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1 Public Site Account Management

1.1 Account Creation Process
The Public site will be made available to the public and will allow interested parties to create an account and submit applications towards an HPA Permit to WDFW. The subsequent sections will highlight the Public site login page, new user creation process, editing user profile information, submitting HPA Permit Applications, and checking the status of submitted applications.

Public Account user creation is made available to anyone who has access to the APPS Public Site URL as there will be a “Create a new account” link on the login page. Follow these steps to obtain a public user account.

Step 1: Click the “Create a New Account” link in the login page.

Step 2: Enter in your personal identification information (Business, Name, Username, Title, etc.) along with your contact information (address, e-mail, phone number).
Step 3: Make sure to review your information to ensure the accuracy of your input. Then, click Next.

Step 4: The system will check user-entered address against WDFW GIS library. Based on user-defined address, APPS presents a list of closely matching addresses in a pop-up window. You may either select one of system-suggested addresses via a checkbox or continue to proceed with initially specified address.

Step 5: Please select a group from a list displayed in screen. Based on description provided for each group record, the applicant must select only one group record – via radio buttons – that most closely matches their business process.
Step 6: Enter the answers to your Security Questions and click Next.
Step 7: Enter the CAPTCHA code to verify that a machine is not generating spam accounts. Click Create Account. Once public users complete account creation process, the system sends an automated message to the users’ email with his/her “temporary” passwords.

Step 8a: Login to APPS using username/password credentials provided in an email.
Step 8b: When logging in for the first time, system will prompt user to change temporary password to a permanent password that has at least one of each of the following: ten characters, one uppercase letter, one lowercase letter, and one number.

If desired and/or needed, users can change their account information at any time in the future by logging in with their account name/password. Their personal information, such as Name and Address, along with Password details can be update via My Account module.
1.2 Public Site – Application Submission and Management

Once the system has sent users their “temporary” passwords, users can login to the Public site, change the password to a preferred one that meets password requirements, and begin the application submission process. The application submission process, and all corresponding details (that are relevant to public users only), is highlighted in subsequent sections and are applicable to paper submission process for agency users as well.

1.2.1 Home Page (aka the “Dashboard”)

When Public User logs into APPS via Public portal, system will navigate user to a dashboard with several out-of-box web parts. These web parts are static and cannot be changed or adjusted in position by any user. For details on what each web part entails, refer to the table below.

<table>
<thead>
<tr>
<th>Web Part</th>
<th>Web Part Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start A New Application</td>
<td>Begin a new application record for submission based on applications listed in the web part.</td>
</tr>
<tr>
<td>My Unfinished Applications</td>
<td>Display five (5) most recent applications that were started but not yet submitted.</td>
</tr>
<tr>
<td>My Submitted Applications</td>
<td>Display five (5) most recent applications that have been submitted and their current status.</td>
</tr>
<tr>
<td>Getting Started with APPS</td>
<td>Access help guide and video on how to use the public portal for application submissions.</td>
</tr>
<tr>
<td>Message Center</td>
<td>Provide a quick link to access applications that have not been paid in full, have been sent back to public user for re-submission, have expired permits, or have scheduled inspections.</td>
</tr>
</tbody>
</table>
1.2.2 Apply for an HPA Permit

Once logged into the Public site, Public users can select and submit applications for WDFW review from a list of application types listed Public Dashboard “Start a New Application” web part or within the Application module. For application types, such as Standard, that correspond to more than one application form, APPS determines the form that needs to be completed based on the user selected criteria on the first page of the form.

During the application submission, the APPS system guides user to successfully submit an application by breaking the entire submission procedure into a 5-step process highlighted below. Additionally, WDFW administrator can define help text (yellow bubble) to further facilitate an online application submission.

1) **Application**: used to capture all desired information as part of an application; the forms can be configured to contain special logic and validation checks to ensure accurate data entry. For example, data fields can be marked as required, enforced for a specific format, shown/hidden based on selection of other parameters within an application, or require attachments based on selected options.

2) **Attachments**: upload supporting documents required for the permit. The applicant may choose to mail the documents, if so desired. In such cases where all documents are not uploaded as part of application submission process, system marks application with “Submitted – Some Components Missing” status after submission has been completed to signify pending receipt of specific documents. On the contrary, if all documents have been uploaded during submission process, APPS marks application as “Submitted – All Components Included” after successful submission.

3) **Validation**: validates entire application package to ensure it meets minimum submission requirements mandated by WDFW.

4) **Payment**: allows user to make a payment towards an application. Applicant has option to make online payment via Credit Card or ACH payment methods or offline via Check, Money Order, Inter-Agency Fund Transfer and Intra-Agency Fund Transfer options. If an application meets the criteria where no fee or payment is required, APPS skips payment step of the process and directly takes user to Submission page. The following criteria define conditions under which no payment is required:
   a. Emergency Application submission: fee is marked as Pay Later; an agency user must update fee by selecting “Pay Now” checkbox in Payment page to enable applicant to make an online or offline payment.
b. Application Type is US Forest Service MOU, Beach Prospecting, or Forest Practice

c. Project Type is one of the following: Farm and Agricultural Land (option available to public and agency users during application submission in Standard form), Beach Mineral Prospecting (application type), or Project Landward of OHWL (Ordinary High Water Line: option not available to public or agency user in application form; agency user must manually determine this criteria and “Waive Fee” accordingly)

d. Application is being processed under a contract with WDFW; user is to provide Contract Number upon selecting this option

e. Application is a modification to submission made before July 2012; user is to provide HPA Number upon selecting this option

5) Submission: used to certify application data to be submitted in the form. Upon successfully submission of an application, APPS sends an automated message to both applicant for receipt confirmation and Olympia Admin for notification of a new application requiring their review.

6) Review: page displayed after successful submission of an application; the page serves as submission receipt for applicant to maintain for records purposes and/or submit payment and attachment material via mail.

To submit an application, follow these steps:

**Step 1:** Log into APPS as a public user.

**Step 2:** Go to the Application tab on the top. Make sure the left panel displays Start a New Application.

**Step 3:** Select the application in which you wish to apply for and click the Apply icon. In this example, we will use a Standard Hydraulics Project Application form for demonstration purposes.

**Step 4:** Make sure to fill in every page of the application, as needed. The application portion consists of four main forms; General Information, Project Information, Waterbodies, and SEPA Compliance and Application Fee Exemption. The subsequent steps will highlight different sections within Standard HPA Application form only; other application forms may or may not contain all pages, data-entry fields, and/or data field logic.
Step 4a: Fill in the General Information Form, which includes Application Information, Project Identification, Applicant, Applicant Account Type, Authorized Agent or Contact, and Property Owner(s).
**Step 4b:** Fill in the Project Information Form, which includes Project Location and Project Description. To add a project location, click the **Add Project Location** button. You will be prompted to enter in the location and the system will perform address validation to ensure the address you entered is valid.
Step 4c: Fill in the Waterbodies Form.
**Step 4d:** Finally, select the SEPA Compliance and Application Fee Exemption. If you do not qualify, please select the fourth selection (Do not qualify for application fee exemption).

**Step 5:** Please upload any supporting attachments or required attachments along with this application.
Step 6: The system will perform a validation on all the data fields within the application to ensure there are no errors or missing required fields that were not entered. If the validation check fails, the system will ask you to go back to the application and change those data fields. If the validation check passes, you will be allowed to proceed on with the payment portion of the application.

Step 7: Based on the application and application type you selected, the system will calculate the required amount of fee that must be paid along with the application. The methods of payment include Credit Card, eCheck, Check, Money Order, Inter-Agency Fund Transfer, and Intra-Agency fund Transfer.
Step 8: Finally, check the certification statement and answer the security question that you had set while setting up your public user account. Then, click Submit.

1.2.3 Submission by Authorized Agents

The APPS system allows Authorized Agents to act as preparers of an application for Applicants. This scenario is identified in one of following two manners:

1) When an applicant does not select “No Agency will be acting on behalf of the Applicant” checkbox option, and
2) User account type is Authorized Representative; in this case, system auto-populates user information from user profile into Authorized Agent section and consequently requires user to enter applicant information instead.

Even in such cases where it is an authorized agent that prepares an application – rather than the applicant, APPS maintains the submission process consistent for all steps (1-8) above. The only difference between an
applicant and authorized agent making a submission is that an authorized agent is required to upload an attachment with applicant’s signature signifying receipt of authorization to submit an application on applicant’s behalf.

1.2.4 Submitting a Pre-Application

The Pre-application is a process that:

- Allows applicant to submit preliminary data in order to obtain WDFW’s assistance
- Allow WDFW to provide technical assistance to an unofficial submission
- The Pre-application could potentially turn into a real application

Public and Agency users alike will have the option to submit any application type, except for Minor and Major Modification, for a biologist’s review only. This activity will be initiated when user selects and makes a submission while selecting “Are you applying for a Pre-application?” checkbox option. APPS will also display a message to user immediately below the checkbox option detailing on conditions that qualify a user to apply for a pre-application.

The Pre-Application submission processes is very similar to the process described Sections (1-8) highlighted above, except for following two differences:

1) Pre-Application bypasses the payment section as no payment is required, and
2) Pre-application does not require user to provide Authorized Agent, Property Owner, Project Start and End Dates, and SEPA Compliance and Payment Fee Exemption details.

Upon submission of an application, the system submits an application “Submitted – All Components Included” or “Submitted – Some Components Missing” statuses, but informs an agency user of pre-application submissions via “Pre-App?” indicator in search result and application summary section.

1.2.5 Application Status Tracking

For all applications submitted, an applicant can keep track of application status in one of the following two (2) manners:

1) Automatic Email Notifications: system sends email notifications automatically to public users when an application status is updated.
2) Review submissions in Public Portal: user can review all submitted applications in “Track My Submitted Applications” page in Application module.
a. Application: user can view information related to application submission and status; APPS displays: Submission ID, Application Type, Submission Date, Submitter details (Name, Address, Phone and Email), Most Recent Application Status, Application Status History with Comments and Most Recent Application Form.

b. Attachments: displays any attachments that have been uploaded to APPS during submission process; if attachments were uploaded during submission process, applicant can upload additional set of attachments in this page.

c. Payment: displays total application fee, payment made and fee balance; user is able to make additional payments via Credit Card or electronic Check if there is any pending balance on application fee.

d. Issued Letters/Permits: displays all permits that have been issued for the submission in question.

e. Correspondence: allows applicant to initiate correspondence with agency users, but visible to third-party users as well.

f. Post-Permit Requirements: lists all reporting requirements detailed in issued HPA; user is also able to create additional records if desired.

g. Appeals: lists any appeals that have been filed against the application record.

h. Email History: displays a list of emails that have been manually sent by agency users, and are not system-automated.

i. Inspections: displays a list of all inspections that have been completed for the submission; system also displays inspection results and attachments corresponding with each inspection record next to the inspection record itself.

1.2.6 Request for Withdrawal

During any part of application review process and before a permit has been issued, an applicant may withdraw an application from WDFW review process. This action, which can be performed in the Form detail page of Submission Applications, is completely independent of any review being performed by WDFW.
Upon withdrawal of application from WDFW review, system will update application status to “Withdrawn” and confirm such status update via email to applicant.

### 1.2.7 Submit Customer Satisfaction Survey

When an HPA is issued, APPS send an automated email to applicants requesting to complete a Customer Satisfaction survey. When applicants click on the link, they are navigated to the Survey site where they must enter APPS site username and password to log in to the site and submit a survey.

The process to submit a survey is indicated in steps below.

**Step 1:** Access email received upon permit issuance and click on **Survey** hyperlink.

**Step 2:** Provide login **Username** and **Password** and click on **Login** button to begin submitting a survey.

**Note:** System requests for user login credentials to ensure that an anonymous user is not submitting a survey. System is not tracking user credentials during survey submission process except for when user chooses to provide his/her contact information while submitting the survey.
Step 3: Rate WDFW support process, provide comments, and specify miscellaneous data if desired (such as County, City, and Biologist). If you would like to provide your information to agency user for review, click on checkbox option that says “I would like to provide my name and contact information to WDFW.”

Step 4: Click on Send Survey button once all necessary details have been specified to submit the survey for WDFW review.

1.3 Public Site – Third-Party Review

1.3.1 Review APPS Submissions

APPS provides the capability for any non-agency user to be able to review specific details about an application that are submitted and tracked in APPS only. These details are available on a third-party site that is accessible from Public Site login page via “SEARCH for applications and permits” link. The third-party site is not to be used for third-party users to file appeals or report suspected violations. These details are managed outside of APPS.
After accessing the third-party site, users may search for applications with a pre-defined list of search parameters, however, users are not able to save their search criteria. If a user would like to save such data, they must sign-up for automatic notification process highlighted in subsequent section of this document.

Once a user searches for applications with set criteria, system outputs results on the same page in a grid view format. These results provide basic details about the submission.

While users remain on application search results page and do not navigate to detail results, users may alter their search criteria at any time. In order to view complete application detail results, user must click on view link for system to display following set of detail information pertaining to selected submission record.

For details instructions on reviewing APPS submissions on third-party site, refer to steps listed below.

**Step 1:** Access Public Site Login Page.

**Step 2:** Click on **Search for Applications and Permits** hyperlink and system will take user to the third-party search page.

**Step 3:** Define search parameters as needed; if all search parameters are not listed in the initial view or if you would like to select multiple options for the same parameter, click on **Advanced Search** hyperlink. Once you have defined all search parameters, click on **Search** button.

**Step 3a:** To access user manual on reviewing the third-party site, click on **Help Guide** link at top of search page.
Step 4: To view application specific details, click on **View** button.

Step 5: Click on various tabs to view application specific details. Please note that some tabs may not display any data, such as Correspondence or Appeals, as no conversation or appeals may have been initiated against the application record. Following table details on information that is displayed in each tab.

<table>
<thead>
<tr>
<th>Tab Name</th>
<th>Details Provided in Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>Basic application details, including Application ID, current Application Status, Application Submission Date, Applicant Name, Application Form, and Application Status History</td>
</tr>
<tr>
<td>Attachment</td>
<td>All attachments uploaded into APPS towards a particular application record</td>
</tr>
<tr>
<td>Issued Letters/Permits</td>
<td>All letters and permits issued in APPS towards a particular application record</td>
</tr>
<tr>
<td>Correspondence</td>
<td>Any conversation initiated by applicant, WDFW Staff, or third-party user</td>
</tr>
<tr>
<td>Post Permit Requirements</td>
<td>Any post permit requirements generated or submitted by applicant or WDFW Staff</td>
</tr>
<tr>
<td>Appeals</td>
<td>Any appeals filed towards a particular application record</td>
</tr>
<tr>
<td>Email History</td>
<td>Any emails manually sent by an agency user towards a particular application record</td>
</tr>
<tr>
<td>Inspections</td>
<td>Inspections, with corresponding results and attachments, completed for the submission record</td>
</tr>
</tbody>
</table>
Application ID: 2362

Application Name: Standard Hydraulic Project
Submitted Date: 4/14/2014 1:39:43 PM
Submitted by: Karan Arora
Address: 1111 Washington Street
City: Olympia
State: WA
Zip: 98501-2283
Status: Submitted - Some Components Missing

Application Form(s) Detail

Online Standard HPA Application Form
Standard Application - PDF View

Application Revision

Reason for Revision:

Application Review History

<table>
<thead>
<tr>
<th>Status</th>
<th>Updated By</th>
<th>Updated Date</th>
<th>Review Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted - Some Components Missing</td>
<td>Karan Arora</td>
<td>04/14/2014</td>
<td></td>
</tr>
<tr>
<td>Now</td>
<td>Karan Arora</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.3.2 Sign-up for Notifications

APPS provides the capability to register for automated email notifications for submissions that match user-desired criteria. In order to sign-up for these notifications, user must create a public site account as described in one of previous sections of this document.

Once an account has been established, users can sign-up for notifications by accessing e-Service module and Review All Applications and Notifications page. In order to create a notification criterion (and user may create multiple if so desired), user must select notification parameters from a list of pre-determined parameters. These parameters are the same as those used to application search parameters on third-party site. When saving a notification, user is requested to provide notification name (to distinguish between different saved parameters) and notification frequency of “Daily”, “Weekly” or “Monthly”.

In order to manage individual notification criteria, APPS provides the user with following three (3) capabilities:

1) **Edit Notification**: user may choose to edit saved notification criterion.

2) **Delete Notification**: user may choose to delete a saved notification criteria if further notifications are no longer desired.

3) **Load Notification Criterion**: user may choose to load existing notification criterion and user it to perform a search against all APPS submissions to review latest set of information.

For specific details on creating and managing notification criterion, refer to steps listed below.

**Step 1:** Click on eService module.

**Step 2:** Click on Review All Submissions and Notifications sub-module.

**Step 3:** Click on Advanced Search and Notification Subscription hyperlink in search.
Step 4: Select desired search criterion among various search parameters available to public user for review.

![Advanced Search and Notification Subscription](image)

**Step 5:** Specify Notification Name and Notification Frequency.

**Step 6:** Click on **Add to My Notification** button. Once a notification criterion has been saved, system displays user saved subscription in **Saved Notification Subscriptions (for automatic email notifications)** grid view.
Step 6a: To stop receiving email notifications based on saved notification criterion, click on **Delete** icon next to a saved notification subscription.

Step 6b: To review saved notification subscription criterion or perform a quick search using such saved criterion, click on **View** icon for desired notification subscription. This action auto-populates saved criterion in Advanced Search pop-up window for you to review. To perform a search, simply click on **Search** button on-screen.