

TERTIUS

A GUIDE TO THE DISTRICT'S
ONLINE MARKETPLACE FOR
CONSTRUCTION INSPECTIONS

tertius.dcrd.dc.gov



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GOVERNMENT OF THE
DISTRICT OF COLUMBIA
DC MURIEL BOWSER, MAYOR

Tertius User Guide

For Customers and Third-Party Agencies

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Tertius Introduction

Tertius is a online marketplace where DC customers (project owners) are able to connect with Third-Party Inspection Agencies (TPIA) and invite TPIAs to work on their projects. Through Tertius, DCRA will be providing a platform where customers can obtain inspections on their open permits in order to close the respective permit per DC regulations. The Tertius application is built to facilitate access for customers to utilize and choose a TPIA that best suits their needs in order to complete/close their respective permits. Tertius also provides ease of scheduling inspections, uploading and reviewing reports with all documentation in an accessible location for all stakeholders.

Get Started

Refer to this section for instructions on login/registration.

Register for Tertius

Note: As a third-party agency, you will need to be invited to Tertius by DCRA and use the email address where you got the invitation to register.

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 'First name'
- Does not contain 'Last name'

Steps

Step 1: Log in to Access DC

Refer to your Tertius invitation email and click on <https://tertius.dkra.dc.gov/>, once in Tertius click log in on the top right corner of the screen. A new window will open prompting you to log in to Access DC. 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 accessdc.dkra@dc.gov.

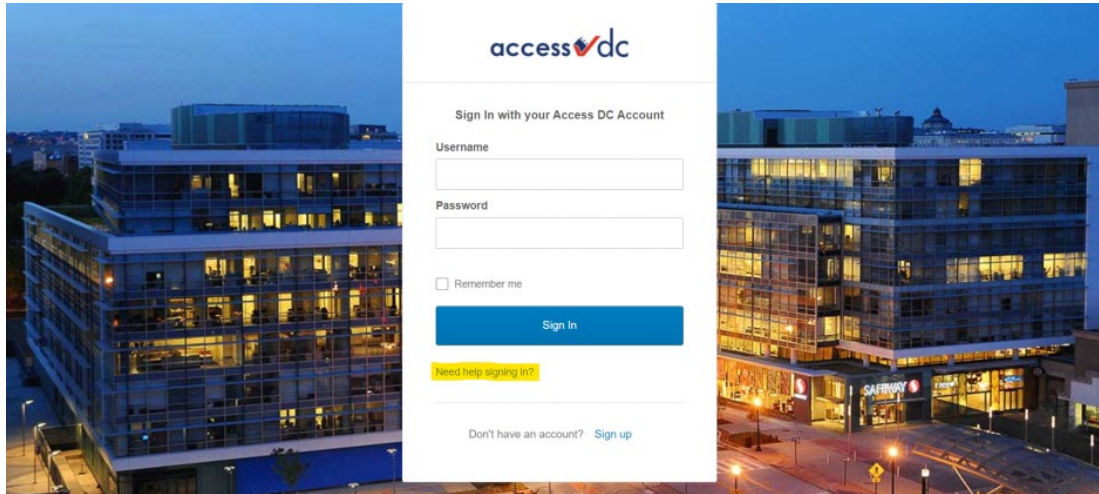
Step 2: Access Tertius

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

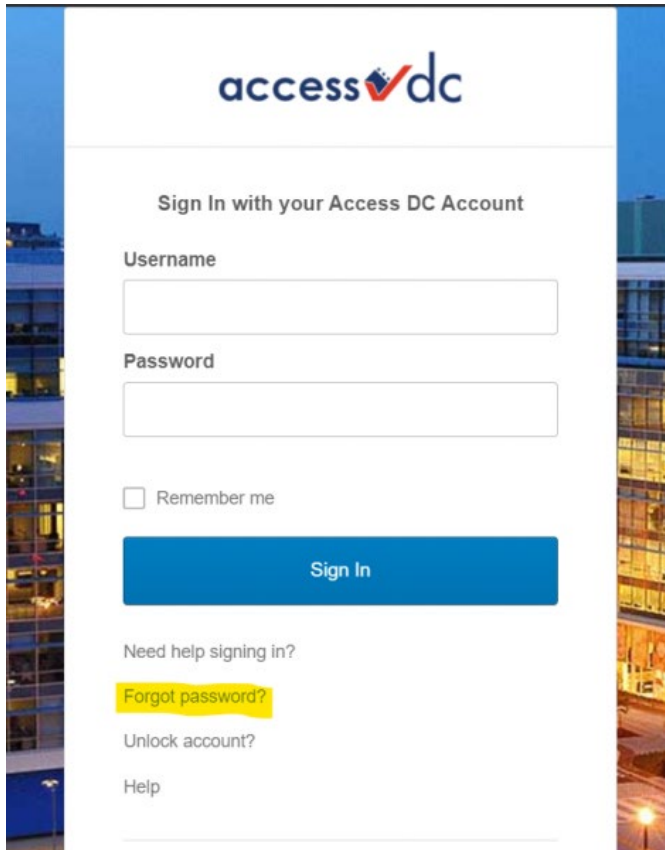
Reset Password

If you forget or need to change your password, visit Access DC and select the “Need help signing in?” option.

Step 1: Select Need help signing in

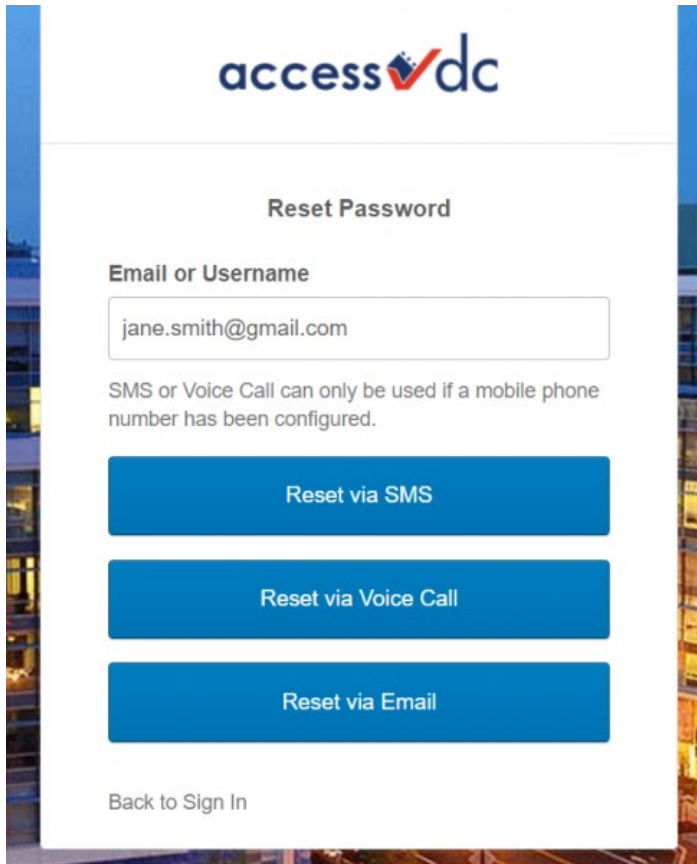


Step 2: Select Forgot password



Step 3: Enter email and

- if you provided a recovery phone number, reset via SMS or Voice Call
- if you did not provide a recovery phone number, reset via Email



Log in to Tertius

Requirements

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

- [Register for Tertius](#)

Steps

Follow these steps to log in to Tertius:

1. Visit <https://tertius.dkra.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

For Customers

Get to know your Dashboard

Requirements

- [Log in to Tertius](#)

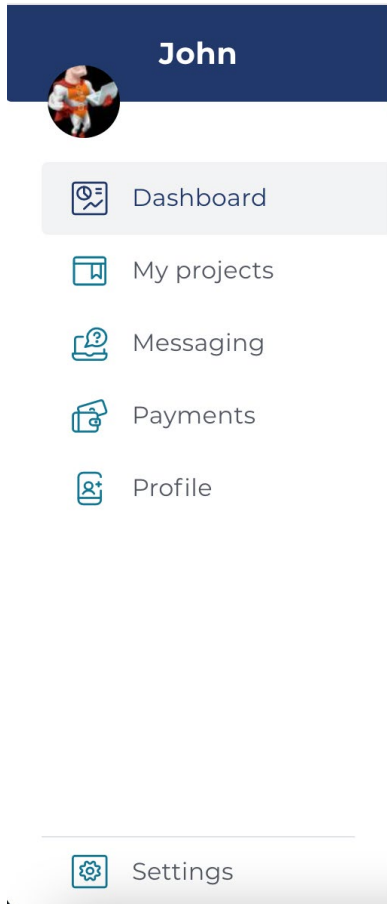
Steps

Following log in, you are navigated to the Dashboard, where an overview and the latest information on your projects can be found.

Note: Find the Dashboard from anywhere in the system by selecting the Dashboard button at top left.

Navigate from the Dashboard:

- **Create Project**
- **Request Proposals**
- **Receive proposals:** Proposals received for proposal-based projects.
- **Schedule inspections:** Review Inspections scheduled for accepted and started projects.
- **Reports:** Review submitted Inspection Reports.
- **Menu:** the main menu is at left. Here, access the Dashboard, projects, messages, payments, and user profile.



Find an Inspector

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

Requirements

- [Log in to Tertius](#)

Steps

To search for an Inspector you will need to:

The screenshot shows the TERTIUS dashboard for a user named John. The main section is titled 'RECEIVED PROPOSALS' and displays two project cards. Each card lists the Project Number, Permits, and Agency. A red arrow points to the 'Find an Inspector' button in the top right corner of the dashboard.

Project Number	Permits	Agency
2053	P1802968	Jan Agency
1962	P1802968	Jan Agency

2. Complete the form with the address of the property under construction and Tertius will provide a list of associated open permits. Fields include:
 - a. Street Number
 - b. Street Number Suffix
 - c. 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.
 - d. Street Type
 - e. Unit Number
 - f. Zip Code
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. 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.

P1903248
Cannot be picked, has Agency assigned already

[Back](#) [Add Details](#)

Check the permit numbers.

B2101808

B2101926

[Back](#) [Add 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 at the construction site.
 - a. Name
 - b. Email Address
 - c. Phone Number: format +1 NXX-NXX-XXXX
4. Select Review Project Details: Review and/or edit your entry.

REVIEW AND CONFIRM REQUEST

Check the details of the project you created.

ADDRESS

73 G
ST
SW

CUSTOMER

John Doe

SELECTED PERMITS

BUILDING B2101808

Inspection types (25) ▼

This permit includes

TEST Renovating Bathroom and Shower

[Edit Permits](#)

PROJECT TIMELINE

Short-term

Oct 3, 2021 - Oct 9, 2021

[Edit Time](#)

SITE CONTACT

Mary Smith

mary@email.com

+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: Fixed Price, Proposal, or both. Select the best option:



JAN AGENCY

See Profile




Fixed

Proposal

- a. **Fixed-Price** construction is more suitable for
- small projects or
 - a small number of permits and
 - When you need the inspection to be scheduled **as soon as possible**.
 - Only send **one request at a time**
 - The agency has **one hour to accept and schedule**. After one hour or a rejection from the agency, send another fixed-price or proposal-based project.

FIXED PRICE

 Click on the request inspections button below if you would like to accept this fixed price. **You can only send one fixed price request at a time.** If the agency can do the inspection in the provided time frame they'll schedule inspections in an hour. Otherwise, you can try to book another agency.


Agency:
JAN AGENCY

PROJECT number:
5562

Fixed Price Booking Terms:

test

Price list:

 Every inspection type under the permits selected for a fixed price project will be performed with the following price list.

Building Permit - \$14.00 / inspection

Plumbing Permit - \$10.00 / inspection


Cancel

Confirm

b. The Proposal Based

- Send **multiple requests at a time** to selected agencies based on the profile.

PROPOSAL

 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 5562

Cancel

Confirm

- Select Request Proposal and Confirm.

REQUEST SENT
These are the agencies you've sent request for proposal or request for inspection.

JAN AGENCY
See Profile

PROPOSAL

AVAILABLE AGENCIES
Please see the following list of inspection agencies with the qualifications necessary for the inspection services that you require. View the agency profiles and choose the agency from whom you would like to get a proposal.

Filter by project 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.

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 fixed price and the agency hasn't accepted your fixed price project 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.

Cancel a project

Steps

Projects may be cancelled 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.

SCHEDULED INSPECTIONS

The table shows your inspection jobs scheduled by your agency. [Contact your inspection agency to modify or cancel an inspection job.](#)

 There are no scheduled inspections for this project. Please [contact your selected inspection agency](#) to get your first inspection scheduled.

 **Aug 2, 2021 - Aug 4, 2021**

DATE	TIME	PAY	STATUS	REPORT	PAYMENT
------	------	-----	--------	--------	---------

[Contact Agency to Schedule Inspection](#)

[Cancel Project](#) 

- If you **accept a proposal for the project and there is an inspection event scheduled**, only DCRA 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. DCRA will review your cancellation request and make a determination. Per DCRA policy a project cannot be cancelled or change inspection agencies once a third-party inspection agency begins a project.

SCHEDULED INSPECTIONS

The table shows your inspection jobs scheduled by your agency. [Contact your inspection agency to modify or cancel an inspection job.](#)

 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	

Contact Agency to Schedule Inspection

[Request Cancel Project](#)

When there is inspection scheduled, the project may only be canceled by an administrator

Describe why you need to cancel this project

Type here...

0/1000

Request

Manage and Accept Proposals

Requirements

- [Get to know your Dashboard](#)
- [Find an Inspector](#)
- [Send a Message](#)
- [Submit a Payment](#)

Steps

John TERTIUS [Find an Inspector](#)

- Dashboard
- My projects
- Messaging
- Payments
- Profile

RECEIVED PROPOSALS

Project Number
2053

Permits
P1802968

Agency
Jan Agency

[See proposal](#)

Project Number
1962

Permits
P1802968

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 [payment arrangement](#)

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.

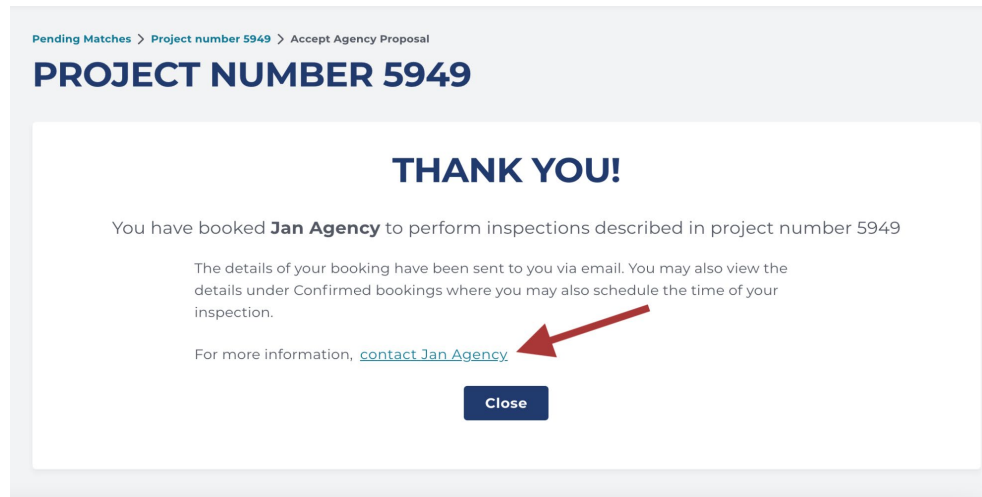


Jan Agency



3. Following proposal review:

- a. **Accept** it: select Accept proposal and complete the checkout process. Find details related to the payment process in the [Submit Payment](#)



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

Send a Message

Chat with any third-party 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 DCRA 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.

Submit Payment

Requirements

- [Get to know your Dashboard](#)
- [Find an Inspector](#)
- [Manage and Accept Proposals](#)

Payment arrangements

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.
- **Single Inspections Payment:** The third-party agency requests payment after each inspection event.

Payment methods

There are two payment method options:

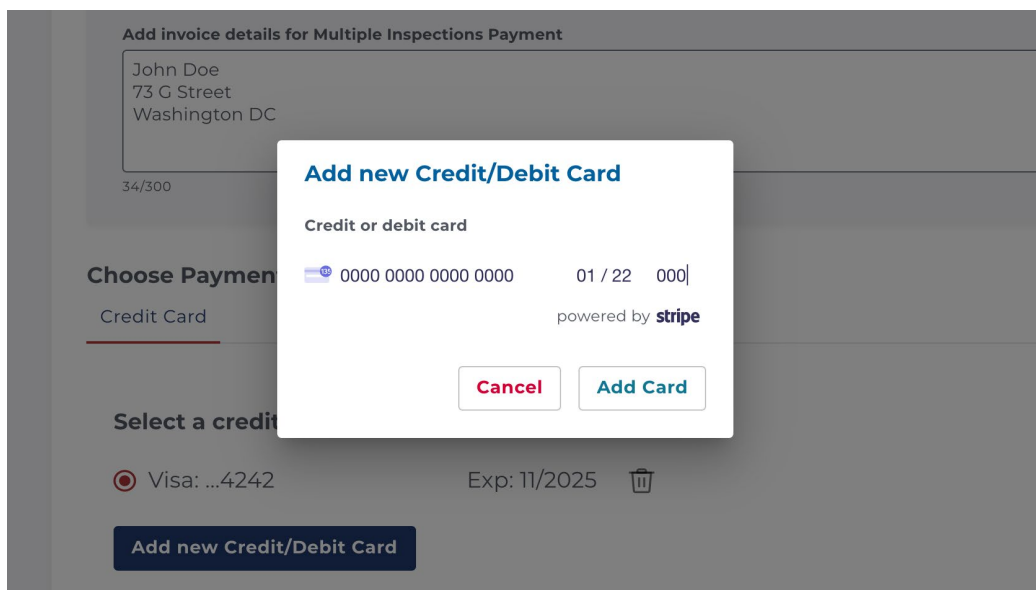
- **Credit card:** Enter card information and the payment will be charged accordingly.
- **eCheck (or ACH: Automated Clearing House):** Add bank account information and the payment will be electronically transferred from your account to the third-party agency's. Both methods require a transaction fee, 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 or bank information

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.
2. Select Add new Credit/Debit Card, enter your credit card number, expiration date, and CSV.



The screenshot shows a web interface for adding invoice details for a 'Multiple Inspections Payment'. A modal window titled 'Add new Credit/Debit Card' is open, allowing the user to enter card information. The modal includes a 'Credit or debit card' label, a card number field (0000 0000 0000 0000), an expiration date field (01 / 22), and a CVV field (000). Below the fields, it says 'powered by stripe'. At the bottom of the modal are 'Cancel' and 'Add Card' buttons. In the background, the user's name 'John Doe' and address '73 G Street, Washington DC' are visible. Below the modal, there is a 'Choose Payment' section with 'Credit Card' selected, and a 'Select a credit' section with a radio button selected for 'Visa: ...4242' and an expiration date of 'Exp: 11/2025'. A dark blue button labeled 'Add new Credit/Debit Card' is at the bottom of the page.

3. Select Add Card.
4. 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

Click on Connect a new bank account, choose your bank and follow the instructions.

Edit your Profile

Requirements

- [Register for Tertius](#)

Steps

To edit your profile, completed the fields:

- Profile photo: Upload a profile photo (5 MB max). Your photo can be changed anytime.
- First name
- Last name
- Contact phone
- Email

For Third-Party Agencies

Get to know your Dashboard

Requirements

- [Log into Tertius](#)

Steps

Following log in, you are navigated to the Dashboard. Here, find the latest information on your projects.

Note: Find the Dashboard from anywhere in the system by selecting the Dashboard button at top right.

Navigate from the Dashboard:

- **Menu:** the main menu is at left. Here, access the Dashboard, projects, messages, payments, and user profile.
- **Received Requests:** Requests received from clients.
- **Scheduled inspections:** Inspections scheduled for accepted and started projects.
- **Reports:** Reports of your Inspections.

Projects

Find Projects for which a client reached out to you by sending a request for proposal or a request for a fixed price project. My Projects is organized by tab:

- **Opportunities**
Find projects requested by a client. These include requests for proposals that you haven't answered, proposals sent but the client hasn't accepted it, and requests for fixed price projects.
- **Confirmed**
Find projects confirmed by the client under the Confirmed tab. These include projects with proposals the client accepted or you created a fixed price. Select the View and Manage button of a project to schedule an Inspection, open the report, or create an invoice.
- **Completed**
Find finished projects under the Completed tab. View more information by selecting the Details button.

Cancel a project

Third-party agencies can cancel a project BEFORE an inspection is scheduled.

- If **no inspection event has been scheduled**, cancel by selecting the Confirmed tab, then the View and Manage button. Select Cancel Project on the project page. Provide an

INSPECTIONS

[Create Invoice](#)

📅 Oct 1, 2021 - Oct 3, 2021

DATE	TIME	PAY	STATUS	REPORT	PAYMENT

SCHEDULE INSPECTION

Choose the permit and inspection types, then enter the date and time when the inspection is to occur. If needed, the name of the individual inspector can be changed later on the inspection report page.

BUILDING B2101808

Date


Time From

Time To

Inspector

[Add Inspection](#)

Cancel Project



- If the client has accepted your proposal for the project, and **there is an inspection event scheduled**, only DCRA 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.

Manage Requests

Requirements

- [Get to know your Dashboard](#)
- [Send a Message](#)

Expect to receive email notifications for new requests. Find client requests on the Dashboard under Received Requests. Open a client request and see the project number, permits, customer and whether the request is for a proposal or a fixed price project. Select the Project Details button to view the request main page.

Answer a Request for Proposal


1. Select See Request

Opportunities > Project number 5949

PROJECT NUMBER 5949

WE HAVE A POTENTIAL CUSTOMER FOR YOU

Check the details of this opportunity below.

 **Message the Customer**


If you need further details

Create a Proposal


If you would like the project

Reject Project

If you are unable to meet the customer's needs

 **ADDRESS**

73 G
ST
SW


 **CUSTOMER**


John Doe



- a. **Message the Customer:** Send a message to the customer if interested, but need more information or clarification on the project. Tertius will send the customer an email, notifying them of the message.
- b. **Create a Proposal:** Create a proposal if you have all the necessary information and would like to bid on the project.
- c. **Reject Project:** Reject the request if unable to meet the client's needs.






Answer a Fixed Price Project Request

1. Select See Request


Jan Agency


TERTIUS

-  Dashboard
-  Projects
-  Messaging
-  Payments
-  Agency Profile

Opportunities > Project number 6075

PROJECT NUMBER 6075

WE HAVE A POTENTIAL FIXED PRICE PROJECT FOR YOU


Time left to accept and schedule an inspection: 55:59

Schedule and Accept


If you can do the project.

Reject Project

If you are unable to meet the customer's needs

 **ADDRESS**

122 G
ST
SW

 **CUSTOMER**

John Doe

PROJECT NUMBER 5980

SCHEDULE INSPECTION

Choose the permit and inspection types, then enter the date and time when the inspection is to occur. If needed, the name of the individual inspector can be changed later on the inspection report page.

MECHANICAL M1902702

Select an Inspection Type

Date

Time From

Time To

Inspector

TOTAL INSPECTIONS

	NUMBER	PRICE/PIECE	SUM
MECHANICAL Permit	3	\$13.00	\$39.00
Total			\$39.00

- b. **Reject Request:** Select Reject if you are not interested in the project. The client will be notified.

Create a Proposal

To create a proposal:

1. Find pending requests:

Jan Agency **TERTIUS** 🔔 1

PROJECTS

Opportunities Confirmed Completed

Search Projects

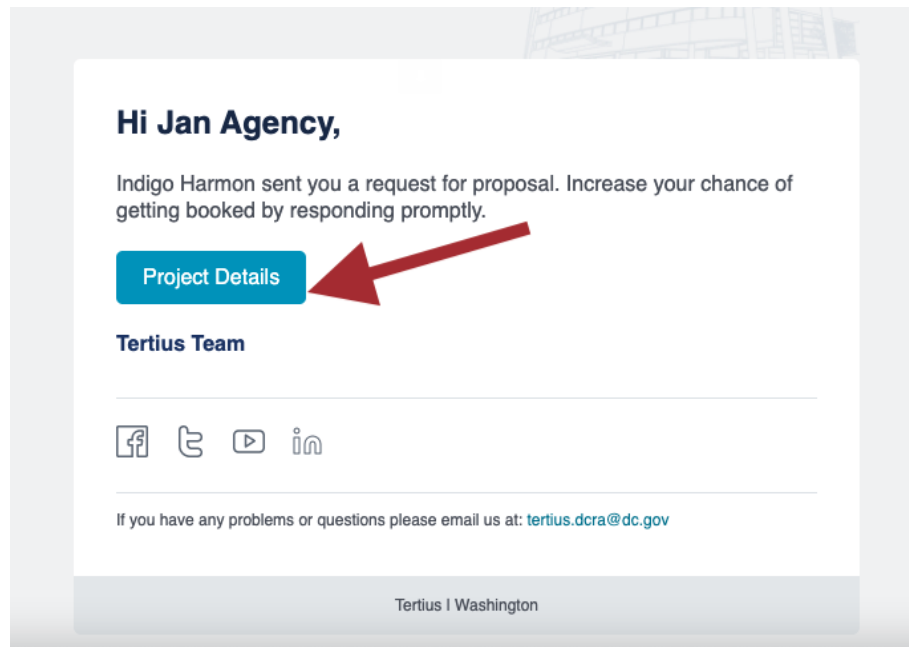
PROJECT	CUSTOMER	WHEN	WHERE	ACTION
2853	John Doe	Sep 3, 2021 - Sep 5, 2021	415 14th ST SE	Answer RFP: 7 days ago
2053	John Doe Proposal Sent	Aug 6, 2021 - Aug 20, 2021	0001 DUPONT CIR NW	View

✔ You have completed your profile.

RECEIVED REQUESTS

<p>Project Number 5980</p> <p>Permits M1902702</p> <p>Customer John Doe</p> <p>See request</p> <p>TIME LEFT: 58:45</p>	Fixed Price	<p>Project Number 2853</p> <p>Permits E1905242</p> <p>Customer John Doe</p> <p>See request</p>	Proposal
---	--------------------	--	-----------------

[See all project opportunities](#)



2. Select the Create a Proposal button.

TERMS AND CONDITIONS

Add your agency specific terms and conditions

Type here...

0/10000

PROPOSED SERVICE

Describe how you are planning to carry out the project as much in detail as possible.

Type here...

0/10000

4. Describe how you will carry out the project in as much detail as possible.
 - a. Provide the anticipated visits necessary for each permit in the project.
 - b. Choose which payment arrangement you would like to offer for the project.
 - i. **Multiple Inspections Payment:** The client pays for inspections in groups or by phase as agreed upon with the third-party agency. This is recommended for long-range projects requiring several inspections. It provides the flexibility to offer special, long-term payment terms.

ANTICIPATED NUMBER OF VISITS

How many visits do you anticipate per permit based on the project description

B2101808

PAYMENT ARRANGEMENT

Which payment arrangement do you prefer for this project?

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

Single Inspection Payment
Payment is requested after each inspection event.

ESTIMATED BUDGET

Add your estimated price for the whole project.


Add details about your pricing policy


These are the details of the pricing policy.
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque nec blandit mi, nec cursus nisi. Maecenas dolor mi, aliquam pulvinar sagittis non, rutrum a tellus. In hac habitasse platea dictumst. Donec a egestas tortor. Donec sapien ipsum, ultricies elementum ligula nec, blandit tempor sem. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Morbi pharetra urna ac facilisis maximus. Duis tincidunt libero ipsum, ac blandit tortor scelerisque id. Donec ut tellus ipsum. Vestibulum tristique porta eros, id volutpat ex. Sed id lorem quis arcu euismod ullamcorper. Praesent neque eros, hendrerit vitae urna vitae, mollis dapibus justo.

7307000

- c. Add an estimated budget for the whole project. This estimated budget will appear on the project detail page and both you and the client can track how much has been invoiced and how much of the budget remains.
- d. Describe the specific pricing policy that you can offer for this project.

ATTACHMENTS

 Upload your terms and conditions, proposed services, the whole proposal document or any other document you think might be useful for the client.

 Drop files here or [browse](#)
Pdf or Image files. Max size 5MB.

Please contact us if you have any questions or need more information. Otherwise, you may accept our proposal and finalize booking your inspection.
Thank you for your business.

5. Select Send Proposal when complete.

Accept a Fixed-Price Project Request

1. Find pending requests:

PROJECTS

[Opportunities](#) [Confirmed](#) [Completed](#)

PROJECT	CUSTOMER	WHEN	WHERE	ACTION
2853	John Doe	Sep 3, 2021 - Sep 5, 2021	415 14th ST SE	Answer RFP: 13 days ago

Jan Agency

TERTIUS

Dashboard

Projects

Messaging

Payments

Agency Profile

You have completed your profile.

RECEIVED REQUESTS

Project Number
6075

Permits
B1907315

Customer
John Doe

[See request](#)

TIME LEFT: 57:12

Project Number
2853

Permits
E1905242

Customer
John Doe

[See request](#)

See all project opportunities

Jan Agency,

Indigo Harmon has requested a Fixed price project from you at 122 G ST, SW for permit(s) B1907315. Click the button below to see project details. You have one hour to accept the offer and schedule the first inspection event.

[Project Details](#)

Tertius Team



If you have any problems or questions please email us at: tertius.dkra@dc.gov

2. Review details and select

Opportunities > Project number 5980 > Fixed Proposal

PROJECT NUMBER 5980

SCHEDULE INSPECTION

Choose the permit and inspection types, then enter the date and time when the inspection is to occur. If needed, the name of the individual inspector can be changed later on the inspection report page.

MECHANICAL M1902702

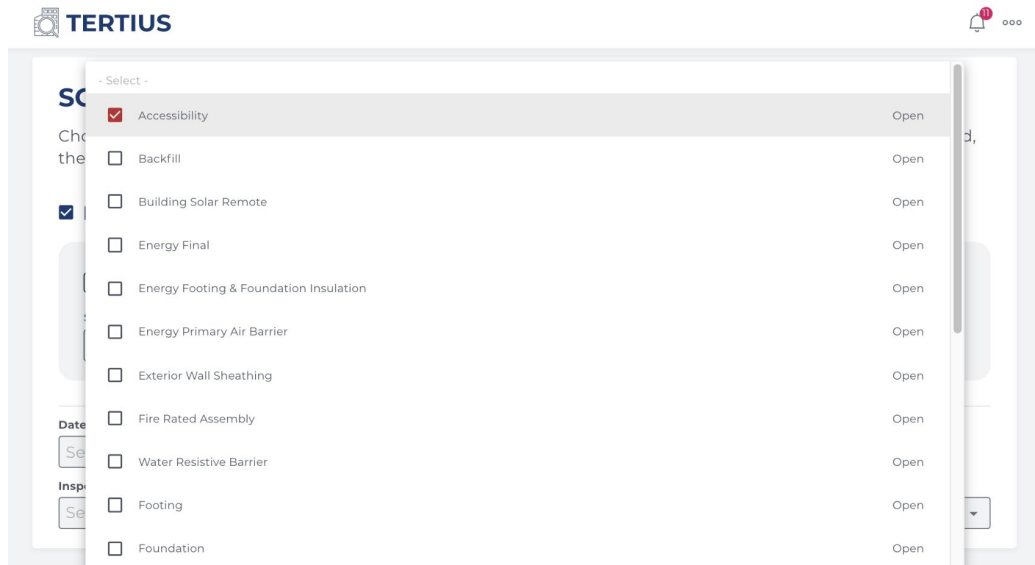
Select an Inspection Type

Date: X Time From: Time To:

Inspector:

TOTAL INSPECTIONS			
	NUMBER	PRICE/PIECE	SUM
MECHANICAL Permit	3	\$13.00	\$39.00
Total			\$39.00

- b. Reject Request if you cannot take the project: complete this step as a courtesy to the client, so that they can look for another third-party agency immediately.
- 3. You will be directed to the scheduling page after selecting Accept and Schedule:
 - a. Select the **permit**. Select one or more permits.



c. Enter the **date and time** for the inspection.

ACCESSIBILITY X

Select an Inspection Type

Accessibility

Date

10/12/2021 X

Time From

8:00am

Time To

9:00am

Inspector

Bob The Builder

TOTAL INSPECTIONS

	NUMBER	PRICE/PIECE	SUM
BUILDING Permit	1	\$14.00	\$14.00
Total			\$14.00

Cancel

Schedule and accept

e. Select Schedule and Accept to finalize project acceptance.

Send a Message

Chat with any client with whom you have a relationship. Find previous conversations under Messaging. Locate prior conversations using 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 DCRA 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.

Manage Inspections

Requirements

- [Get to know your Dashboard](#)
- [Manage Requests](#)
- [Send a Message](#)

Schedule Inspections

Contact your customers about their needs first, then:

The screenshot displays the TERTIUS dashboard for 'Jan Agency'. The left sidebar contains navigation options: Dashboard, Projects, Messaging, Payments, and Agency Profile. The 'Projects' option is highlighted with a red arrow. The main area is titled 'PROJECTS' and has tabs for 'Opportunities', 'Confirmed', and 'Completed'. Below the tabs is a search bar labeled 'Search Projects'. A table lists projects with columns: PROJECT, CUSTOMER, WHEN, WHERE, and ACTION. Two projects are listed, both by 'John Doe' and scheduled for 'Oct 1, 2021 - Oct 3, 2021'. The first project is at '637 G ST SW' and the second is at '73 G ST SW'. Each row has a 'View and Manage' button, with a red arrow pointing to the button for the second project.

PROJECT	CUSTOMER	WHEN	WHERE	ACTION
5980	John Doe	Oct 1, 2021 - Oct 3, 2021	637 G ST SW	View and Manage
5949	John Doe	Oct 1, 2021 - Oct 3, 2021	73 G ST SW	View and Manage

2. Go to Schedule Inspection.

BUILDING B2101808

ACCESSIBILITY X BACKFILL X ENERGY FINAL X

Select an Inspection Type
Accessibility, Backfill, Energy Final

Date: 10/11/2021 X Time From: 8:00am Time To: 9:00am

Inspector: Sally Inspects

Add Inspection

- b. Select **inspection types**. Check the selected inspection. Verify the status of each inspection type next to it.
 - c. Enter the **date and time** for the inspection.
 - d. Select the **inspector**. Change the inspector name as needed on the inspection report page.
3. Select Add Inspection to save the scheduled inspection.

Adjust the Inspection Schedule

To change the time and assigned inspector:

- 1. Go to Projects, select the Confirmed tab, select the View and Manage button for the relevant project.

INSPECTIONS Create Invoice

Oct 1, 2021 - Oct 3, 2021

DATE	TIME	PAY	STATUS	REPORT	PAYMENT
Oct 11, 2021	8:00am - 9:00am	\$0.00	Scheduled	Open Report	

- a. Start and end time: select Modify Time, make adjustments and select Save Time.

TIME
Adjust the start and end time before finalizing your report.

Inspection Start - **9:00am (modified)** ✎ Modify time

Set hour: 9am ▾ Set minutes: 00 ▾

Inspection End - **10:00am (modified)** ✎ Modify time

Set hour: 10am ▾ Set minutes: 00 ▾

Save Time

To change the date and inspection type:

1. To change a date or inspection type, cancel the existing inspection first. Then, schedule a new one.
2. Go to Projects and access the Confirmed tab. Find the selected project, select the View and Manage button.

INSPECTIONS **Create Invoice**

📅 Oct 1, 2021 - Oct 3, 2021

DATE	TIME	PAY	STATUS	REPORT	PAYMENT
🗑️ Oct 11, 2021	9:00am - 10:00am	\$0.00	Scheduled	Open Report	

4. Your event is cancelled. Next, [schedule a new inspection event](#).

Update Inspection Reports

When an inspection is complete:

1. Go to Projects and select the Confirmed tab. Find the project and select the View and Manage button.
2. From the project detail page, access Scheduled Inspections, select Open Report next to the selected inspection.
3. Under Inspections Completed, update status of each inspection:
 - Scheduled (this was the status before editing)
 - Third Party Completed

- Third Party Partial Submission
- Third Party Failed
- Cancelled

ⓘ Naming convention for uploaded reports:

Third Party Partial Submission:
 Inspection type_inspection date_location_pass/fail
 Examples:
RoughElec_9.28.21_2Floor_pass
FinalMech_9.28.21_1-4Floor_fail

Third Party Complete or Third Party Failed:
 Inspection type_inspection date_pass/fail
 Examples:
FinalBuild_9.28.21_pass
Insulation_9.28.21_fail

5. Time: Adjust the time by selecting Modify time if the inspection was not completed at the time scheduled. Modify these details until you send the payment request.
6. Inspector: Select who completed the inspection.
7. Total cost: Add the fee for the inspection. Format: \$00.00
8. Finalize your inspection report and select the Request Payment button if this is a Single Inspection Payment project or Mark Inspection as Complete button if you apply Multiple Inspections Payment Arrangement.

Inspector Check-Ins

Inspectors are required to check in to Tertius at the start of their inspection event and check out at the end. Every inspector is required to allow geolocation on the device they are using for check-in/out.

Requirements:

- Inspectors must have their correct cell phone numbers and email addresses saved.
- Inspectors must enable location services.
 Enabling location services in browsers helps websites serve more relevant results using general geographical positions. Inspectors need to enable location services to submit their geographical location along with their check-in.

Follow these tutorials to enable location services in different browsers:

Computers:

- [Google Chrome](#)
- [Safari](#)
- [Mozilla Firefox](#)
- [Microsoft Edge](#)

Phones and tablets:

- [Google Chrome on Android Phone or Tablet](#)
- [Google Chrome on iPhone or iPad](#)
- [iPhone or iPad](#) (any app, including Safari)

Agency Steps:

- Go to your Agency profile
- Select the staff tab
- Add the current phone number and email address for each of your inspectors.

Inspector Check-In steps:

1. You will receive a text message and an email with a check-in link at the start time of the inspection.
2. Select the link from the text message or the email.

uat-dcra.staging.oregon.platform-os.com/app/n/d007f0

Log In Register

...ng.oregon.platform-os.com wants to Know your location

Block Allow

CHECK IN

① You are required to share your location with Tertius when you check in and check out. Your location will be added to the inspection report. Click on Allow Location Access in your browser.

Click button below to check in when you start the inspection #5548 at 224 5th ST, SE .

Observed unsafe conditions on site

I affirm under penalty of perjury that I have enabled the geolocation function on my mobile device prior to conducting this inspection, and I understand that failure to do so is a Class 1 violation under the DCRA Third-Party Program Manual (last revised 3/29/21), which may result in discipline up to and including suspension or expulsion of myself and my employer from the DCRA Third-Party Program and the Tertius marketplace.

Check In

Please allow this page to check Your localization first.

4. Check the box to confirm that you have understood your obligations.
5. Check Unsafe Conditions on Site as appropriate.
6. Select the Check-in button.

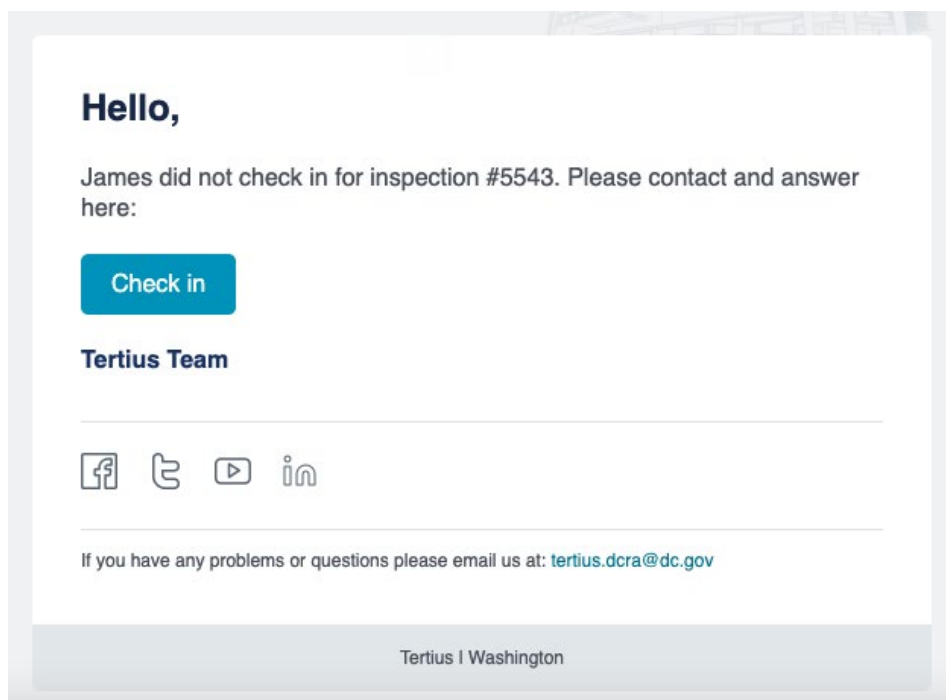
Inspector Check-Out steps:

1. You will receive text message and an email with a check-out link right immediately following check-in
2. Select the link from the text message or the email when finished inspecting.

3. At the check-out page, allow location access in your browser. If you do not see a prompt to allow location access, go to your device settings and enable location access.
4. Check the box to confirm that you have understood your obligations.
5. Check Unsafe Conditions on Site as appropriate.
6. Select the Check-out button.

Agency Administrator Escalation

If an inspector of yours does not check in at the scheduled time+30minutes of the inspection, the agency admin gets a notification email about this.



Edit your Agency Profile

Steps

To edit your profile, complete the fields on each tab:

1. Profile

- a. Profile picture: Upload your agency logo or a picture that will appear on your profile. Images should be square in size and maximum 2048 pixels in height and width to prevent your picture from being resized or distorted.
- b. Introduction: Write a short introduction about your agency. Who you are, your background, and why should customers choose you.

- c. Pricing policy: Provide a short description of your general pricing policy. Do not specify rates. Determine rates for each project in the proposal.
 - d. Other specialties: Add specialties that differentiate your agency from others and that customers may find attractive when making a selection.
- 2. Availability**
- a. General availability: Add your working hours by selecting days and times.
 - b. Unavailable periods: Set days or periods when you are unavailable, such as planned closures that may occur if for example the owner is on vacation. This information will appear on your profile during your unavailable period and one week prior.
- 3. Agency details**
- a. Public details: Details visible to clients and potential clients
 - b. Office contact: Only necessary for DCRA approval. This information does not appear on your profile.
 - c. Quality assurance plan: Upload your quality assurance plan. Check the [Third-Party Program Procedure Manual](#) for further information. Accepted format: pdf
 - d. Conflict of interest affidavit: Upload your notarized, sworn Conflict of Interest Affidavit. Check the [Third-Party Program Procedure Manual](#) for further information. Accepted format: pdf
 - e. Insurance policy: Upload your Insurance Policy. Accepted format: pdf
- 4. Staff**
- a. Staff members: Add your inspectors and supervisors with their relevant specialties and necessary qualifications. Update staff member information and add new members anytime.
 - b. Make sure to add the correct phone number and email address for the inspectors, as Tertius sends the check-in/out links to them.
- 5. Qualifications**
- a. Agency qualifications: Add the disciplines your third-party agency can provide inspection services based on staff qualifications. Temporarily suspend any discipline for services not provided.



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