

# TERTIUS

THE DISTRICT'S ONLINE  
MARKETPLACE FOR  
CONSTRUCTION INSPECTIONS

**A GUIDE FOR THIRD-PARTY AGENCIES**

[tertius.dcra.dc.gov](http://tertius.dcra.dc.gov)



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GOVERNMENT OF THE  
DISTRICT OF COLUMBIA  
DC MURIEL BOWSER, MAYOR

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# Tertius Introduction

Tertius is a marketplace platform in which DCRA 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 DCRA. 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

DCRA must invite Third-Party Agencies to use Tertius. Contact DCRA via email at [dcra@dc.gov](mailto:dcra@dc.gov) for more information on how to register for Tertius. Upon registration, use the email address where you received the invitation.

### 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 [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 DCRA via email at [dcra@dc.gov](mailto:dcra@dc.gov).

If you are a registered Access DC user: Follow the link provided in the Tertius invitation: [tertius.dcra.dc.gov](https://tertius.dcra.dc.gov). 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:

- [Register for Tertius](#)

### Steps

Follow these steps to log in to Tertius:

1. Visit [tertius.dcra.dc.gov](http://tertius.dcra.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 will be navigated to the Dashboard, where you will find the latest information on your projects.

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:** Here, find upcoming or scheduled inspections.
- **Reports:** Reports of your inspections.

# Manage 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.

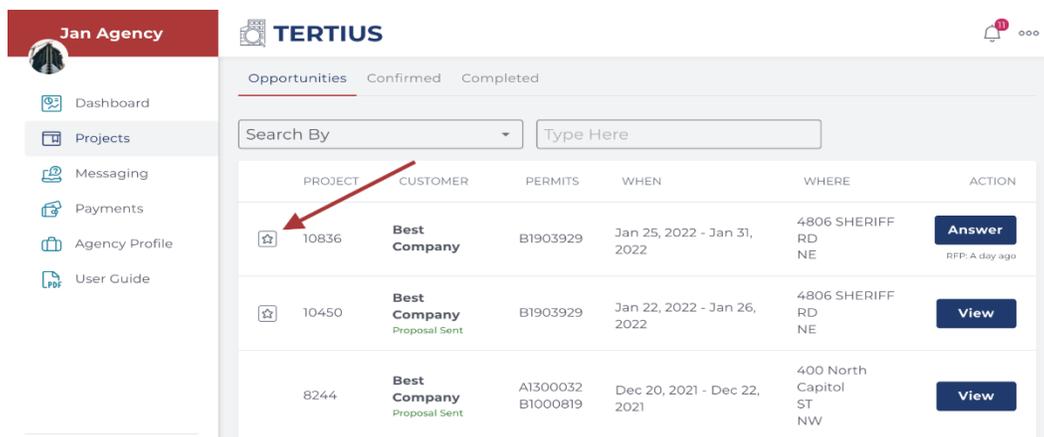
- **Confirmed**

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.

The star icon next to a project means that it is a special inspection project.



# Cancel a Project

## Regular Inspections

Third-party agencies may 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 explanation for the cancellation and select Cancel.

The screenshot shows the 'INSPECTIONS' section of a web application. At the top right is a 'Create Invoice' button. Below it is a date range 'Oct 1, 2021 - Oct 3, 2021' and a table with columns: DATE, TIME, PAY, STATUS, REPORT, PAYMENT. Below the table is the 'SCHEDULE INSPECTION' section. It includes a checkbox for 'BUILDING B2101808', a 'Date' field with a 'Set date' button, and 'Time From' and 'Time To' fields with 'Pick time' buttons. There is an 'Inspector' dropdown menu with 'Select Inspector' text. An 'Add Inspection' button is on the right. At the bottom of the form, a red arrow points to a 'Cancel Project' button.

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

## Special Inspections

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

- If the client has accepted your proposal for the project, but the Special Inspection Meeting Minutes haven't been accepted by DCRA, 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.

The screenshot shows the 'SCHEDULED INSPECTIONS' section. It features a message box: 'There are no scheduled inspections for this project. Please contact your selected inspection agency to get your first inspection scheduled.' Below this is a date range 'Aug 2, 2021 - Aug 4, 2021' and a table with columns: DATE, TIME, PAY, STATUS, REPORT, PAYMENT. A red button labeled 'Contact Agency to Schedule Inspection' is present. At the bottom, a red arrow points to a 'Cancel Project' button.

# Manage Requests

## Requirements

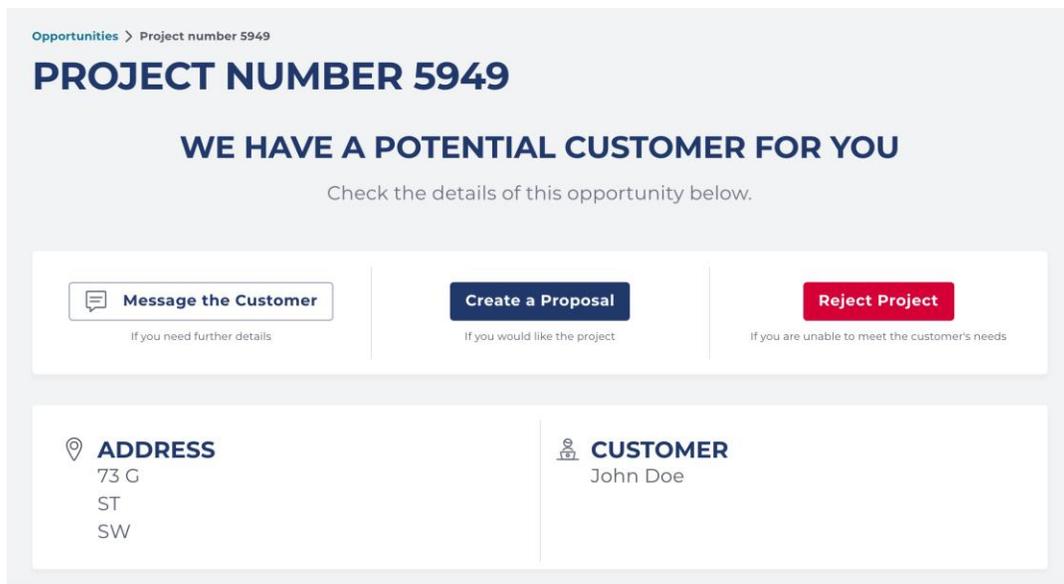
- [Get to Know Your Dashboard](#)
- [Send a Message](#)

## Steps

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 cost per inspection (available only for regular inspections) project. Select the Project Details button to view the request main page.

## Answer a Request for Proposal

1. Select See Request.
2. Find detailed information from the client in the request for proposal. The star icon next to the project number means it is a special inspection project. Find 3 buttons on the top of the page:



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 in the project, but need more information or clarification. 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 Cost Per Inspection Project Request

1. Select See Request.
2. Review the detailed information from the client. See 2 buttons at the top of the page:

**Schedule and Accept:** Accept the project and schedule the necessary inspection(s) if interested in the project. Tertius requires agencies to **respond to a request within 72 hours** of receiving the request.

Jan Agency | TERTIUS

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

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**

MECHANICAL ENERGY FINAL X | MECHANICAL UNDERGROUND & SLAB X | MECHANICAL ROUGH-IN X

Select an Inspection Type  
Mechanical Energy Final, Mechanical Underground & Slab, Mechanical Rough-In

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

Inspector: Bob The Builder

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

Cancel | **Schedule and accept**

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

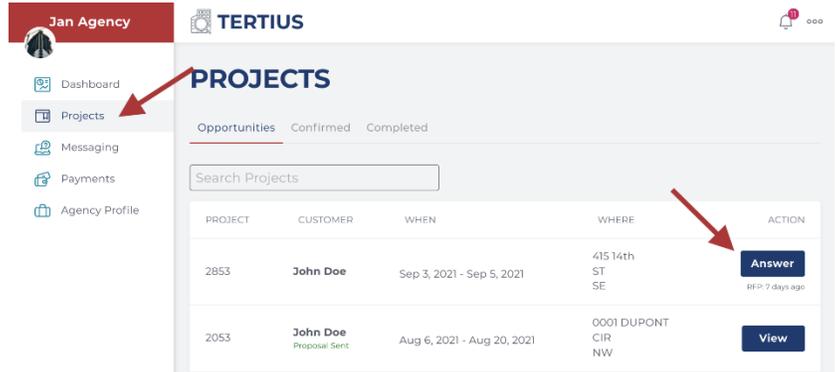
# Create a Proposal

## Regular Inspections

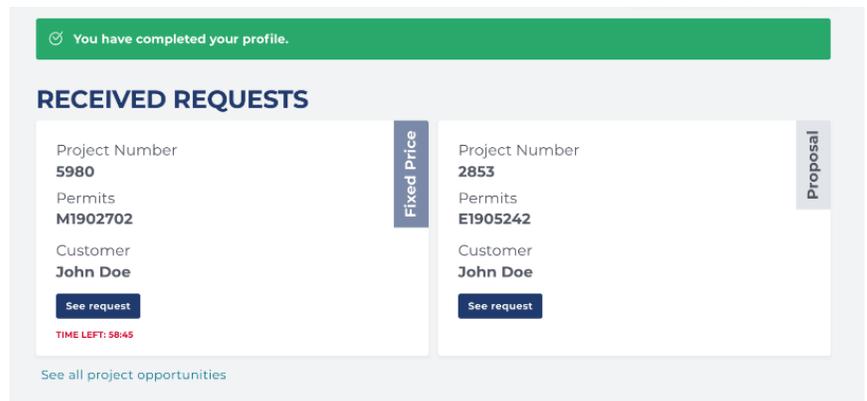
To create a proposal:

1. Find pending requests:

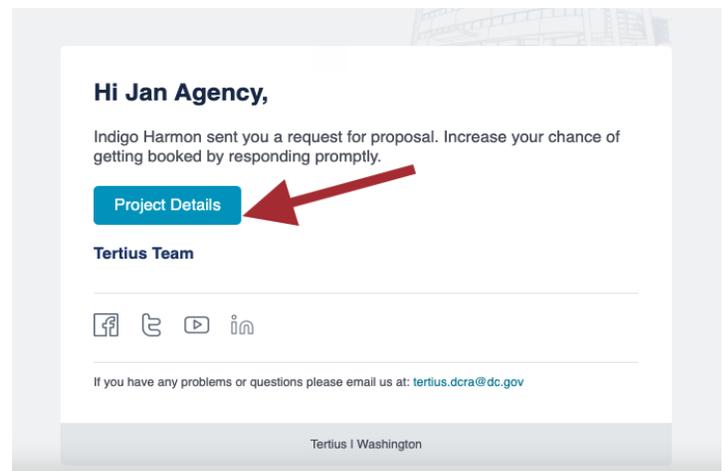
a. Under Projects, select the Opportunities tab, select the project, and select Answer.



b. Or, in the Received Requests section on the dashboard, select the project and select Answer.



c. Or, open the notification email for the proposal and select Project Details.



2. Once you have found proposals, select the Create a Proposal button.
3. Add your terms and conditions.

### 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...

0/1000

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. The agency creates a payment request and attach their own invoice to it.
    - ii. **Single Inspections Payment:** The third-party agency requests payment after each inspection event. This is recommended for projects requiring fewer inspections.

### 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.

\$230

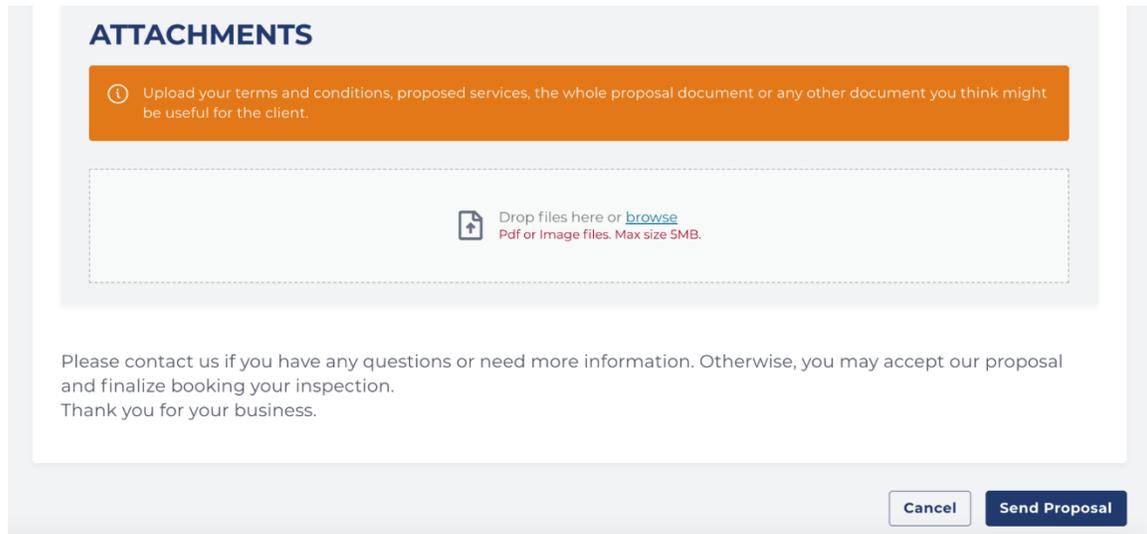
Add details about your pricing policy

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.

730/1000

- 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.
- e. You can also upload any documents you think would be useful for the client.

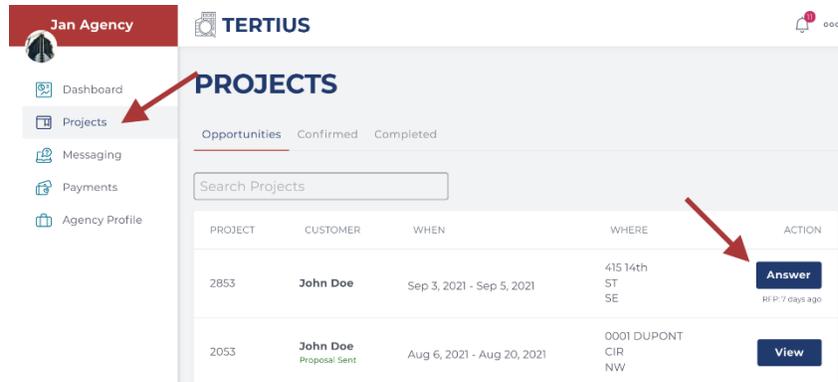


5. Select Send Proposal when complete.

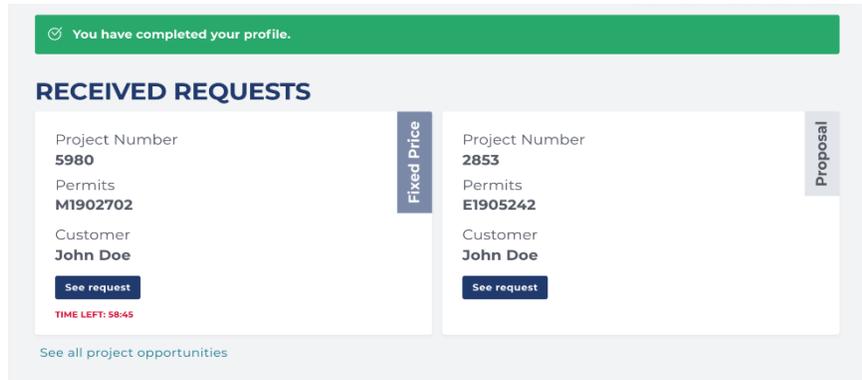
## Special Inspections

To create a proposal:

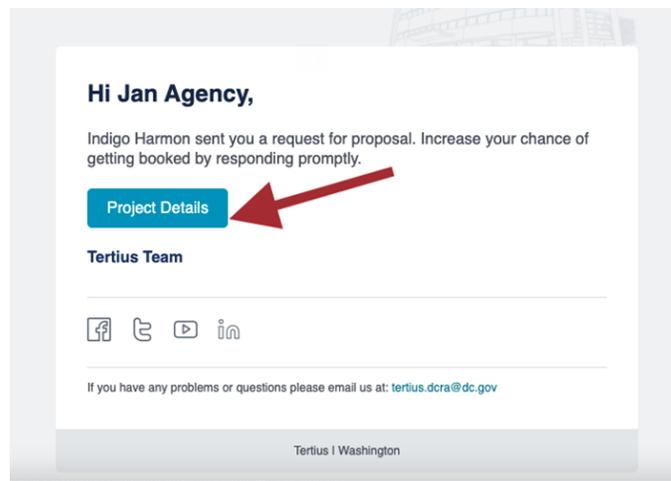
1. Find pending requests:
  - a. Under Projects, select the Opportunities tab, select the project, and select Answer. Special Inspection projects have a star icon on the left of the project number.



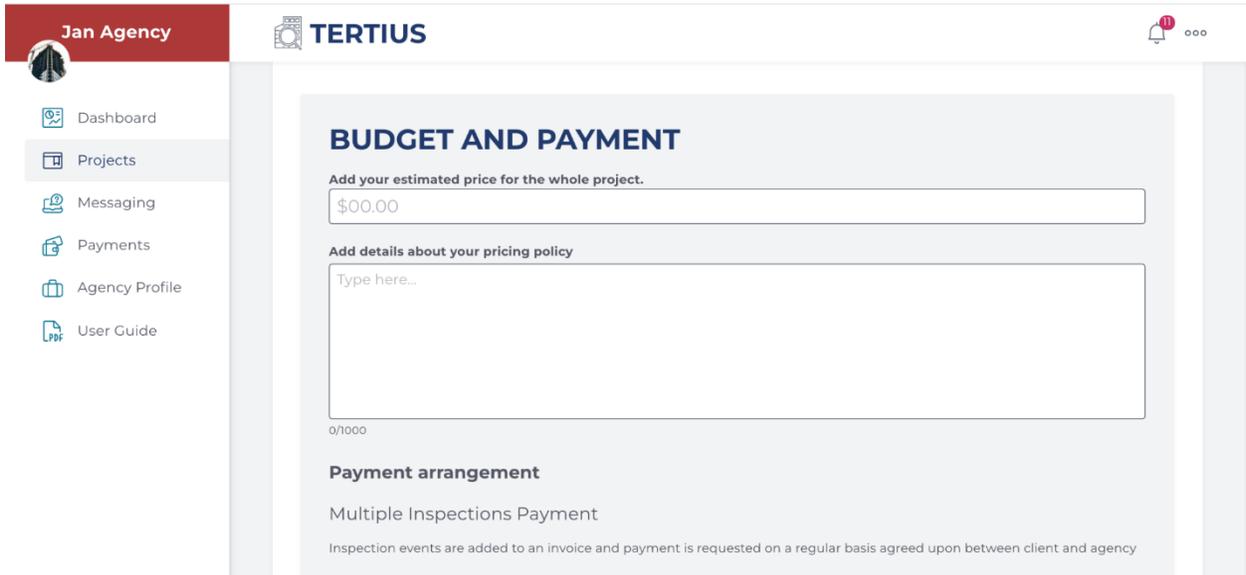
- b. Or, in the Received Requests section on the dashboard, select the project and select Answer...



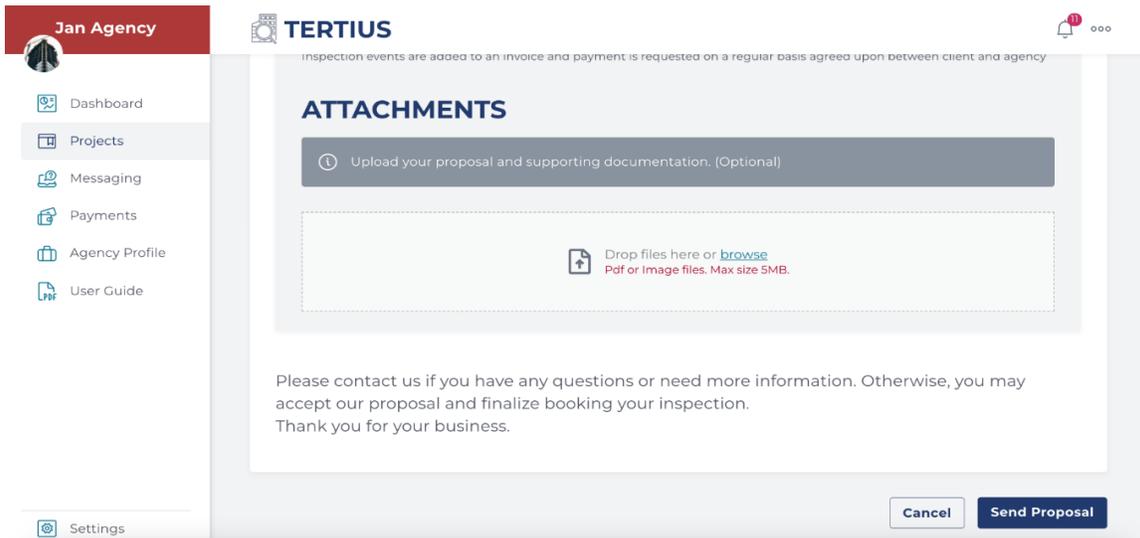
- c. Or, open the notification email for the proposal and select Project Details.



2. Select the Create a Proposal button.
3. Provide details about Budget and Payment.
  - a. Add your estimated price 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.
  - b. Describe your pricing policy for this project.
    - i. Special Inspection projects are available with a Multiple Inspections Payment arrangement. In this arrangement the client pays for inspections in groups or by phase as agreed upon with the agency. The agency creates a payment request and attach their own invoice to it.

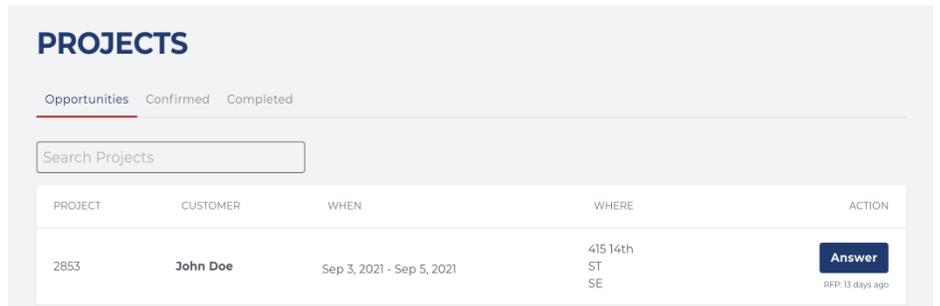


4. Attach your detailed proposal and any other supporting documentation you might need.

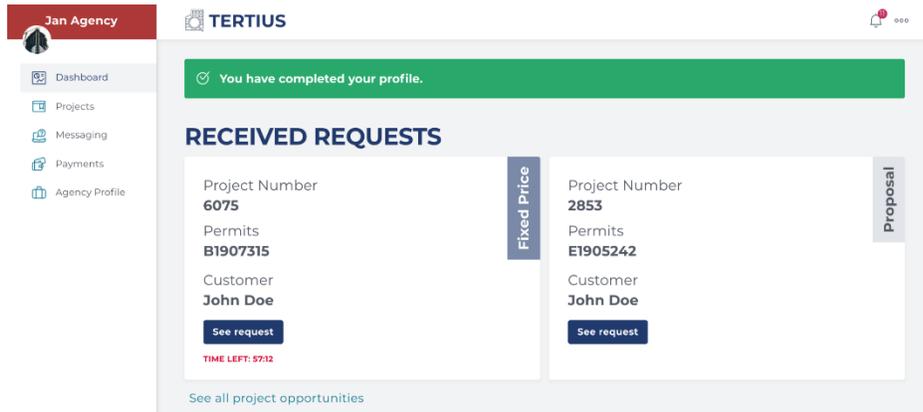


## Accept a Cost Per Inspection Project Request

1. Find pending requests:
  - a. In the Projects section, select the Opportunities tab and select Answer next to the selected project or



- b. Go to your Received Requests section from the dashboard, select Answer next to the selected project or



- c. Open the notification email about the project request and select Project Details.

### 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.dcr@dc.gov](mailto:tertius.dcr@dc.gov)

Tertius | Washington

2. Review details and select Accept and Schedule to accept this project.
  - a. Next, you will be able to schedule an inspection.
  - 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.

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**

MECHANICAL ENERGY FINAL X
  MECHANICAL UNDERGROUND & SLAB X
  MECHANICAL ROUGH-IN X

Select an Inspection Type  
 Mechanical Energy Final, Mechanical Underground & Slab, Mechanical Rough-In

Date: 10/11/2021 X

Time From: 8:00am+

Time To: 10:00am+

Inspector: Bob The Builder

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

- b. Select **inspection types**. Check the inspection types. Verify the status of each inspection type. Select inspection types with an Open status.

TERTIUS

- Select -

- Accessibility Open
- Backfill Open
- Building Solar Remote Open
- Energy Final Open
- Energy Footing & Foundation Insulation Open
- Energy Primary Air Barrier Open
- Exterior Wall Sheathing Open
- Fire Rated Assembly Open
- Water Resistive Barrier Open
- Footing Open
- Foundation Open

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

- d. Select the **inspector**. Change the inspector name as needed on the inspection report page.  
Select Schedule and Accept to finalize project acceptance.

The screenshot shows a web form for scheduling an inspection. At the top, there is a tab labeled 'ACCESSIBILITY X'. Below it, a dropdown menu is set to 'Accessibility'. The 'Date' field is '10/12/2021', 'Time From' is '8:00am', and 'Time To' is '9:00am'. The 'Inspector' dropdown is set to 'Bob The Builder'. Below the form is a summary table:

TOTAL INSPECTIONS			
	NUMBER	PRICE/PIECE	SUM
BUILDING Permit	1	\$14.00	\$14.00
<b>Total</b>			<b>\$14.00</b>

At the bottom right, there are two buttons: 'Cancel' and 'Schedule and accept'.

## Send a Message

Chat with any client with whom you have a relationship. 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.

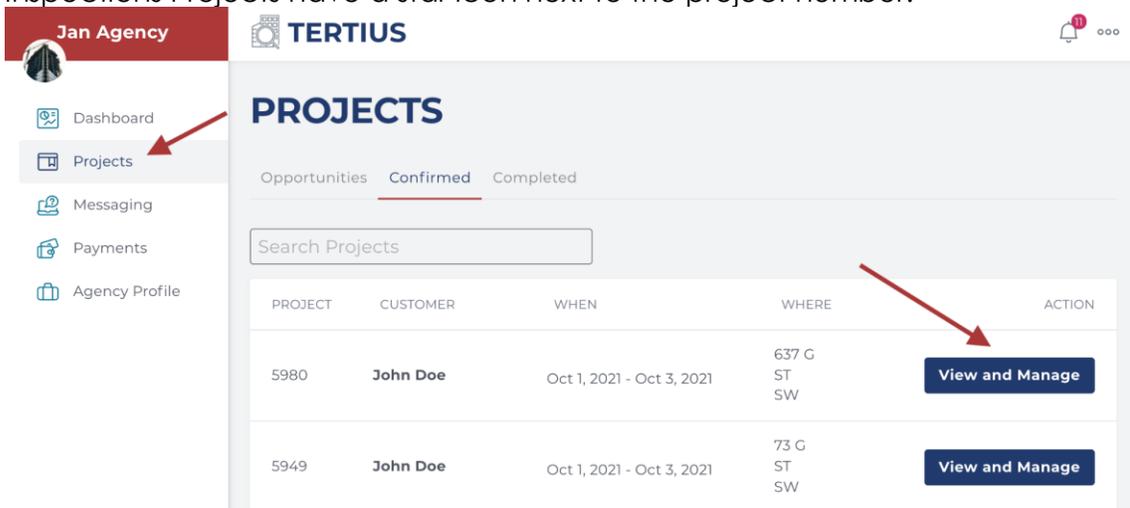
# Manage Inspections

## Requirements

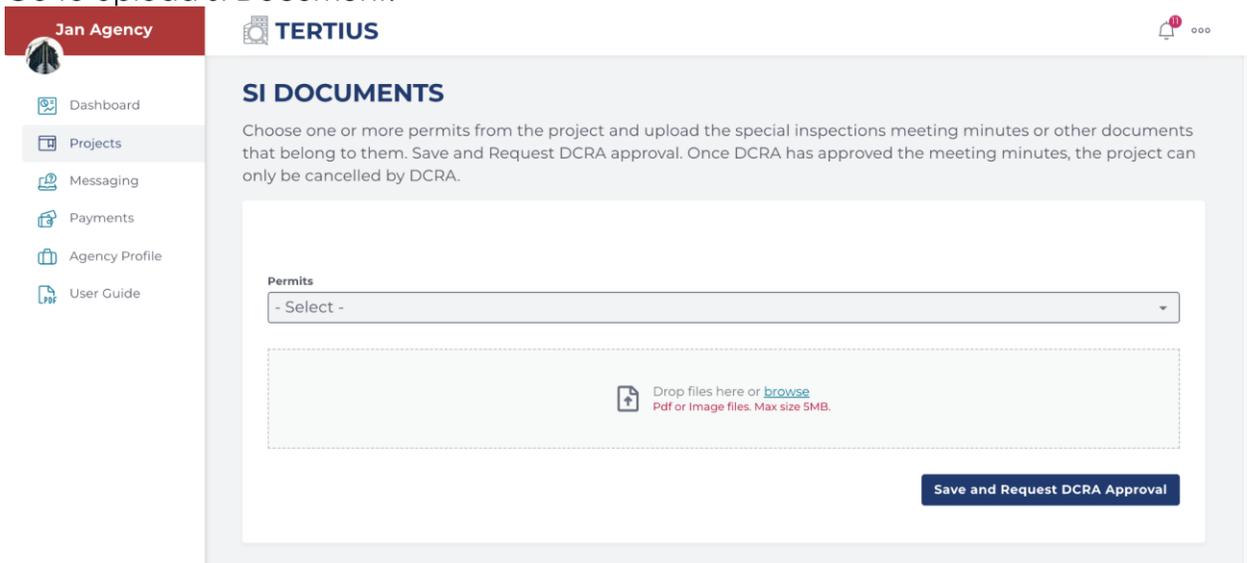
- [Get to Know Your Dashboard](#)
- [Manage Requests](#)
- [Send a Message](#)

## Upload the Special Inspections Meeting Minutes

1. Go to Projects, select the Confirmed tab, find the selected project and select the View and Manage button. Tertius displays the project detail page. Special Inspections Projects have a star icon next to the project number.



2. Go to Upload SI Document.



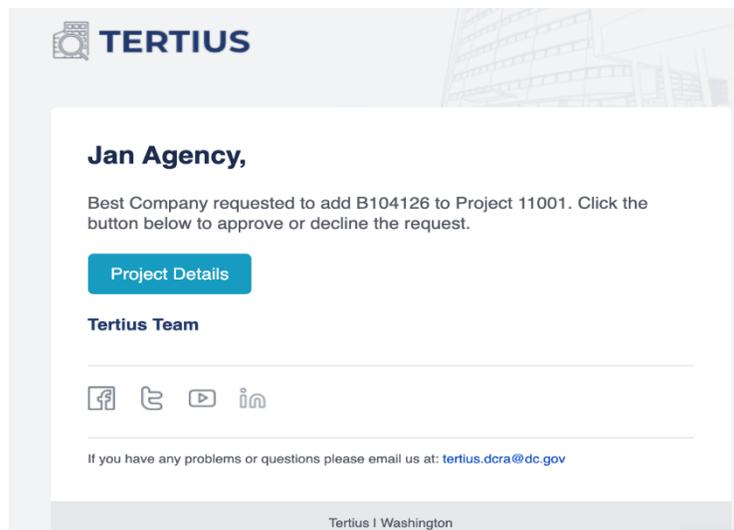
3. Select the permit or permits that the document you'd like to upload apply for.

4. Upload your document. Please combine all the documentation into one pdf if possible.
5. Click Save and Request DCRA Approval when you're done.
6. You'll get an email notification about DCRA's decision.
7. After the meeting minutes have been accepted by DCRA and the permit has been issued you can schedule the first inspection.

## Accept/Reject New Permits on an Existing Project

Clients can request new inspections to be added to an already existing project. The new permits have to be at the same address as the project.

1. Find the client's request:
  - a. You get an email notification with the client's request. Click on the Project Details button in the email OR



b. Open Project Details on the project page.

**TERTIUS**

Confirmed Projects > Project number 11001

## PROJECT NUMBER 11001

<b>ADDRESS</b> 400 North Capitol ST NW	<b>CUSTOMER</b> Best Company 	<b>SITE CONTACT</b> Test +12346787654 test@email.com	<b>PROJECT TIMELINE</b> Long-term Jan 15, 2022 - Feb 5, 2022
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**PROJECT DETAILS**

<b>TOTAL INSPECTIONS</b>	
Number of scheduled inspections	3
Budget used	\$0.00
Estimated budget	\$1,000.00
<b>Remaining</b>	<b>\$1,000.00</b>

**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

**PAYMENT METHOD**  
Credit Card

2. Click on Accept or Reject button.

**Jan Agency**

**TERTIUS**

- Dashboard
- Projects**
- Messaging
- Payments
- Agency Profile
- User Guide
- Settings

**B1007125** **Permit Complete**

This permit includes:  
INTERIOR RENOVATION TO 5TH FLOOR "GREEN ROOM" MEP AND LIFE SAFETY. "FOX NEWS CHANNEL".

Inspection types (26)

**B104126** **PENDING**

**Accept** **Reject**

This permit includes:  
Renovation to office space on the 2nd floor per plans

Inspection types (22)

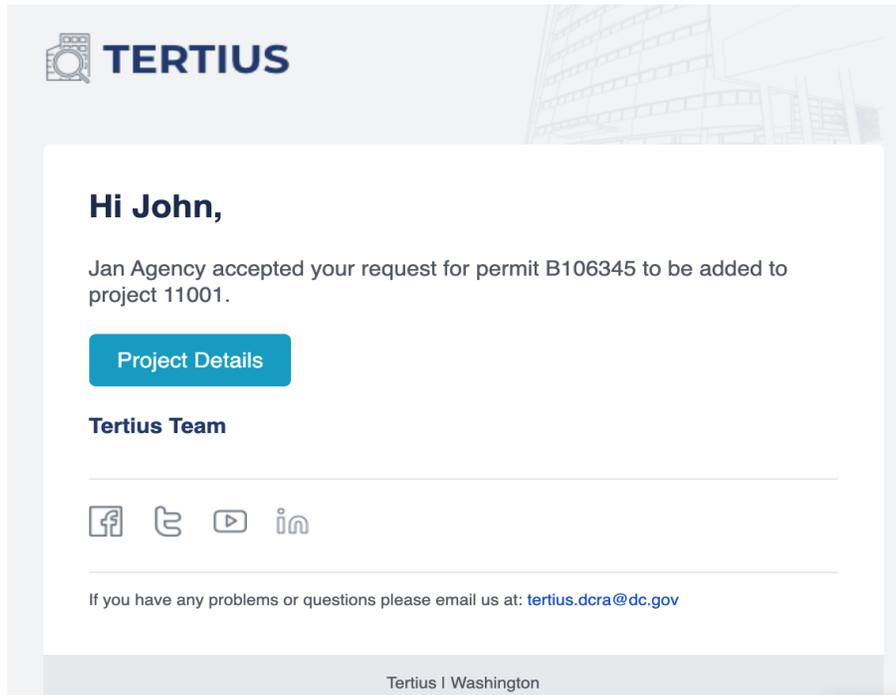
**PROJECT DESCRIPTION**  
Test

**TERMS AND CONDITIONS OF THE PROPOSED PROJECT**  
Test

**PROPOSED SERVICE**  
Test

**ANTICIPATED NUMBER OF VISITS**  
.....

3. The status you have chosen appears under the permit number and the client gets an email notification about your decision.

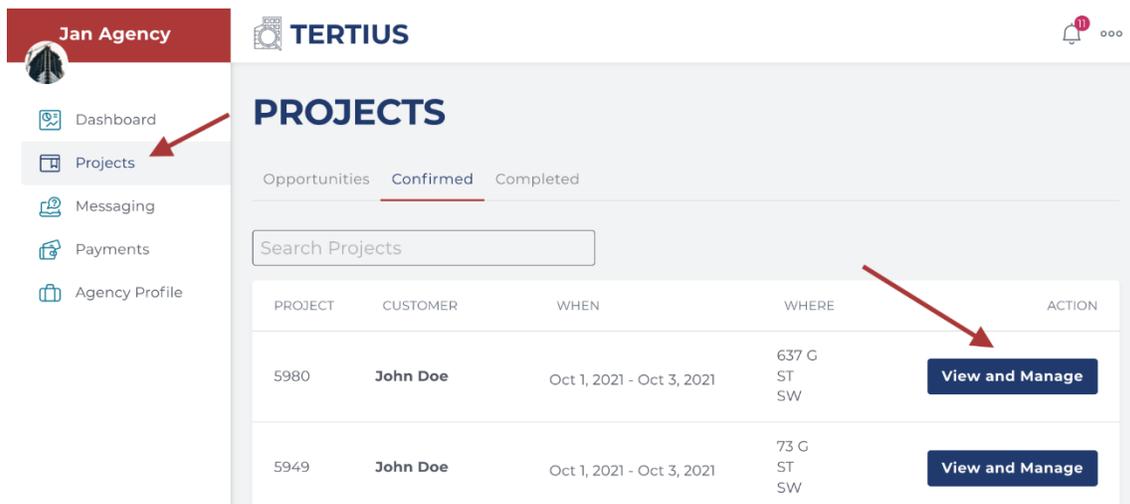


## Schedule Inspections

Scheduling inspections is only possible on permits that have been issued.

Contact your customers about their needs first, then:

1. Go to Projects, select the Confirmed tab, find the selected project and select the View and Manage button. Tertius displays the project detail page. Special Inspections projects have a star icon next to the project number.



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

- a. Select one or more **permits**.
  - 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.
2. Select the Open Report Button. Adjust any of the following:

**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	<span>Open Report</span>	

- a. Start and end time: select Modify Time, make adjustments and select Save Time.
- b. Name of the inspector: select the field containing the inspector's name. Choose a new inspector from the dropdown list and select Save.

**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.
3. From the Project Detail page, select the recycle bin icon next to the date of the inspection.

**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	<span>Open Report</span>	

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
4. Upload your inspection report to each inspection completed. Make sure to follow the requested naming convention.



**🕒 Naming convention for uploaded reports:**

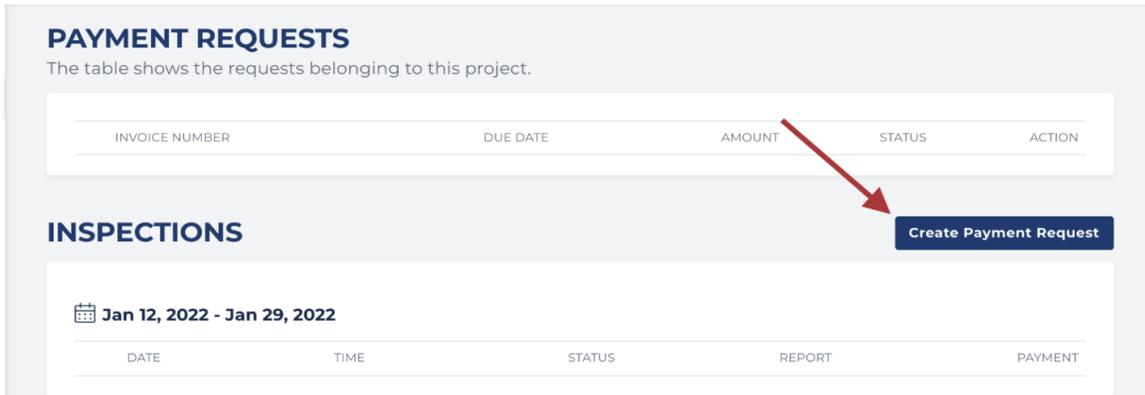
Third Party Partial Submission:  
Inspection type\_inspection date\_location\_pass/fail  
Examples:  
**RoughElec\_9.28.21\_2Floor\_pass**  
**FinalMech\_9.28.21\_1-4Floor\_fail**

Third Party Complete or Third Party Failed:  
Inspection type\_inspection date\_pass/fail  
Examples:  
**FinalBuild\_9.28.21\_pass**  
**Insulation\_9.28.21\_fail**

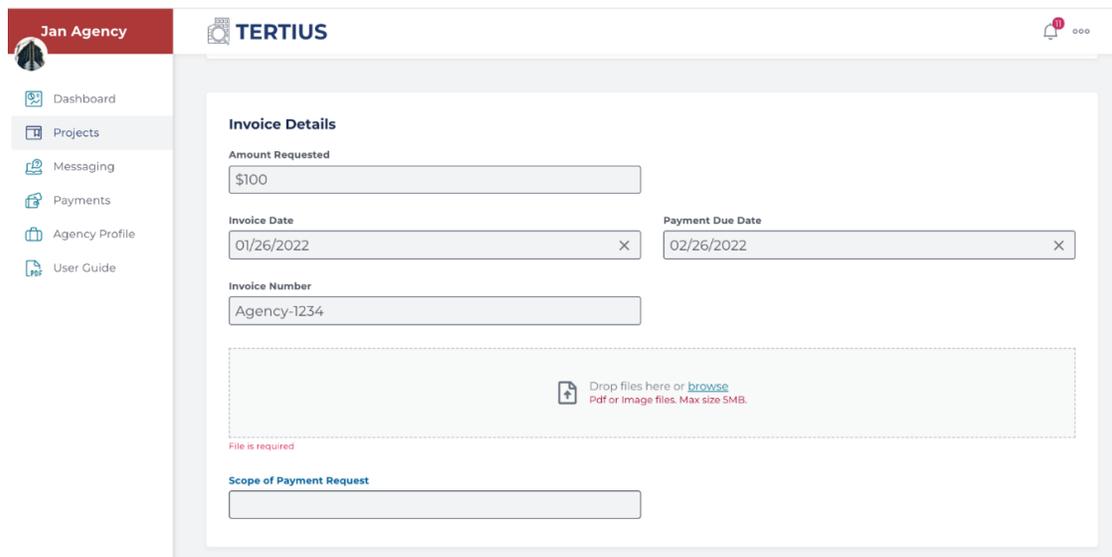
5. Time: Adjust the time by selecting Modify time if the inspection was not completed at the time scheduled. Modify these details until you send the payment request.
6. Inspector: Select who completed the inspection.
7. Total cost ONLY FOR SINGLE INSPECTION PAYMENTS: Add the fee for the inspection. Format: \$00.00
8. Finalize your inspection report:
  - Single Inspection Payment: select the Request Payment button. The client will get an email notification with your payment request. If they approve the payment, the cost of the inspection will appear on your bank account after maximum 2 (credit card payment) -7 (ACH payment) days. If the client doesn't approve the payment the cost of the inspection will automatically be charged on their selected payment method after 45 days.
  - Multiple Inspection Payment: select Mark Inspection as Complete button. Inspections that are marked as complete can be added to a payment request.

# Create Payment Request – Multiple Inspections Payment

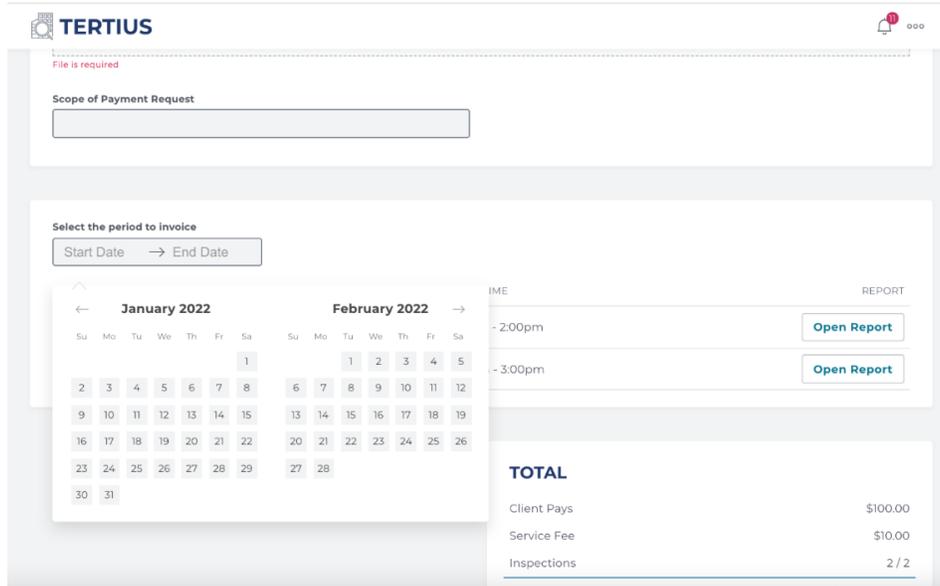
1. Go to Projects and select the Confirmed tab. Find the project and select the View and Manage button.
2. From the project detail page, go to Inspections and click on Create Payment Request.



3. Add your Invoice Details. All fields are required.
  - o The amount you request in your invoice
  - o Invoice Date: the date when your invoice is created
  - o Payment Due Date: the latest a payment can be made on an invoice or debt before it's considered overdue.
  - o Invoice number: the number of the invoice generated in your own invoicing system. This number will appear in your Payments menu.
  - o Upload your invoice generated in your own invoicing system.
  - o Scope of Payment Request: add any information that can help you identify the invoice.



4. Inspection events in the Payment Request: all inspection events that are marked as complete are selected by default.
  - o Select the period in which the inspection events happened for which you would like to request the payment.



**TERTIUS**

File is required

Scope of Payment Request

Select the period to invoice

Start Date → End Date

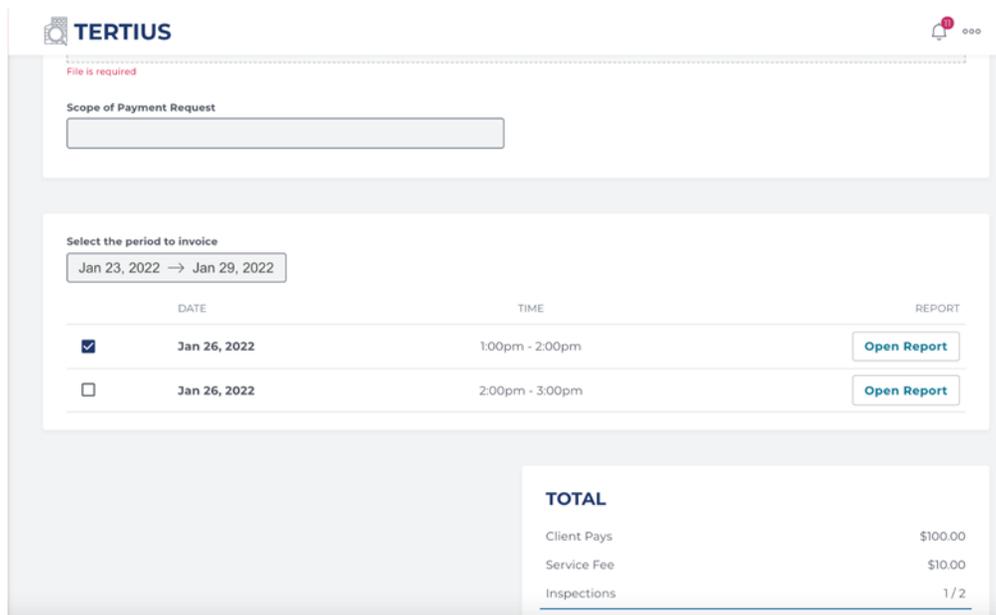
January 2022      February 2022

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
						1	1	2	3	4	5		
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28					
30	31												

TIME	REPORT
- 2:00pm	<a href="#">Open Report</a>
- 3:00pm	<a href="#">Open Report</a>

TOTAL	
Client Pays	\$100.00
Service Fee	\$10.00
Inspections	2 / 2

- o Uncheck the inspection events that you would like to exclude from the payment request.



**TERTIUS**

File is required

Scope of Payment Request

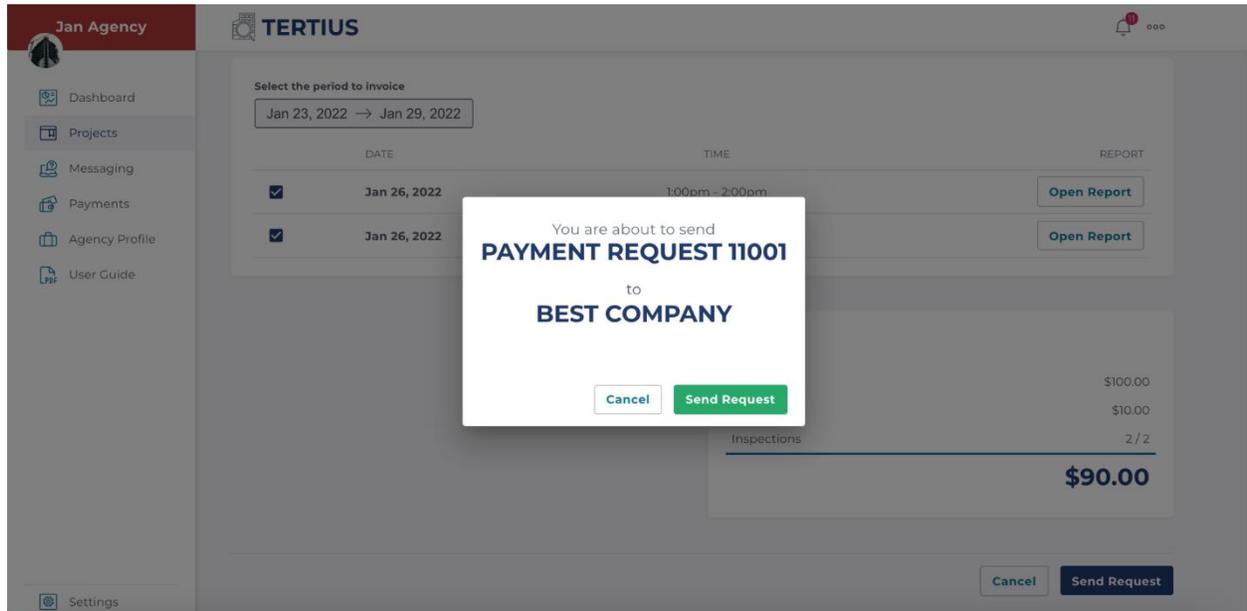
Select the period to invoice

Jan 23, 2022 → Jan 29, 2022

DATE	TIME	REPORT
<input checked="" type="checkbox"/> Jan 26, 2022	1:00pm - 2:00pm	<a href="#">Open Report</a>
<input type="checkbox"/> Jan 26, 2022	2:00pm - 3:00pm	<a href="#">Open Report</a>

TOTAL	
Client Pays	\$100.00
Service Fee	\$10.00
Inspections	1 / 2

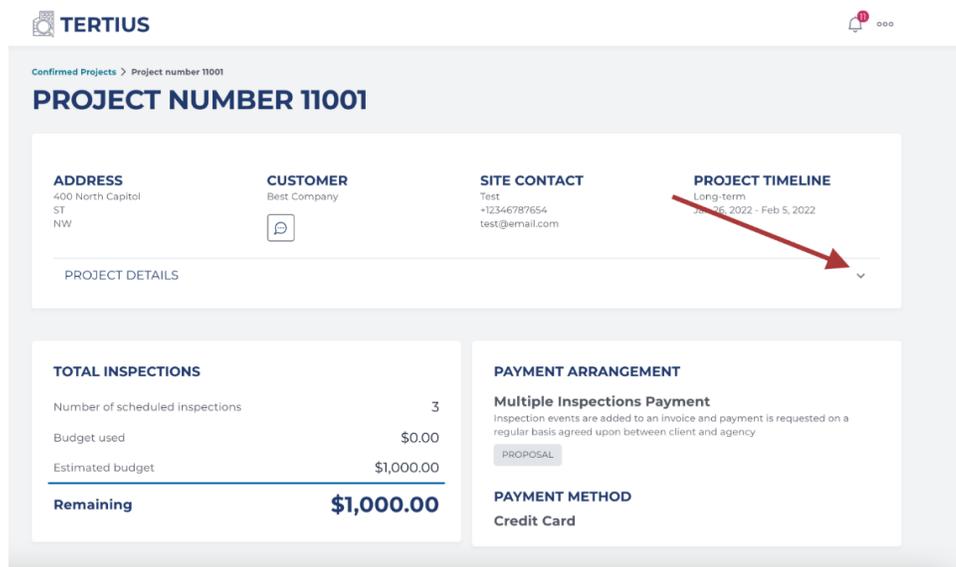
5. Click on Request Payment. Confirm your request.



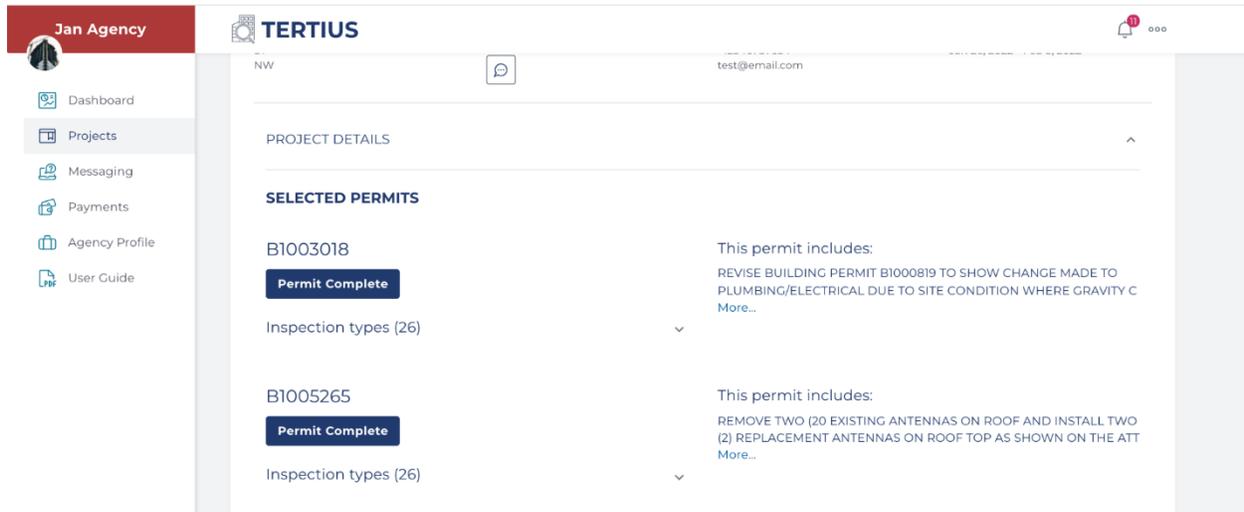
## Request Permit Complete

When you have performed all of the inspections necessary for a permit you can request DCRA mark that permit as complete. Once all permits in a project are completed, and all payment requests have been cleared the project is automatically closed.

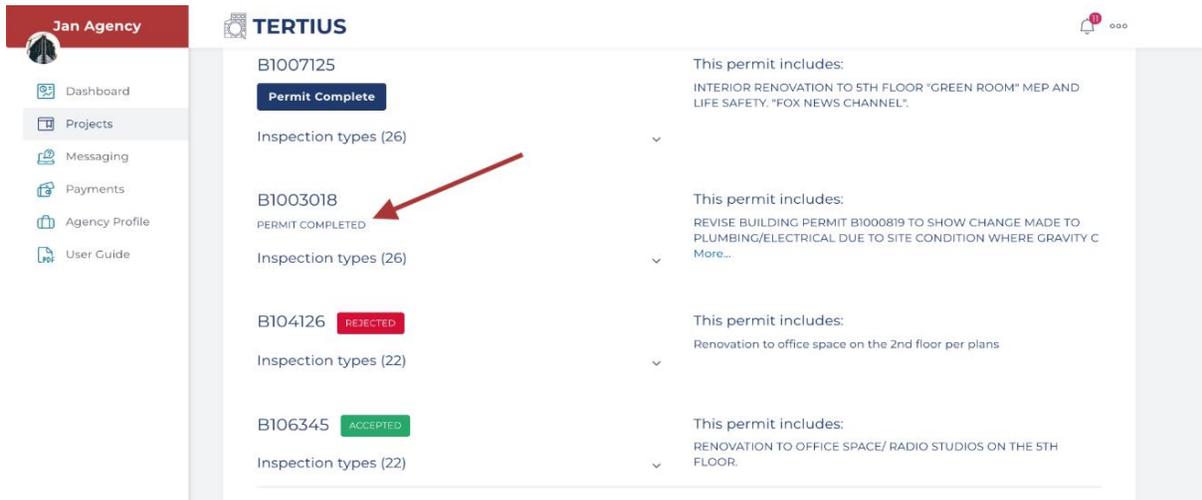
1. Open Project Details on the project page.



2. Select Permit Complete button under your chosen permit.



3. If DCRA approves your request and marks the permit as complete you will get an email notification and the permit will be marked as complete.



## 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:

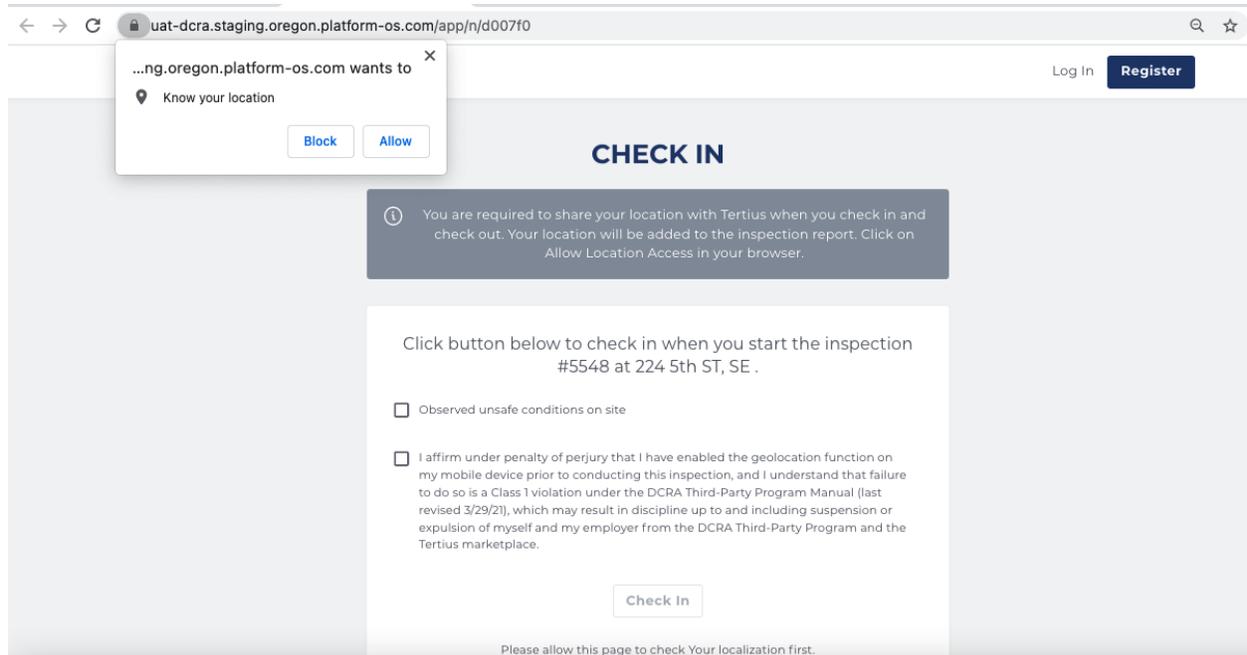
- [Google Chrome on Android Phone or Tablet](#)
- [Google Chrome on iPhone or iPad](#)
- [iPhone or iPad](#) (any app, including Safari)

### 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.
3. At the check-in 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-in button.

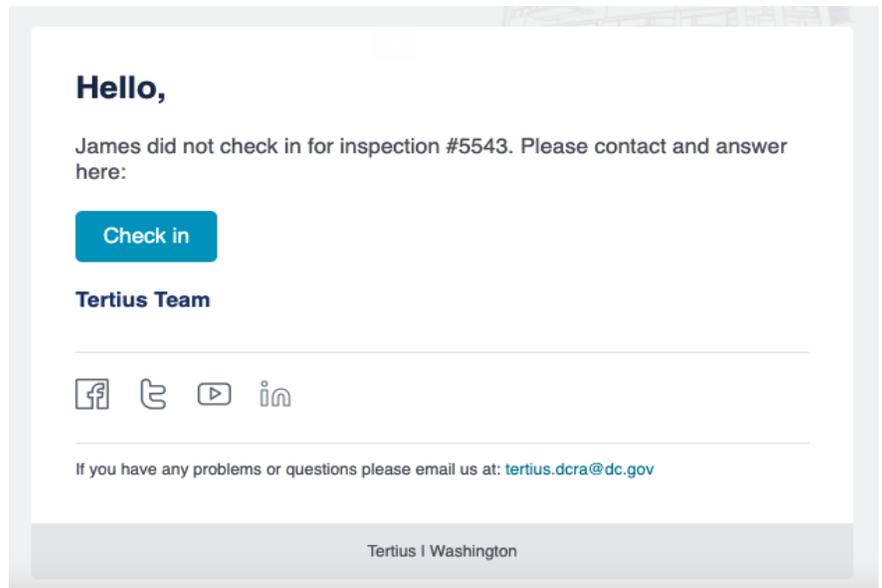
### Inspector Check-Out Steps:

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 +30 minutes of the inspection, the agency admin gets a notification email about this.

If you can contact the inspector and they confirm that they could perform the inspection, but were unable to check in, you can use the button in the notification email to check in for them. DCRA will be notified that it was the agency admin who checked in for the inspector.



## 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, 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.

## 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.
- 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 DCRA

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 DCRA

### 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.

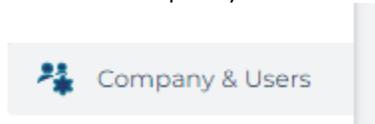
### Schedule Inspections

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".

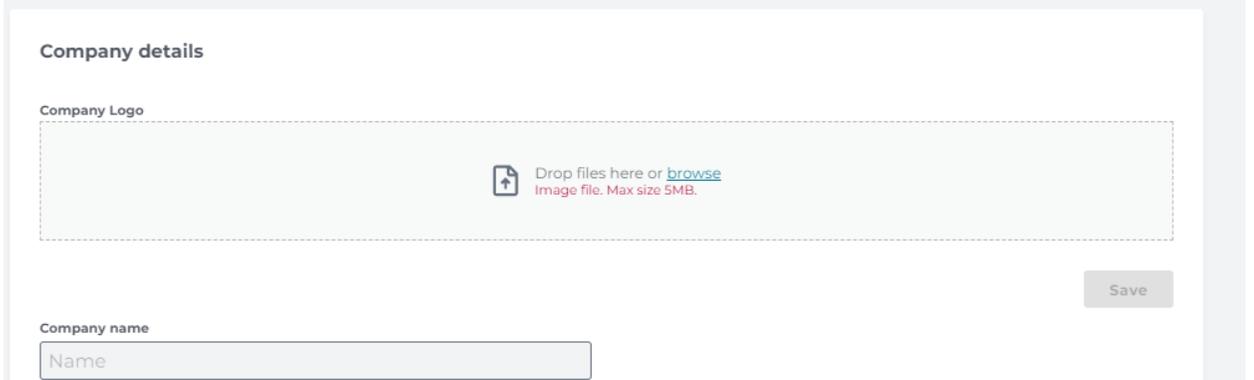


2. Create a company.

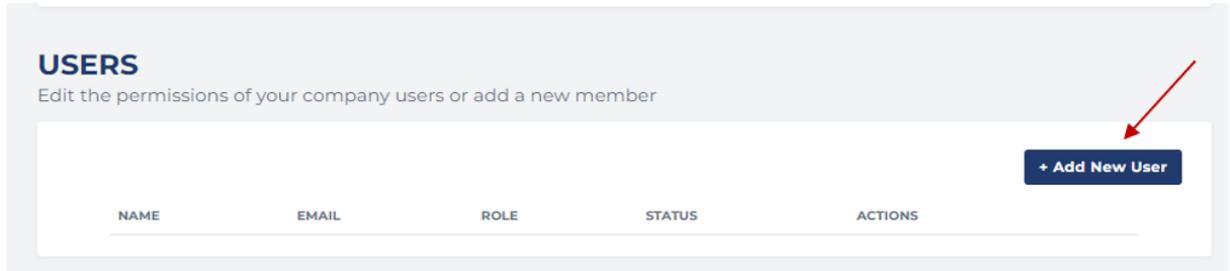
## COMPANY AND USERS

### 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.

A screenshot of a web form titled "Company details". It features a "Company Logo" section with a dashed border and a "Drop files here or browse" instruction, with a note "Image file. Max size 5MB." Below this is a "Company name" input field with the placeholder text "Name". A "Save" button is located at the bottom right of the form area.

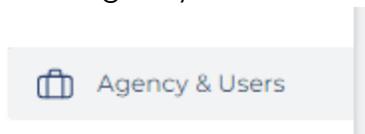
3. Click On "Add New User".



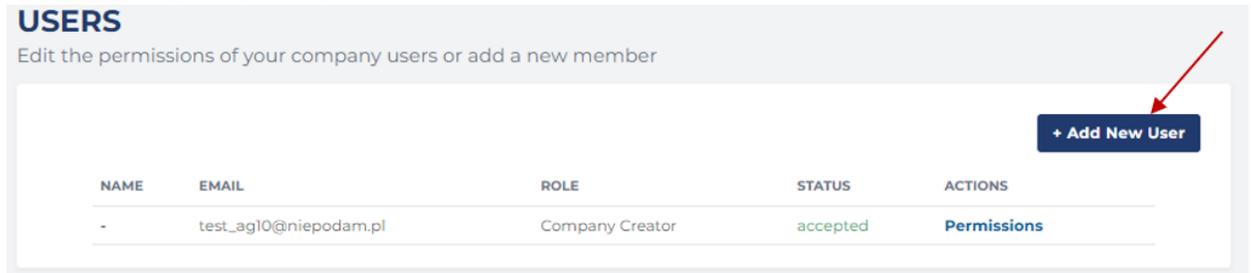
4. Add the email address of the person you would like to invite.
5. Choose the role you want to give the person. If you choose one of the three predefined roles - Administrator, Project Manager, or Accounting – you will the permissions selected. You may also customize any of these roles to meet your 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".



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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