TERTIUS

THE DISTRICT'S ONLINE MARKETPLACE FOR CONSTRUCTION INSPECTIONS

A GUIDE FOR CUSTOMERS



tertius.dcra.dc.gov

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Tertius Introduction

Tertius is a marketplace platform in which DOB customers (project owners) connect with and invite Third-Party Inspection Agencies (TPIA) to work on their projects. Through Tertius, customers schedule inspections on open permits. Permits can be closed once all inspections are completed, filed by the TPIA, and approved by DOB. Tertius also provides a one-stop shop for uploading reports and documentation, where they are accessible for review by all stakeholders.

Log In and Register

Register for Tertius

Requirements

Select a password for your account. It must comply with the following:

- At least 8 character(s)
- At least 1 number(s)
- At least 1 symbol(s)
- At least 1 lowercase letter(s)
- At least 1 uppercase letter(s)
- Does not contain part of username
- Does not contain the first name used for registration
- Does not contain the last name used for registration

Steps

Step 1: Log in to <u>Access DC</u>

To register with Access DC:

- 1. Select the Register button on the Tertius homepage.
- 2. Select the Register with Access DC button.
- 3. Choose the sign-up option.
- 4. Enter the email address where you received the invitation to register for Tertius, password, first name, last name, and mobile phone number.
- 5. Receive the verification email and verify your email address as directed. Remember to check your spam folders. If you do not receive a verification email, please contact DOB via email at <u>DOB@dc.gov</u>.

If you are a registered Access DC user:

Follow the link provided in the Tertius invitation: <u>tertius.DOB.dc.gov</u>. Once in Tertius select Login at the top right corner of the screen. You will be navigated to the Access DC home screen. Login as usual.

Step 2: Access Tertius

After verifying your email address in Access DC, you will be redirected to your Tertius account.

Reset Password

If you forget or need to change your password, visit Access DC and select the "Need help signing in?" option. Next, select Forgot Password? Then, enter your Access DC email address as directed.

Log In To Tertius

Requirements

If you don't have one yet, follow the steps in this section:

<u>Register for Tertius</u>

Steps

Follow these steps to log in to Tertius:

- 1. Visit tertius.DOB.dc.gov.
- 2. Select log in at top right.
- 3. Sign in with your Access DC account.
- 4. You will be navigated to the Dashboard.

Get to Know Your Dashboard

Requirements

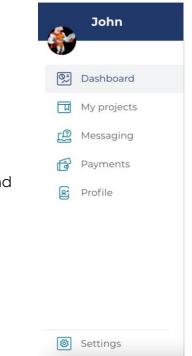
• Log In To Tertius

Steps

Following login, you are navigated to the Dashboard, where you will find an overview and the latest information on your projects.

Navigate from the Dashboard:

- Find an Inspector: Create project and request proposals.
- **Menu**: The main menu is at left. Here, access the Dashboard, projects, messages, payments, and user profile.
- **Received Proposals**: Proposals received for proposal-based projects.



- Scheduled Inspections: Review inspections that have been scheduled.
- **Reports**: Review submitted Inspection Reports.

Regular Inspections

Customers who require special inspections will find an inspector using a different procedure than those who require regular inspections.

In general, use the Regular Inspections workflow if you have issued permits. Otherwise, the Special Inspections workflow is appropriate. If you are unsure of whether you need a regular or special inspection, contact DOB Customer Service at 202-671-3500 or DOB@dc.gov.

Find instructions on how to initiate special inspections in the Special Inspections section.

Find an Inspector

To find an inspector, first create and submit a project by following the steps below.

Requirements

• Log In To Tertius

Steps

Step 1: Search for an Inspector:

1. Select the Find an Inspector button.



2. Select Search by Address or Permit Number in the Regular Inspections section.

John		(B) Find an Inspector
Dashboard My projects	REGULAR INSPECTIONS Search for Third-Party Inspection Agencies if you have your per	rmits issued
 Messaging Payments Profile 	Search By >	Search By
🕞 User Guide	 Enter address Select permit numbers you'd like to add to the project 	 Enter Permit numbers (ideally maximum 5 permits under the same address) Select permit numbers you'd like to add to the project
	SPECIAL INSPECTIONS Search for special inspection Agencies	
	Search By > PERMIT NUMBER	

- a. Address-Based Search
 - i. Complete the form with the address of the property under construction and Tertius will provide a list of associated open permits. Fields include:
 - 1. Street Number
 - 2. Street Number Suffix
 - 3. Street Name If the address is a numbered street, please include the "th", "rd", "st", etc. as in 4th Street SW. If the street name includes North, South, East, or West, spell out the words, e.g., North Capitol. Please use the full street name, abbreviations are not accepted.
 - 4. Street Type
 - 5. Unit Number
 - 6. Quadrant
 - 7. Zip Code
- b. Permit-Based Search: Enter your permit number or numbers divided by commas. All permits must be under the same address.
- 3. Select Continue.

Step 2: Select your Permits

- 1. Accept the Project Terms by checking the checkbox.
- 2. Select a permit. Tertius displays all open permits for the address. Select any available permit for which you want inspections. Permits for which an agency has already been assigned are also listed, but you cannot select them. The scope and the list of inspection types for that permit are displayed.

Check the permit numbers.		Check the permit numbers.	
□ P1903248		□ B2101808	
Cannot be picked, has Agency assigned already		□ B2101926	
Back	Add Details	Back	dd Details

- 3. Select the Add Details Button
- Step 3: Specify Inspection Details
 - 1. When: Select when you need the inspection. Select:
 - a. Short-term projects: Add preferred time period.
 - b. Long-term projects: Add preferred time period.
 - 2. Additional information: Add relevant details for the inspection agency. For example, "Project will be phased," "Project may have a conditional occupancy," etc.
 - 3. **Site contact**: Add contact information for the person responsible to meet the inspector at the construction site.
 - a. Name
 - b. Email Address
 - c. Phone Number: format +1 XXX-XXX-XXXX
 - 4. Select Review Project Details: Review and/or edit your entry.
 - 5. If all project details are correct, select **Find an Inspector**.

REVIEW AND CONFIRM REC Check the details of the project you created.	UEST
ADDRESS 73 G ST SW	<u>&</u> CUSTOMER John Doe
SELECTED PERMITS	
BUILDING B2101808	
Inspection types (25)	~
This permit includes TEST Renovating Bathroom and Shower	
	Edit Permits
PROJECT TIMELINE	SITE CONTACT
Short-term	Mary Smith
🛗 Oct 3, 2021 - Oct 9, 2021	🖾 mary@email.com
E	Lit Time & +12345678998
	Edit Site Contact

Step 4: Browse Agency Profiles

- 1. Below the project details, find a list of available third-party agencies. All agencies listed have the qualifications for the inspection services you specified.
- 2. Find buttons for each agency depending on services available: Cost per Inspection, Proposal, or both. Select the best option:

JAN AGENCY See Profile		•
	Fixed	Proposal

- a. Cost per Inspection construction is more suitable for:
 - Small projects or
 - Small number of permits, and
 - When you need the inspection to be scheduled as soon as possible.
 - See the price list and project terms for these projects by selecting the Cost per Inspection button.
 - Once the third-party agency uploads the inspection reports, payment will be due immediately.

	FIXED PRICE	
	Click on the request inspections button below accept this fixed price. You can only send one at a time. If the agency can do the inspection frame they'll schedule inspections in an hour. to book another agency.	fixed price request in the provided time
	Agency: JAN AGENCY	
	PROJECT number: 5562	
	Fixed Price Booking Terms:	
	Price list:	
	Every inspection type under the permits select project will be performed with the following put	
	Building Permit - \$14.00 / inspection	Cancel Confirm
		PROPOSAL
b. Proposal • Se	Based nd multiple requests at a time	You can request a proposal from the agencies and accept the one that is the best for you.
	selected agencies based on e profile.	You are about to send JAN AGENCY
	lect Request Proposal and onfirm.	a request for proposal for PROJECT NUMBER 5562
	///////.	Cancel Confirm

3. Your request was sent to the third-party agency. Find a list of agencies you requested a proposal from in the Requests Sent section.

\sim	EQUEST SENT ese are the agencies you've sent re	uest for proposal or request for inspection.	
	JAN AGENCY See Profile	•	
Ø		PROPOSAL	
Ple		on agencies with the qualifications necessary for the inspection services that nd choose the agency from whom you would like to get a proposal.	
Filter by proje	La type All	Sort by Random	-

- 4. Review your received proposals and accept the agency that best suits your needs.
- 5. Find all projects and explore details and statuses under Projects.

Manage Projects

Once you have selected your inspection agency and accepted a proposal, view and manage your projects under My Projects. My Projects is organized by tab:

• Pending

Find a list of projects you requested proposals for but have not yet accepted here. It also shows projects for which you have requested a Cost per Inspection project and the agency hasn't accepted your request. Review the search results of available inspection agencies for a project by selecting See Inspectors.

• Confirmed

Find a list of projects for which you have received and accepted the proposal. Select the View and Manage button to explore details and contact the third-party agency to schedule an inspection.

• Completed

Find a list of finished projects. Find details by selecting the Details button.

The star icon next to a project means that it is a Special Inspection project.

John	TERTIUS		(I) Find	l an Inspector 🍦 👓
	Pending Confirmed Corr	pleted		
💇 Dashboard				
My projects	Search By	▪ Type Here		
Page Messaging	PROJECT PERMI	rs when	WHERE	
Payments			4806 SHERIFF	See Inspectors
Profile		29 Jan 25, 2022 - Jan 31, 2022	RD NE	Cancel project
User Guide				
	B0800	068	620 MICHIGAN	See Inspectors
	10752 B10003	Jan 21, 2022 - Jan 23, 2022 57	NE	Cancel project
Settings	10625 AN1500	137 Jan 24 2022 - Mar 3 2022	5000 OVERLOOK AVE	See Inspectors

Add New Permit to an Existing Project

Using Tertius, you can add a new permit to an existing project by submitting a request to the third-party agency. The new permit has to be for the same address as the project.

1. Open the Project Details on your project page.

2. Select Add New Permit.

John		(I) Find an Inspector	Û
Dashboard My projects	Confirmed Projects > Project number 11001 PROJECT NUMBER 11001		
Messaging Payments Profile User Guide	ADDRESS ACENCY 400 North Capitol Jan Agency ST NW	SITE CONTACT PROJECT TIMELINE Test Long-term +12346787654 Jan 26, 2022 - Feb 5, 2022 test@email.com	
	PROJECT DETAILS SELECTED PERMITS Add new permit		^
	B1003018 Inspection types (26)	This permit includes: REVISE BUILDING PERMIT B1000819 TO SHOW CHANGE MADE PLUMBING/ELECTRICAL DUE TO SITE CONDITION WHERE GRA More	
Settings	B1005265	This permit includes:	

- 3. Type the number of the permit you want to add and select Add.
- 4. You will receive an email notification when the third-party agency has accepted/rejected your request.

John		① Find an Inspector
Dashboard	Confirmed Projects > Project number 1000	ADD NEW PERMIT
Messaging Payments Profile User Guide	ADDRESS 400 North Capitol ST NW	Permit Number B104126 CT PROJECT TIMELINE Long-term 3an 26, 2022 - Feb 5, 2022 BUILDING B104126
	PROJECT DETAILS SELECTED PERMITS Add new permit	This permit includes Renovation to office space on the 2nd floor per plans Inspection types (22)
	B1003018 Inspection types (26)	Cancel Add ncludes: NG PERMIT BIO00819 TO SHOW CHANGE MADE TO PLUMBING/ELECTRICAL DUE TO SITE CONDITION WHERE GRAVITY C More
Settings	B1005265	This permit includes:

Cancel a Project

Steps

Projects may be canceled BEFORE an inspection is scheduled.

- If you have not accepted a proposal for the project, cancel by selecting the Cancel Project button next to it under the Pending tab.
- If you accepted a proposal for the project, but no inspection event has been scheduled, select the View and Manage button next to it under the Confirmed tab. On the project page, select Cancel Project. Provide an explanation for the cancellation and select Cancel.

SCHEDULED INSPECTIONS The table shows your inspection jobs scheduled by your agency. <u>Contact your inspection agency to modify or cancel an inspection job</u> .							
(i) 1			Please <u>contact your sele</u>	ected inspection agency to g		ed.	
	Aug 2, 2021 - Aug 4, 2	021					
	DATE	TIME	PAY	STATUS	REPORT	PAYMENT	
Conta	act Agency to Schedule Ir	spection					
	Cancel Project						

• If you accept a proposal for the project and there is an inspection event scheduled, only DOB can cancel the project. Select the View and Manage button next to it under the Confirmed tab. Then, select Cancel project. Complete the form, including an explanation for the cancellation. Then, select Request Cancel. DOB will review your cancellation request and make a determination. Per DOB policy, a project cannot be canceled or a change in inspection agencies may not be made once a third-party inspection agency begins a project.

CHEDULED INSPECTIONS e table shows your inspection jobs scheduled by your agency. <u>Contact your inspection agency to modify or cancel an</u> <u>pection job</u> .						
🛗 Jun 25, 2021 - Jul 30, 2021						
DATE	TIME	PAY	STATUS	REPORT	PAYMENT	
Jul 6, 2021	7:00am - 11:00am	\$0.00	In Progress	Open Report		
ontact Agency to Schedu	le Inspection					
		Request Canc	el Project			
When there is inspection s	scheduled, the project may only	be canceled by an a	administrator			
Describe why you need to ca	ncel this project					
Type here						
2/1000						

Manage and Accept Proposals

Requirements

- Get to Know Your Dashboard
- Find an Inspector
- <u>Send a Message</u>
- <u>Submit a Payment</u>

Steps

Find proposals from third-party and special inspection agencies on your Dashboard under Received Proposals. The card displays the project number, permits, and third-party agency.

John		(1) Find an Inspector
🐨 Dashboard	RECEIVED PROPOS	ALS
My projects	Project Number 2053	Project Number 1962
🔂 Payments 😰 Profile	Permits P1802968	Permits P1802968
	Agency Jan Agency See proposal	Agency Jan Agency See proposal
	See all pending projects	

- 1. Select See Proposal.
- 2. View the detailed information provided in the proposal, including the type of <u>payment arrangement</u>. Find the information you entered when submitting the proposal request. Contact the third-party or special inspection agency if you would like to have further communication with them about the proposal as indicated in the image below.

PAYMENT ARRANGEMENT
Multiple Inspections Payment Inspection events are added to an invoice and payment is requested on a regular basis agreed upon between client and agency
ESTIMATED BUDGET
\$100.00
test
Project Details ~
Please contact us if you have any questions or need more information. Otherwise, you may accept our proposal and finalize booking your inspection.
Reject proposal Accept Proposal
Thank you for your business.
Jan Agency

- 3. Following proposal review:
 - Accept it: select Accept Proposal and complete the checkout process. Find details related to the payment process in the <u>Submit Payment</u> section.
 Following checkout, find details of this project under Confirmed Projects.

OJE	CT NUMBER 5949
	THANK YOU!
You	have booked Jan Agency to perform inspections described in project number 5949
	The details of your booking have been sent to you via email. You may also view the details under Confirmed bookings where you may also schedule the time of your inspection.
	For more information, <u>contact Jan Agency</u>
	Close

b. **Reject** it: Select Reject proposal and confirm.

Send a Message

Chat with any third-party or special inspection agency already contacted and find previous conversations under Messaging. Locate prior conversations using the Search Messages field.

Inbox

Find contacts for any project under Inbox. To start a conversation, select the contact card and type in the chat box. Check Include an Admin to copy DOB on the conversation. To move a conversation from the Inbox to Archived, select Archive This Conversation.

Archived

Find your archived conversations under Archived. Select a contact card to view the conversation and the Restore This Conversation link to move it back to the Inbox.

Special Inspections

Customers who require regular inspections will find an inspector using a different procedure than those who require special inspections.

In general, use the Special Inspections workflow to find a Special Inspection Agency and create a project once you have a permit number regardless of issuance. Otherwise, the Regular Inspections workflow is appropriate. If you are unsure of whether you need Special Inspections contact the project's structural engineer or, contact DOB Customer Service at 202-671-3500 or DOB@dc.gov.

Find instructions on how to initiate regular inspections in the <u>Regular Inspections</u> section.

Find an Inspector

To find an inspector, first create and submit a project by following the steps below.

Requirements

• Log In To Tertius

Steps

Step 1: Search for an Inspector:

- 1. Select the Find an Inspector button.
- 2. Search by Permit Number in the Special Inspections section.
 - a. Conduct a permit-based search. Enter your permit number or numbers divided by commas. All permits must be under the same address.
 - b. Special inspection agencies must be contacted when the application screening is successful and plan review starts. Note: DOB will review the Special Inspection pre-construction documents after structural drawings are approved.

	🛞 Find an inspector 🛛 🖨 🚥
REGULAR INSPECTIONS Search for Third-Party Inspection Agencies if you have your permi	its issued
Search By ADDRESS	Search By PERMIT NUMBER Permit numbers (deally maintainum 5 permits under the same address)
SPECIAL INSPECTIONS Search for special inspection Agencies	 Select permit numbers you'd like to add to the project
Search By PERMIT NUMBER Fater Permit number(s) Seder Ensection specs you'd like to add to the period.	
	Back for Third-Party Inspection Agencies if you have your permit Sarch for Third-Party Inspection Agencies if you have your permit Sarch By DDDEESS I for a darks I fo

Step 2: Select Your Permits

- 1. Accept the Project Terms by checking the checkbox.
- 2. Select a permit. Tertius displays all issued and non-issued permits in the plan review phase for the address: Select any available permit. The scope and the list of Special Inspection types for that permit are displayed. Regular Inspection types for a permit are not displayed in the Special Inspections flow.

Check the permit numbers.	
□ B2101808	
□ B2101926	
Back	Add Deta

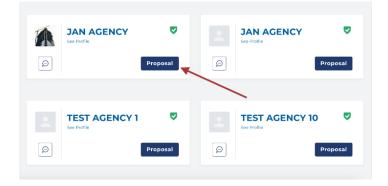
3. Select the Add details button.

Step 3: Specify Inspection Details

- 1. **Project Scope**: Describe the scope of your project in one sentence. This might be useful if more special inspection agencies work on the same permit, and you'd like to define the scope for each one of them
- 2. When: Select the period when you'll need the special inspections to be performed.

Url of the document	
	Remove

- 3. **Project Documents:** Share the links of the documents that might be necessary for the agency. Add the name of the document and copy and paste the website address, or URL, where it can be found.
 - a. <u>Required:</u>
 - i. Latest construction drawings. Make sure to include the structural drawings.
 - b. Optional
 - i. Specs
 - ii. Schedule of Special Inspections
 - iii. Geotech Report
 - iv. Project Schedule
- 4. **Project Details:** Describe any details that might be useful for the agency. The following information can help:
 - a. New Construction or Renovation
 - b. Building Use
 - c. High or Low Rise
 - d. Foundation Type
- 5. Contact Person: Add contact details of the person the agency can reach out to for project questions.
 - a. Name
 - b. Email Address
 - c. Phone Number: format +1 XXX-XXX-XXXX
- 6. Click on **Review Project** Details.
- 7. If all project details are correct, select Find an Inspector.



Step 4: Browse Agency Profiles

- 1. Below the project details, find a list of available special inspection agencies. All agencies listed have the qualifications for special inspection services.
- 2. Select the agency you'd like to request a proposal from. The default order of the agencies is random.
 - a. Type the name of the agency you'd like to find, or
 - b. Sort the agencies A-Z or Z-A
- 3. Request a proposal from an agency or multiple agencies.
- 4. Select Confirm to send the request.

PROPOSAL
(i) You can request a proposal from the agencies and accept the one that is the best for you.
You are about to send JAN AGENCY
a request for proposal for PROJECT NUMBER 10836
Cancel Confirm

Manage Projects

Once you have selected your inspection agency and accepted a proposal, view and manage your projects under My Projects. My Projects is organized by tab:

Pending

Find a list of projects you requested proposals for but have not yet accepted here. It also shows projects for which you have requested a Cost per Inspection project and the agency hasn't accepted your request. Review the search results of available Inspection Agencies for a project by selecting See Inspectors.

Confirmed

Find a list of projects for which you have received and accepted the proposal. Select the View and Manage button to explore details and contact the third-party agency to schedule an inspection.

Completed

Find a list of finished projects. Find details by selecting the Details button.

The star icon next to a project means that it is a Special Inspection project.

John				(I) Find	d an Inspector
	Pending Confirmed	Complete	d		
隢 Dashboard					
My projects	Search By		▼ Type Here		
P Messaging	PROJECT	PERMITS	WHEN	WHERE	
Payments				4806 SHERIFF	See Inspectors
Profile	10836	B1903929	Jan 25, 2022 - Jan 31, 2022	A806 SHERIFF RD NE	Cancel project
User Guide				NE	cancer project
		B0800068		620 MICHIGAN	See Inspectors
	10752	B1000357	Jan 21, 2022 - Jan 23, 2022	AVE NE	Cancel project
				5000 OVERLOOK	See Inspectors
Settings	10625	AN1500137	1an 24-2022 - Mar 3-2022	AVE	

Add New Permit to an Existing Project

Using Tertius, you can add a new permit to an existing project by submitting a request to the third-party agency. The new permit has to be for the same address as the project.

Open the Project Details on your project page.

Dashboard	Confirmed Projects > Project number 11001 PROJECT NUMBER 11001		
Messaging Payments Profile	ADDRESS ACENCY 400 North Capitol Jan Agency ST NW D PROJECT DETAILS	SITE CONTACT Test +12346787654 test@email.com	PROJECT TIMELINE Long-term Jan 26, 2022 - Perio 2022
	PAYMENT ARRANGEMENT Multiple Inspections Payment Inspection events are added to an invoice and payment is requested on a regular basis agreed upon between client and agency PROPOSAL PAYMENT METHOD	TOTAL INSPECTIONS Number of scheduled inspections Budget used Estimated budget Remaining	3 \$0.00 \$1,000.00 \$1,000.00

Select Add New Permit.

John		() Find an Inspector
Dashboard	Confirmed Projects > Project number 11001 PROJECT NUMBER 11001	
My projects Messaging Payments Profile User Guide	ADDRESS AGENCY 400 North Capitol Jan Agency ST NW E	SITE CONTACT PROJECT TIMELINE Test Long-term +12346787654 Jan 26, 2022 - Feb 5, 2022 test@email.com
	PROJECT DETAILS SELECTED PERMITS Add new permit	^
	B1003018 Inspection types (26)	This permit includes: REVISE BUILDING PERMIT B1000819 TO SHOW CHANGE MADE TO PLUMBING/ELECTRICAL DUE TO SITE CONDITION WHERE GRAVITY C More
Settings	B1005265	This permit includes:

Type the number of the permit you want to add and select add.

John			(iii) Find an Inspector
💓 Dashboard	Confirmed Projects > Project number 1303	ADD NEW PERMIT	
My projects Messaging Payments Profile	ADDRESS 400 North Capitol 57	Permit Number B104126	CT PROJECT TIMELINE Long-term Jan 26, 2022 - Feb 5, 2022
User Guide	NW PROJECT DETAILS	BUILDING B104126 This permit includes Renovation to office space on the 2nd floor per plans	*
	SELECTED PERMITS	Inspection types (22)	ncludes:
	B1003018 Inspection types (26)	Cancel Add	nciudes: NG PERMIT B1000819 TO SHOW CHANGE MADE TO ECTRICAL DUE TO SITE CONDITION WHERE GRAVITY C
Settings	B1005265	This permit	includes:

You will receive an email notification when the third-party agency has accepted/rejected your request.

Cancel a Project

Steps

Projects may be canceled BEFORE the Special Inspection Meeting Minutes have been accepted by DOB.

• If you have not accepted a proposal for the project, cancel by selecting the Cancel Project button next to it under the Pending tab.

Tertius User Guide | For Customers

• If you accepted a proposal for the project, but the Special Inspection Meeting Minutes haven't been accepted by DOB, select the View and Manage button next to it under the Confirmed tab. On the project page, select Cancel Project. Provide an explanation for the cancellation and select Cancel.

SCHEDULED INSPECTIONS The table shows your inspection jobs scheduled by your agency. <u>Contact your inspection agency to modify or cancel an inspection job</u> .						
	There are no scheduled insi		Please <u>contact your sel</u>	<u>ected inspection agency</u> to <u>g</u>	get your first inspection schedul	ed.
	DATE	TIME	ΡΑΥ	STATUS	REPORT	PAYMENT
Contact Agency to Schedule Inspection						
	Cancel Project					

• If you accepted a proposal for the project and the Special Inspection Meeting Minutes have been accepted by DOB, only DOB can cancel the project. Select the View and Manage button next to it under the Confirmed tab. Then, select Cancel project. Complete the form, including an explanation for the cancellation. Then, select Request Cancel. DOB will review your cancellation request and make a determination. Per DOB policy, a project cannot be canceled or have a change in inspection agencies once the Special Inspection Meeting Minutes have been accepted by DOB.

Manage and Accept Proposals

Requirements

- <u>Get to Know Your Dashboard</u>
- Find an Inspector
- <u>Send a Message</u>
- Submit a Payment

Steps

Find proposals from third-party and special inspection agencies on your Dashboard under Received Proposals. The card displays project number, permits, and third-party agency.

John		(Find an Inspector) 🗘 🚥
🖳 Dashboard	RECEIVED PROPOSALS	
My projects		
😰 Messaging	Project Number 2053	Project Number 1962
Payments	Permits	Permits
Profile	P1802968	P1802968
	Agency	Agency
	Jan Agency	Jan Agency
	See proposal	See proposal
	See all pending projects	

- 1. Select See Proposal.
- 2. View the detailed information provided in the proposal, including the type of <u>payment arrangement</u>. Find the information you entered when submitting the proposal request. Contact the third-party or special inspection agency if you would like to have further communication with them about the proposal as indicated in the image below.

PAYMENT ARRANGEMENT

Multiple Inspections Payment

Inspection events are added to an invoice and payment is requested on a regular basis agreed upon between client and agency

ESTIMATED BUDGET

\$100.00

test

Project Details		~
Please contact us if you have any que finalize booking your inspection.	stions or need more information. Otherw	ise, you may accept our proposal and
	Reject proposal Accept Proposal	
Thank you for your business.		
Jan Agency 🕞		

- 3. Following proposal review:
 - a. Accept it: select Accept Proposal and complete the checkout process. Find details related to the payment process in the <u>Submit Payment</u> section.
 Following checkout, find details of this project under Confirmed Projects.

Pending Matches > Project number 5949 > Accept Agency Proposal PROJECT NUMBER 5949				
	THANK YOU!			
Th de ins	e details of your booking have been sent to you via email. You may also view the tails under Confirmed bookings where you may also schedule the time of your spection. r more information, <u>contact Jan Agency</u>			

b. Reject it: Select Reject Proposal and confirm.

Send a Message

Chat with any third-party or special inspection agency already contacted and find previous conversations under Messaging. Locate prior conversations using the Search Messages field.

Inbox

Find contacts for any project under Inbox. To start a conversation, select the contact card and type in the chat box. Check Include an Admin to copy DOB on the conversation. To move a conversation from the Inbox to Archived, select Archive This Conversation.

Archived

Find your archived conversations under Archived. Select a contact card to view the conversation and the Restore This Conversation link to move it back to the Inbox.

Legacy Projects (Projects Initiated Before Tertius)

All permits that were issued prior to the launch Tertius on November 1, 2022 must be moved onto the Tertius platform, however, the payment process can continue outside of Tertius for these projects.

Changes To Address Legacy Projects In Tertius

The address and permit search in Tertius provides additional information. If there is a condition on the permit placed by a third-party inspection agency, the user will see when a Notice of Intention authorizing the agency to conduct inspections was completed.

Clients can create a project in Tertius with permits under the same address that were authorized to the agency selected before November 1, 2021, with the following conditions:

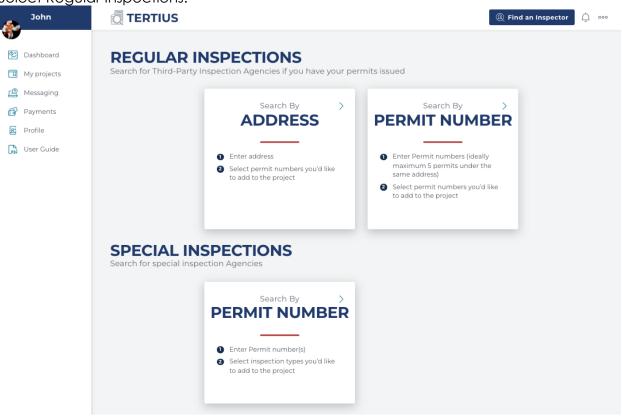
- No payment information is requested for legacy projects
- Clients can only choose the already authorized agencies
- Clients don't need to request a proposal, they can book the agency right away

Creating A Legacy Project

1. Select the Find an Inspector button.

John		(I) Find an Inspector
Dashboard	RECEIVED PROPOSALS	
My projects Messaging Payments Profile	Project Number 2053 Permits P1802968	Project Number 1962 Permits P1802968
圖 Settings	Agency Jan Agency See proposal See all pending projects	Agency Jan Agency See proposal

2. Select Regular Inspections.



- 3. To Conduct an Address-Based Search
 - a. Complete the form with the address of the property under construction and Tertius will provide a list of associated open permits.
 - b. Fields include:
 - Street Number
 - Street Number Suffix
 - Street Name If the address is a numbered street, please include the "th", "rd", "st", etc. as in 4th Street SW. If the street name includes North, South, East or West, spell out the words, e.g. North Capitol. Please use the full street name, abbreviations are not accepted.
 - Street Type
 Unit Number
 - Quadrant
 - Zip Code
- 4. Or, To Conduct a Permit Based Search
 - a. Enter your permit number or numbers, divided by commas.
 - b. All permits must be under the same address.
- 5. Select your permits
 - a. Accept the Project Terms by checking the checkbox.
 - b. Select a permit. Tertius displays all open permits for the address. Select a legacy permit (a permit authorized to an agency before November 1, 2021).

- 6. Once you've selected a legacy permit, you can only add permits that are also legacy permits and that are authorized to the same agency.
 - a. Click on Add Details
 - b. Fill out additional information
 - c. Click on Review Project Details
 - d. If all details are correct click on Find an Inspector
 - e. On the results screen you'll see the third-party agency that is already authorized on the permits you've added to your project
 - f. Click on Book Agency
 - g. The legacy project is now created. The project appears under your Confirmed projects, with the label "Legacy Project".

Submit Payment

Requirements

- Get to Know Your Dashboard
- Find an Inspector
- <u>Manage and Accept Proposals</u>

Payment Arrangements

Proposal Based Projects

There are two payment arrangement types, which the third-party agency specifies in the proposal:

- **Multiple Inspections Payment**: The client pays for inspections in groups or by phase as agreed upon with the third-party agency. Only Special Inspection projects can use this payment method.
- **Single Inspection Payment**: The third-party agency requests payment after each inspection event. Note that this option is only available for regular inspections.

Cost Per Inspection Projects

Cost per Inspection projects are always Single Inspection Payment: The third-party agency will request payment after each inspection event.

Payment Methods

There are two payment method options:

- Credit Card: Enter card information and the payment will be charged accordingly.
- **eCheck** (or ACH: Automated Clearing House): Add bank account information and the payment will be electronically transferred from your account to the third-party agency's. Both methods require a transaction fee, but eCheck is lower (no more than \$5). Because of the lower fee, eCheck is a better option for larger payments.

Add a Credit Card

John Doe 73 G Street Washington DC	
34/300	Add new Credit/Debit Card
	Credit or debit card
Choose Paymen	■ 0000 0000 0000 0000 01 / 22 000
Credit Card	powered by stripe
	Cancel Add Card
Select a credit	
() Visa:4242	Exp: 11/2025 🔟
Add new Credit/	Debit Card

Depending on the payment method, you must add either a credit card for credit card payment or a bank account for eCheck payment.

Steps

- 1. Go to Payments, select the Payment information tab.
- Select Add new Credit/Debit Card, enter your credit card number, expiration date, and CSV.
 Select Add Card.
- 3. Find all cards entered on your payment information page. Delete a card by selecting the trashcan icon next to it and confirming.

Connect New Bank Account

Select Connect a New Bank Account, choose your bank, and follow the instructions.

Edit Your Profile

Requirements

<u>Register for Tertius</u>

Steps

To edit your profile, complete the fields: Tertius User Guide | For Customers

- **Profile Photo**: Upload a profile photo (5 MB max). Your photo can be changed anytime.
- First Name
- Last Name
- **Company Name**: Add the name of the company you represent (if there is one) to help the agencies identify you as a client.
- Contact Phone
- Email

User Roles

User roles make it possible for clients and third-party inspection agencies to have multiple user profiles with access to the projects of the company or agency.

Basic Concepts

There are no predefined roles, the permissions can be freely customized for each user. There are recommendations for roles for clients, e.g. Administrator, Project Manager, and Accounting) and for agencies, e.g. Administrator and Accounting, but the permissions of these roles are also fully customizable.

The concept of a "Company" has been introduced to Tertius. Only companies can invite new users to join them.

When the roles feature was introduced in Tertius, existing agencies were converted to companies. Clients remain the same.

Inviting Users To An Agency

The account owner of the agency can invite new users to participate. They can invite new users who do not have an account in Tertius, or users who already have an account on Tertius, but do not have any projects associated with their account. Agencies cannot invite existing Tertius users who already have projects.

Inviting Users To A Company

Any user with a client account can decide to create a company and invite users to the company. They can invite users who do not have an account on Tertius, or users who already have an account on Tertius – with or without projects on their accounts. Users who have already created a company cannot be invited to join another company.

Joining A Company As A User With Existing Projects

If a user is invited to a company and they accept the invitation, they may join the company on the following conditions:

- The payment methods defined before joining the company WILL NOT be shared with the company.
- Users in the company who have "See All Projects" permissions will see their projects.
- Users in the company with both "See All Projects" and "Manage Projects" permissions will be able to manage their projects.

Tertius User Guide | For Customers

- The user's role and permissions will be defined by the company user who has "Invite Users And Assign Roles" permission.
- If the user leaves the company, their projects will remain the property of the company and their Tertius account will be empty.

Roles And Permissions

Invite Users And Assign Roles

The user can invite new users to the company, assign them roles, and change the permissions of existing users.

Access To All Projects

The user has access to all projects associated with the company. The permission is view only: the owner cannot perform any actions on the projects.

Assign Owner To Projects

The user can assign owners to new projects, or change ownership of older projects. This permission is only available for users who have the permission "Access To All Projects."

Set Up Payment Information

The user can set up credit cards or bank accounts that can be used to make payments on the projects associated with the company. The credit card and bank account information is only available for these users.

View Transactions

The user has "See And Download Information" permission regarding the payment transactions associated with any project of the company.

Approve Payment Requests

The user can approve any payment request in any of the projects of the company. To see all project details, the user needs the "Access To All Projects" permission also.

Manage Projects

The user has the following permissions for their own projects:

- Create Projects
- Accept Proposals
- Add New Permit To An Existing Project
- Cancel A Project
- Request Project Cancellation From DOB

The user needs the Access to all Projects permission to be able to manage any of the projects of the company.

Agencies

Invite Users And Assign Roles

The user can invite new users to the agency, assign roles, and change the permissions of existing users.

Assign Owner To Projects

The user can assign owners to new projects or change the ownership of old projects.

Set Up Payment Information

The user can set up all the merchant accounts for the agency.

View Transactions

The user can see and download payment transaction information for any project of the agency.

Manage Payment Requests

The user can create a payment request for any of the projects of the agency.

Update Agency Profile

The user can change anything in the overall agency profile.

Manage Projects

The user has the following permissions:

- Create proposals
- Accept a cost-per-inspection project
- Accept new permit addition
- Request permit complete
- Cancel projects
- Request project cancellation from DOB

Manage Reports

The user can edit any of the reports of the agency.

Upload Special Inspection Documents

The user can upload documents to special inspection projects.

Schedule Inspections

The user can schedule inspections on any of the projects of the agency.

Setting Roles And Permissions For Invited Users

Clients

1. Go to "Company and Users".



2. Create a company. COMPANY AND USERS

COMPANY AND INVOICE DETAILS

If you'd like to add more users to your account you need to create a company on Tertius. As the account owner of the company you'll keep all your present permissions and you can invite users with the permissions you set.

Company details	
Company Logo	
Drop files here or browse Image file. Max size 5MB.	
	Save
Company name Name	

3. Click On "Add New User".

USERS Edit the permissions of	f your company us	sers or add a new n	nember		
NAME	EMAIL	ROLE	STATUS	ACTIONS	+ Add New User

- 4. Add the email address of the person you would like to invite.
- 5. Choose the role you want to give the person. If you choose one of the three predefined roles Administrator, Project Manager, or Accounting you will the permissions selected. You may also customize any of these roles to meet your needs. If you choose the custom option, add a name for this custom role, and choose the permissions you would like to add.

Agencies

1. Go to "Agency & Users".



2. Click on "Add New User".

USERS Edit the permissions of your company users or add a new member							
						+ Add New User	
		NAME	EMAIL	ROLE	STATUS	ACTIONS	
		-	test_ag10@niepodam.pl	Company Creator	accepted	Permissions	

- 3. Add the email address of the person you'd like to invite.
- 4. Choose the role you want to give the person. If you choose one of the two predefined roles Administrator or Accounting you will see the permissions selected. You may also customize any of these roles to meet your needs. If you choose the custom option, add a name for this custom role, and choose the permissions you would like to add.

Remove Users From Agency/Client Company

Any user with "Invite Users and Assign Roles" permission can delete users. A user cannot be deleted if they are a project owner on any projects

Project Owner

Once a company is set up in Tertius, all projects must have a project owner. Projects may also be created before a company is setup.

Client

The owner of the projects created before a company is setup is the user who originally created the project.

Agency

The owner of the projects is the user who originally created the project.

Projects Created After A Company Is Setup

Client

Once a company is created, users with "Manage Projects" permission can create projects. The project creator can choose the project owner at the "Additional Information" step of project creation. By default, the user creating the project is the owner. Anyone with the "Manage Projects" permission can be selected from the dropdown list.

Agency

Any user at the agency with "Manage Projects" permission can answer a request for proposal. By default, the user who creates the proposal is the owner. During proposal

creation, the user can select any member of the agency with "Manage Projects" permission to be the owner of the project.

Change Project Owner

Client

Any user in the client company who has "Assign Owner To Projects" and "Access To All Projects" permissions can change the project owner on any project.

- 1. Go to My Projects and choose "Confirmed" Or "Completed Projects".
- 2. Select the project where you'd like to change the owner, and click on "View And Manage".
- 3. Click on "Change Owner".
- 4. Select the user you want to be the new project owner.

Agency

Any user in the agency who has "Assign Owner To Projects" permission may change the project owner on any project of the agency.

- 1. Go to "My Projects" and choose "Confirmed" Or "Completed Projects".
- 2. Select the project where you would like to change the owner, and click on "View And Manage".
- 3. Click on "Change Owner".
- 4. Select the user you want to be the new project owner.



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WEARE GOVERNMENT OF THE DISTRICT OF COLUMBIA DC MURIEL BOWSER, MAYOR