submitted.



2. Assign a replacement plate.

   This includes all board types whether it be an L or a C plate or an illegal board that has been issued a plate after a legal hearing.
   Open the application and click on the replacement plate icon at the top right hand corner of the screen. The icon has two arrows on it. The icon can also be identified by holding the cursor over the icon.

When the icon is clicked, this box appears:



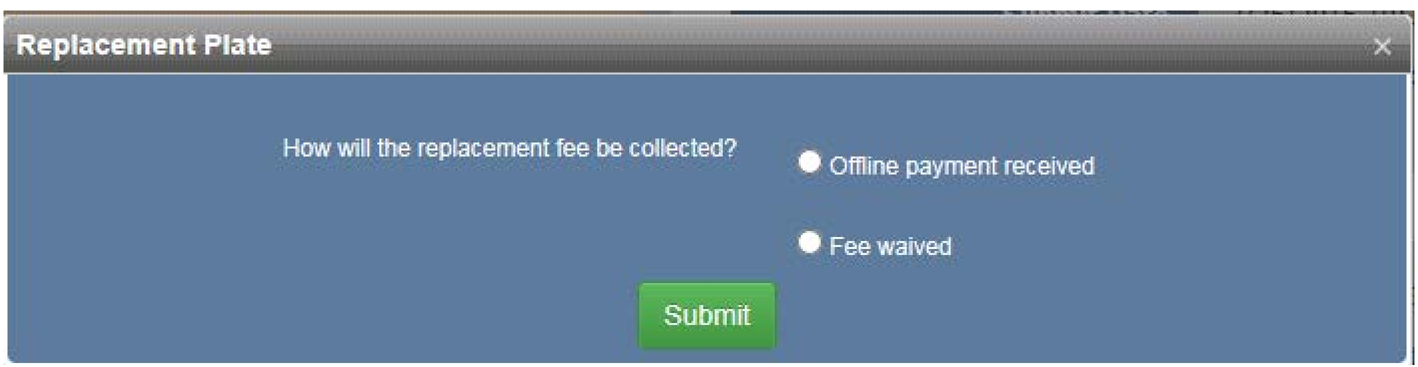
The box above will appear when an INDOT employee requests the replacement plate.

The outside customer can request a replacement plate and pay for it with a credit card. The district will receive a notice from EPS and assign the plate.

3. Downgrade a sign from L to C plate.

Change classification to match the plate. Do this by going under the outdoor sign details in the permit and change the sign classification from L to C. This is done by district staff only.

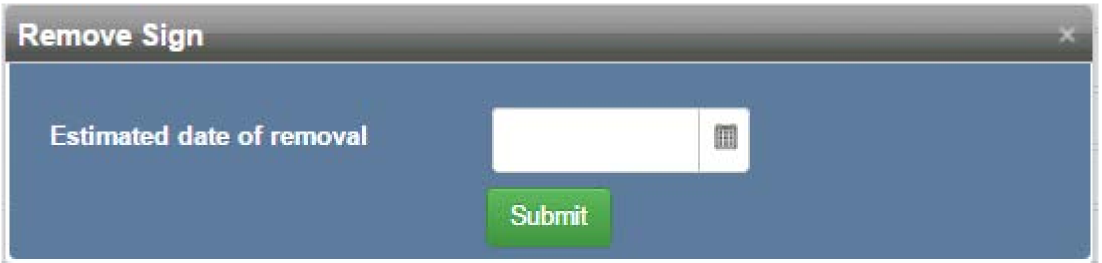
Click on the replacement plate icon at the top right hand corner of the screen. The icon has two arrows on it. The icon can also be identified by holding the cursor over the icon.



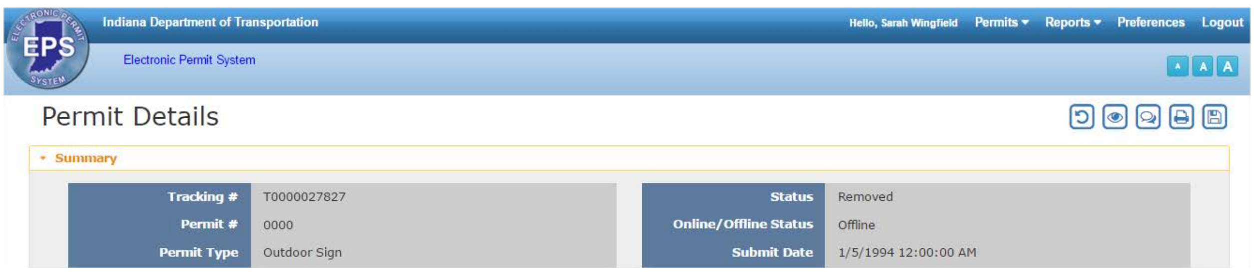
The box above will appear when an INDOT employee requests the replacement plate. This process is for INDOT employees only.

Remove Sign

Click **Remove Sign** to indicate an Outdoor Sign has been removed. It is only available to the Investigator and Permit Manager assigned to the permit application and the EPS Admin, and only when the application status is **Active**. Enter the estimated date of removal and click **Submit** to mark the sign removed or click the grey to close the window and return to the permit application.

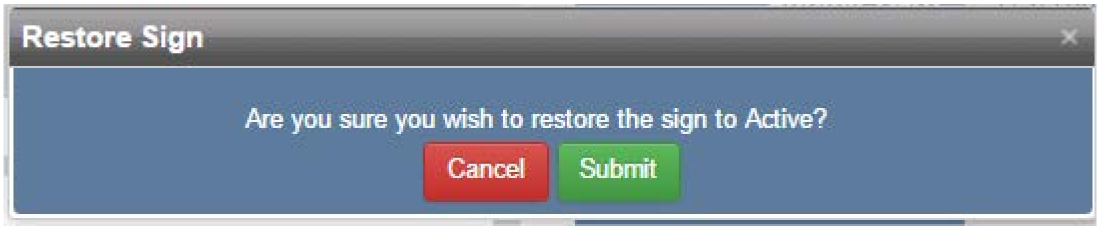


Click **OK** at the confirmation message. Once marked Removed, the status changes to **Removed** and the only options are **Restore**, **Add Watch**, **Request for Comment**, **Print** and **Save**.

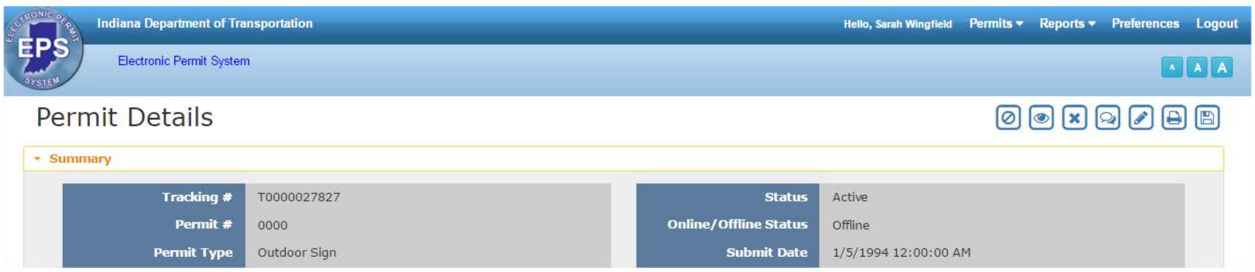


Restore Sign

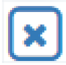
Click **Restore Sign**  to indicate an Outdoor Sign has been restored. Click **Submit** at the confirmation message to restore the sign or click **Cancel** to return to the application without restoring the sign.

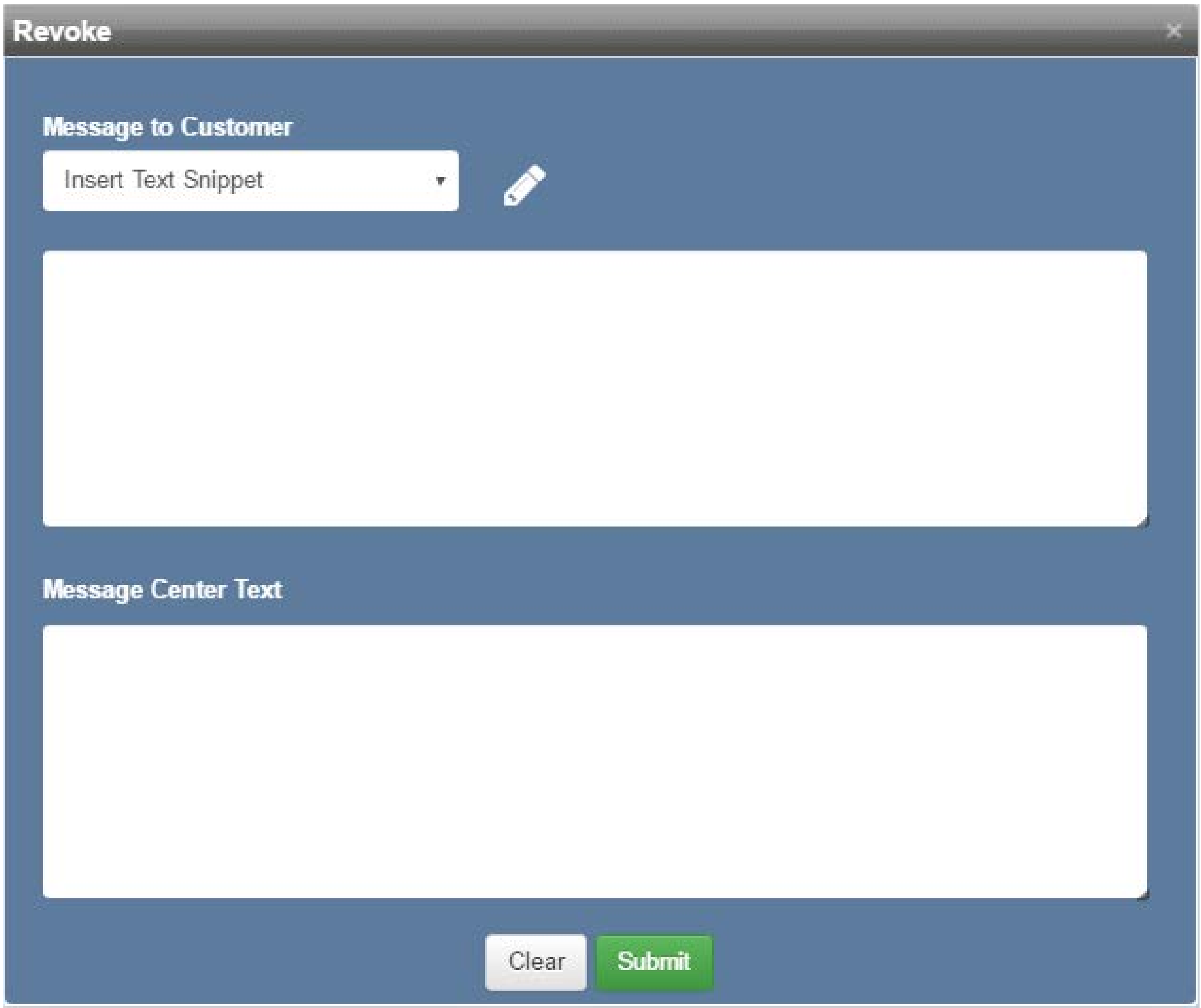


If restored, the status changes to **Active** and the actions are **Remove Sign**, **Add Watch**, **Revoke**, **Request for Comment**, **Addendum**, **Print** and **Save**.



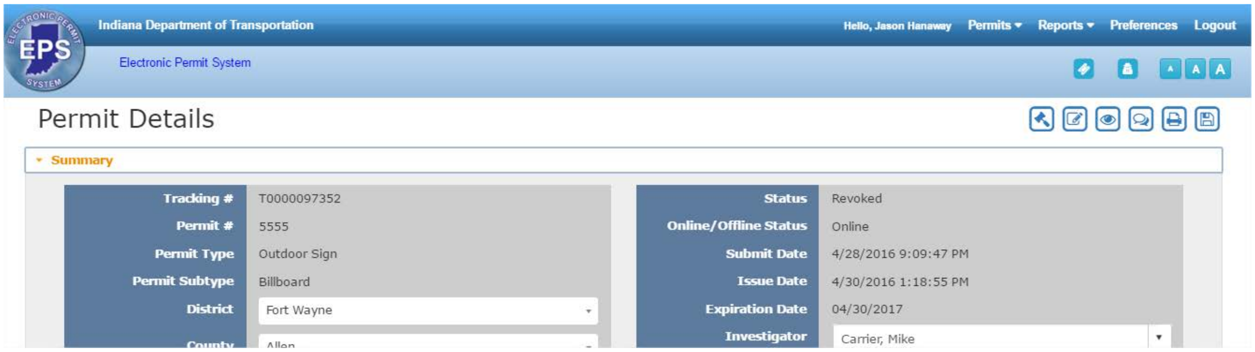
Revoke Sign

Click **Revoke Sign**  to revoke a sign. Enter a message to the customer and another to the Message Center and click **Submit** to revoke the sign or click **Cancel** to return to the permit without revoking the sign.

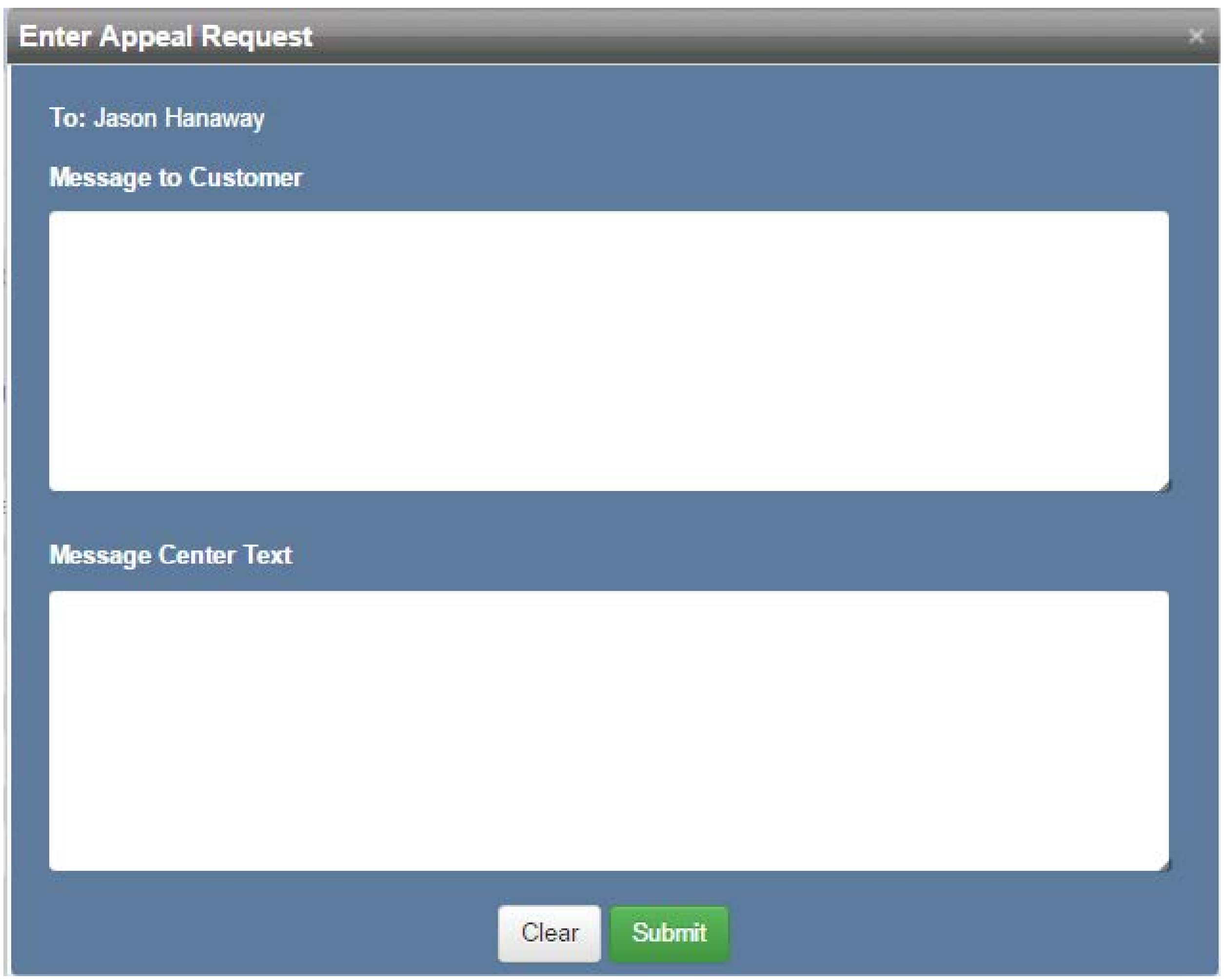


Enter Appeal Request

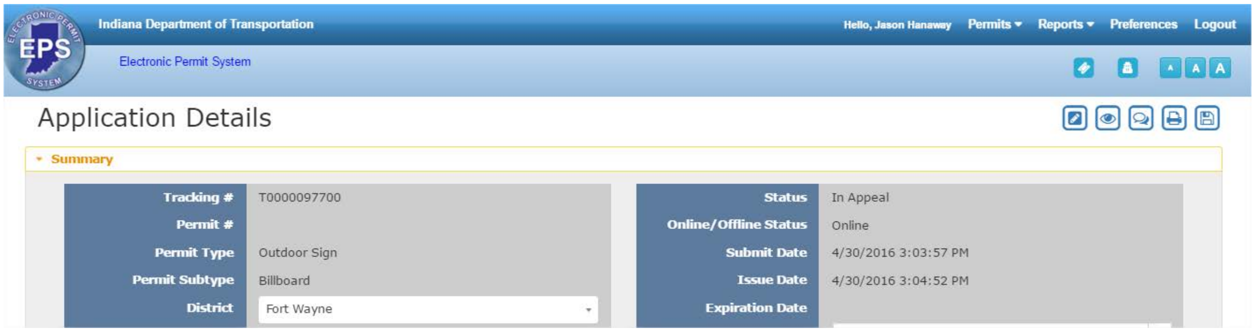
If an Outdoor Sign permit has been denied or revoked, click **Enter Appeal Request** to enter an appeal request. This option is only available to the Permit Manager.



Enter a message to the Customer and one for the Message Center and click **Submit** to submit the Appeal Request or click **Clear** to clear the text fields or click the grey to close the window and return to the permit application.

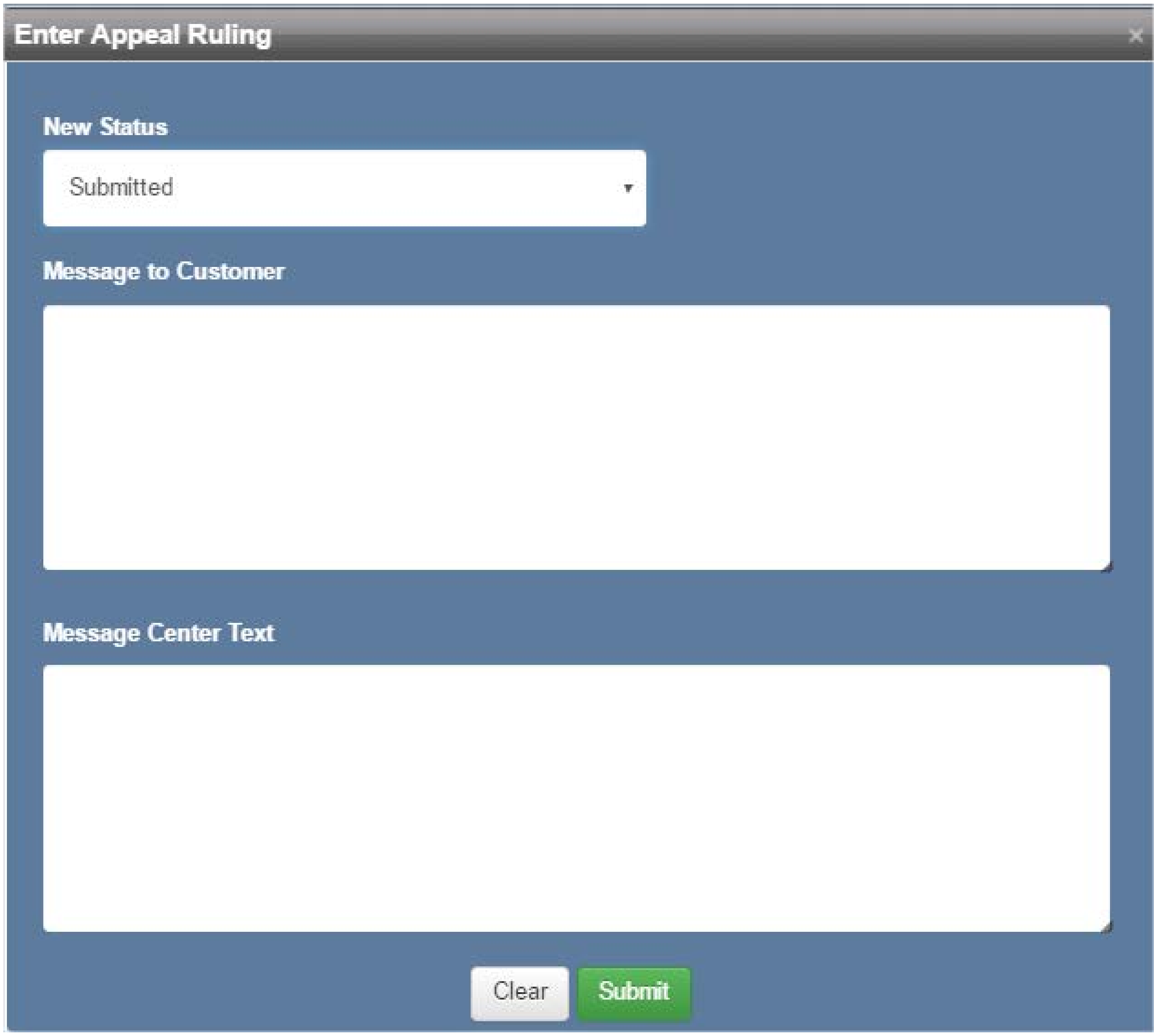


The status changes to **In Appeal** and the **Enter Appeal Ruling**  icon is available.

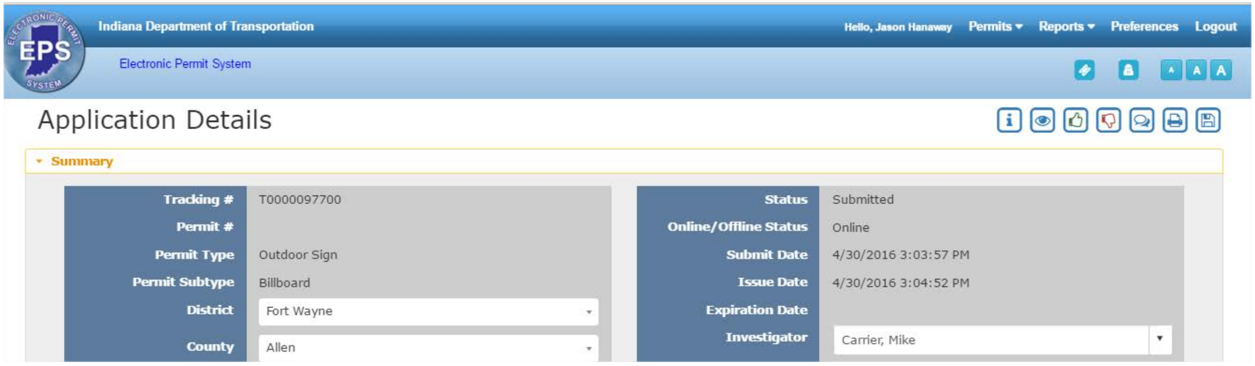


Enter Appeal Ruling

Click **Enter Appeal Ruling** to enter an appeal ruling in the case of a denied or revoked Outdoor Sign permit. Select the new status from the dropdown, enter text for the Customer and Message Center and click **Submit** to submit the Appeal Ruling or click **Clear** to clear the text fields or click the grey to close the window and return to the permit application.



The status is changed to the selected status and the available action icons are updated as appropriate.

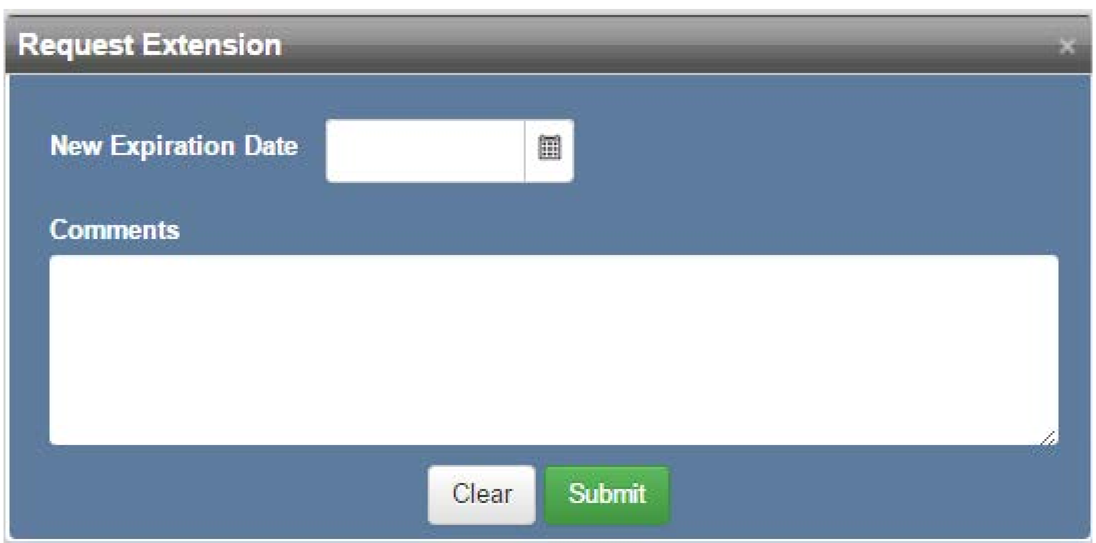


Active Permit Actions

Once a permit is Active, several additional actions can be taken.

Request Extension

Investigators can click **Request Extension** to request an extension on an active permit. Enter the new Expiration date and add Comments .Click **Submit** to request the extension, click **Clear** to clear any entered data, or click the grey to return to the permit without requesting an extension.

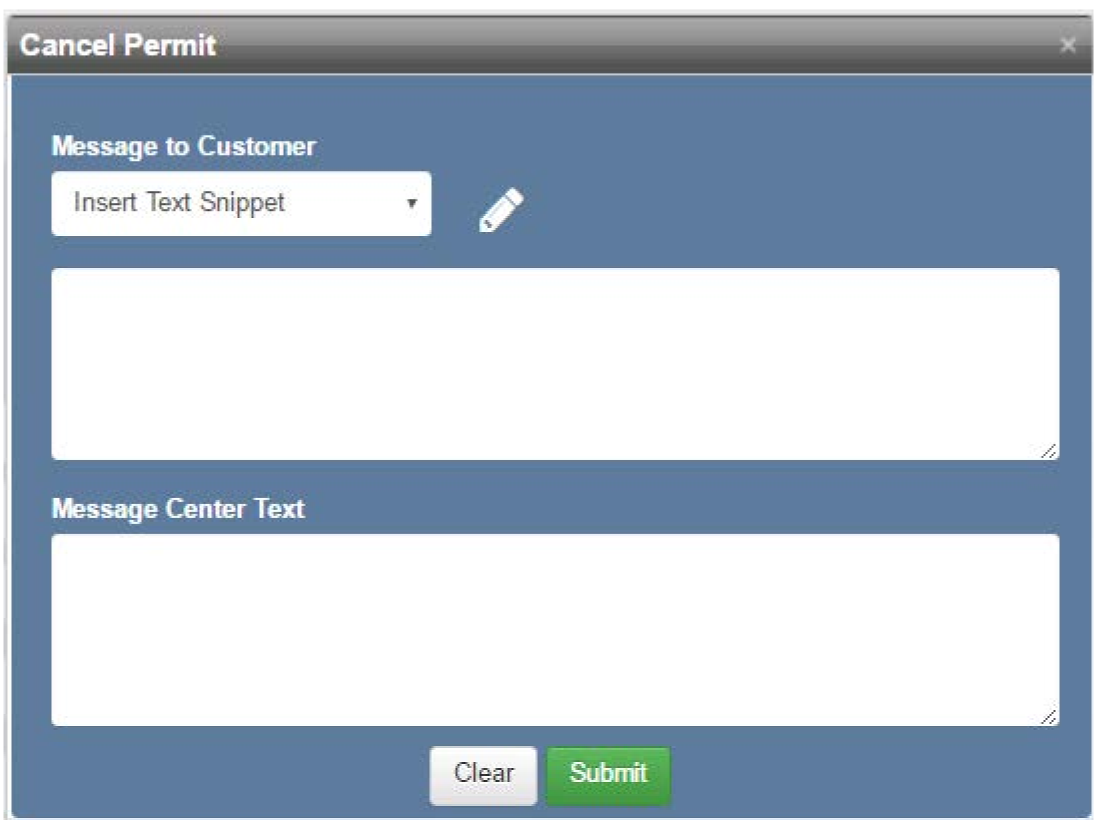


Grant Extension

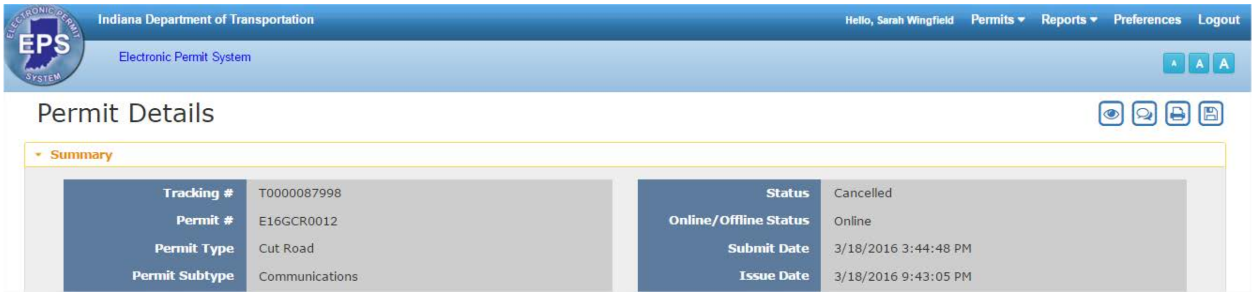
Permit Managers can click **Grant Extension** to grant an extension on an active permit. Enter the new Expiration date and add Comments .Click **Submit** to grant the extension, click **Clear** to clear any entered data, or click the grey to return to the permit without granting an extension.

Cancel

Click **Cancel** to Cancel an Active permit. Enter the text to be sent to the Community as well as a message for the Message Center. Click **Submit** to cancel the Permit, click **Clear** to clear any entered data, or click the grey to return to the permit without cancelling.

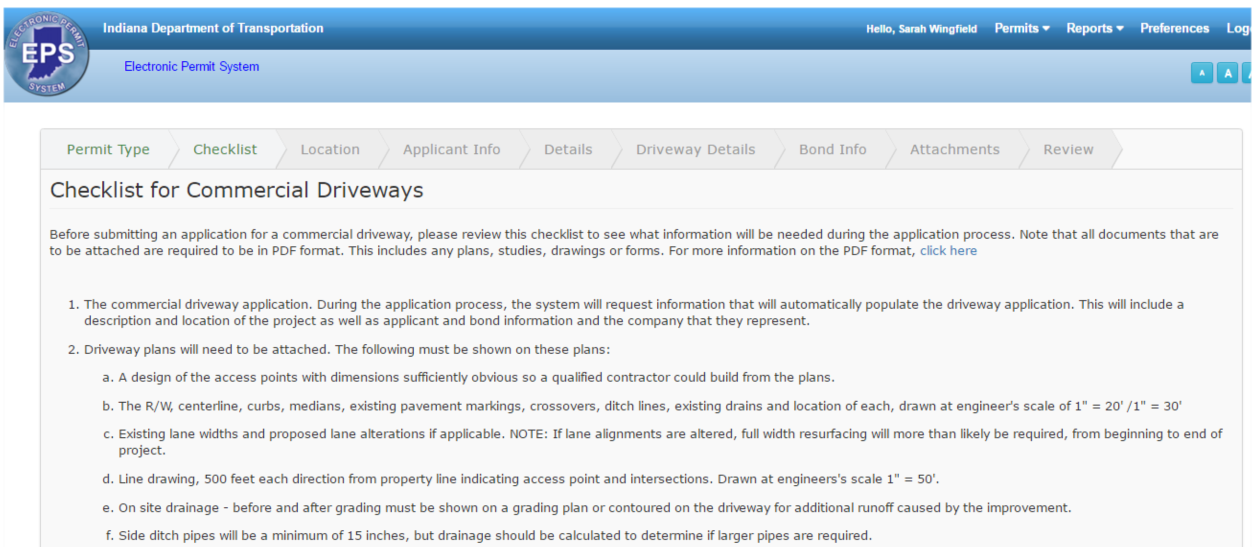


Upon cancelling the **Addendum** icon is removed and the status changes to **Cancelled**. An email is sent to the Community notifying them of the change in status.

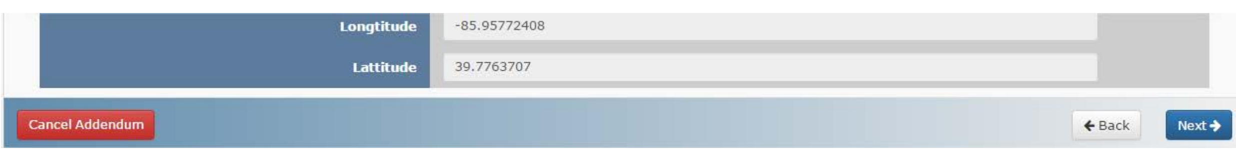


Addendum

Click **Addendum** to create an addendum to an approved Permit. A new permit application will open with the Permit Type and Subtype selected based on the previously approved permit.



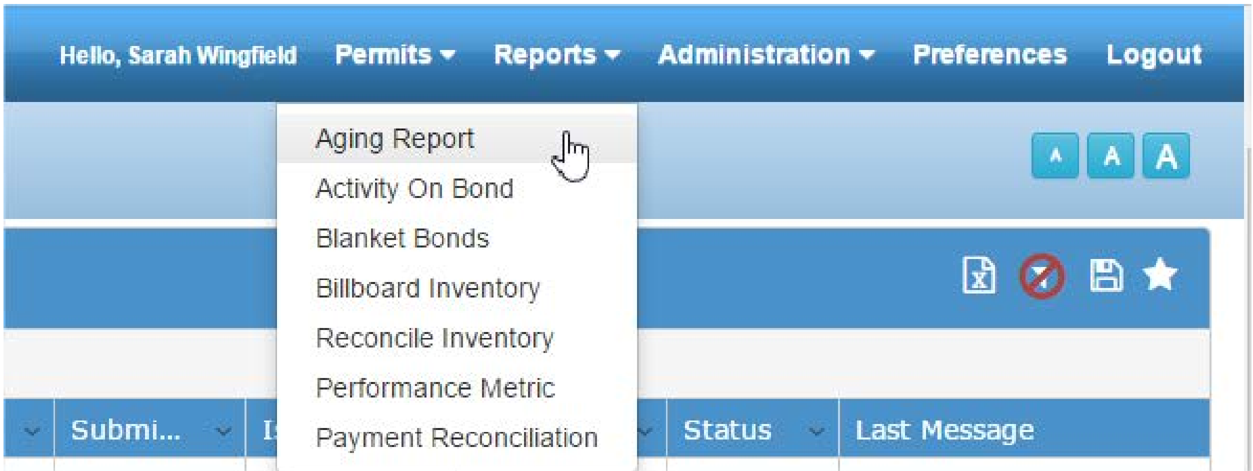
Progress through the sections as with the initial application. Click **Cancel Addendum** at the bottom of the page to cancel the addendum or click **Back/Next** to move through the addendum application process.



Enter the payment information and click **Submit** to submit the Addendum. Once the Addendum is approved, the original Permit status is changed to **Addendum Approved** and the Addendum's status is changed to **Active**.

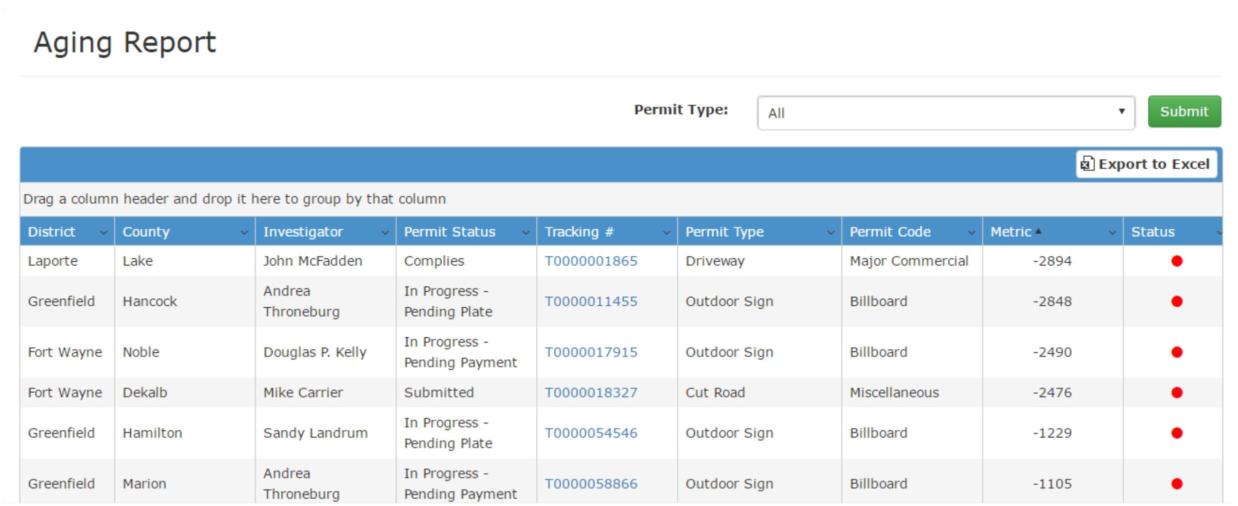
Reports

Frequently used reports are available to view through the Reports menu. Click on the desired report from the Reports submenu to display the selected report.



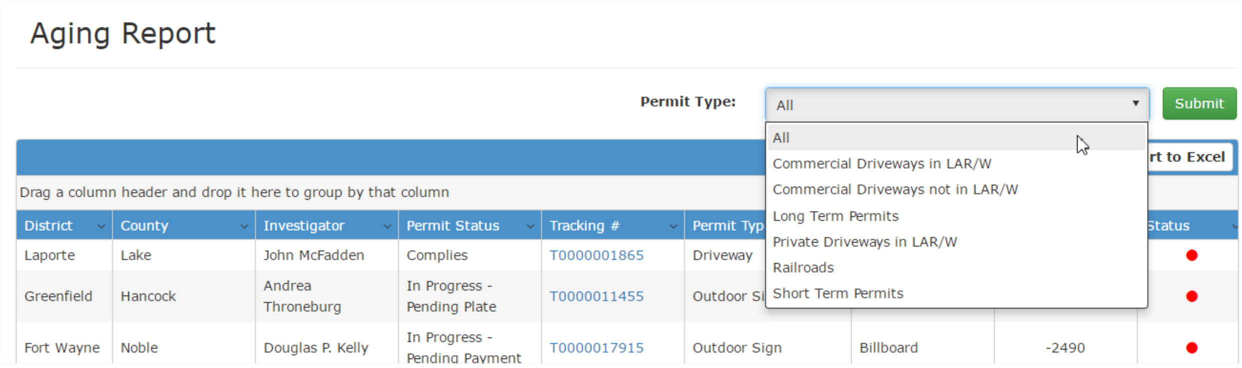
Aging Report

The Aging Report provides a way to view overdue permits. In addition to the tools described in the [Table Tools]() section, the Report can be narrowed by selecting a Permit Type from the Permit Type dropdown.



District	County	Investigator	Permit Status	Tracking #	Permit Type	Permit Code	Metric	Status
Laporte	Lake	John McFadden	Complies	T0000001865	Driveway	Major Commercial	-2894	●
Greenfield	Hancock	Andrea Throneburg	In Progress - Pending Plate	T0000011455	Outdoor Sign	Billboard	-2848	●
Fort Wayne	Noble	Douglas P. Kelly	In Progress - Pending Payment	T0000017915	Outdoor Sign	Billboard	-2490	●
Fort Wayne	Dekalb	Mike Carrier	Submitted	T0000018327	Cut Road	Miscellaneous	-2476	●
Greenfield	Hamilton	Sandy Landrum	In Progress - Pending Plate	T0000054546	Outdoor Sign	Billboard	-1229	●
Greenfield	Marion	Andrea Throneburg	In Progress - Pending Payment	T0000058866	Outdoor Sign	Billboard	-1105	●

Select the Permit Type from the dropdown and click **Submit** to refine the Aging Report.



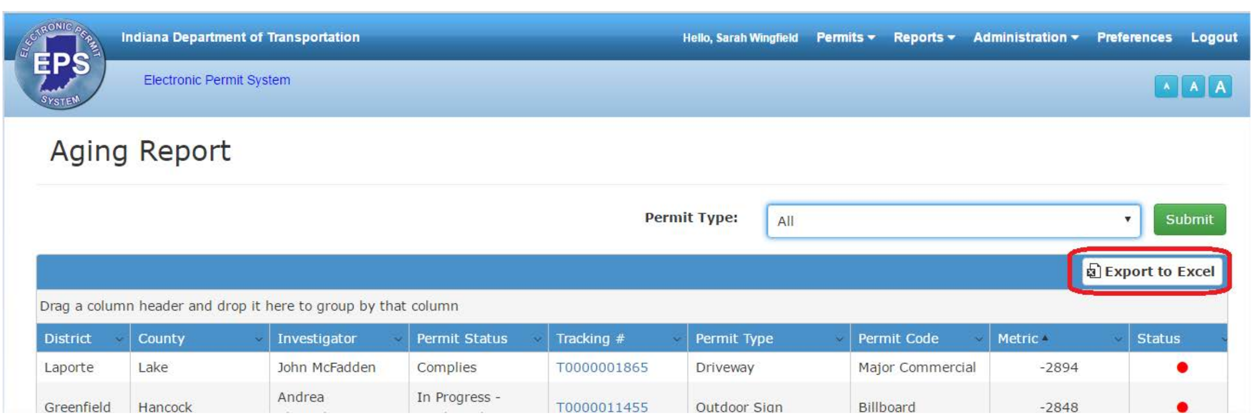
The permits displayed are those where the submitted date is not empty, the issued date is empty, and the status is not cancelled, denied, or revoked.

Anything beyond the time limits below is considered overdue:

Commercial Driveways in LAR/W: 200 days
Commercial Driveways not in LAR/W: 70 days
Long Term Permits: 70 days
Private Driveways in LAR/W: 70 days
Railroads: 10 days
Short Term Permits: 10 days

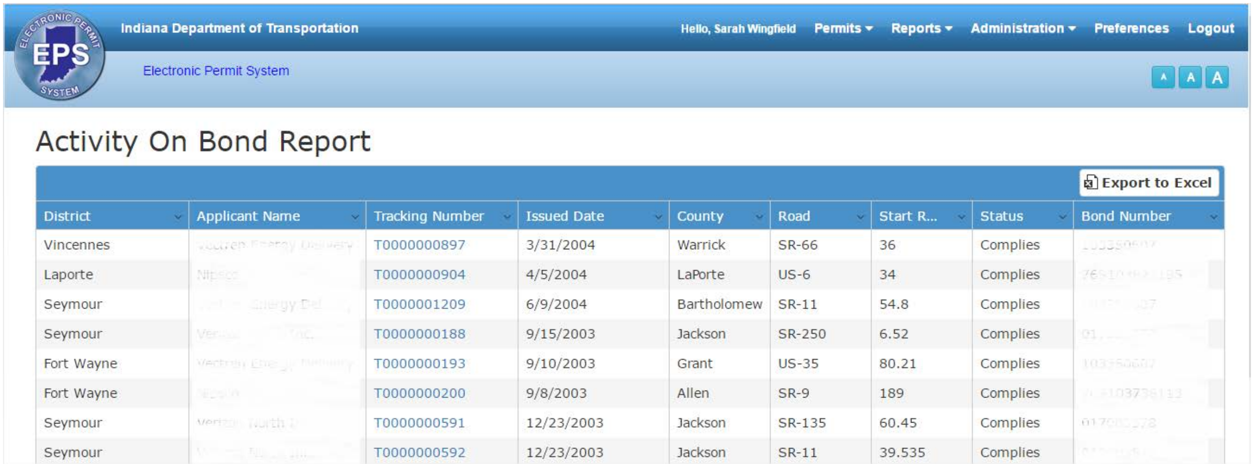
These are the Aging Metrics, not the Performance Metrics.

The **Status** color is yellow when the record is nearing the metric due date and turns red once it has passed the metric limit. Click **Export to Excel** to export the Report.



Activity on Bond

The Activity on Bond report displays information on Bonds. Click **Export to Excel** to export the Report.



District	Applicant Name	Tracking Number	Issued Date	County	Road	Start R...	Status	Bond Number
Vincennes	[illegible]	T0000000897	3/31/2004	Warrick	SR-66	36	Complies	[illegible]
Laporte	[illegible]	T0000000904	4/5/2004	LaPorte	US-6	34	Complies	[illegible]
Seymour	[illegible]	T0000001209	6/9/2004	Bartholomew	SR-11	54.8	Complies	[illegible]
Seymour	[illegible]	T0000000188	9/15/2003	Jackson	SR-250	6.52	Complies	[illegible]
Fort Wayne	[illegible]	T0000000193	9/10/2003	Grant	US-35	80.21	Complies	[illegible]
Fort Wayne	[illegible]	T0000000200	9/8/2003	Allen	SR-9	189	Complies	[illegible]
Seymour	[illegible]	T0000000591	12/23/2003	Jackson	SR-135	60.45	Complies	[illegible]
Seymour	[illegible]	T0000000592	12/23/2003	Jackson	SR-11	39.535	Complies	[illegible]

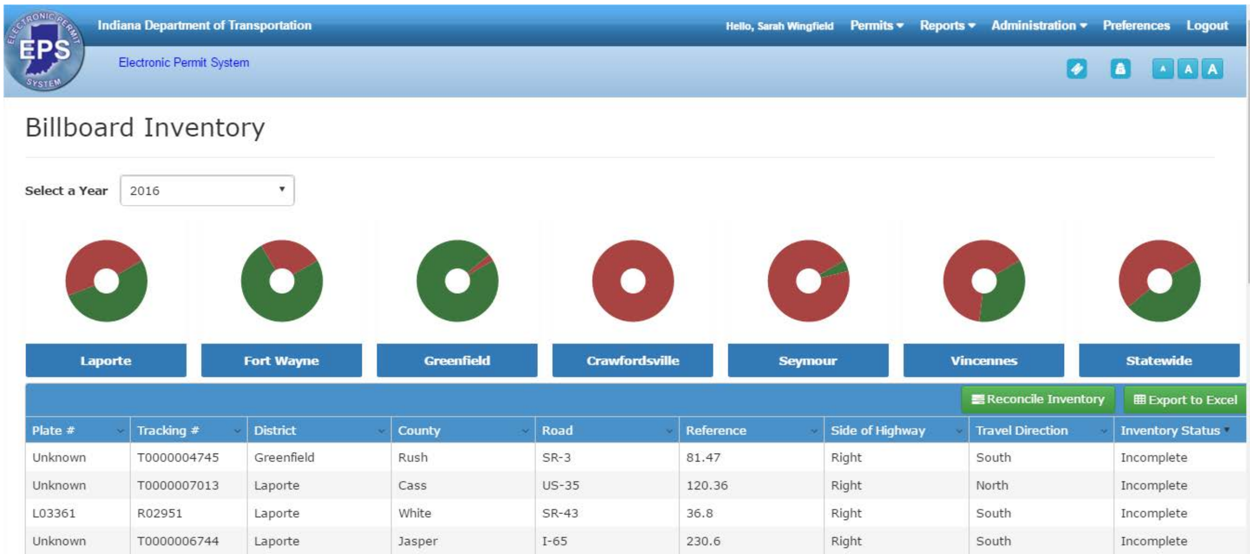
Blanket Bond

The Blanket Bond report provides detailed information on bonds. Click **Export to Excel** to export the Report.

Bond Number	Company Name	Surety Name	Surety Address	Bond Amount	Received Date	Released Date	Comments
[illegible]	[illegible]	NATIONAL FARMERS UNION PROPERTY & CASUALTY	[illegible] AURORA, CO 80014	$2,500.00	10/26/1988	8/2/2012	
[illegible]	[illegible]	FIDELITY & DEPOSIT COMPANY OF MARYLAND	[illegible] BALTIMORE, MD 21211	$2,500.00	3/20/1992	8/10/2012	
[illegible]	[illegible]	FIDELITY & DEPOSIT COMPANY OF MARYLAND	[illegible] BALTIMORE, MD 21211	$2,500.00			

Billboard Inventory

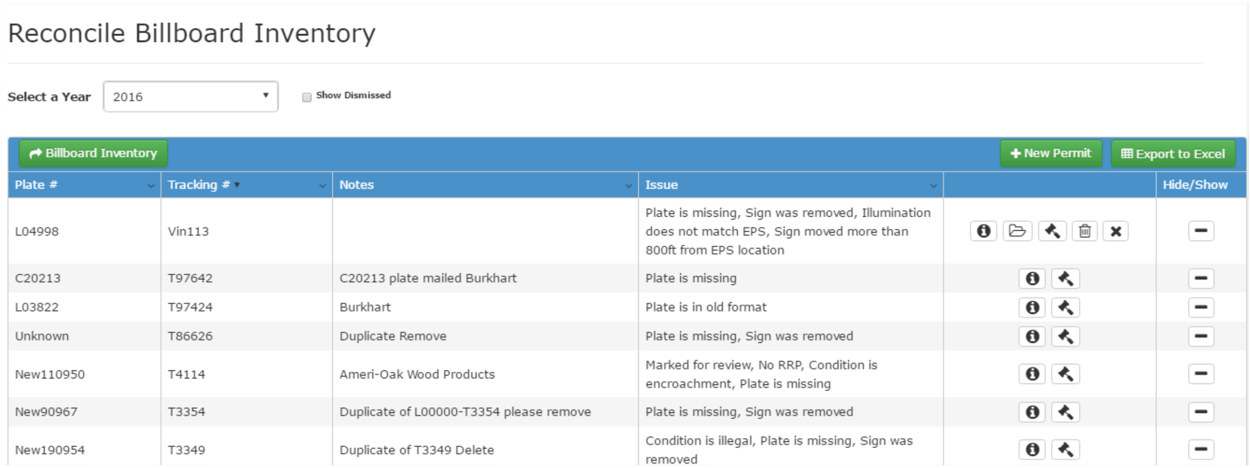
The Billboard Inventory report displays the progress of the annual Billboard Inventory and information on specific billboards. The report displays the current year's information by default. Select a year from the **Select a Year** dropdown to change the displayed billboard inventory information. A dashboard across the top of the table provides an "at a glance" indication of the completeness of each district's billboard inventory. Click **Export to Excel** to export the Report.



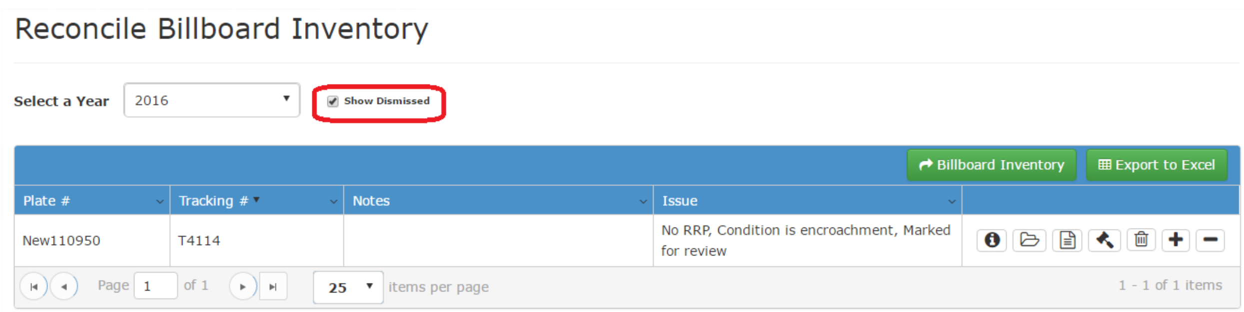
Click the **Reconcile Inventory** button to view and work with the data synched from the investigators.

Reconcile Inventory

The Reconcile Inventory report provides a place to review and take action on billboards that needed further review during the Billboard Inventory process. The report displays data for the current year by default. Select a year from the **Select a Year** dropdown to display data from a different inventory year. Click **Billboard Inventory** to return to the Billboard Inventory report page.

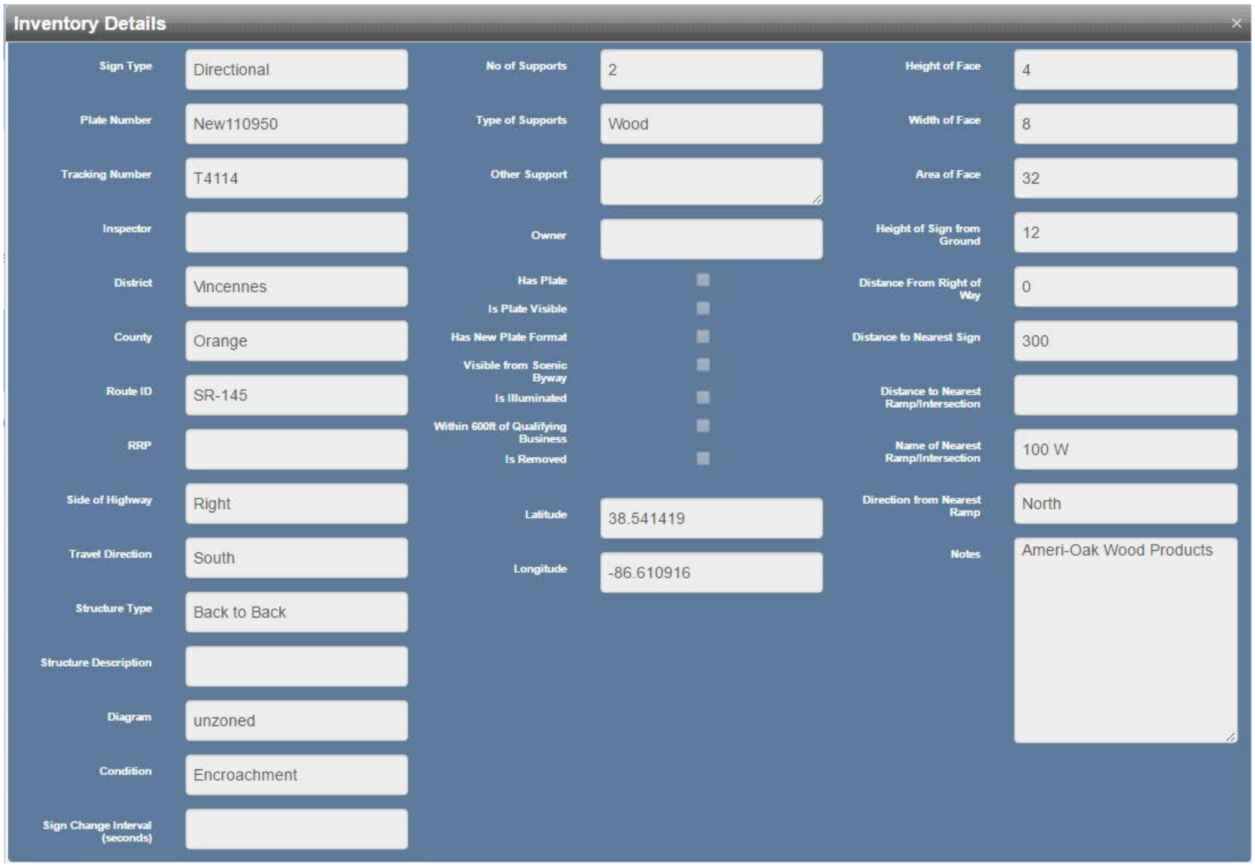


Dismissed records will not display in the report automatically. Click in the check box next to **Show Dismissed** to view dismissed records. Uncheck the box to view all the non-dismissed records.

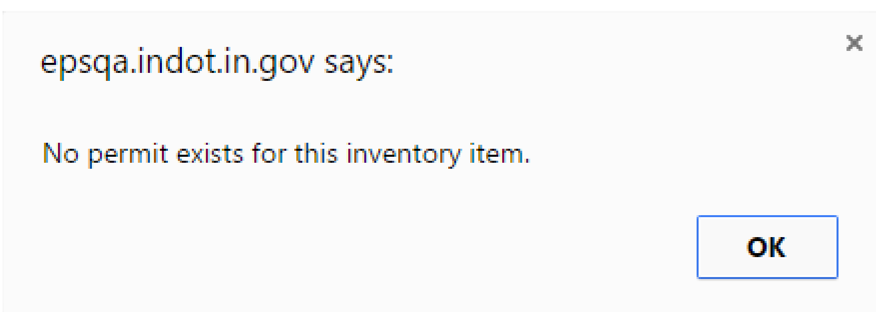


Each record has several action icons in the far right column. Users can View Inventory Details , Open the Permit , Start a New Permit , Mark as Illegal , Remove Permit , Add to Report and Dismiss .

Click **View Inventory Details** to view the Inventory Details for a record. The details open in a new window and are not editable. Click on the **Close** icon in the upper right corner to close the details and return to the Reconcile Inventory table.

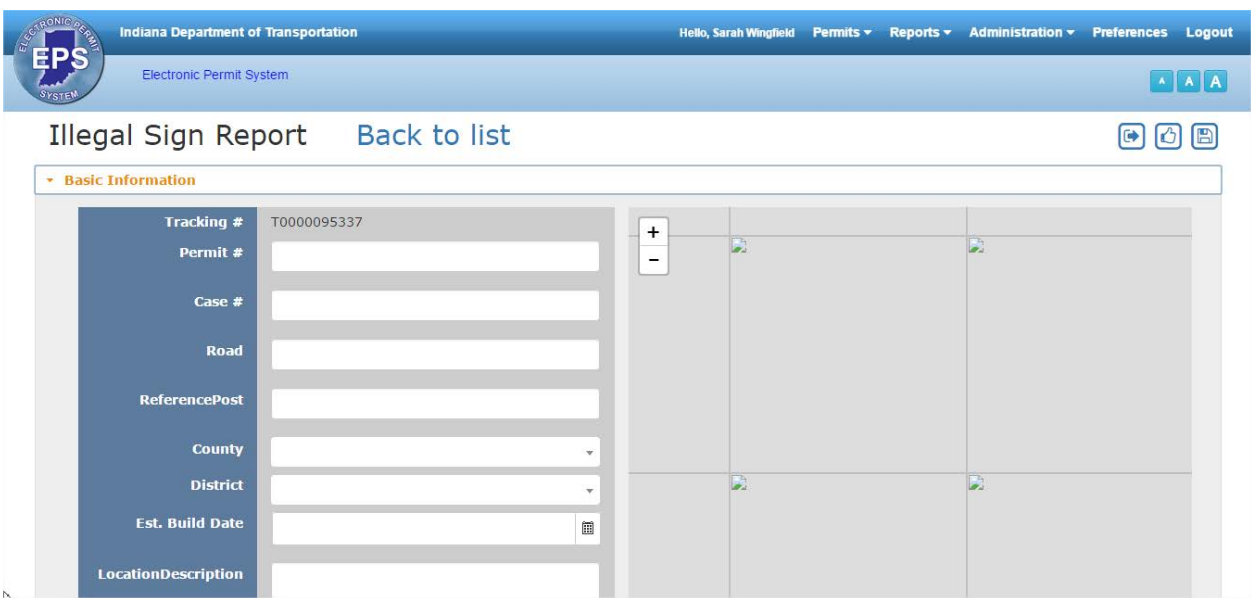


Click **Open the Permit**  to open and edit the record's permit. If no permit exists, an error message displays.

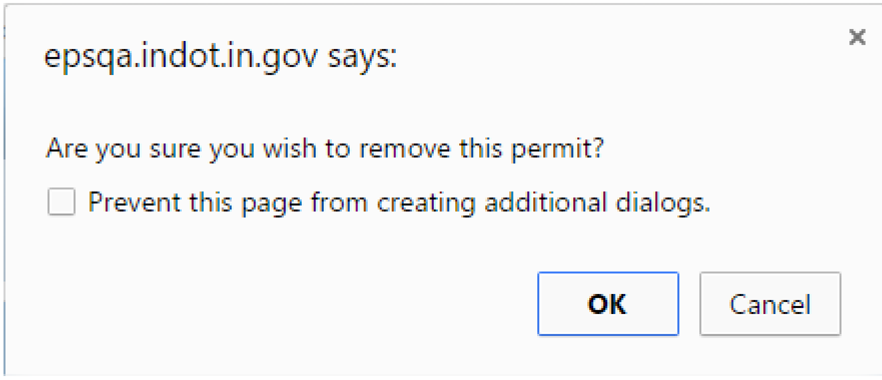


Click **Start a New Permit**  to start a new permit application for the record.

Click **Mark as Illegal**  to mark a record as illegal. The screen refreshes and displays the Illegal Sign Report add screen. See [Add Illegal Sign](#) for more information on adding Illegal Signs.



Click **Remove Permit** to remove a permit. Click **OK** at the warning message to remove the permit, or click **Cancel** to return to the Reconcile Inventory report without removing the permit.

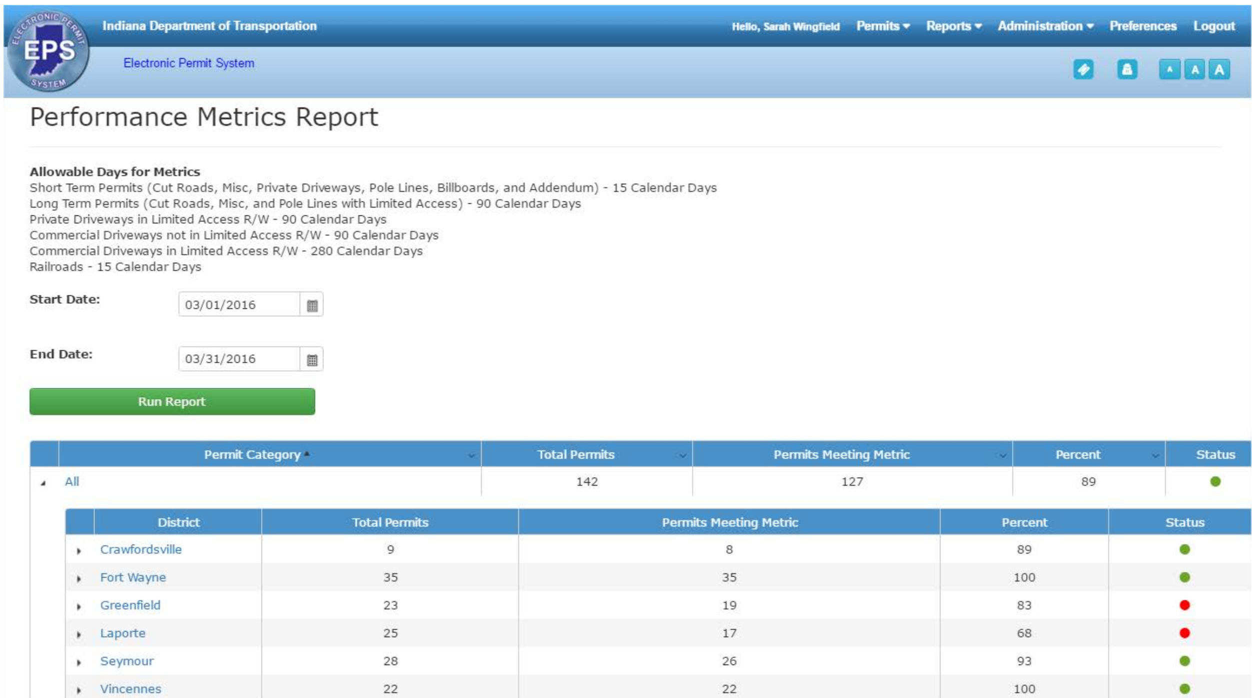


Click **Add to Report** to add a dismissed record back to the Reconcile Inventory report.

Click **Dismiss** to remove/dismiss a record from the Reconcile Inventory report. The record will removed from the report instantly. To add the record back to the Reconcile Inventory report click the **Show Dismissed** check box to display dismissed records, then click the **Add to Report** icon to add the record back to the report.

Performance Metrics

The Performance Metrics report displays the issued permits for a given date range and displays if they meet the metrics for categories of permit type, District, and for a given investigator. Select the **Start** and **End Date** by typing in the dates or clicking on the calendar to select days by clicking on the calendar. Click **Run Report** to run the report and display the results.



The returned results display in the table under the **Run Report** button. Green dots indicate metrics were met; red dots mean metrics were not completed in the allowable days. Click on the District Name (or Permit Category) to view the Detail Metric Report.

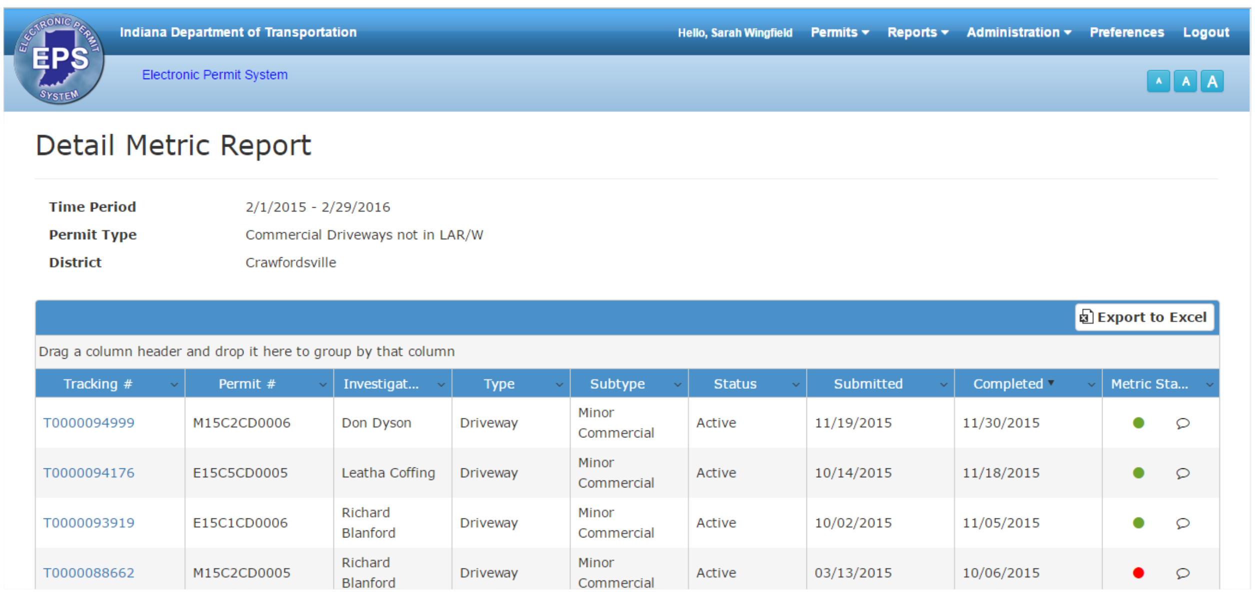
The permits displayed are those where the submitted date is not empty, the issued date is empty, and the status is not cancelled, denied, or revoked.

Anything beyond the time limits below is considered overdue:

Commercial Driveways in LAR/W: 280 days
Commercial Driveways not in LAR/W: 90 days
Long Term Permits: 90 days
Private Driveways in LAR/W: 90 days
Railroads: 15 days
Short Term Permits: 15 days

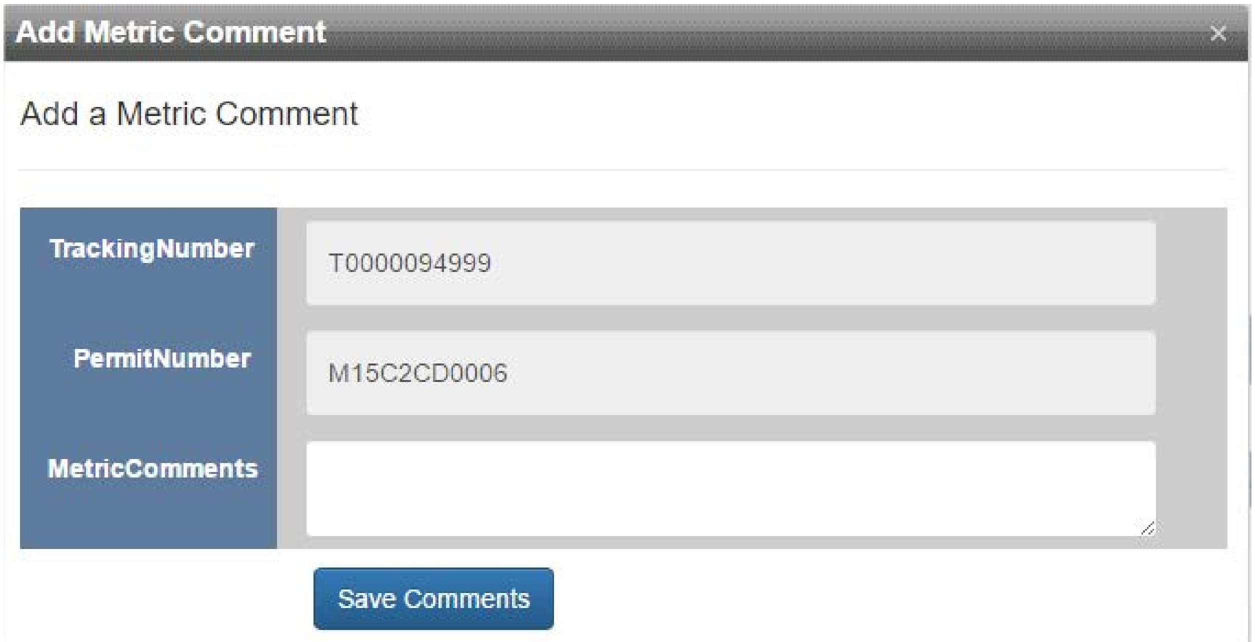
These are the Performance Metrics, not the Aging Metrics.

The Detail Metric Report provides specific details on the Performance Metrics. Click **Export to Excel** to export the Report.



Tracking #	Permit #	Investigat...	Type	Subtype	Status	Submitted	Completed	Metric Sta...
T0000094999	M15C2CD0006	Don Dyson	Driveway	Minor Commercial	Active	11/19/2015	11/30/2015	
T0000094176	E15C5CD0005	Leatha Coffing	Driveway	Minor Commercial	Active	10/14/2015	11/18/2015	
T0000093919	E15C1CD0006	Richard Blanford	Driveway	Minor Commercial	Active	10/02/2015	11/05/2015	
T0000088662	M15C2CD0005	Richard Blanford	Driveway	Minor Commercial	Active	03/13/2015	10/06/2015	

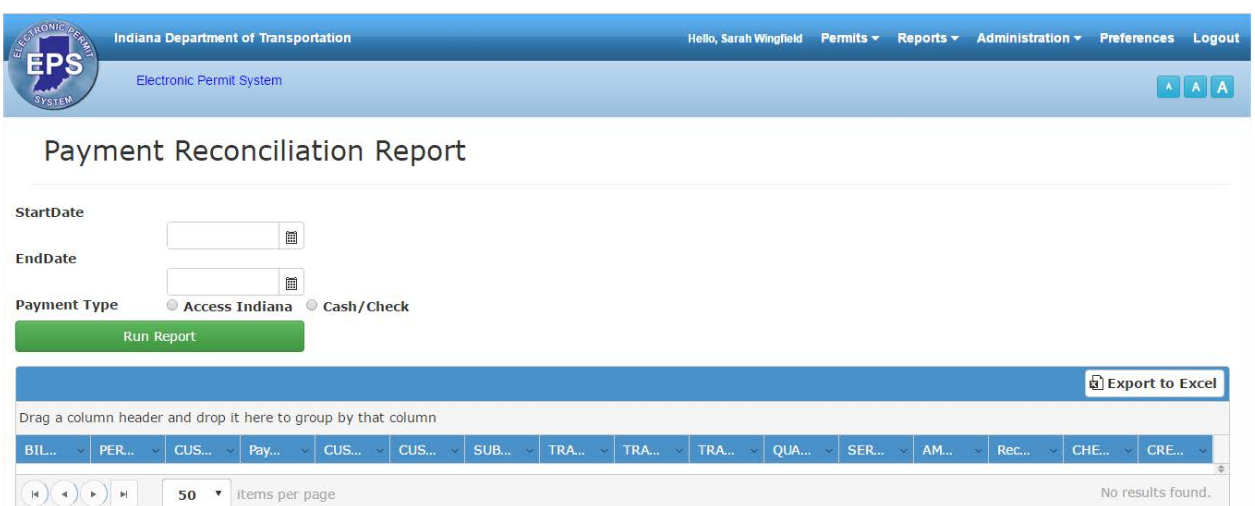
Click on the **Metric Comments** icon to add or view Metric Comments. Add information as necessary and click **Save Comments** to save the comment or click the grey **X** in the upper right corner to close the window without adding a comment.



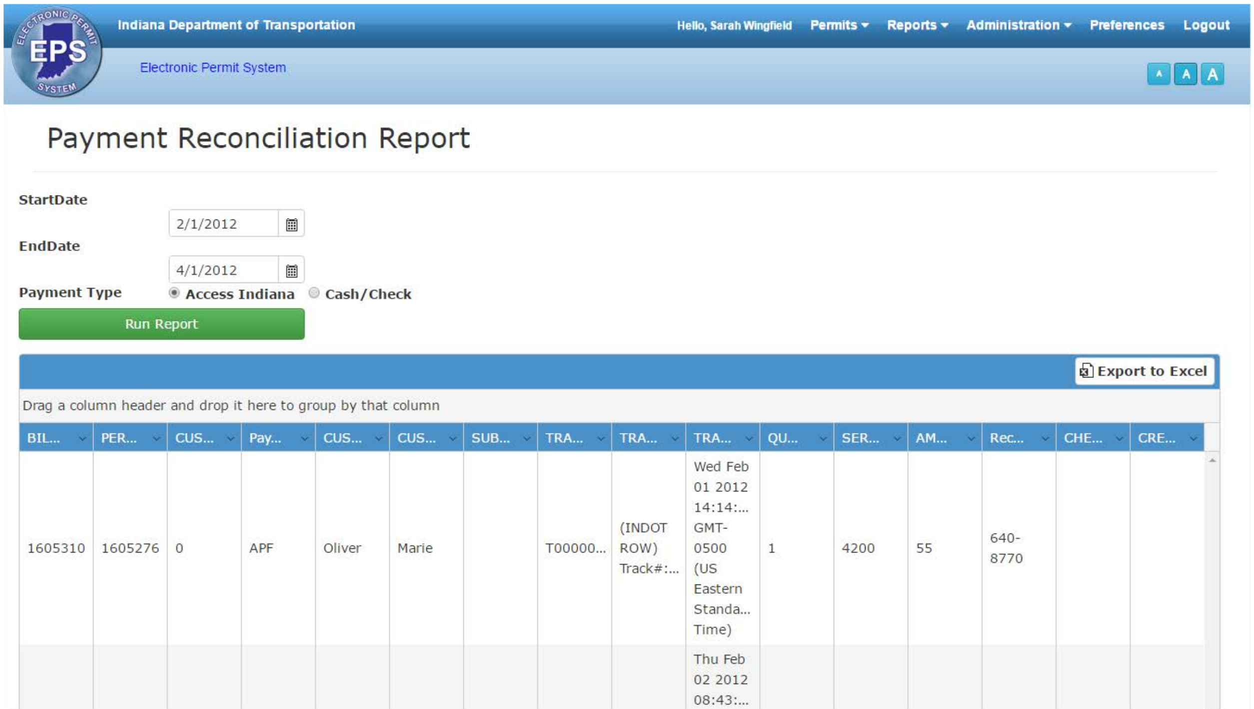
Once a comment has been added, the **Metric Comments** speech bubble turns black . Click on the icon to view or edit comments. Once a comment is added it cannot be deleted.

Payment Reconciliation

The Payment Reconciliation report displays the payments EPS received over a specified time period so that Accounting can reconcile against bank statements. Select the **Start** and **End Date** by typing in the dates or clicking on the calendar to select days by clicking on the calendar. Select the payment type by clicking in the radio button next to Access Indiana or Cash/Check. Click **Run Report** to run the report and display the results.



The results display in the Payment Reconciliation table. Click **Export to Excel** to export the Report.

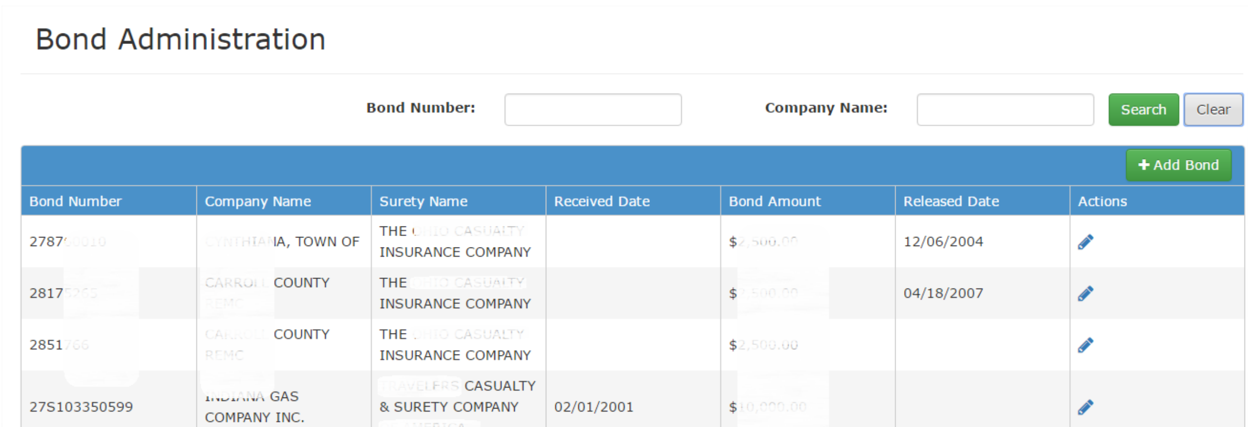


Administration

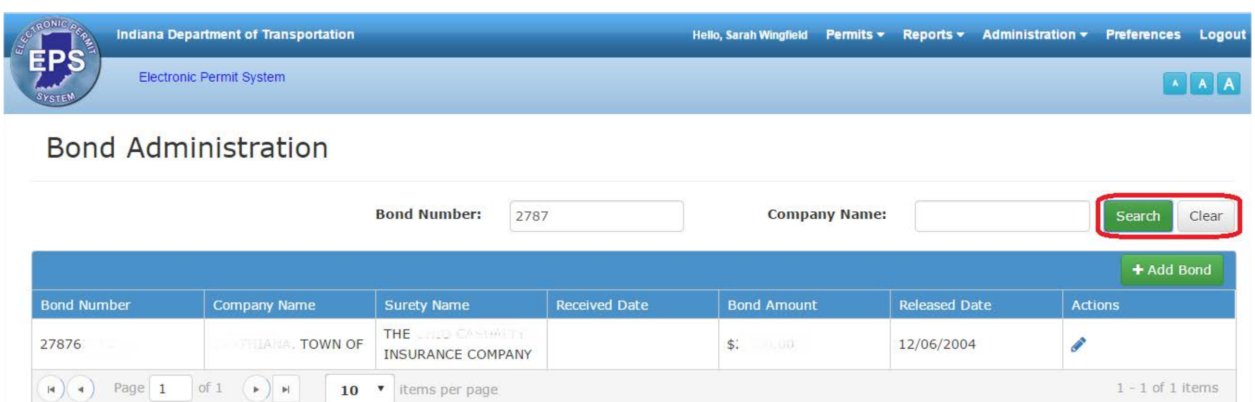
Some of the tasks specific to EPS System Administrators are located in the **Administration** menu. Click on the desired topic from the Administration submenu to display the selected section.

Bonds

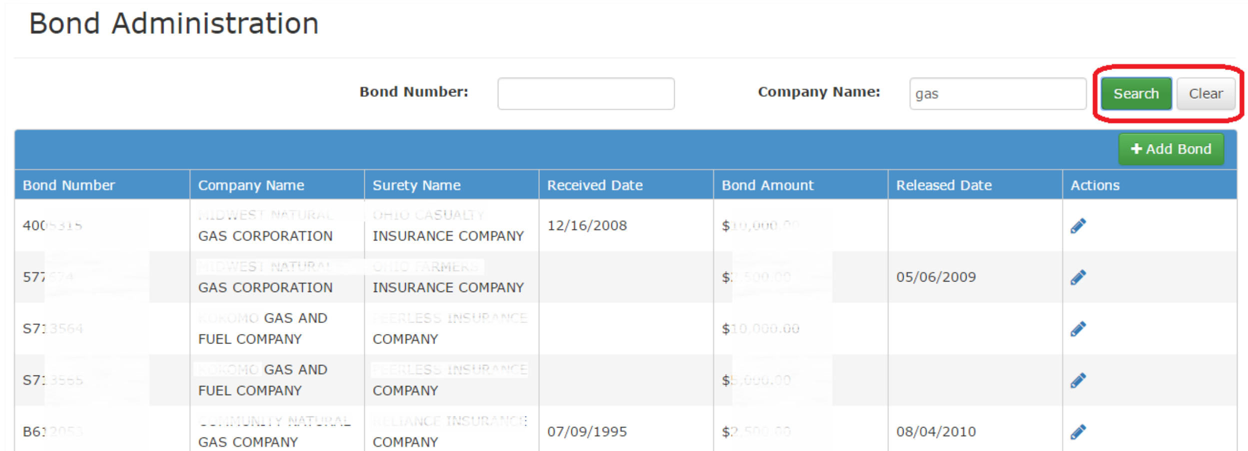
Administrators need to maintain and administer Bond information. On the Bond Administration screen administrators can search for bond by Bond Number or Company Name as well as add or edit a bond.



To search for a Bond by Bond Number, enter a bond number (or just a portion of the bond number) and click **Search**. The table will display only the matching results. Click **Clear** to clear the search and return all results.

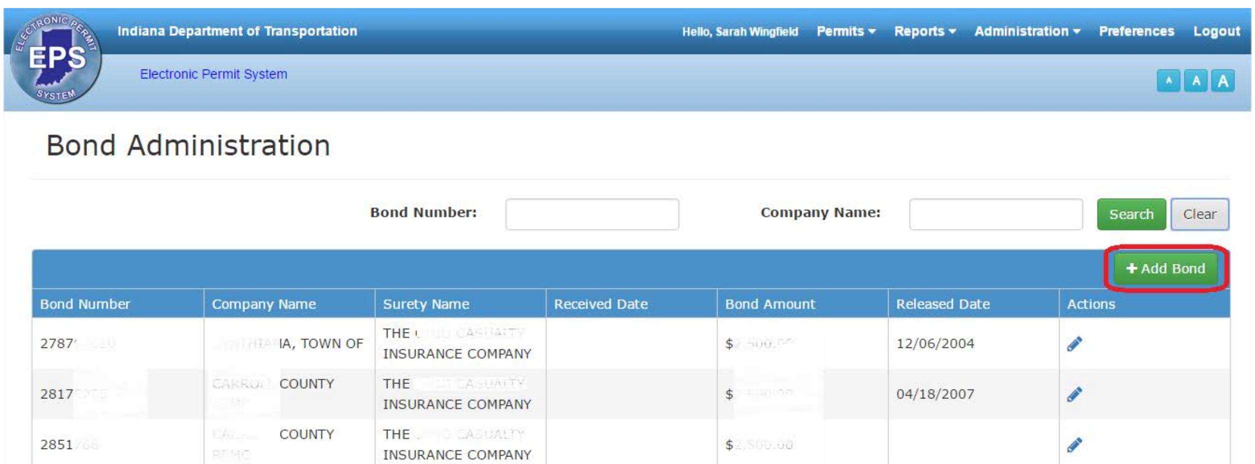


To search for a Bond by Company Name, enter the company name (or a portion of the company name) and click **Search**. The table will display only the matching results. Click **Clear** to clear the search and return all results.

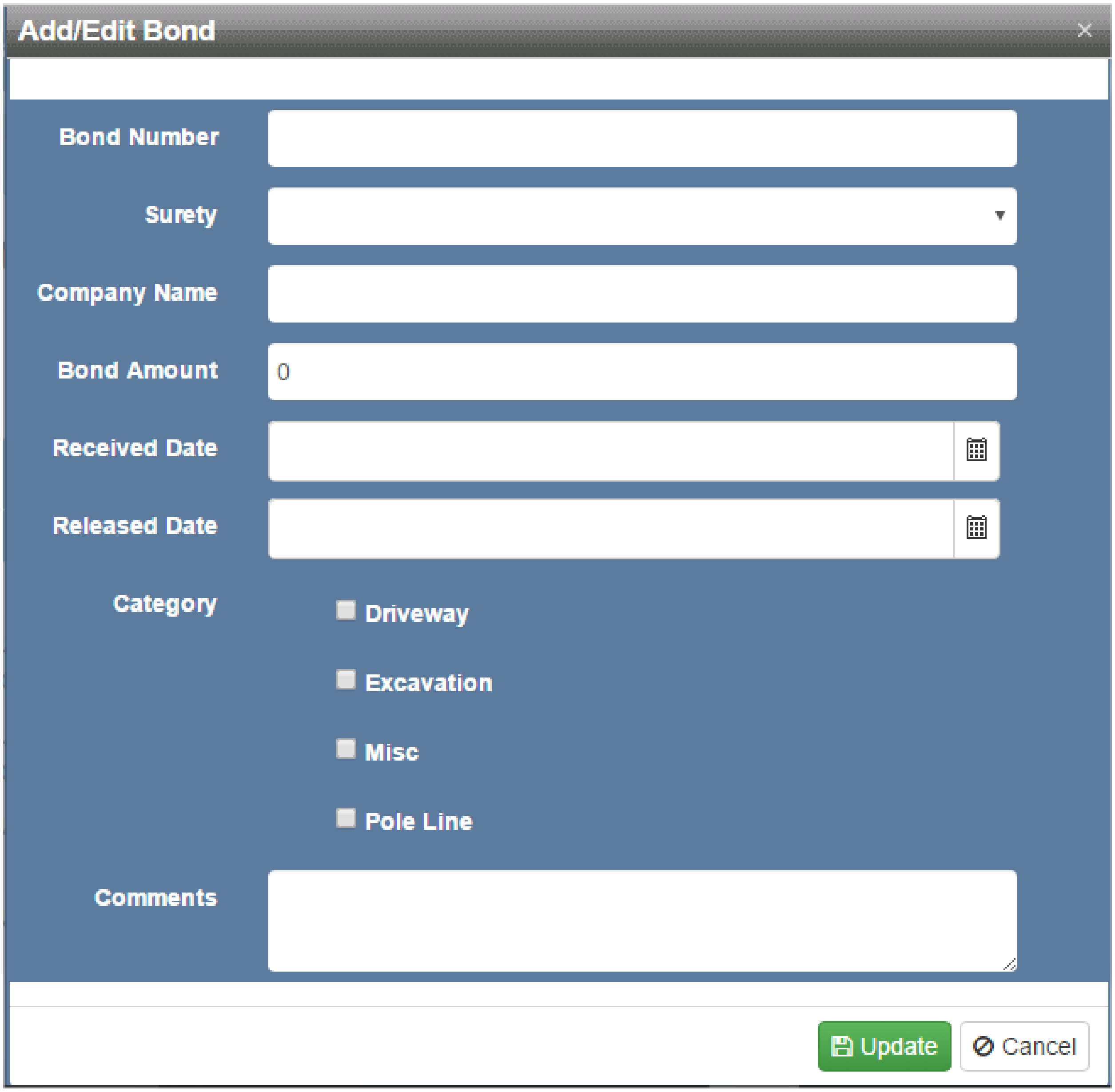


Add a Bond

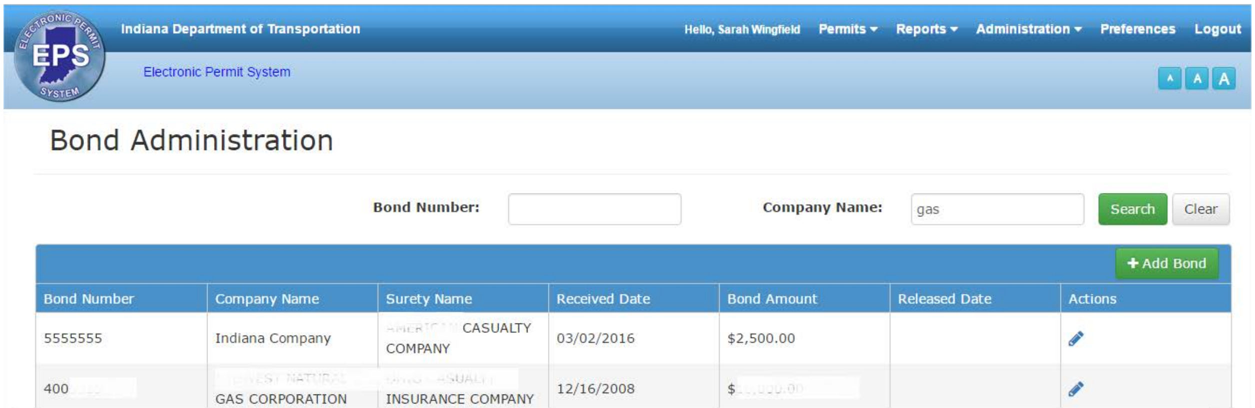
To add a bond, click on the **Add Bond** button at the top of the Bond Administration table.



Complete the Bond fields as necessary and click **Update** to save the Bond or click **Cancel** to return to the Bond table without adding the bond.

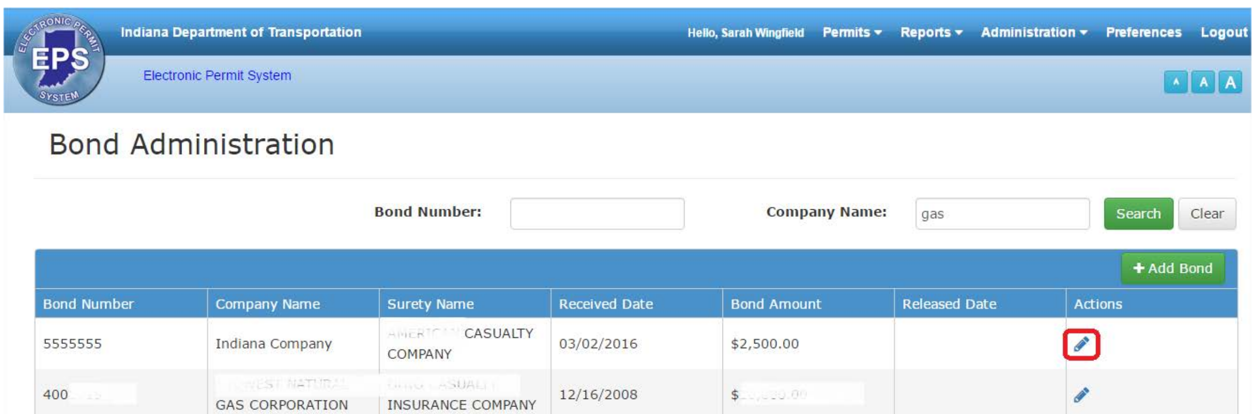


The new bond displays in the Bond table.

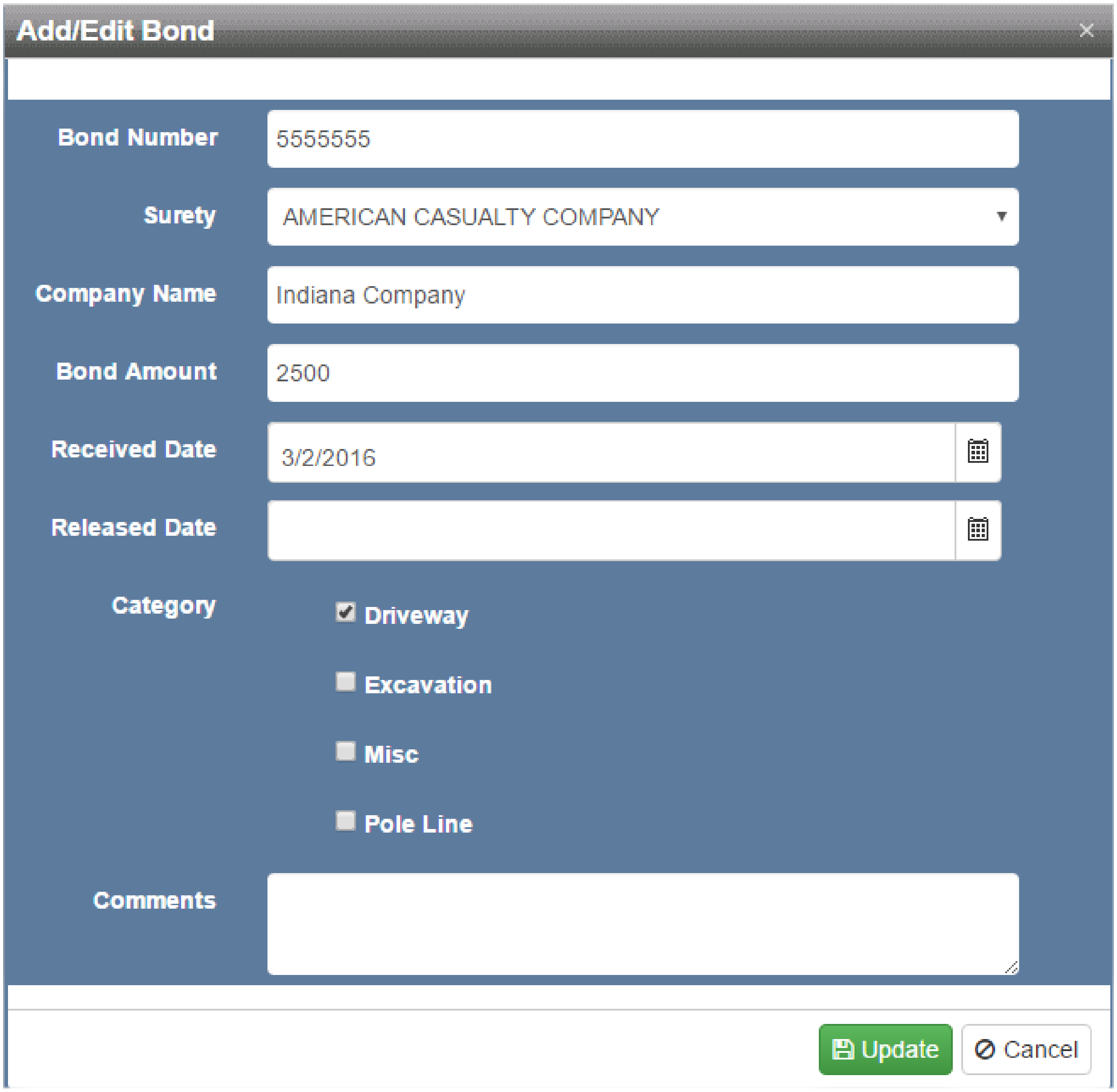


Edit a Bond

To edit a bond, click on the **Edit** icon in the row of the bond to edit.

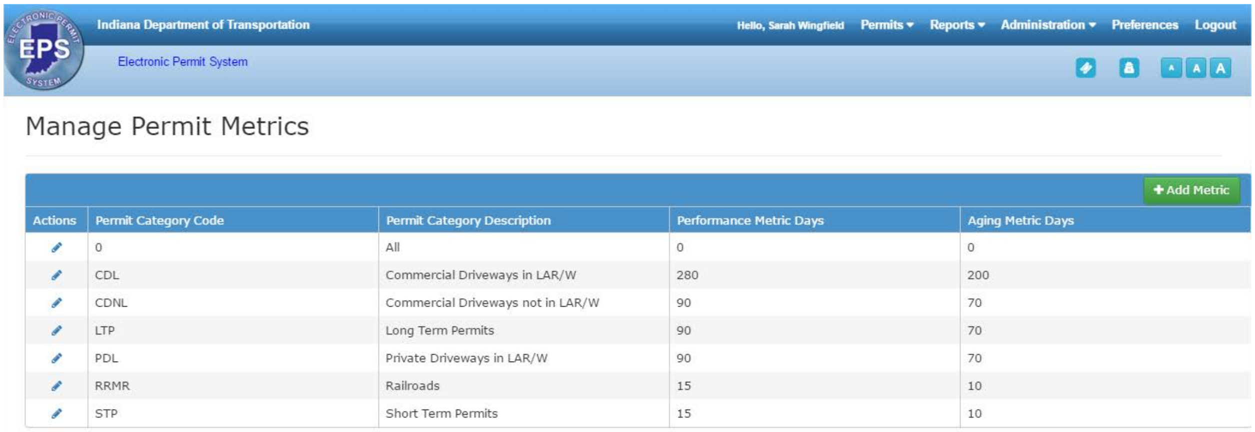


Update the Bond fields as necessary and click **Update** to save the changes or click **Cancel** to return to the Bond table without changing the bond.



Manage Metrics

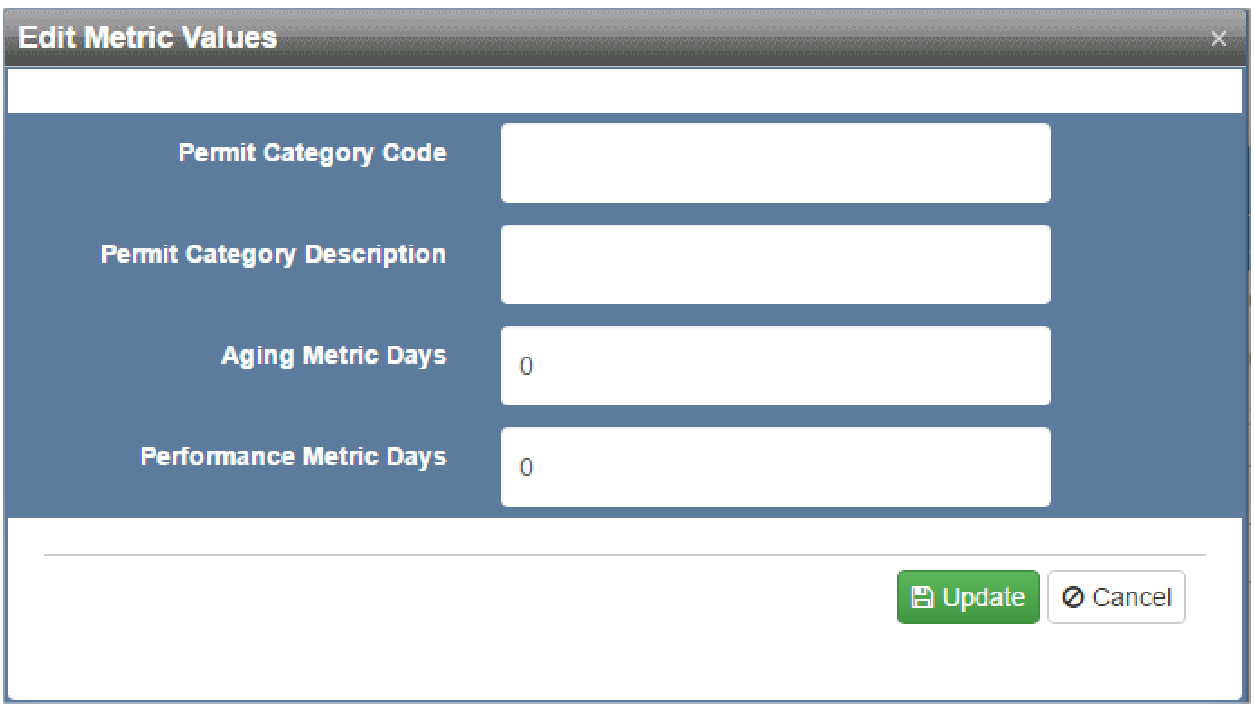
To determine if permits are being issued and addressed in a timely manner, metrics are set by Administrators. These timeframes are guides in the metric reports and indicate when metrics are being met or missed. The EPS site metrics are managed on the Manage Metrics panel.



Actions	Permit Category Code	Permit Category Description	Performance Metric Days	Aging Metric Days
	0	All	0	0
	CDL	Commercial Driveways in LAR/W	280	200
	CDNL	Commercial Driveways not in LAR/W	90	70
	LTP	Long Term Permits	90	70
	PDL	Private Driveways in LAR/W	90	70
	RRMR	Railroads	15	10
	STP	Short Term Permits	15	10

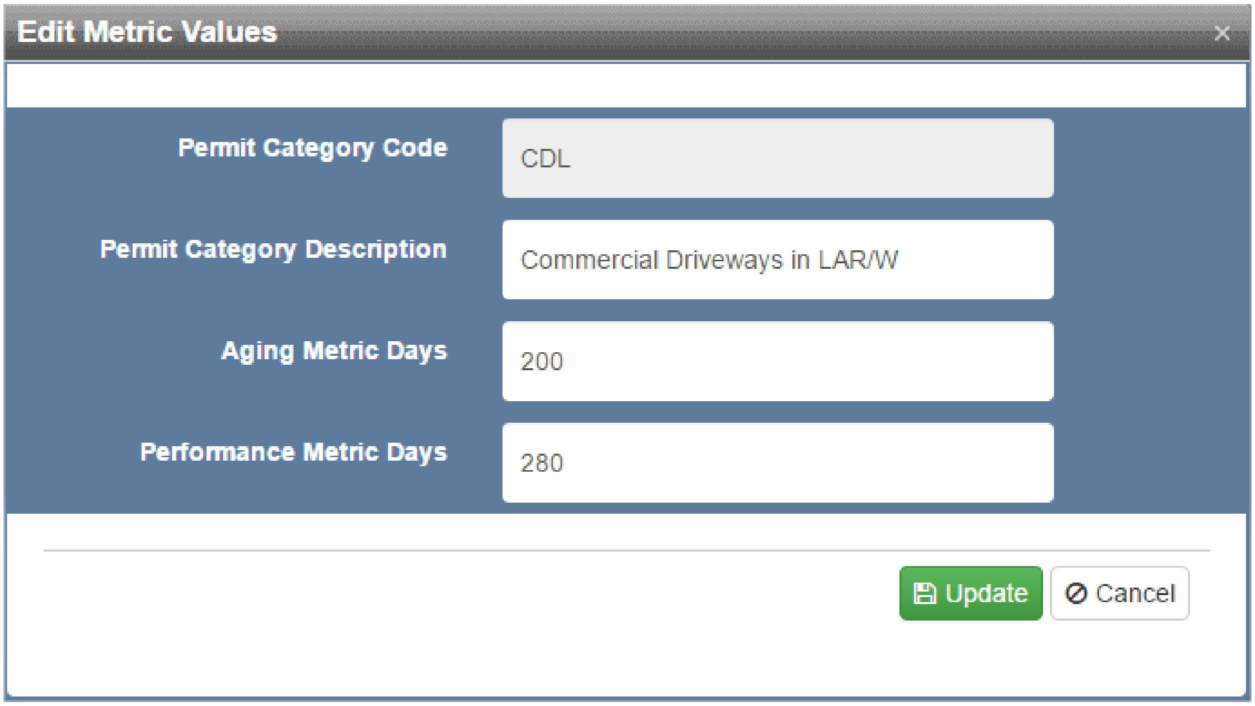
Add a Metric

Click on the **Add Metric** button to add a new Permit Metric. Once a Metric is added it cannot be deleted. Complete the information as necessary and click **Update** to add the new metric or click **Cancel** to return to the Metric table without adding a new metric.



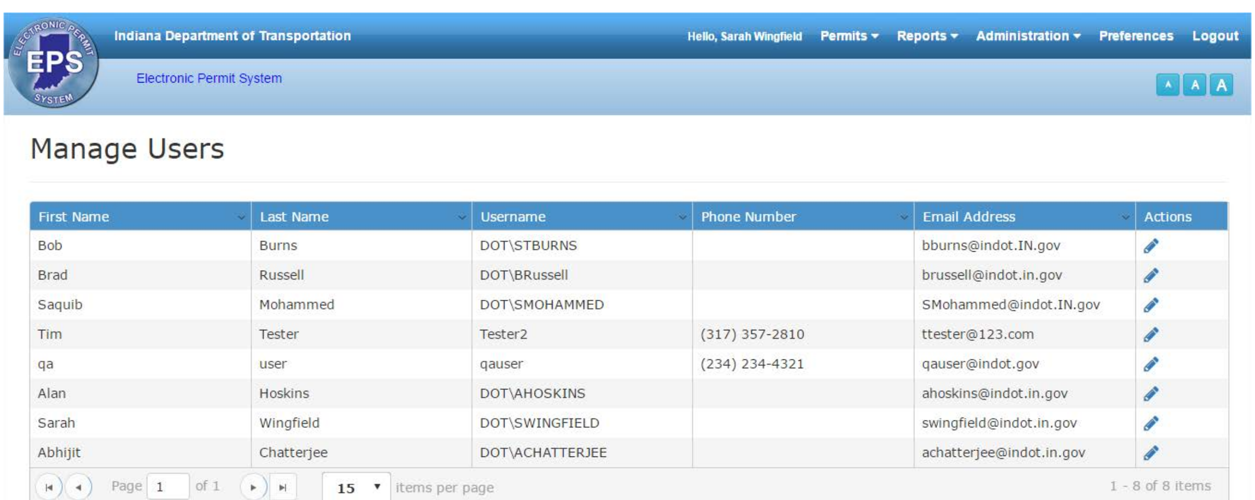
Edit a Metric

Click on the **Edit** icon in the row of the metric to change to edit a performance metric. Complete the information as necessary and click **Update** to update the metric or click **Cancel** to return to the Metric table without changing the metric.



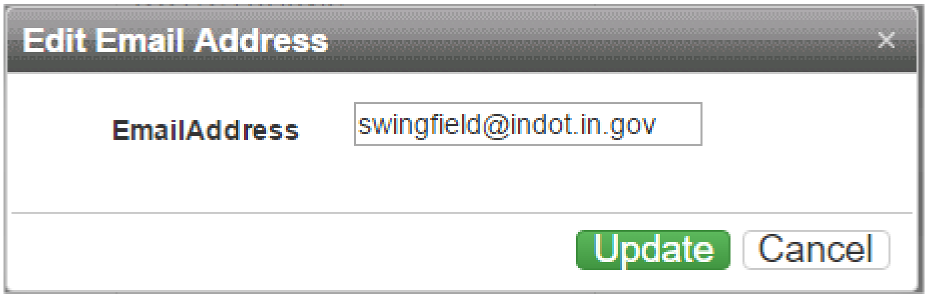
Manage Users

EPS Administrators cannot add users or manage personal information, but they can change the password of users when necessary (for example, if the user cannot remember which email address they registered with or no long has access to the registration email). The **Manage Users** screen allows Administrators to manage User email addresses.



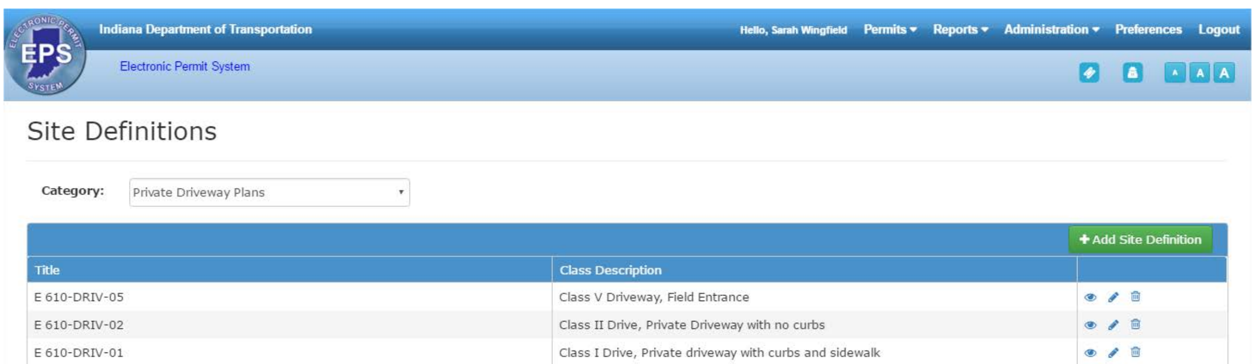
First Name	Last Name	Username	Phone Number	Email Address	Actions
Bob	Burns	DOT\STBURNS		bburns@indot.IN.gov	
Brad	Russell	DOT\BRussell		brussell@indot.in.gov	
Saquib	Mohammed	DOT\SMOHAMMED		SMohammed@indot.IN.gov	
Tim	Tester	Tester2	(317) 357-2810	ttester@123.com	
qa	user	qauser	(234) 234-4321	qauser@indot.gov	
Alan	Hoskins	DOT\AHOSKINS		ahoskins@indot.in.gov	
Sarah	Wingfield	DOT\SWINGFIELD		swingfield@indot.in.gov	
Abhijit	Chatterjee	DOT\ACHATTERJEE		achatterjee@indot.in.gov	

Click on the **Edit** icon next to the email address to edit. Update the email address as necessary and click **Update** to update the address or click **Cancel** to return to the User table without updating the email address.



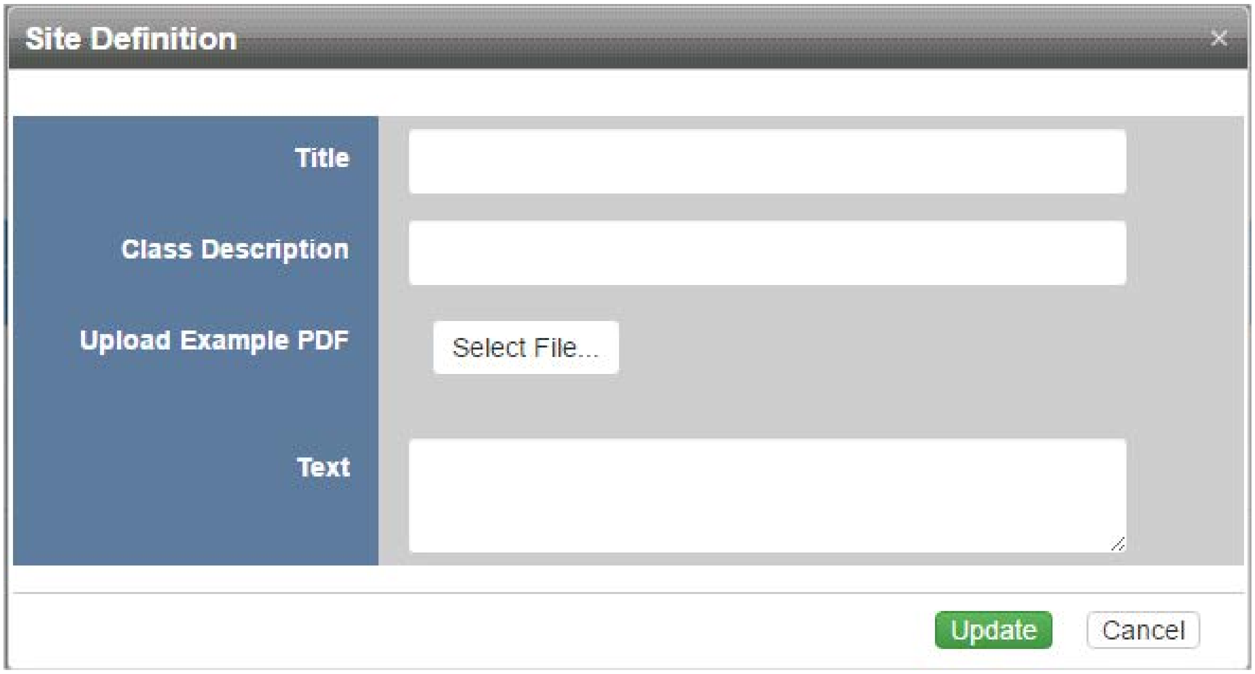
Site Definitions

The **Site Definitions** section allows Administrators and the State Permit Manager to modify the definitions for Private Driveway Plans and Sign Location Diagrams. Select the category from the **Category** dropdown to view that category's site definitions.

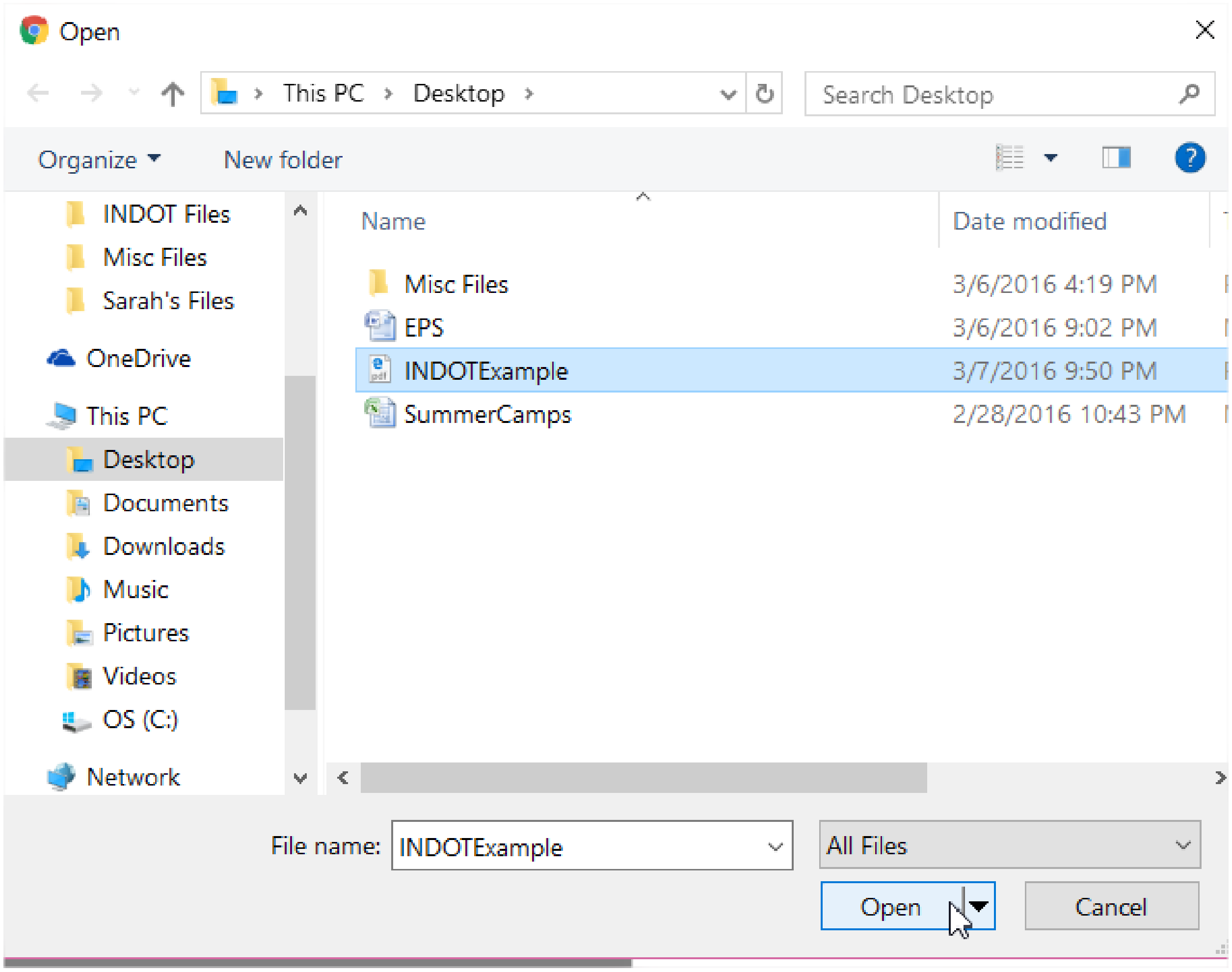


Add a Site Definition

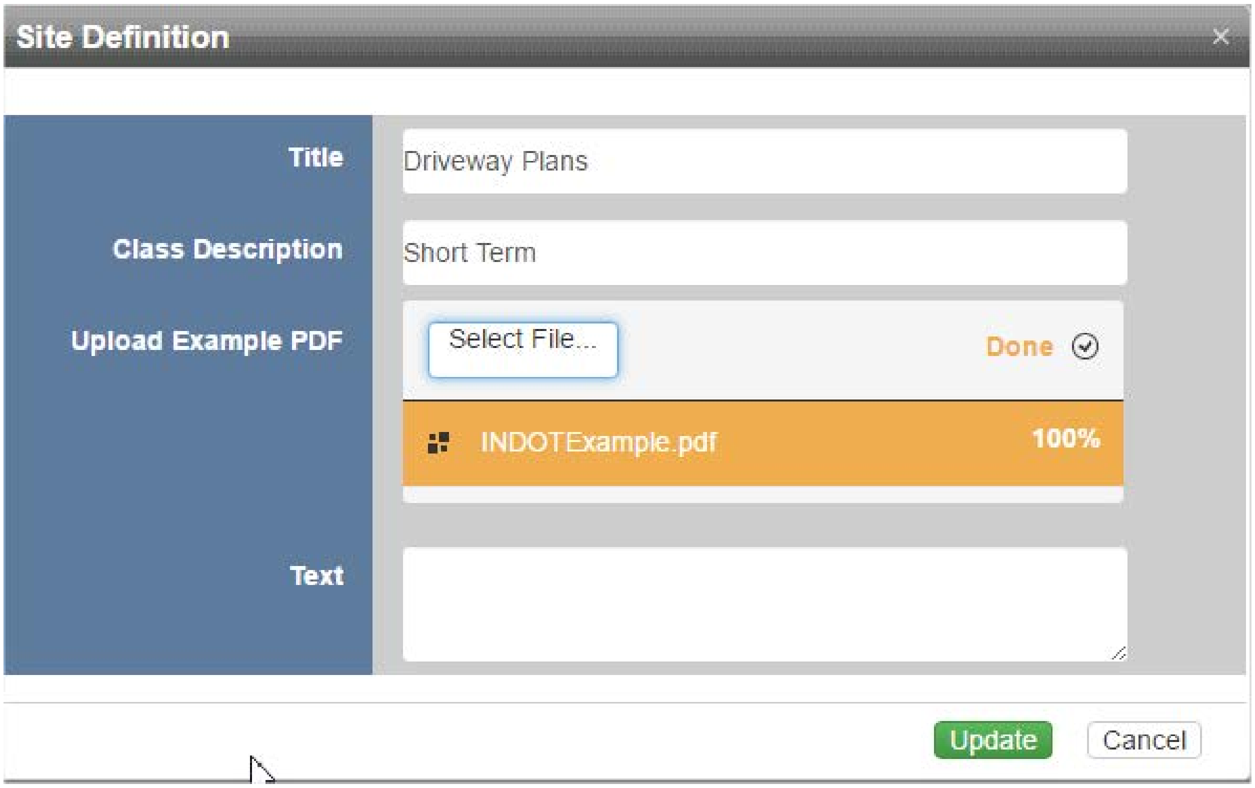
Click **Add Site Definition** to add a New Site Definition. Enter the definition information as necessary. Click **Select File…** to upload a sample PDF. The file MUST be a PDF.



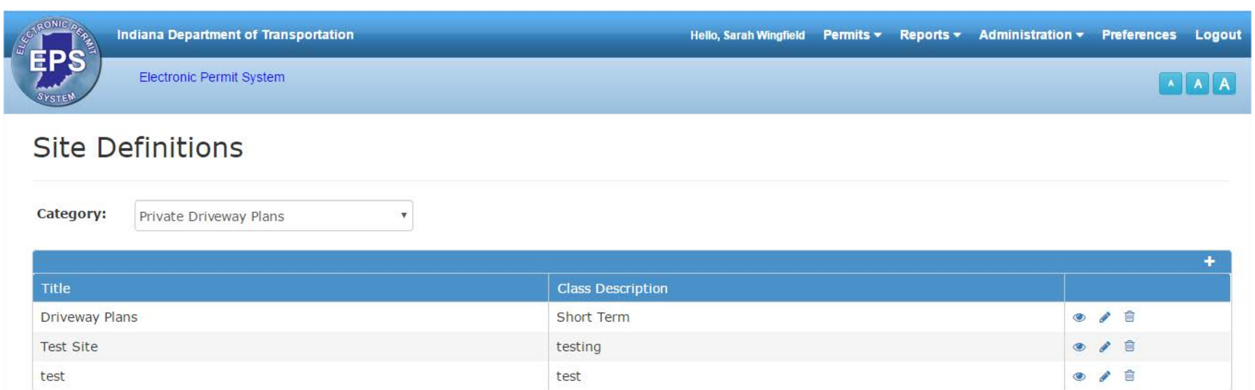
Navigate to the PDF location on the computer and click **Open** to upload the PDF.



The PDF will upload and a confirmation window appears when the upload is complete. Only one file can be uploaded; to change the uploaded file, click **Select File…** again and select a new file. Click **Update** to save the changes and add the Site Definition or click **Cancel** to return to the Site Definition table without adding a new definition.

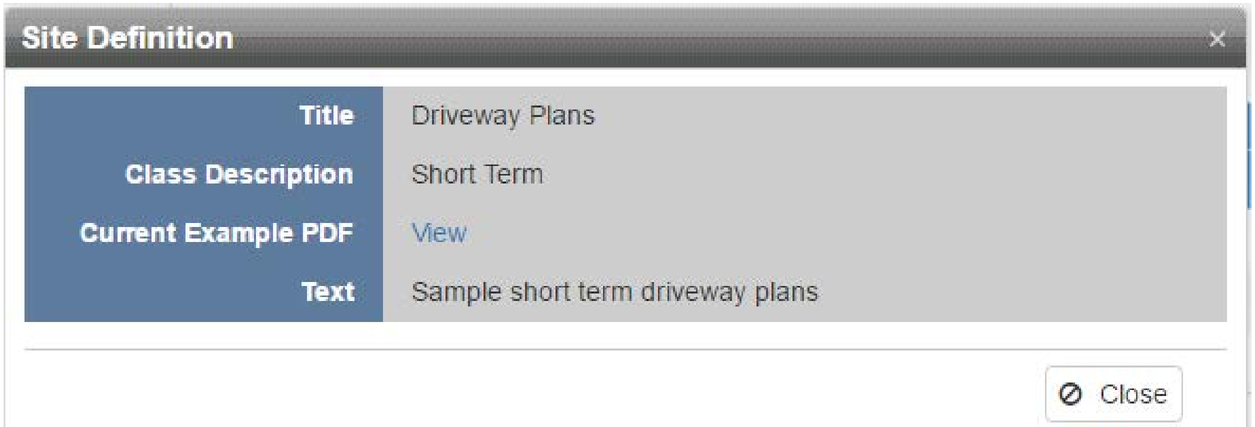


The new Site Definition displays at the top of the table, with the option to **View Details**, **Edit** or **Delete** the Site Definition.



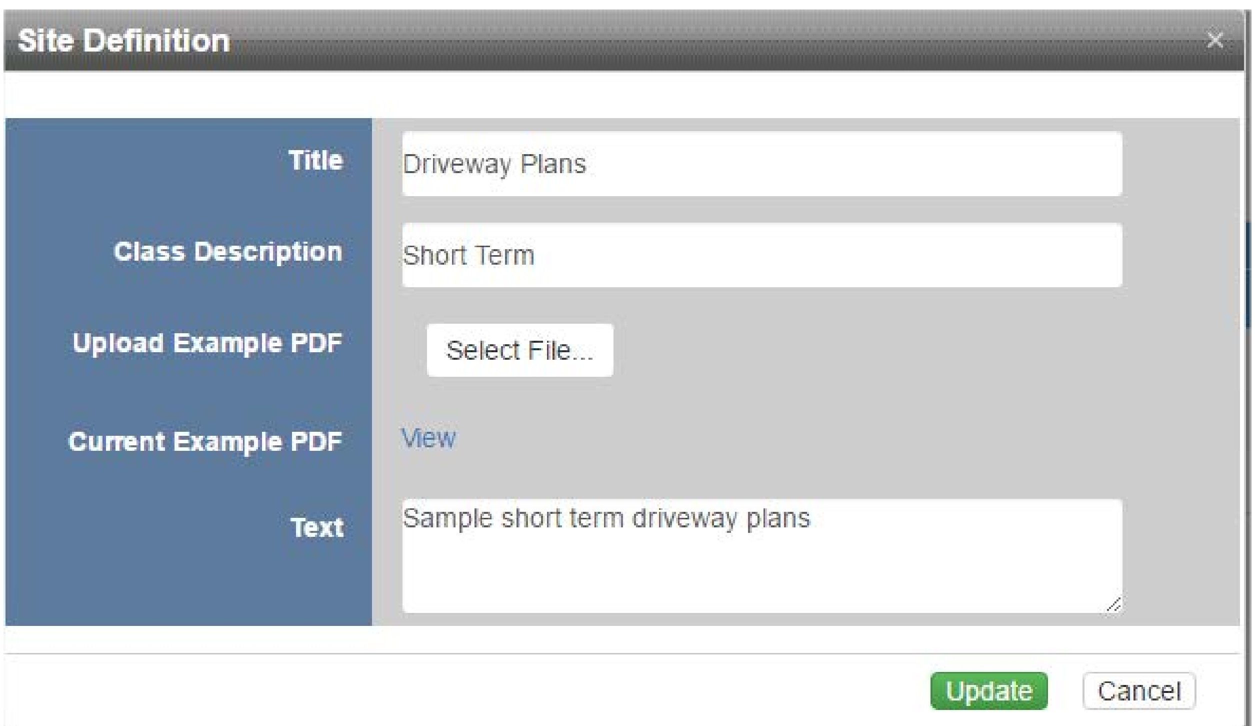
View a Site Definition

Click **View Details** to view details on a Site Definition. Click **View** to view the attached PDF. Click **Close** to return to the Site Definition table.



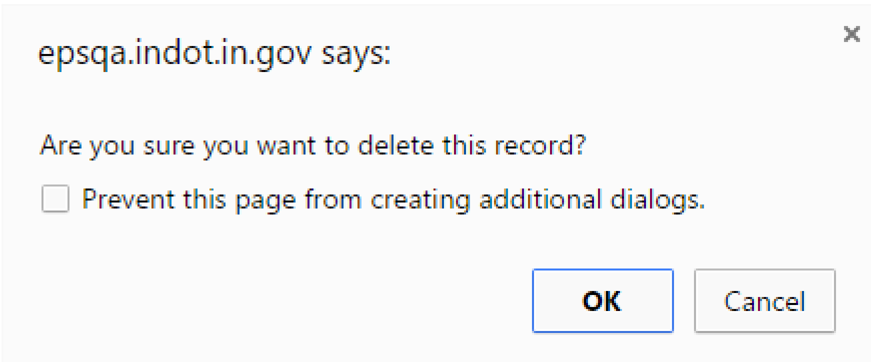
Edit a Site Definition

Click **Edit** to edit a Site Definition. The edit screen opens in a new window. Make changes as necessary and click **View** to view the attached PDF. Click **Update** to save updates or click **Cancel** to return to the Site Definitions table without saving any changes.



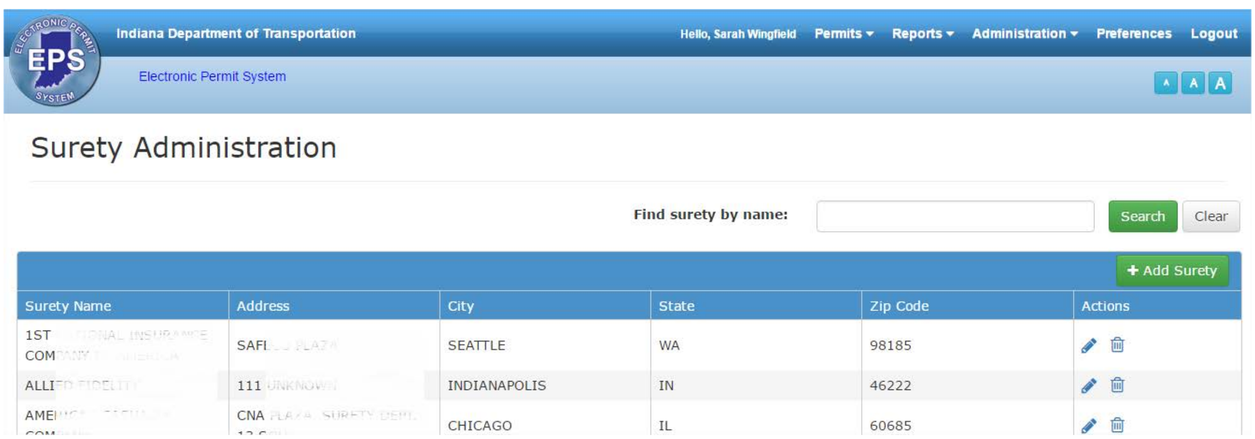
Delete a Site Definition

Click **Delete** 🗑 to delete a Site Definition. Click **OK** at the confirmation window to delete the record or click **Cancel** to return to the Site Definition table without deleting the record.

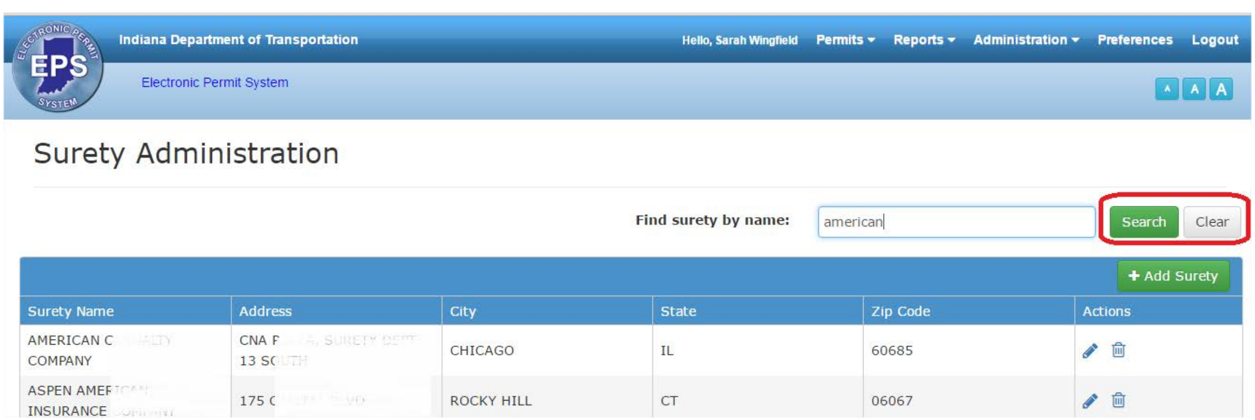


Sureties

Administrators need to maintain and administer Surety information. On the Surety Administration screen administrators can search for sureties by Surety Name as well as add, edit or delete a surety.

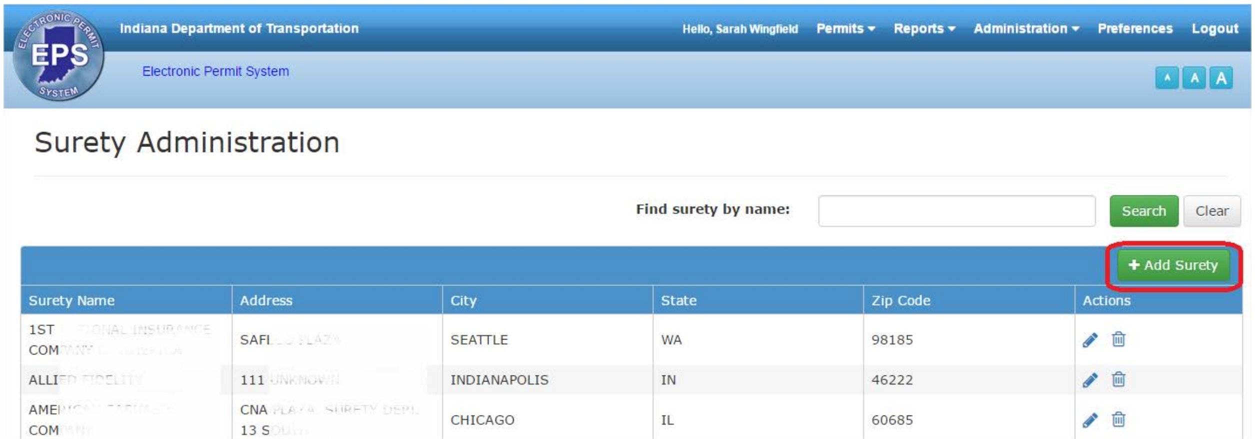


To search for a Surety by name, enter a name (or just a portion of the name) and click **Search**. The table will display only the matching results. Click **Clear** to clear the search and return all results.

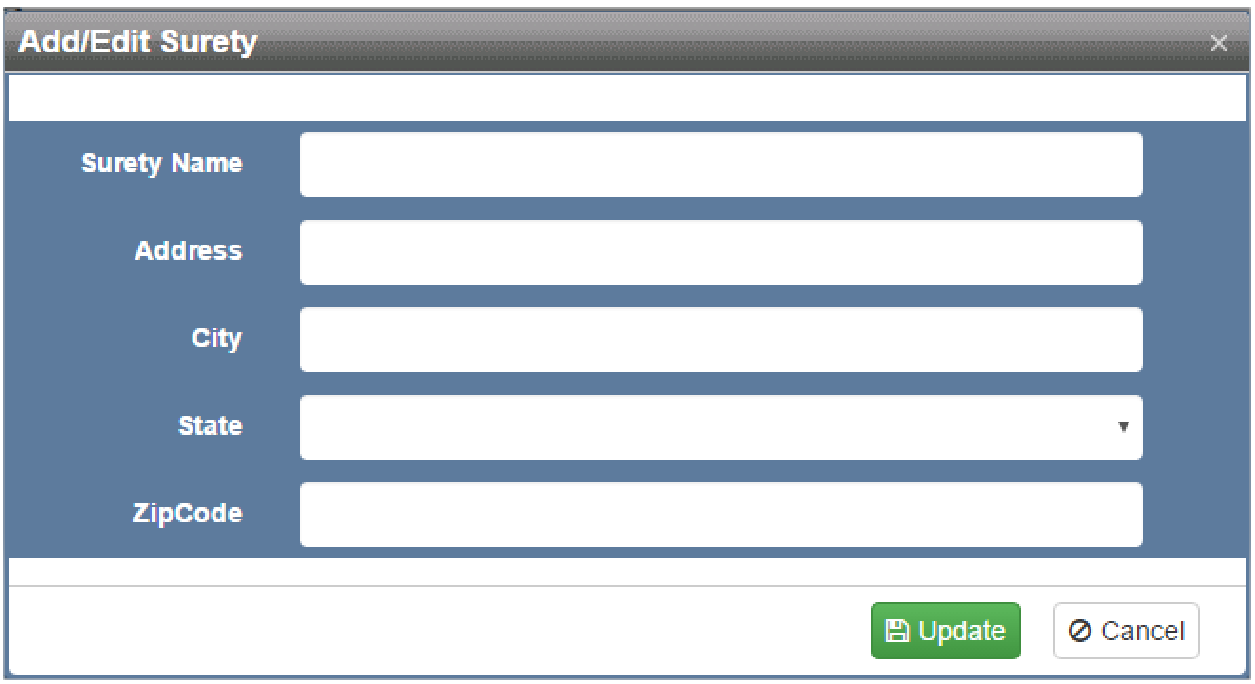


Add a Surety

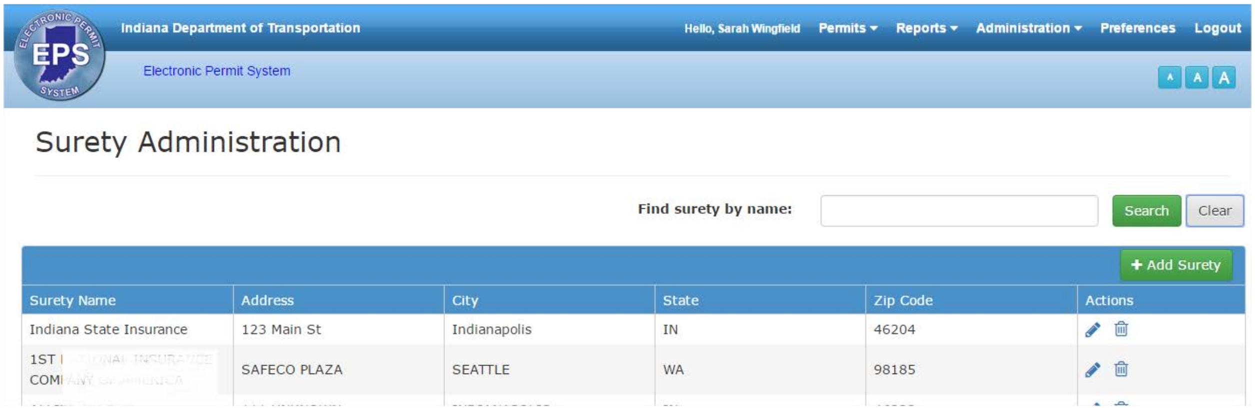
To add a surety, click on the **Add Surety** button at the top of the Surety Administration table.



Complete the Surety fields as necessary and click **Update** to save the Surety or click **Cancel** to return to the Surety table without adding the surety.

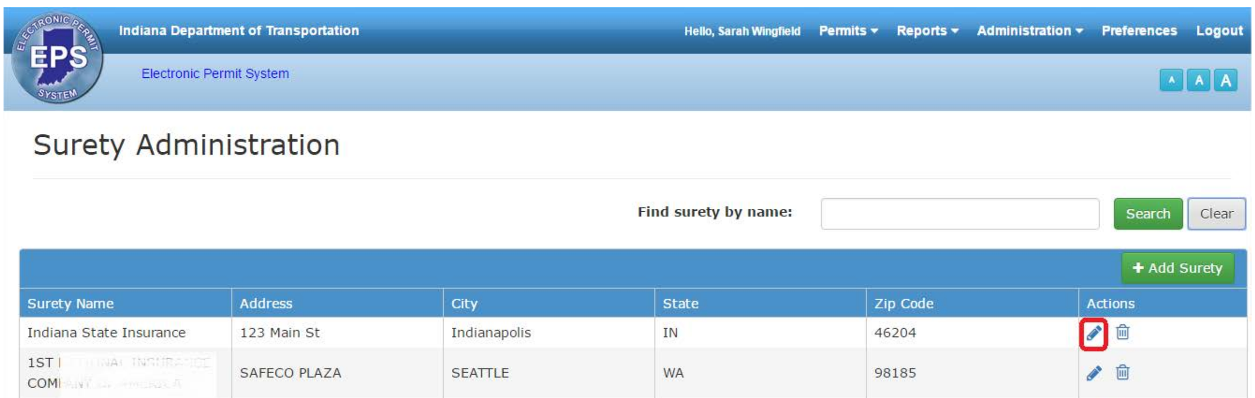


The new surety displays in the Surety table.

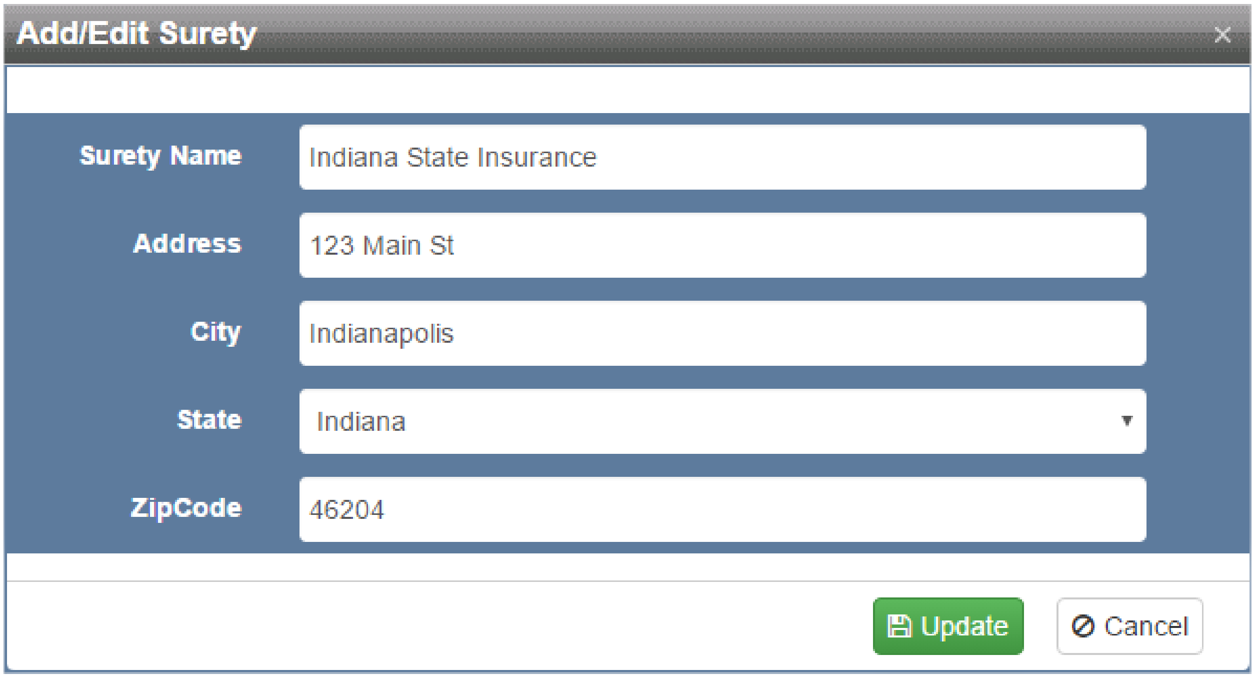


Edit a Surety

To edit a surety, click on the **Edit** icon in the row of the surety to edit.

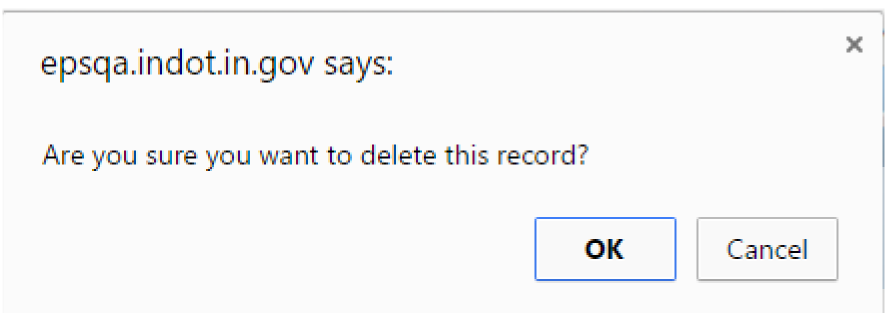


Update the Surety fields as necessary and click **Update** to save the changes or click **Cancel** to return to the Surety table without changing the surety.



Delete a Surety

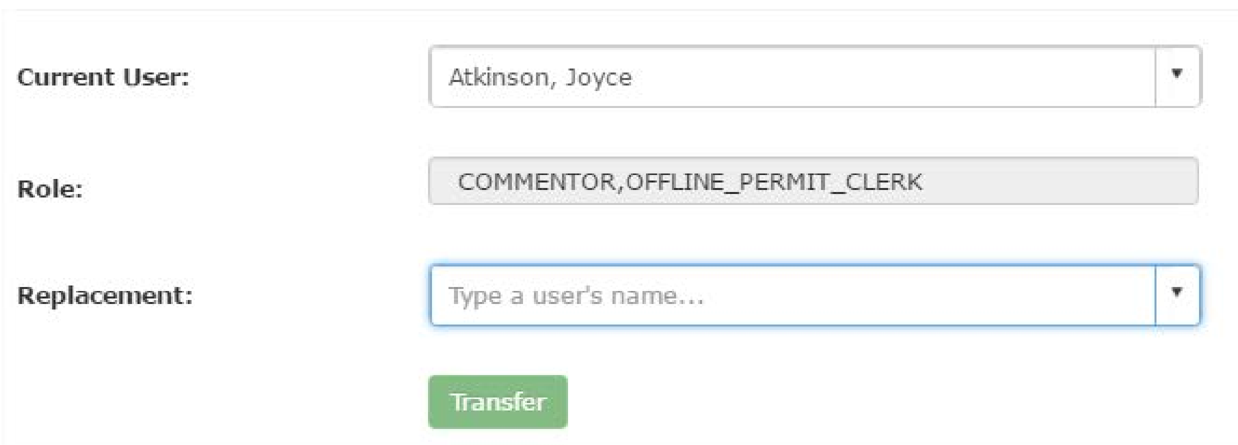
To delete a Surety, click the **Delete** icon. Click **OK** at the confirmation window to delete the record or click **Cancel** to return to the Surety table without deleting the record.



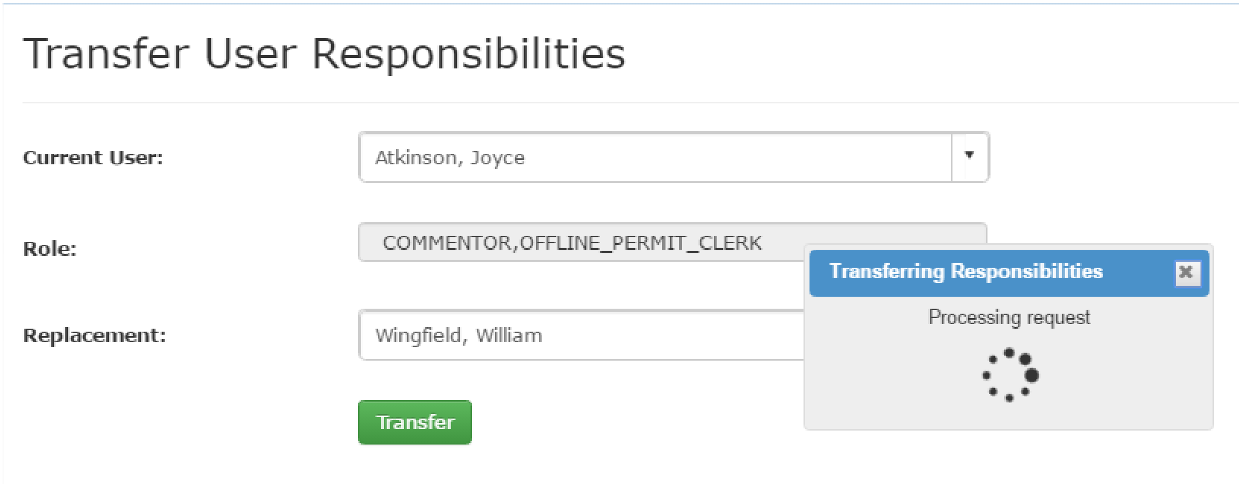
Transfer Users

Administrators need the ability to transfer user responsibilities from one user to another. On the **Transfer User Responsibilities** screen, begin typing the name of the current user to pull up all matching users and select the appropriate one.

When the Current User is selected, that user's role will display under their name.



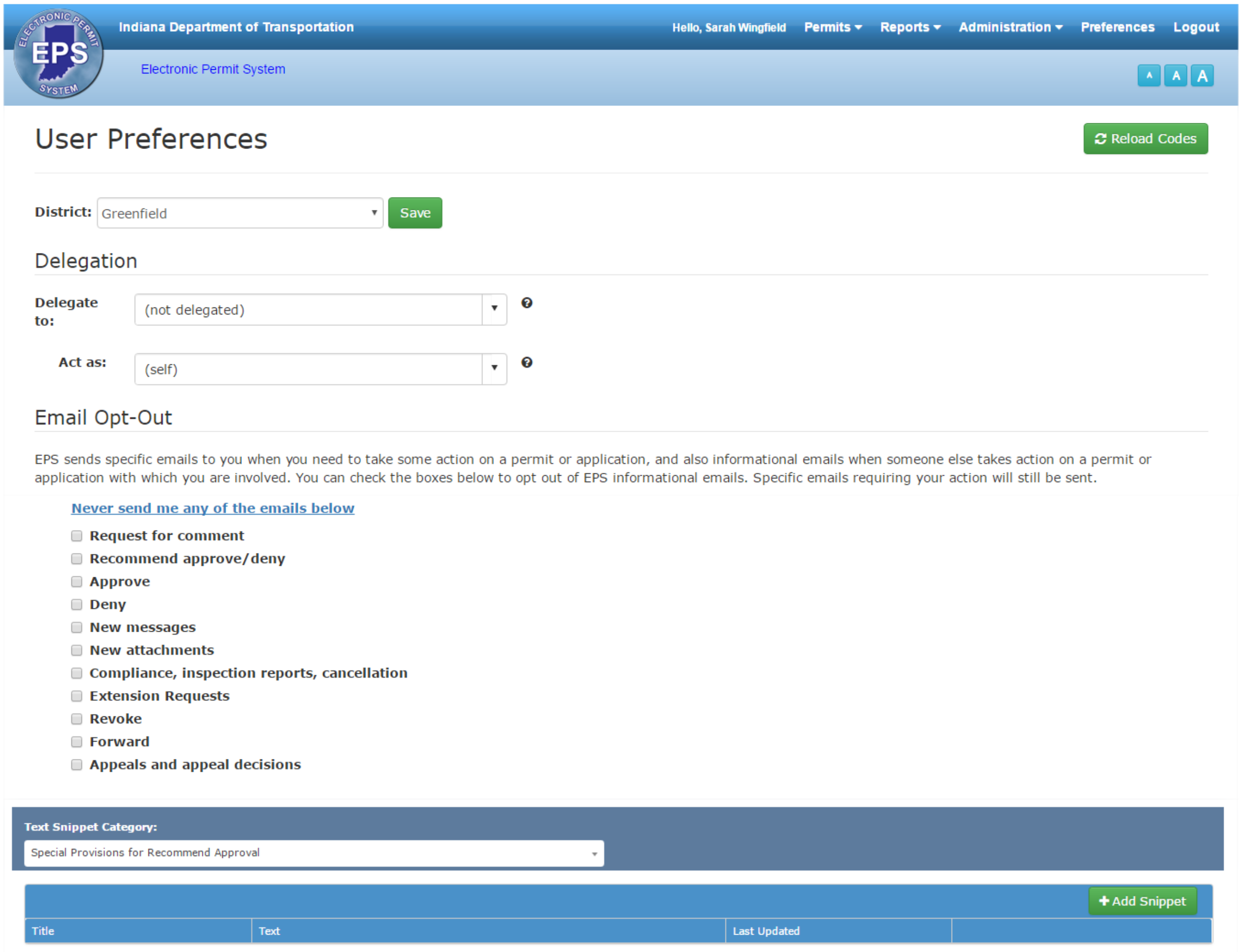
Then type the replacement user's name in the Replacement field. When the desired users are selected, click **Transfer** to transfer the current user's responsibilities to the replacement. There may be a slight delay while the responsibilities are transferred.



A confirmation window displays when the responsibilities are transferred.

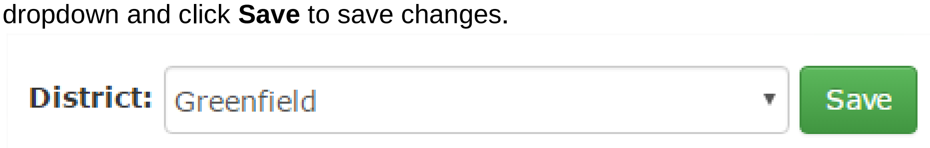
Preferences

The **Preferences** screen allows Users to change District selections, Delegate user roles, change email preferences and manage custom text used during applications.



District

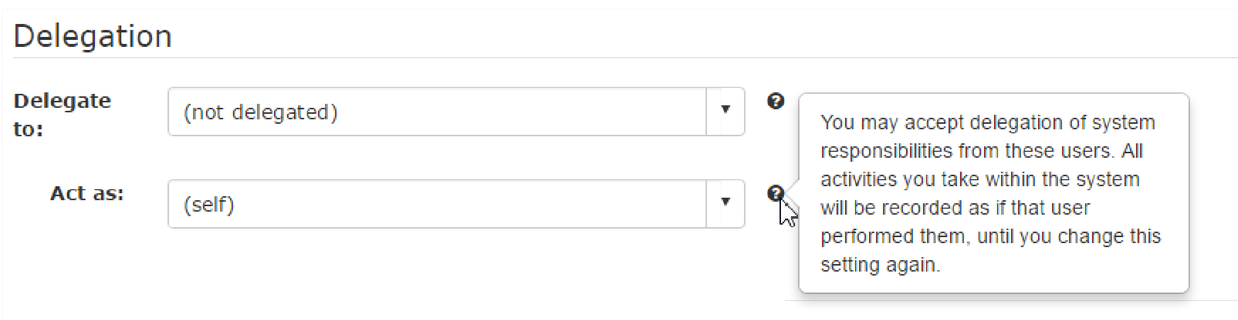
To change the selected District, click on the District list dropdown. Select the new District from the dropdown and click **Save** to save changes.



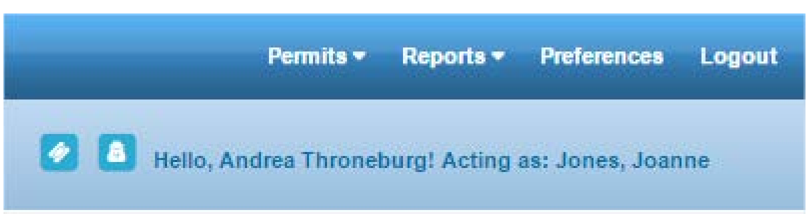
Delegation

Delegation allows Users to delegate their system responsibilities to another user, and to act as another User when they have been delegated to. When delegating responsibilities to another user, all EPS system and information emails will be sent the delegated user until the setting is changed back to (not delegated). To delegate to another user, click on the **Delegated to:** dropdown. Begin typing any portion of the name of the user and the system will narrow the selection list. Click on the name of the person to select them as the delegate. To end the delegation, click in the dropdown and remove the entry by clicking delete or backspace until all text is removed. The system will automatically change the field to display **(not delegated)**.

When someone has delegated their responsibility to you, the User can accept delegation of system responsibilities by changing the **Act as:** selection. All activities taken within the system will be recorded as if that User performed them, until the setting is changed back to **(self)**. The User can select who they are acting as by selecting a role in the **Act as:** dropdown. The default is **(self)**. The dropdown list will only have additional users when someone has delegated their responsibilities to you. Begin typing any portion of the name of the user and the system will narrow the selection list. Click on the name of the person to select them as the User to **Act as**. To end the Act as role, click in the dropdown and remove the entry by clicking delete or backspace until all text is removed. The system will automatically change the field to display **(self)**.



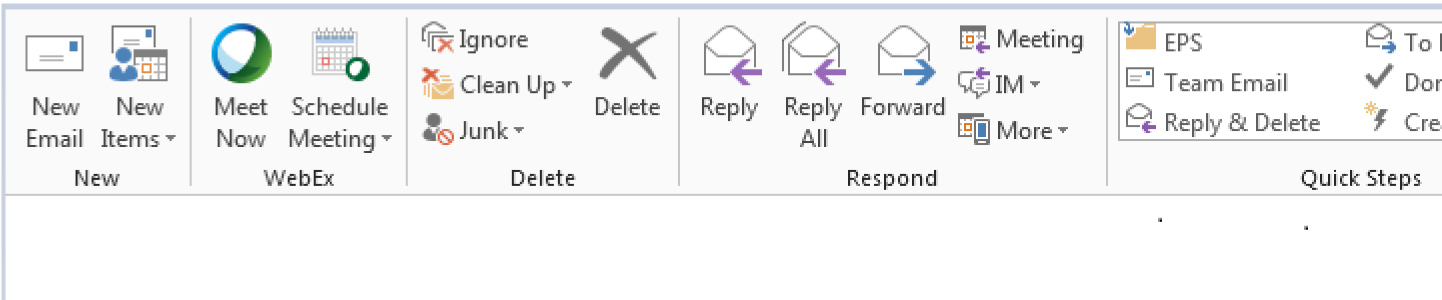
When acting as another user, the header will notify that the user is Acting As another user.



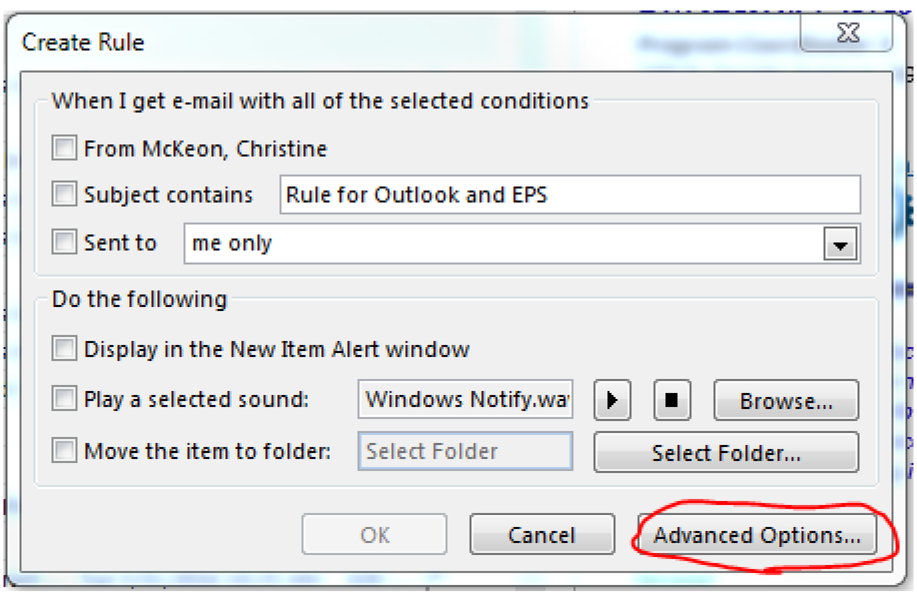
Redirecting Emails

When you have delegated your tasks due to being unavailable, you may want to redirect all of your EPS-related emails to another person. This can be accomplished by creating a rule to do so in Outlook. Instructions follow:

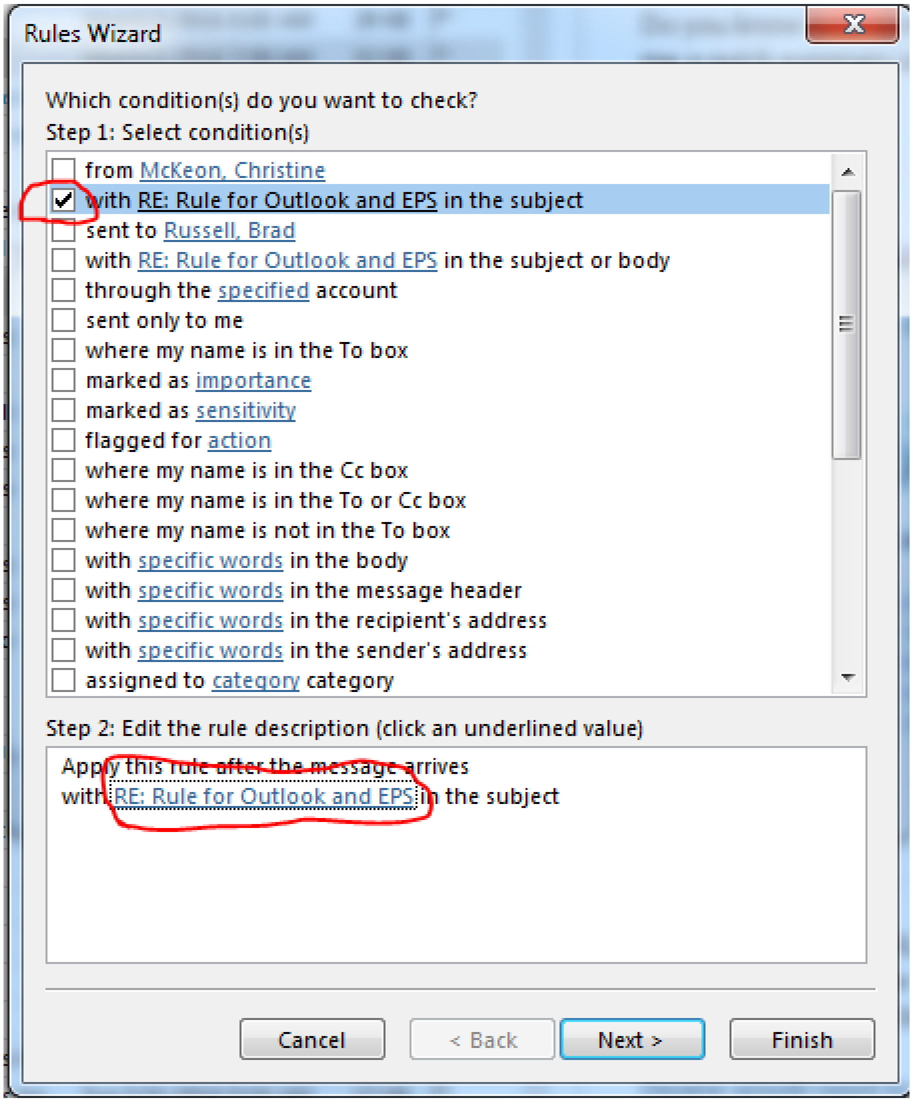
In Outlook, click the Home option from the menu, then Rules, Create Rule…



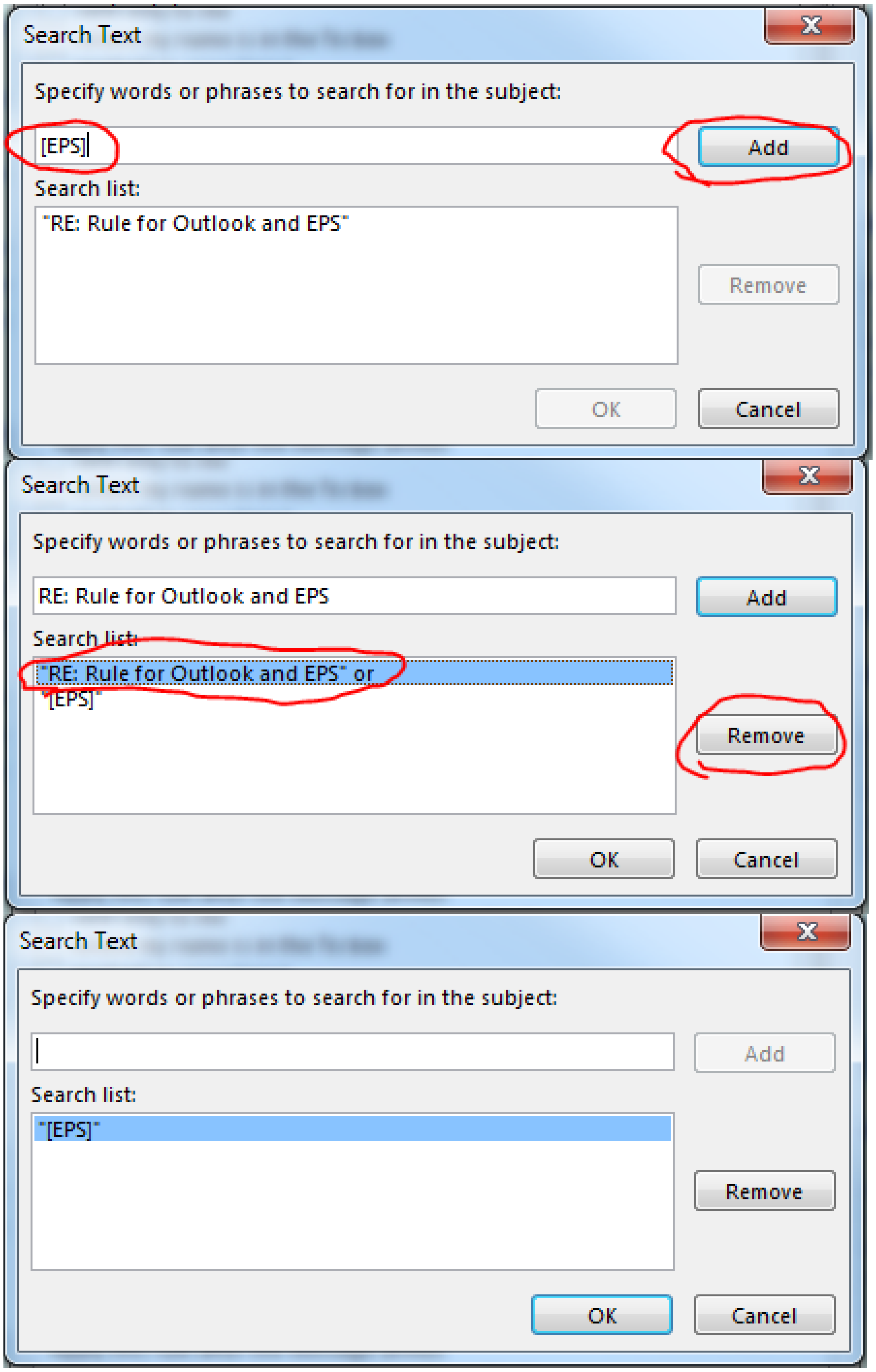
Then click Advanced Options



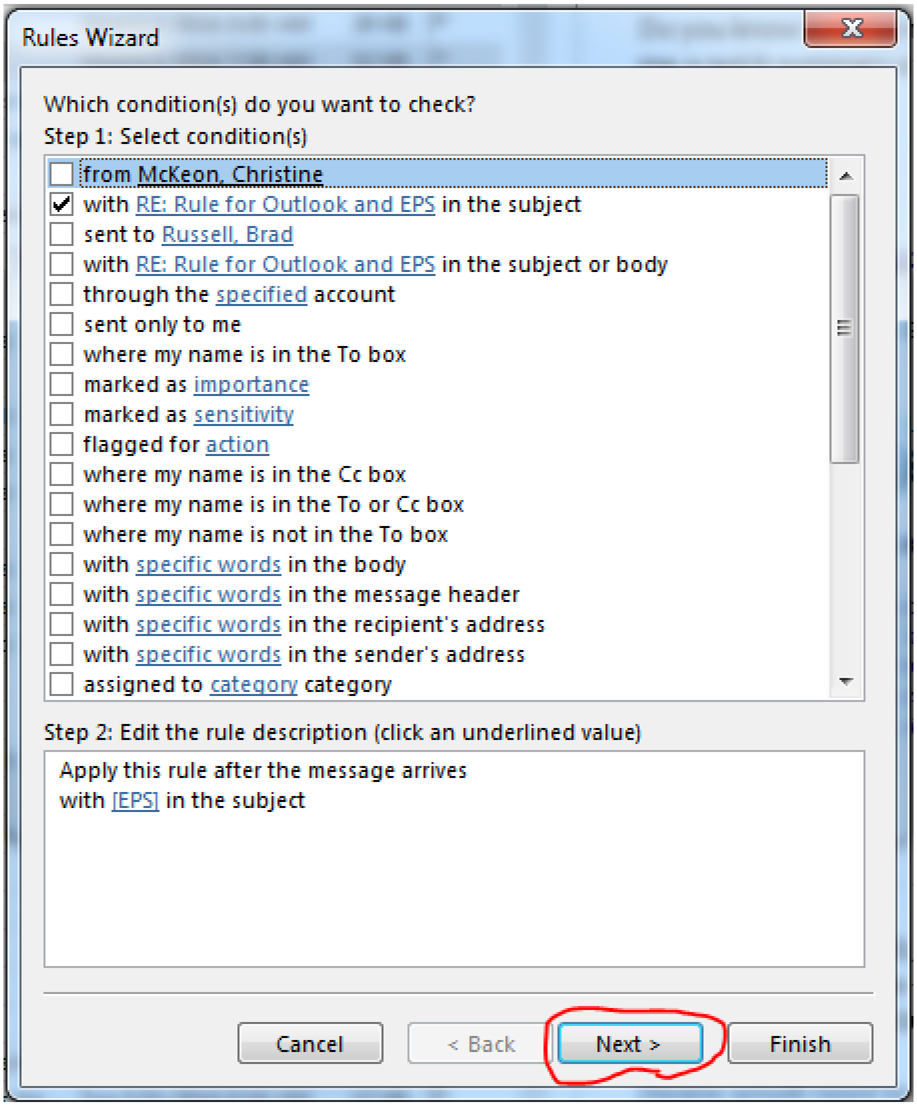
Check the “With {link} in the subject” checkbox, then click the link at the bottom



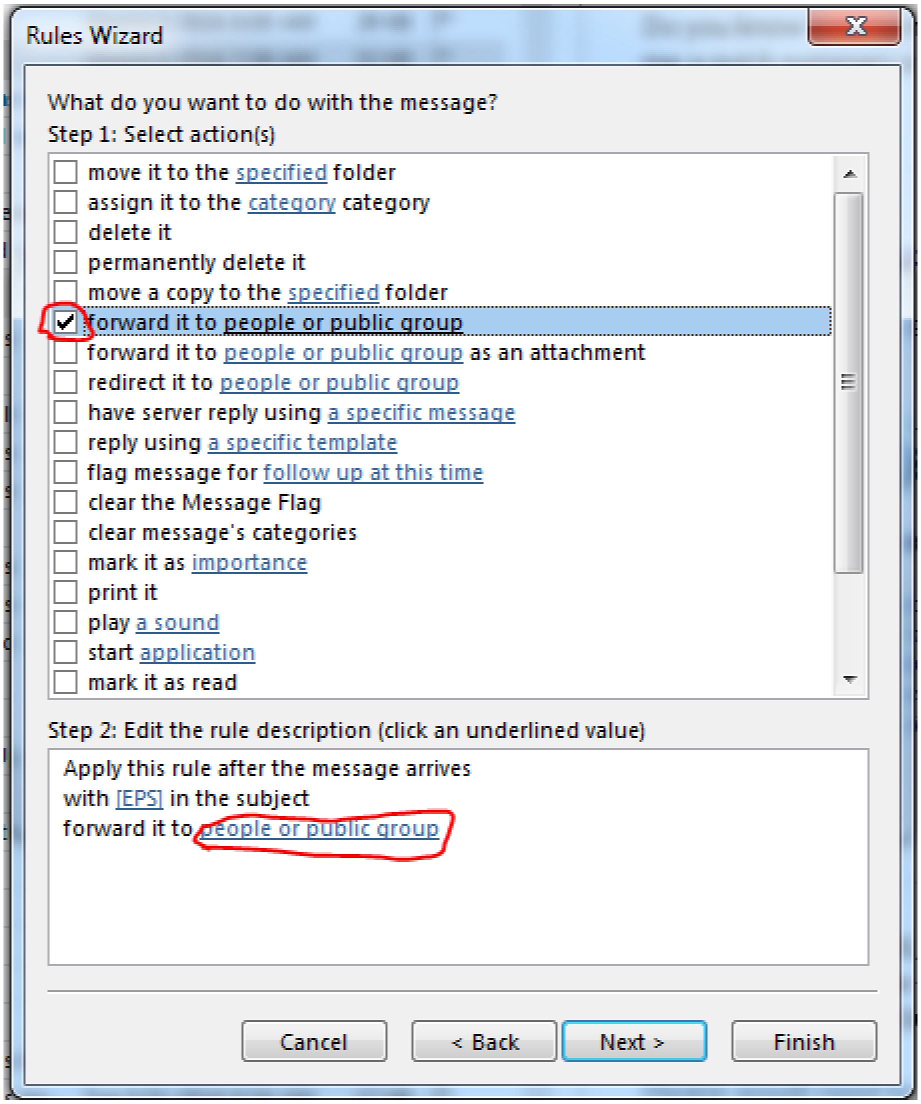
Type “[EPS]” into the box and click Add. (All EPS system-generated emails have a subject beginning with “[EPS]”.) You can also highlight the default text and click Remove so that [EPS] is the only thing in the filter.



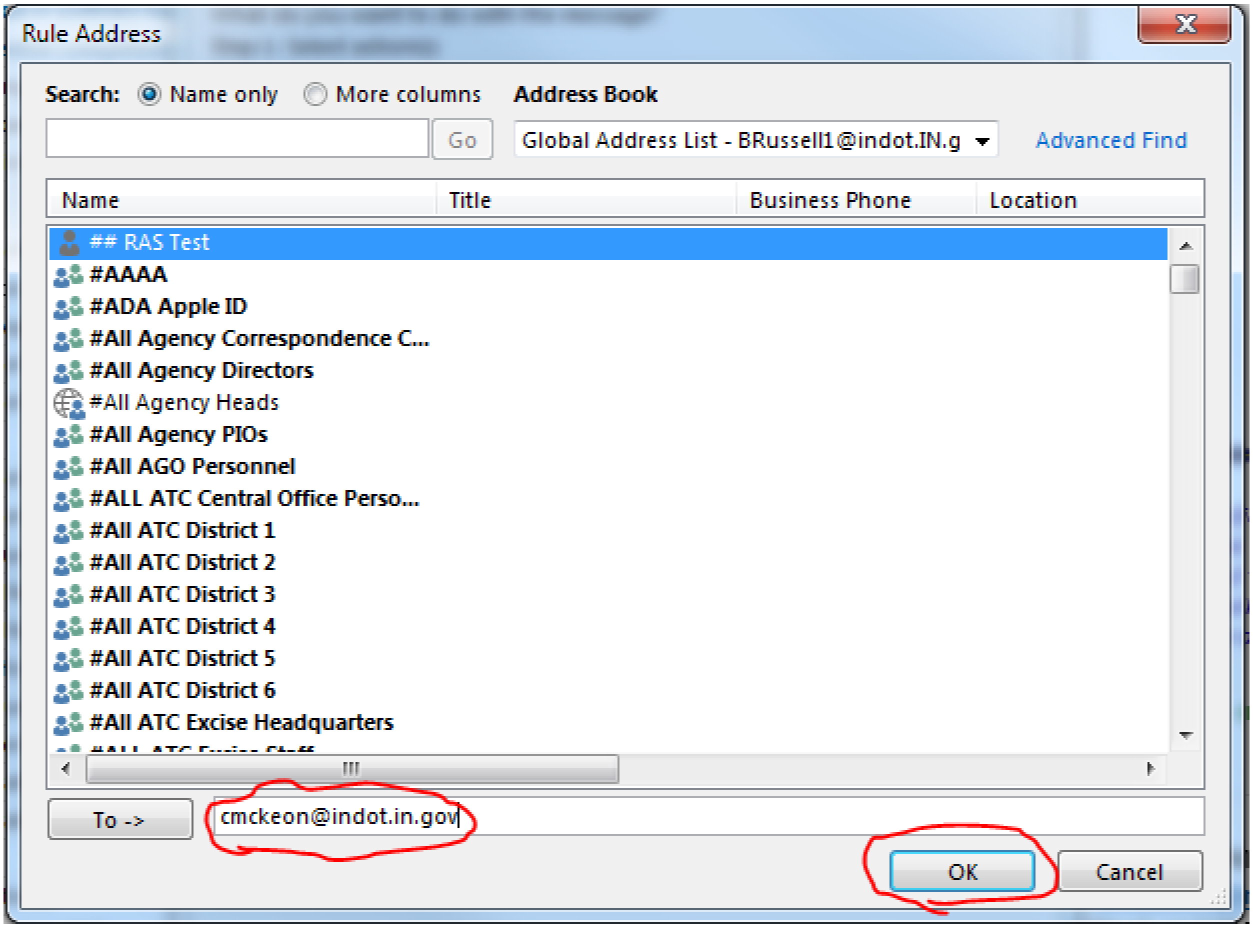
Then click OK and Next



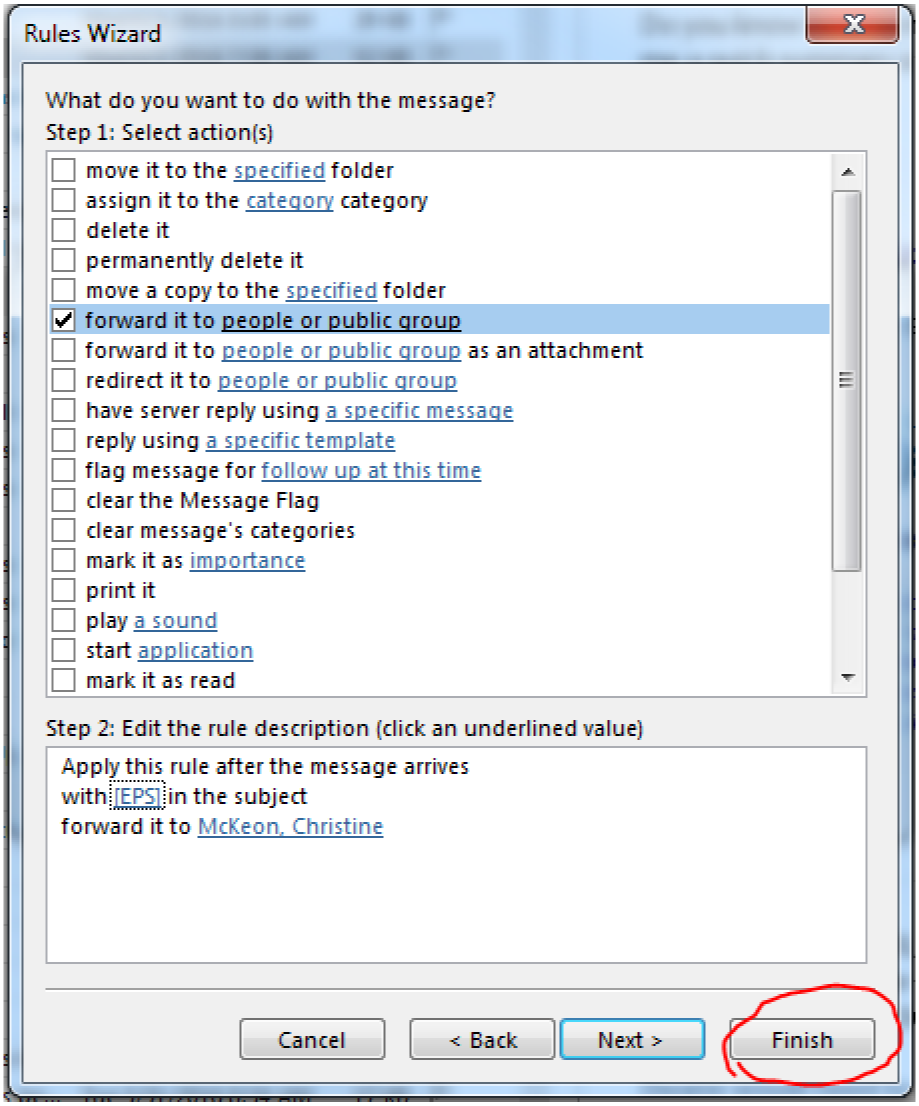
Check the “forward it to people or public group” box and click the link at the bottom



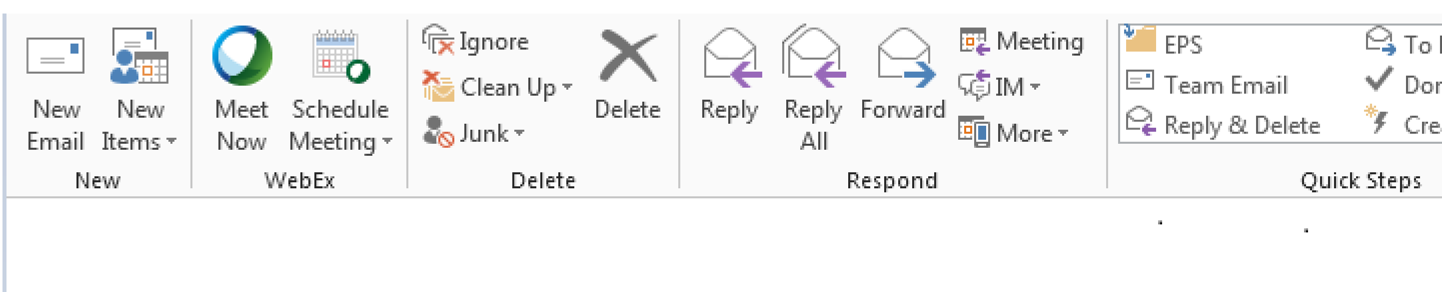
Type the person's email address in the "To ->" box and click OK



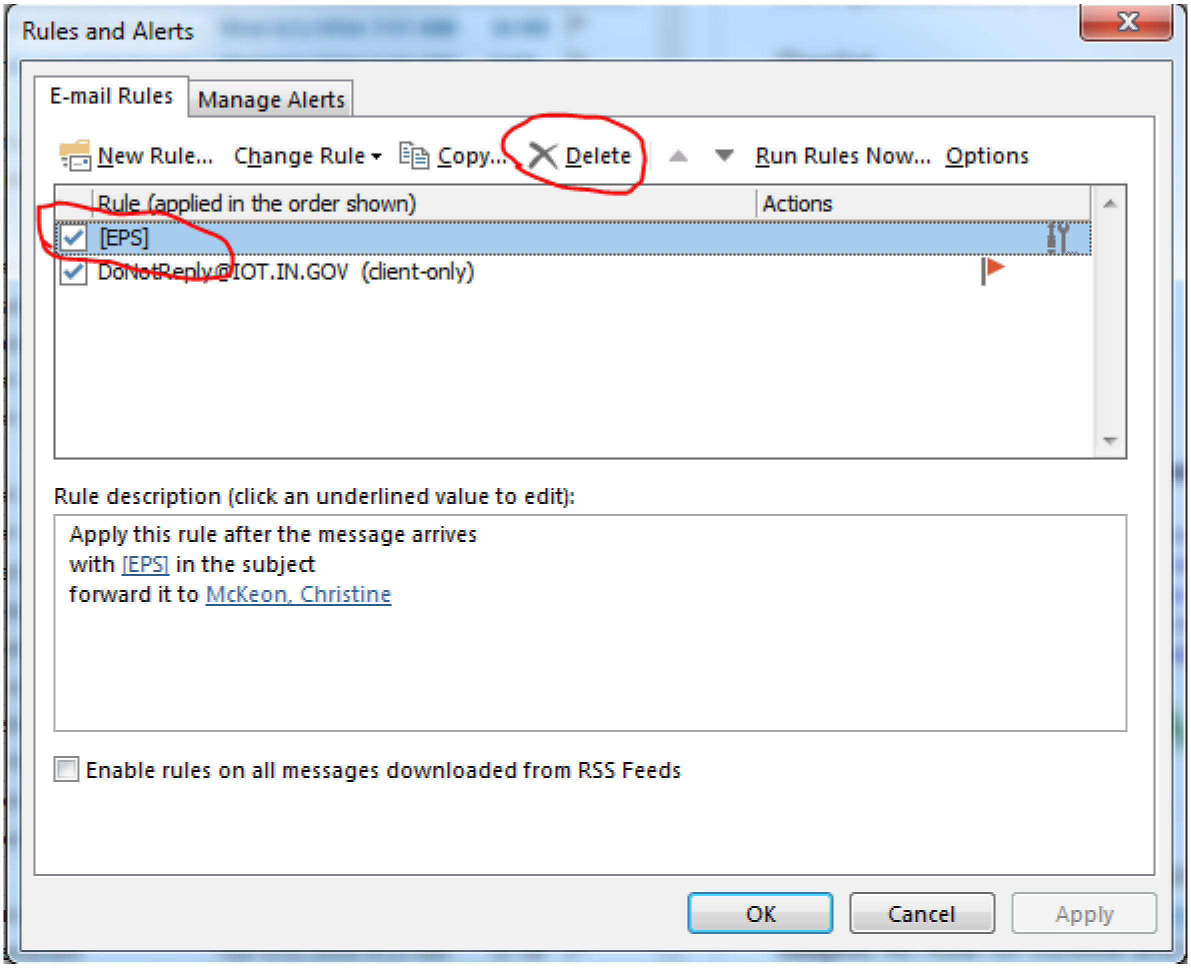
Now your rule looks like this and you can click Finish



To view your rule, you can go to Home → Rules → Manage Rules and Alerts…

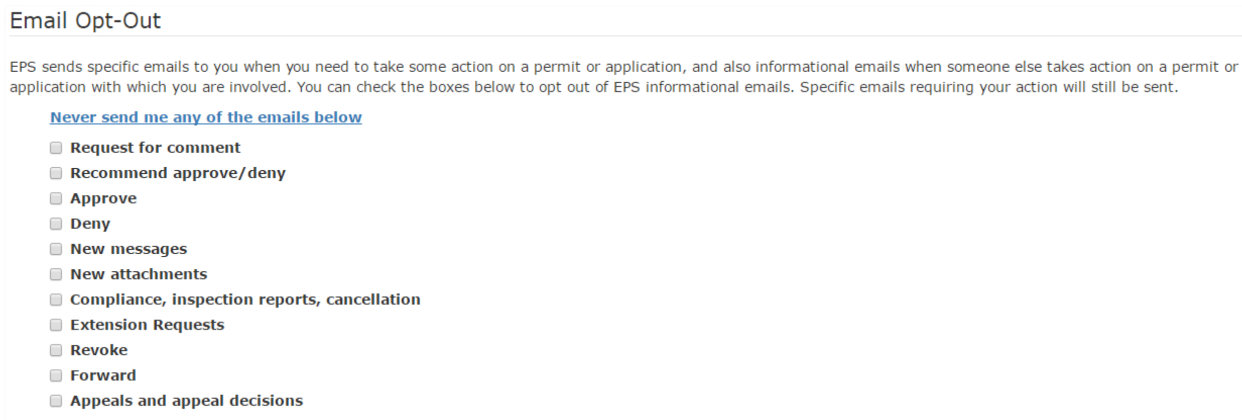


To delete the rule, highlight it and click Delete



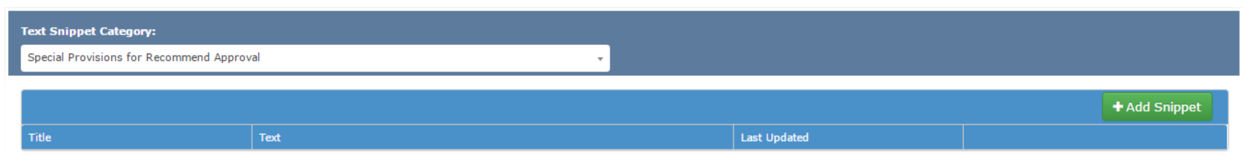
Email Opt Out

EPS sends specific emails Users when action is needed on a permit or application, and also sends information emails when someone else takes action on a permit or application with which the User is involved. Check in the boxes next to the types of emails to opt out of specific types of emails. Specific emails requiring the User's action will still be sent. To select all the available emails to opt out of, click on the blue **Never send me any of the emails below** to opt out. To opt back in to a type of email, click in the check box next to the type to receive; the check mark will be removed and the User will receive those emails again.

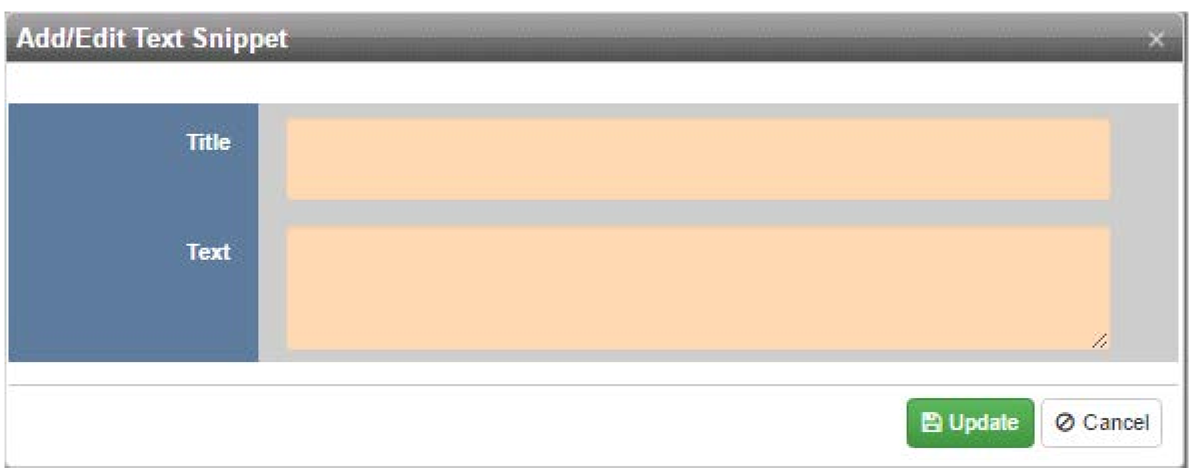


Custom Text Snippets

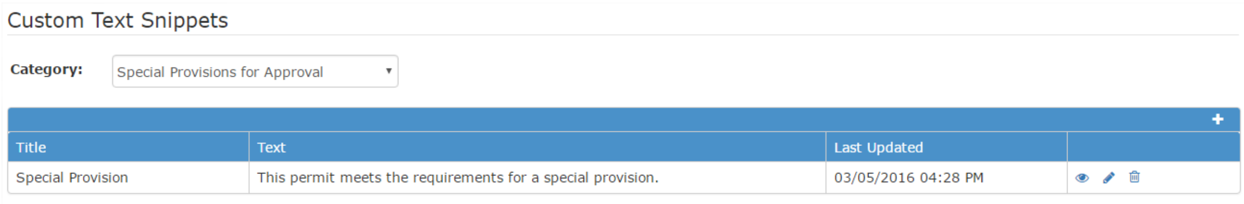
Custom Text Snippets allow Users to auto fill fields when the same text is used repeatedly. To add a Custom Text Snippet, select a category from the **Category:** dropdown. Click on the **Add Snippet** button in the upper right portion of the table to add a new Custom Text Snippet.



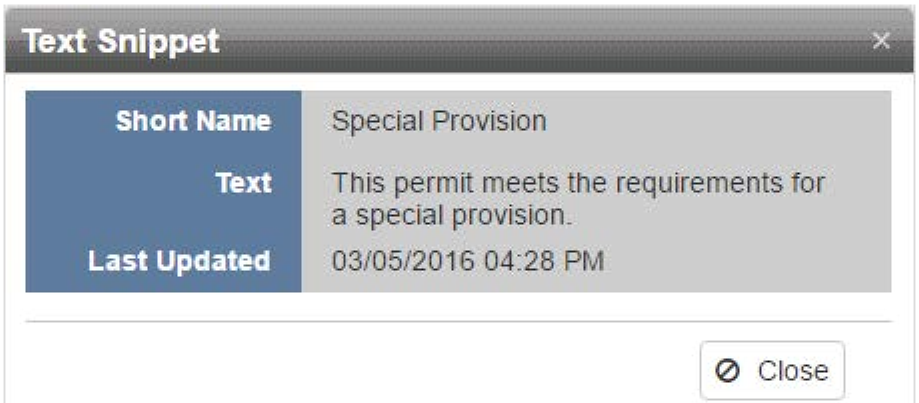
An Add/Edit window opens. Enter the Title and text as necessary and click **Update** to save the text or click **Cancel** to change.



The added text displays in the table, along with the option to **View Details**, **Edit** and **Delete** the Custom Text Snippet. Only the Custom Text Snippets for the selected category display in the table. To add or view other Custom Text Snippets, change the Category dropdown.

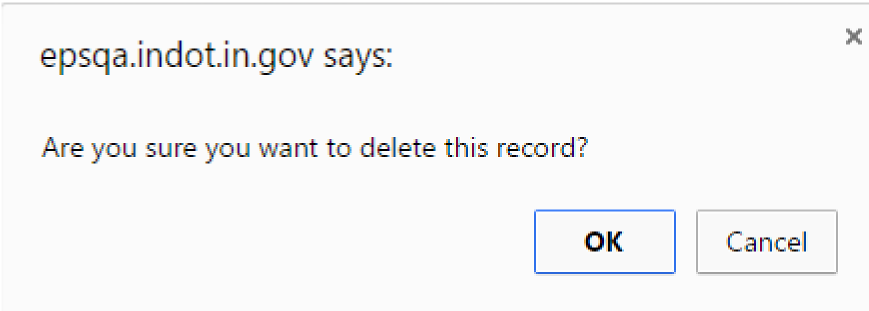


Click **View Details** to view the Custom Text Snippet. Click **Close** to close the pop up window.



Click **Edit** to edit an existing Custom Text Snippet. Make the necessary changes and click **Update** to save the changes or **Cancel** to return to the table without making any changes.

Click **Delete** to remove a Custom Text Snippet. Click **OK** to delete the Custom Text Snippet or click **Cancel** to return to the table without removing the Custom Text Snippet.



When working an application or permit, if a Custom Text Snippet can be applied a dropdown will display with the snippets that were entered in the Preferences section displayed. The entered text will display in the text box, but can be edited if necessary.