EnerGov Customer Self-Service (CSS) Contact Best Practices & FAQs

What are Contact Records in EnerGov/CSS?

Contact records are the way that EnerGov identifies individuals and companies and connects them to a CSS account. EnerGov has contact records that are used for all services types in EnerGov and the Customer Self-Service (CSS) Portal. A contact can be connected to all types of cases.

How do I create accounts for a company?

The company should have a single (primary) contact and email address for their business. The contact may or may not have a person's name on the contact. This primary company contact record will be the license holder for contractor licenses (if applicable). When you register your company through Customer Self-Service (CSS) you should use the company email address already on file with Building Codes and entered in EnerGov or notify permitting staff (by submitting a CSS Contact/Case Connection Form) with the email address you'd like to designate as your primary contact record, prior to creating an account. This should automatically connect your registered CSS user account with your case records. This will ensure that all cases associated with the company are viewable at your first log-in.

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

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

When individuals create a CSS account, they should use an email address that is on file for them as an individual (not the same email address that was used for the company record). Through the company's CSS account, you can associate individuals with applicable cases, permits, or licenses. By associating an individual with cases, they will be able to view case information using their individual CSS account. Please reference the "*How can I add additional contacts to an active case through CSS?"* Section below. When you submit for new applications, add the company contact record and any individual contact that should have access to the record in CSS.

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

Any permits or cases that were submitted or issued prior to December 11, 2017 and are still active may need to be manually connected to your new CSS account registration by permitting staff before you are able to view or interact with them in CSS. This may also happen if you used a different email address when creating your CSS account than one that was previously on file with us. If you are unable to view your records through CSS, submit a CSS Contact/Case Connection Form or speak with a permitting technician, so we can assist you with making the connections.

We appreciate your patience as we work through a high volume of these types of requests. In the meantime, if you need assistance requesting inspections on records you are unable to view, please call 864-898-5950 and speak directly to a permitting technician.

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

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

- Open permit in CSS portal
- Under “Active” permits
- Open permit
- Click the permit number
    - This will open the permit with a row of tabs
    - Click on “contacts”
    - Add contact
        - Select contact type in the drop down labeled “Add Contact As”
        - Search by “Last name” or “Company name” or “Email” (you can also add frequent contacts to “My Favorites” by clicking the blue star, then you will see that contact in “My Favorites” without needing to search.)
            - Click Add
            - Save
            - Refresh

The instructions are the same for a PLAN case, except there is a "plan number" instead of a "permit number" and the selection of contact types that you can add will vary.

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

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