

TERTIUS

THE DISTRICT'S ONLINE
MARKETPLACE FOR
CONSTRUCTION INSPECTIONS

A GUIDE FOR THIRD-PARTY AGENCIES

tertius.dcra.dc.gov



WE ARE WASHINGTON
GOVERNMENT OF THE
DISTRICT OF COLUMBIA
DC MURIEL BOWSER, MAYOR

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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

DOB must invite Third-Party Agencies to use Tertius. Contact DOB via email at dob@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 DOB via email at dob@dc.gov.

If you are a registered Access DC user: Follow the link provided in the Tertius invitation: tertius.dcr.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.dcrd.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.

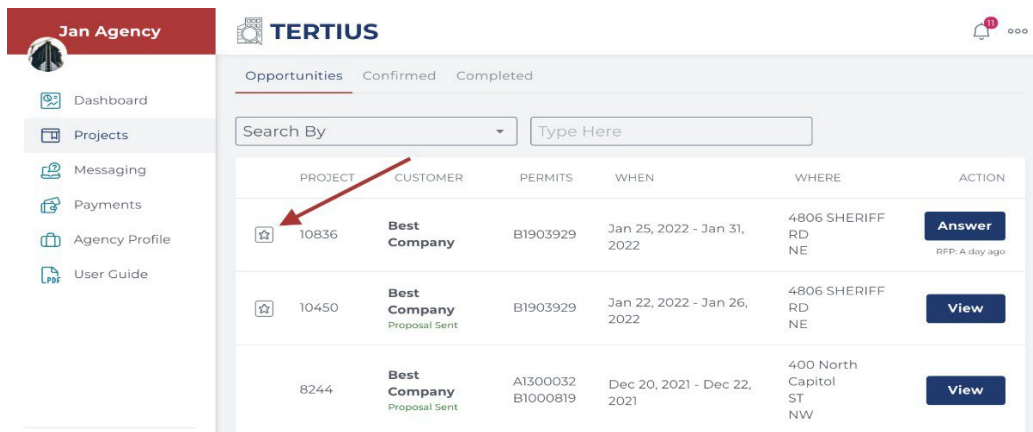
- **Confirmed**

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 an Inspection Event

Regular Inspections

Third-party agencies may cancel a project BEFORE an inspection is scheduled. Users must have the "Manage Projects" permission to do this.

1. Go to the Project Details page.
2. Find the inspection that you would like to cancel under Inspections.
 - Click on the trashcan icon at the beginning of the row.

Manage Requests

Requirements

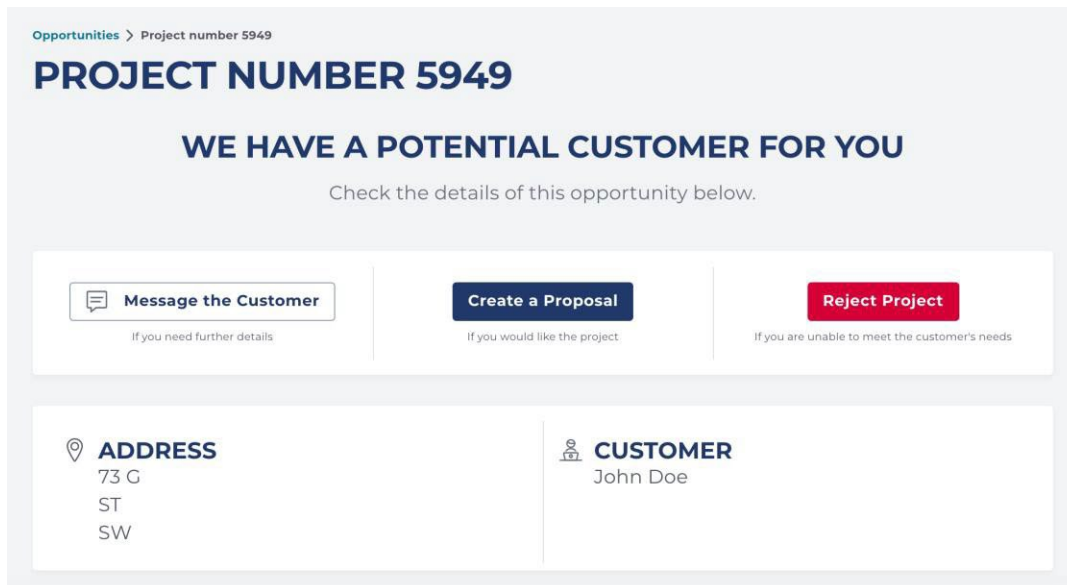
- [Get to Know Your Dashboard](#)
- [Send a Message](#)

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	\$39.00
Total			\$39.00

Cancel Schedule and accept

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

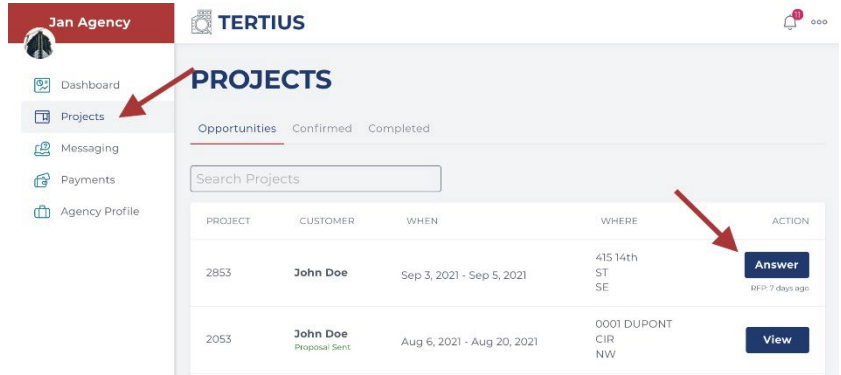
Create a Proposal

Regular Inspections

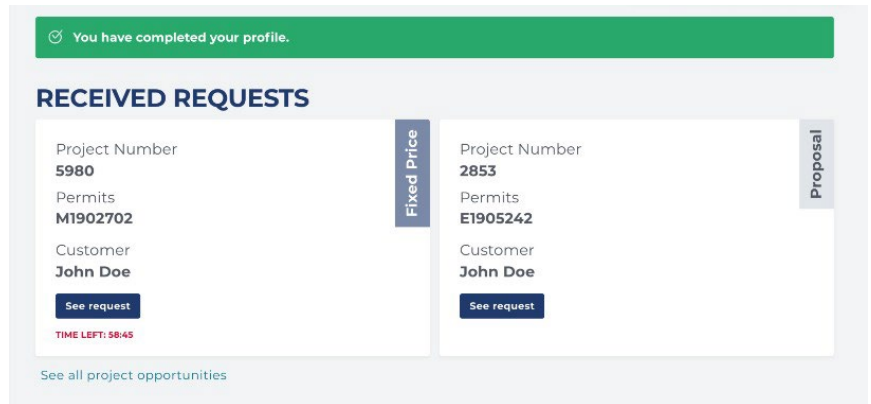
To create a proposal:

1. Find pending requests:

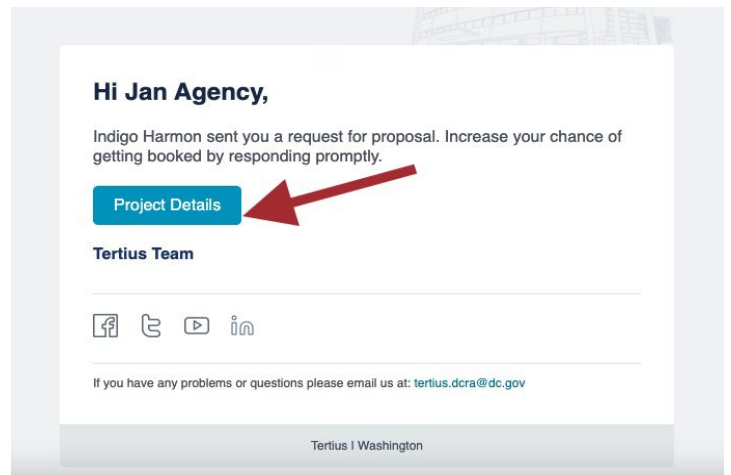
a. Under Projects, select the Opportunities tab, select the project, and select Answer.



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

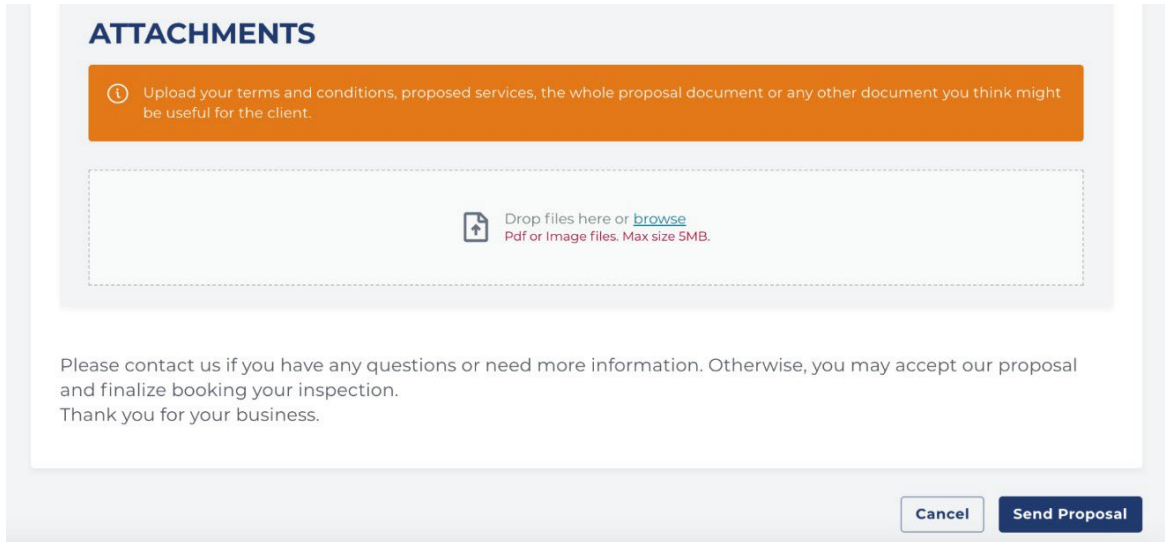
Add details about your pricing policy

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.

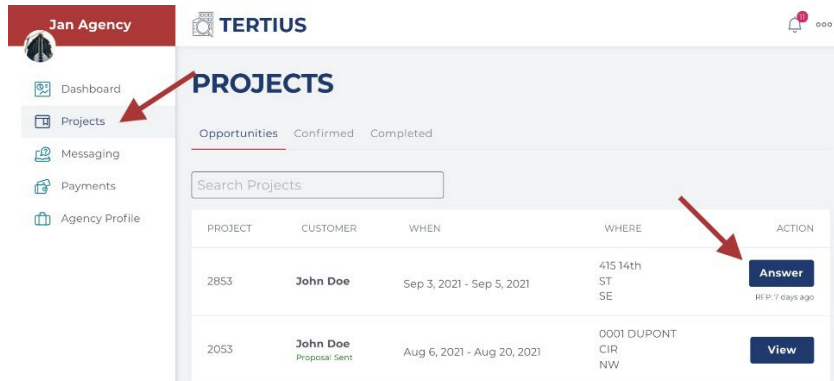


5. Select Send Proposal when complete.

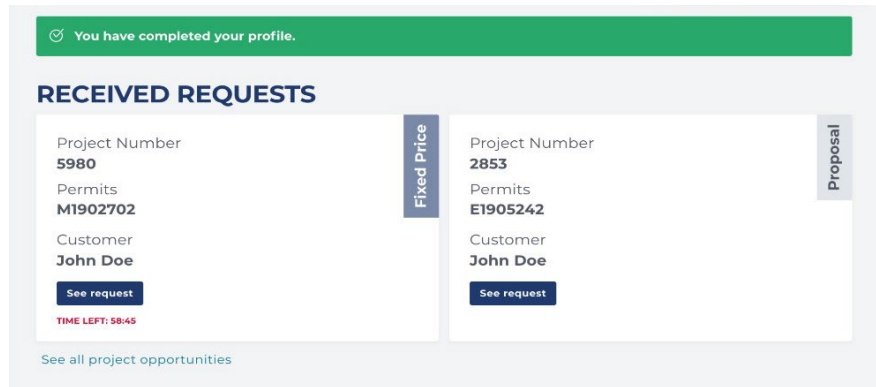
Special Inspections

To create a proposal:

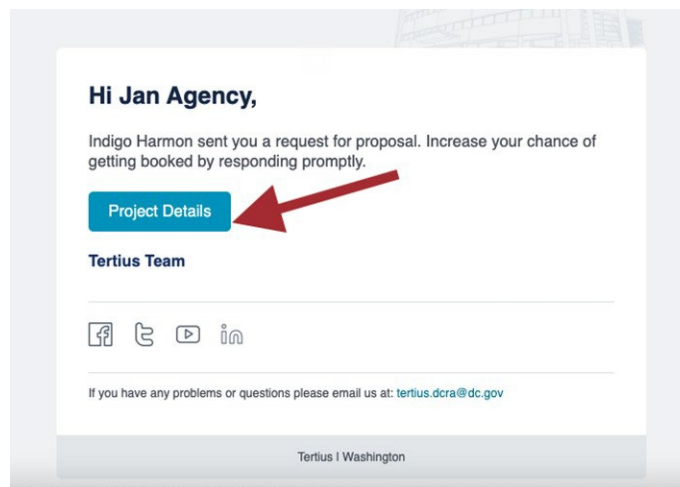
- 1. Find pending requests:
 - a. Under Projects, select the Opportunities tab, select the project, and select Answer. Special Inspection projects have a star icon on the left of the project number.



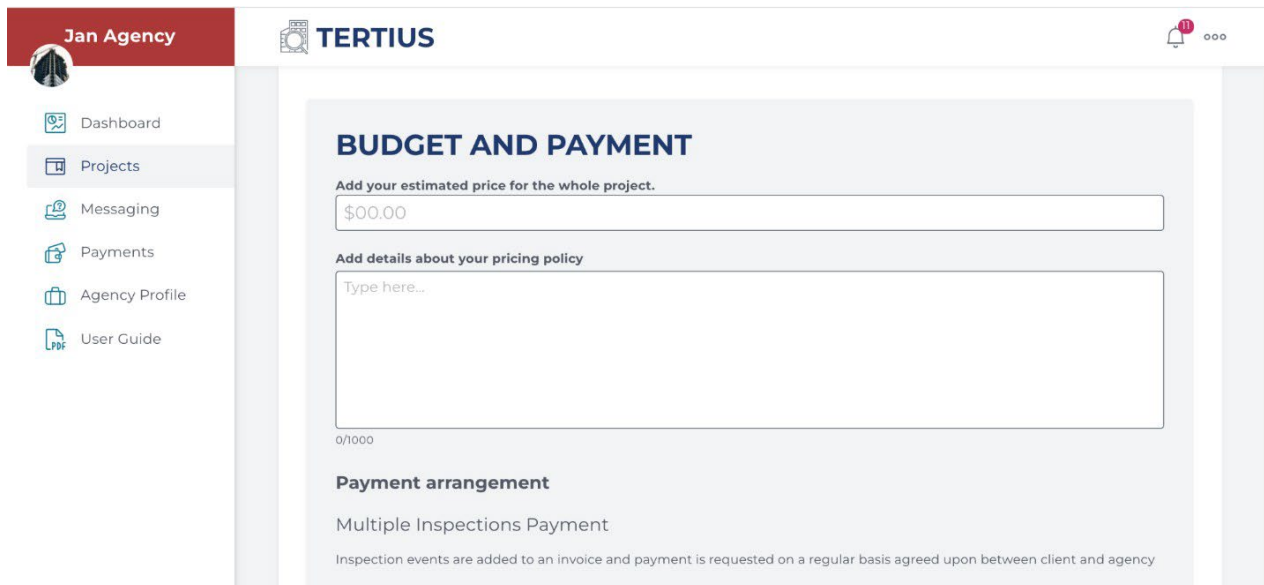
- b. Or, in the Received Requests section on the dashboard, select the project and select Answer...



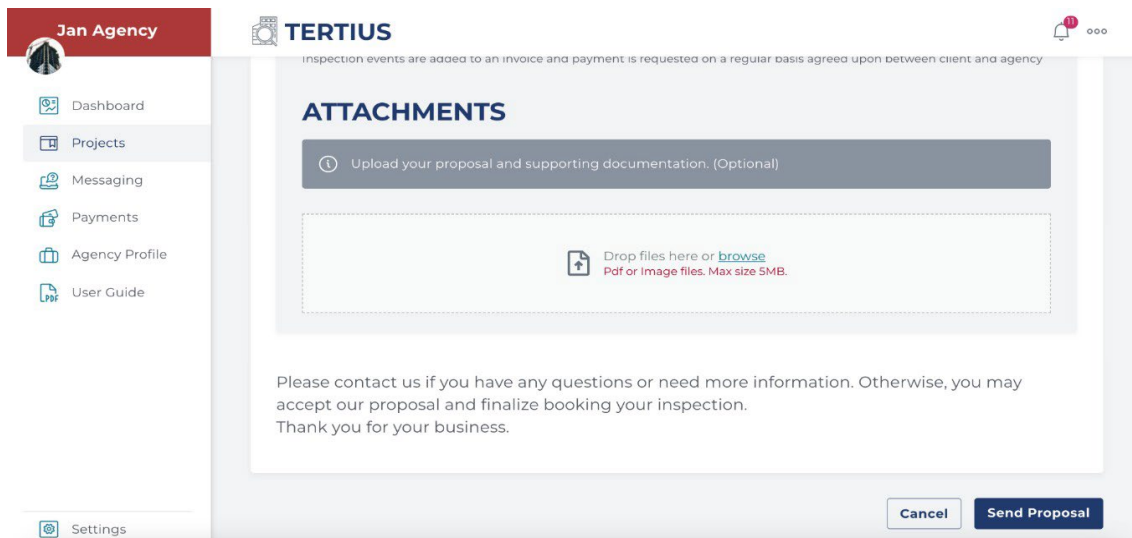
- c. Or, open the notification email for the proposal and select Project Details.



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.

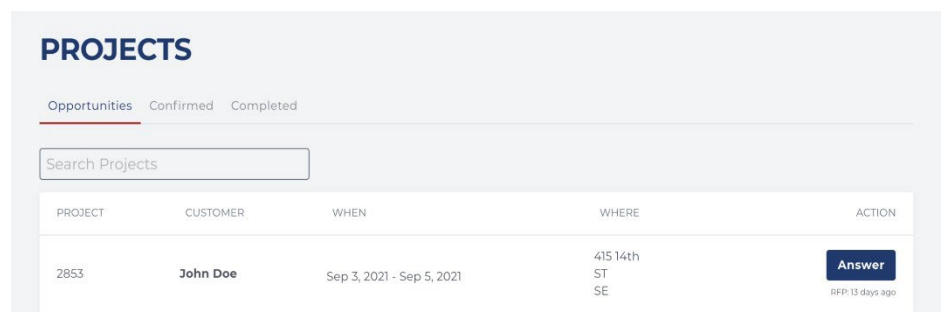


4. Attach your detailed proposal and any other supporting documentation you might need.

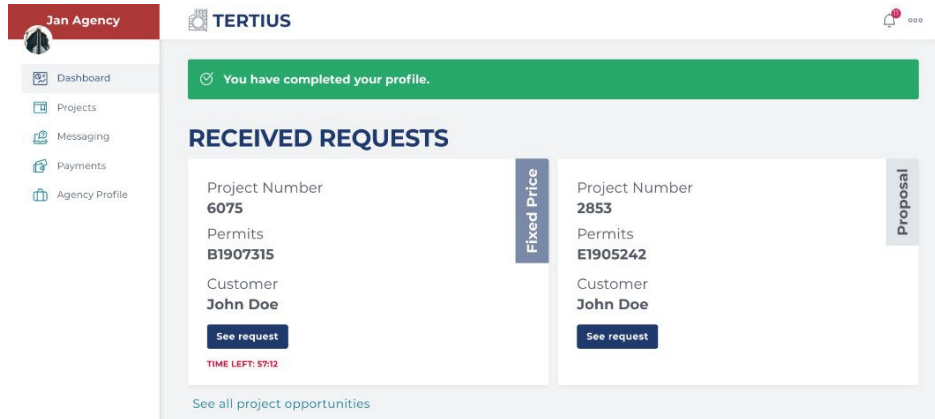


Accept a Cost Per Inspection Project Request

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.dkra@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.

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 MECHANICAL UNDERGROUND & SLAB MECHANICAL ROUGH-IN

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

Date: 10/11/2021
Time From: 8:00am
Time To: 10:00am
Inspector: Bob The Builder

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

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 is a dropdown menu for 'Select an Inspection Type' with 'Accessibility' selected. The form includes fields for 'Date' (10/12/2021), 'Time From' (8:00am), and 'Time To' (9:00am). An 'Inspector' dropdown menu is set to 'Bob The Builder'. Below these fields is a table titled 'TOTAL INSPECTIONS' with columns for 'NUMBER', 'PRICE/PIECE', and 'SUM'. The table contains one row for 'BUILDING Permit' with a value of 1, a price of \$14.00, and a total of \$14.00. A 'Total' row is also present, showing a total of \$14.00. At the bottom right, there are two buttons: 'Cancel' and 'Schedule and accept'.

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

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 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.

Manage Inspections

Requirements

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

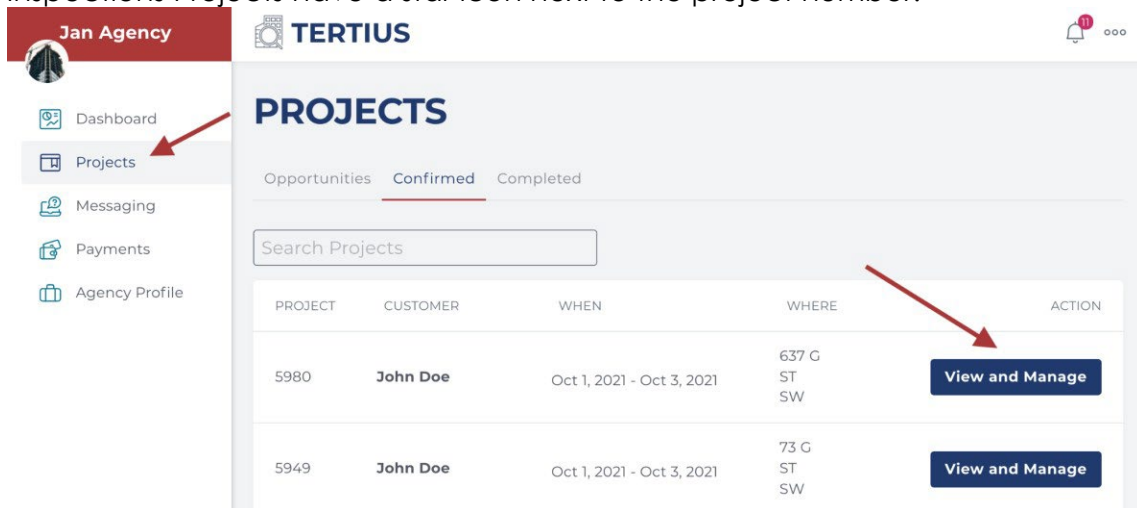
Add Supplemental Documents for Regulatory Code Inspection Projects

With the “Manage Projects” permission, users can upload and submit documents for DOB on the project details page.

1. Select the permit of the project that the document is needed for.
2. Select the document type (Notice of Intent, Abatement Letter, Conditional Recommendation Letter, Certificate of Occupancy Certification, Other).
3. Upload the document, then click “Save and Request DOB Approval.”

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.

The screenshot shows the TERTIUS web application interface. On the left is a navigation sidebar for 'Jan Agency' with menu items: Dashboard, Projects (highlighted), Messaging, Payments, Agency Profile, and User Guide. The main content area is titled 'SI DOCUMENTS' and contains the following text: 'Choose one or more permits from the project and upload the special inspections meeting minutes or other documents that belong to them. Save and Request DCRA approval. Once DCRA has approved the meeting minutes, the project can only be cancelled by DCRA.' Below this text is a form with a 'Permits' dropdown menu currently showing '- Select -'. Underneath the dropdown is a dashed-line box for file uploads with the text: 'Drop files here or [browse](#). Pdf or Image files. Max size 5MB.' At the bottom right of the form is a blue button labeled 'Save and Request DCRA Approval'.

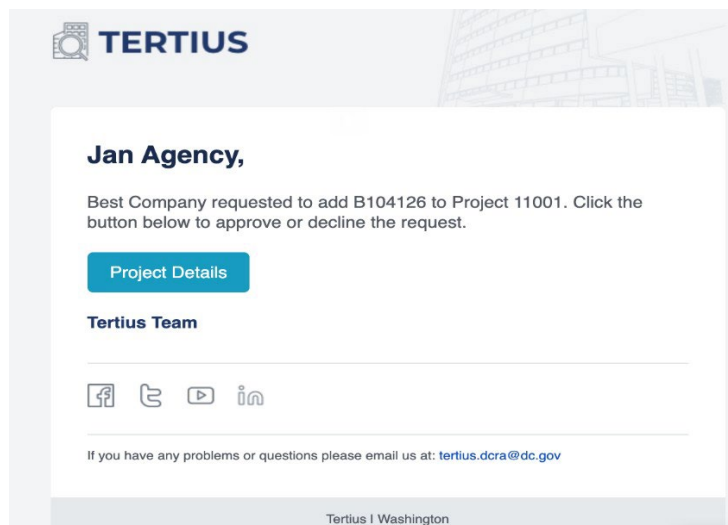
3. Select the permit or permits that the document you'd like to upload apply for.

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

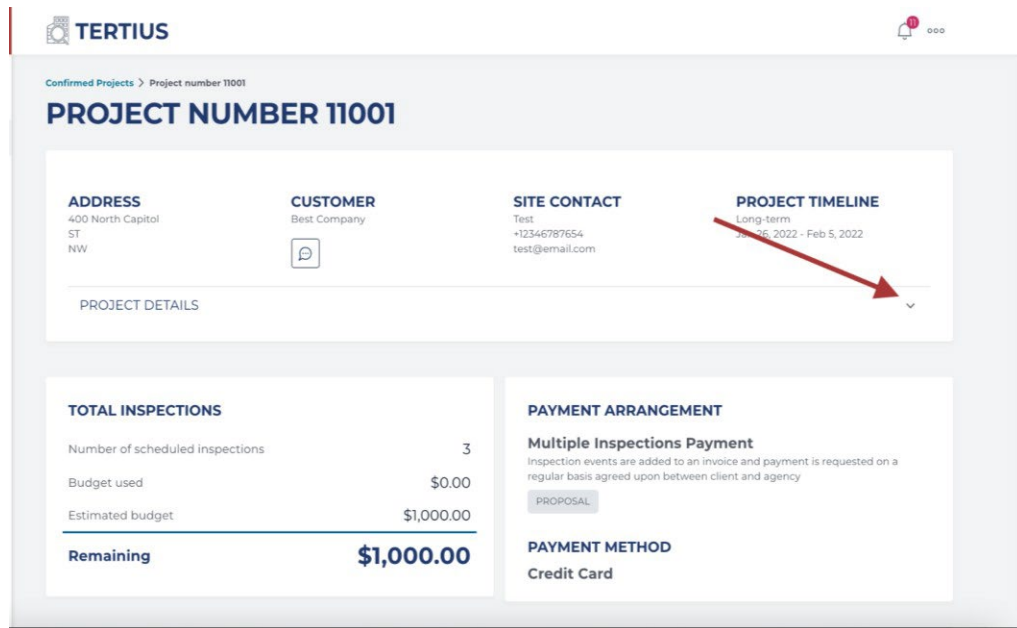
Accept/Reject New Permits on an Existing Project

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.

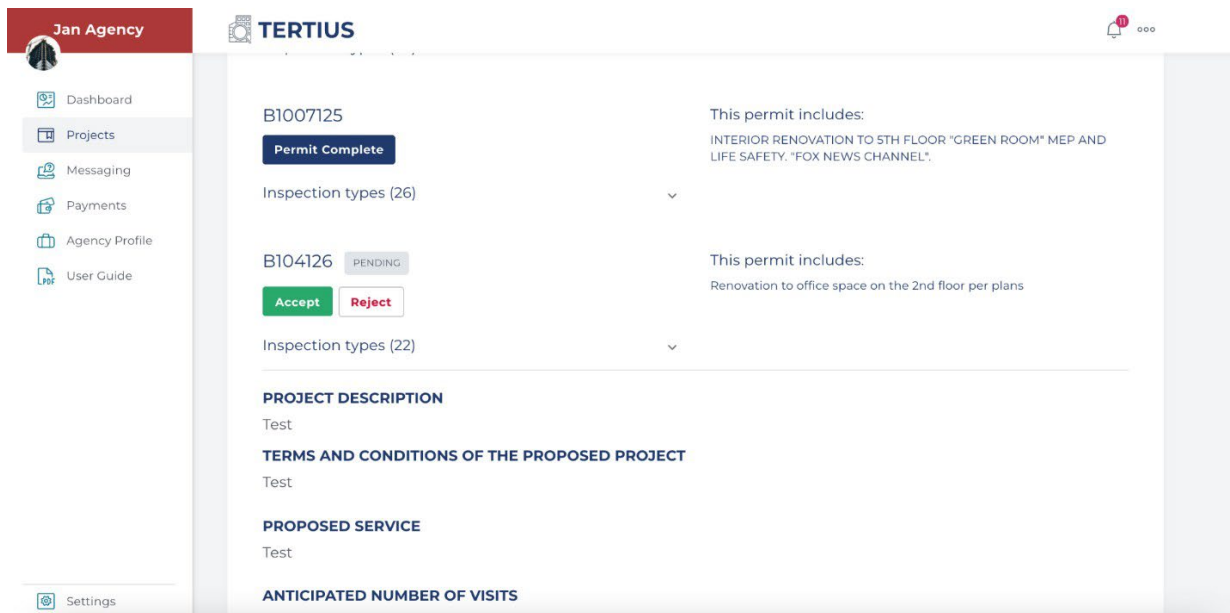
1. Find the client's request:
 - a. You get an email notification with the client's request. Click on the Project Details button in the email OR



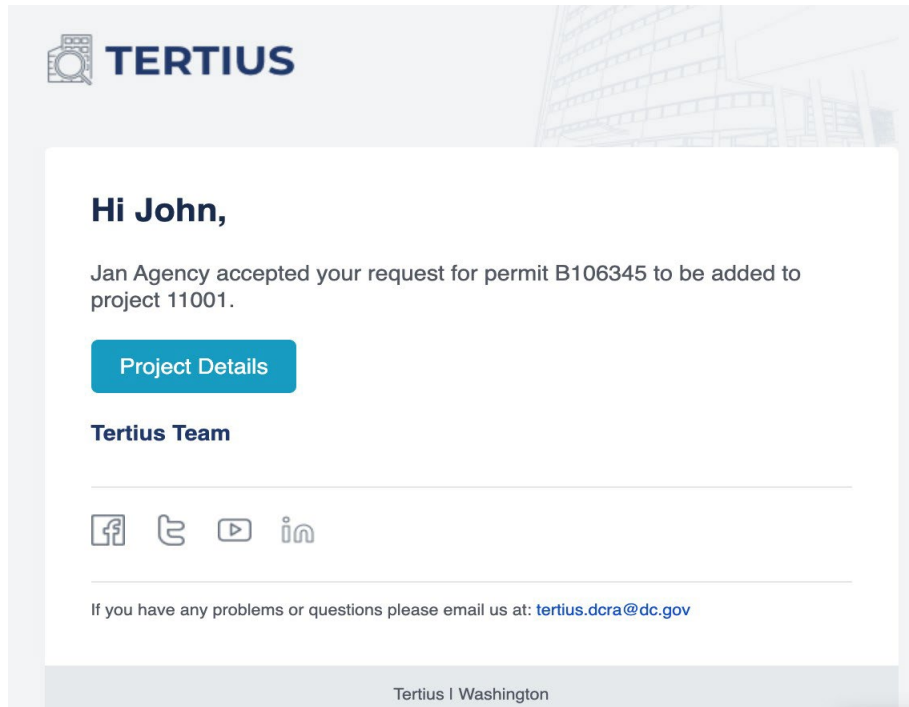
b. Open Project Details on the project page.



2. Click on Accept or Reject button.



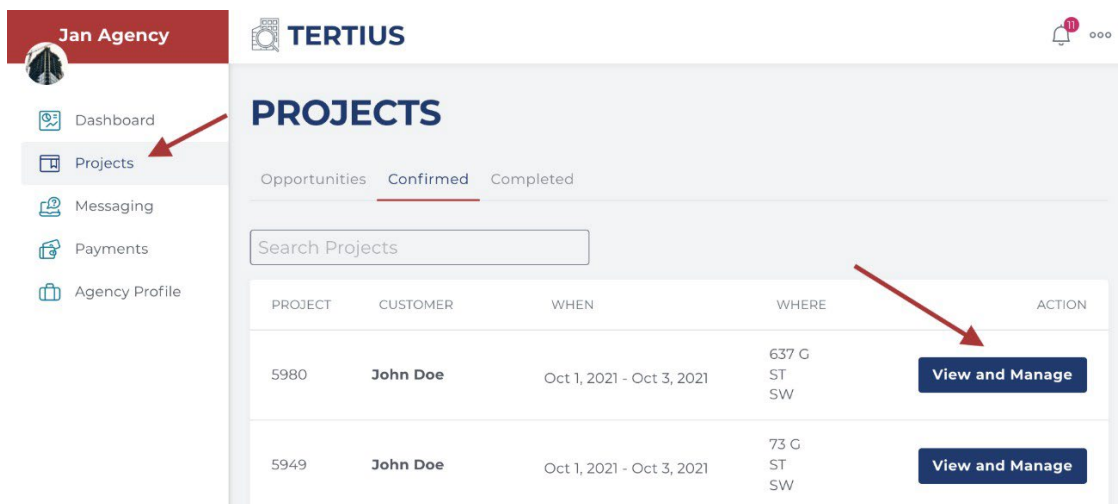
3. The status you have chosen appears under the permit number and the client gets an email notification about your decision.



Schedule Inspections

Scheduling inspections requires the "Schedule Inspections" permission and 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.
 - e. Select the PIC/MCP. You can change the inspector name as needed on the report page until the PIC/MCP submits the report for issuance to the client and DOB.
3. Select Add Inspection to save the scheduled inspection.

Adjust the Inspection Schedule


Modifying an inspection event requires the “See Any Reports”, “Assign a New PIC/MCP”, “Modify Date and Time”, and “Assign a New Inspector” permissions. To change the time and assigned inspector or PIC/MCP:

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	Open Report	

- a. Date and time: select Edit, make adjustments and select Save.
- b. Inspector: select Edit, select the field containing the inspector's name. Choose a new inspector from the dropdown list and select Save.
- c. PIC/MCP: select Edit, select the field containing the PIC/MCP's name. Choose a new PIC/MCP from the dropdown list and select Save.

Please note: Up until the assigned inspector checks in, the date and time of the event can be changed by the assigned inspector/MCP/PIC/agency user with the permission level of "See Any Reports" and "Modify Date and Time". Additionally, the assigned inspector and MCP/PIC can also be changed by users with the appropriate permissions. Inspector changes can take place until the assigned inspector checks in, while PIC/MCP changes can take place until the PIC/MCP submits the report for issuance (single-inspection payment) or submits to the client and DOB (multiple-inspections payment).

Perform an Inspection and Fill Out Report as Inspector

This requires an inspector/PIC/MCP profile and being assigned as the inspector for a given inspection event.

1. Go to Inspections and select the Scheduled Inspections tab.
2. Find the event you need to inspect. You may search by address, permit number, inspector, PIC/MCP, client, and event number. Select the date or period, and select the agency (available for users who belong to multiple agencies).
3. Click on the event number at the beginning or the view icon at the end of the row
4. Accept the disclaimer and **check in** to the event. Only the assigned inspector may check into the event. Once you've checked in, the status of the event changes from "Scheduled" to "In Progress."
5. Optional: Take notes at the **inspection field notes**. This field can be edited later by the inspector and the PIC/MCP during quality assurance.
6. Check if all the **on site documents** are available at the site.
 - a) Select "yes" if they are and continue the inspection.
 - b) Select "no" if any of the documents are missing. The result of all the inspection types in the event will automatically set to "Third-Party Failed", and the relevant code section and reasoning is added. You cannot continue the inspection at this point, so click on "Submit for PIC Review."
7. If all on site documents are available, open the permit you'd like to start your inspection with by clicking on the permit number.
8. Select the inspection type you would like to start your inspection with. The DC Code section and required actions listed can help you while performing the inspection.
9. Select the result of the inspection type:
 - o **Third-Party Approved:** inspector may leave note if necessary.
 - o **Third-Party Partial Approval:** inspector may leave note if necessary.
 - o **Third-Party Partial Failed:** in this case, you must select the relevant DC Code section pertaining to the violation. Once it is selected, a predefined reasoning appears in the Note section; the inspector may edit this note or provide additional comments.
 - o **Cancelled:** inspector may leave note if necessary.
10. Save the result and notes at each inspection type. You may edit them until you submit the report for PIC/MCP review.

11. Check out when you've finished your inspection. Please report to DOB if you witness any unsafe conditions at the site.
12. After you have added all the necessary information to the report, please click on "Submit for PIC Review." Agencies must submit the inspection reports to the client and DOB within the timeframe specified in the Third-Party Program Procedure Manual.

Review an Event Report as a PIC/MCP

Assigned PICs and MCPs are responsible for the quality assurance process of reviewing inspection reports submitted by inspectors; PICs and MCPs receive email notification when there is a report ready for their review.

1. Click on the link of the report in the email notification, or go to the Inspections section and select the Event in QA tab. There, you may find the event you need to review using address, permit number, inspector, PIC/MCP, client name, and event number.
2. Once you open the permit, select the inspection type that you would like to start your review with.
3. Edit the notes and/or change the inspection results when you feel necessary.
4. Click on Submit for Issuance (single-inspection payment method) or Submit to Client and DOB (multiple inspection payment method) when you have finished your review. Agencies must submit the inspection reports to the client and DOB within the timeframe established in the Third-Party Program Procedure Manual.

Create Payment Request – Single Inspection Payment

1. Users who have the "Manage Payment Inspection Requests for Single Inspection Payments" permission must Go to Inspection and select the Ready for Issuance tab.
2. Find the event and go to the Payment section of the report.
3. Add the price of the inspection (proposal-based projects) or check the calculated price and adjust as necessary (cost per inspection projects).
5. Click on "Submit to Client and DOB." Agencies must submit the inspection reports to the client and DOB within the timeframe established in the Third-Party Program Procedure Manual.

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.

PAYMENT REQUESTS
The table shows the requests belonging to this project.

INVOICE NUMBER	DUE DATE	AMOUNT	STATUS	ACTION
				Create Payment Request

INSPECTIONS
Jan 12, 2022 - Jan 29, 2022

DATE	TIME	STATUS	REPORT	PAYMENT

3. Add your Invoice Details. All fields are required.

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

Jan Agency **TERTIUS**

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

Invoice Details

Amount Requested:

Invoice Date: Payment Due Date:

Invoice Number:

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

File is required.

Scope of Payment Request:

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.

The screenshot shows the TERTIUS interface with a 'File is required' message at the top. Below it is a 'Scope of Payment Request' field. The main section is 'Select the period to invoice', which includes a date range selector showing 'Jan 23, 2022 → Jan 29, 2022'. A calendar view for January and February 2022 is displayed. To the right, a table lists inspection events:

DATE	TIME	REPORT
Jan 26, 2022	1:00pm - 2:00pm	Open Report
Jan 26, 2022	2:00pm - 3:00pm	Open Report

Below the table is a 'TOTAL' summary:

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.

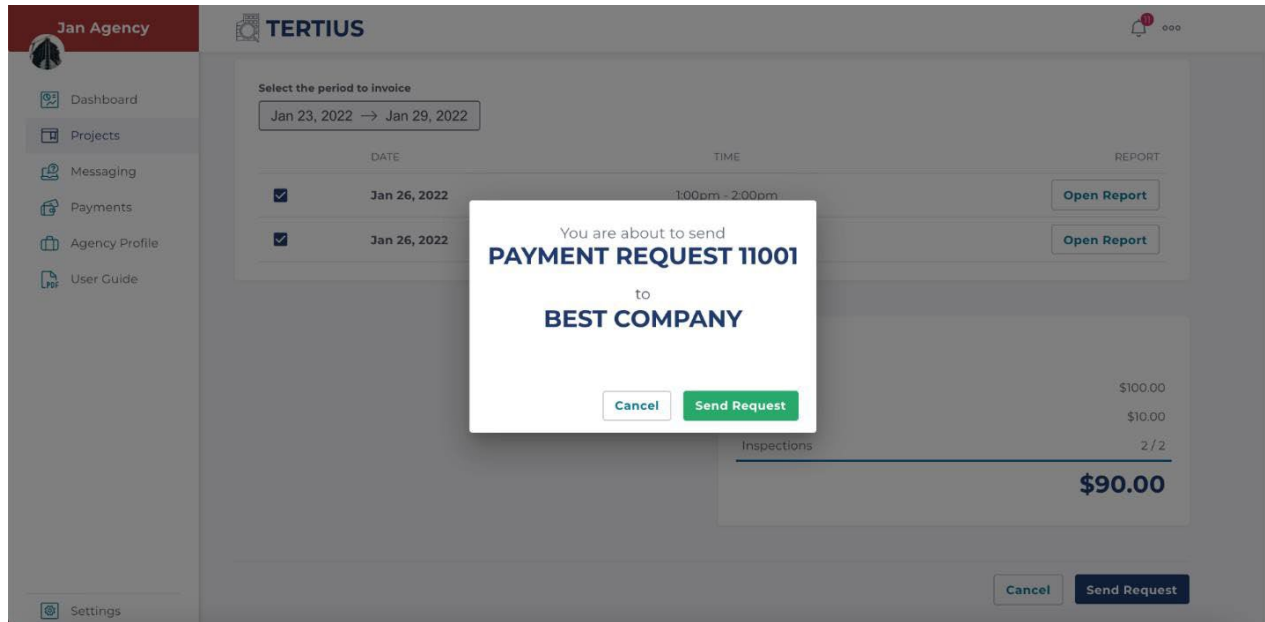
This screenshot shows the same TERTIUS interface, but with the date range set to 'Jan 23, 2022 → Jan 29, 2022'. The inspection events table is updated:

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

The 'TOTAL' summary is also updated:

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

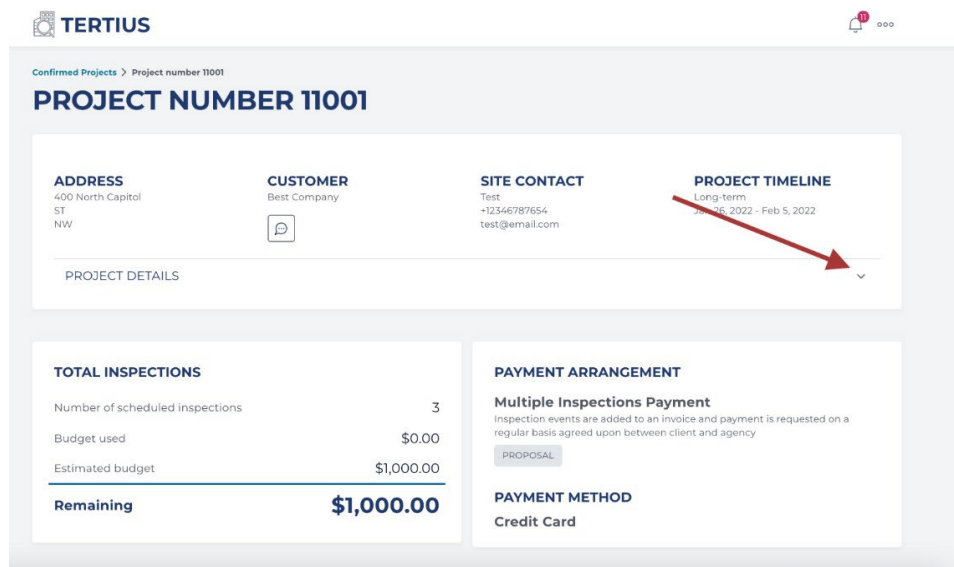
5. Click on Request Payment. Confirm your request.



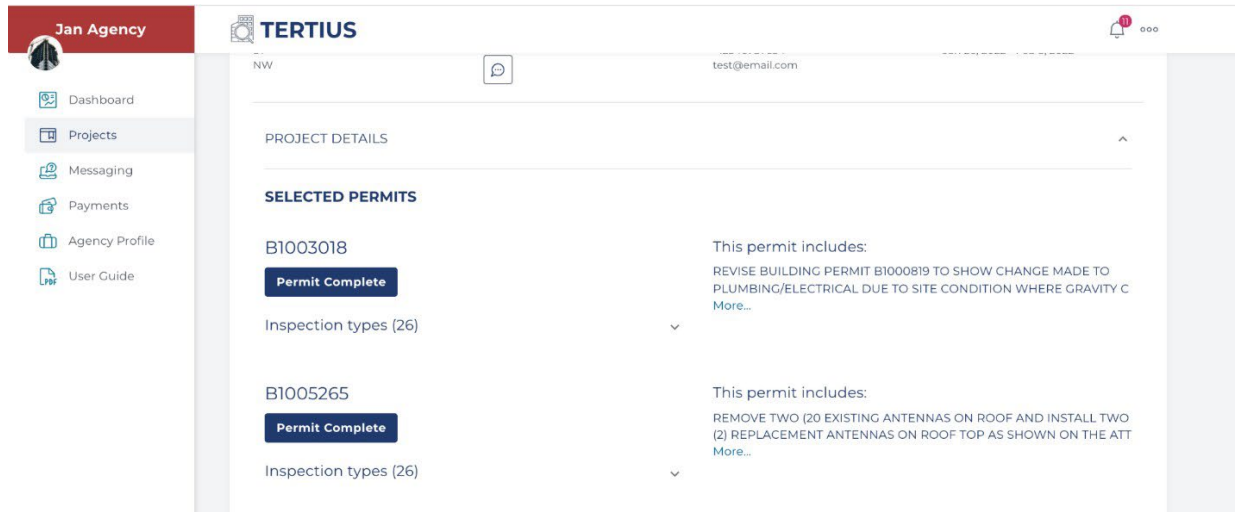
Request Permit Complete

When you have performed all of the inspections necessary for a permit you can request DOB 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.

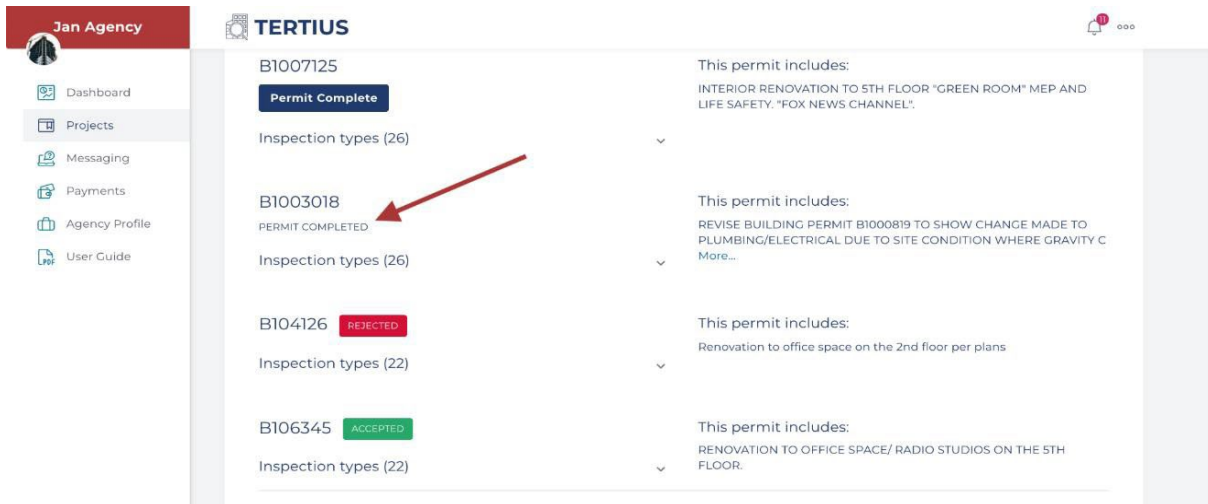
1. Open Project Details on the project page.



2. Select Permit Complete button under your chosen permit.



3. If DOB 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 and Check-Outs

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.

Edit Your Agency Profile

Requirements

Only users with the permission “Manage Agency and Users” may edit the general agency profile. If a user belongs to multiple agencies, they can only have this permission at one of these agencies.

Steps

To edit your profile, complete the fields on each tab under Agency and Users. This menu item is only visible for users who have the “Manage Agency and Users” permission.

Profile

Profile picture: Upload your agency logo or a picture that will appear on your profile. Images should be square in size, and a maximum of 2048 pixels in height and width to prevent your picture from being resized or distorted.

Services: List the services you offer.

Pricing policy: Provide a short description of your general pricing policy. Please do not specify rates here, as rates will be determined for each project in their individual proposals.

Availability

General availability: Add your working hours by selecting days and times.

Unavailable periods: Set days or periods when you are unavailable, such as planned closures that may occur. This information will appear on your profile one week prior to and during your unavailable period.

Agency Details

Public details: Details available for clients and potential clients to see.

Office contact: Only necessary for DOB approval; this information does not appear publicly on your profile.

Quality assurance plan: Upload your quality assurance plan in PDF format.

Conflict of interest affidavit: Upload your notarized and sworn Conflict of Interest Affidavit in PDF format.

Insurance policy: Please upload a copy of your insurance policy in PDF format.

Qualifications

Agency qualifications: Please add the disciplines your third-party agency can provide inspection services on based on staff qualifications.

Users: All agency users are listed under this tab. Users with the permission level of “Manage Agency and Users” can invite new users and have access to edit the roles and permissions of all agency users. Only user account owners may edit their own personal details: name, email address, and phone number.

Basic Concepts

There are no predefined roles; permissions can be freely customized for each user. There are recommendations for the roles which have been identified during interviews with third-party agencies (Administrator, Accounting, Inspector, PIC/MCP), but the permissions of these roles are fully customizable.

Inspectors

Agency staff members with the position of "Inspector". They perform inspections at the construction site, check in at the site, check the presence of onsite documents, and fill out the inspection report.

Professional in Charge/Master Code Professional (PIC/MCP)

All PICs/MCPs are supervisors responsible for quality assurance who automatically have the same permissions that inspectors do, in addition to being able to review results and notes created by the inspector, edit inspection type results and notes as necessary, and ultimately submit the report to DOB.

Manage Agency and Users

Administrators can access the "Agency and Users" section to invite new users to the agency, assign roles to and change permissions of existing users, and change anything in the overall agency profile. They also can see and manage agency reviews. Please note: users who belong to multiple agencies can only have Administrator permissions at one of their agencies on Tertius.

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

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. Users who belong to multiple agencies can only have this permission at one of the companies. Once they have this permission at an agency and they are invited to a new agency the permission can't be selected for them.

View Transactions

The user has permission to see and download information about all the payment transactions for any project of the agency.

Manage Payment Requests

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

Manage Payment Requests for Multiple Inspections Payments

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

Manage Payment Requests for Single Inspection Payments

The user can add the price of the inspection after PIC/MCP review, submit a report to the client and DOB and request payment in any of the events of a single inspection payment project 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
- Upload supplemental documents

Manage Own Reports

The user can manage the reports where they are assigned as inspectors or PIC/MCPs. This permission is automatically added to every PIC/MCP and inspector. Users can:

- Modify date and time
- Assign new inspector (until inspector checks in)
- Assign new PIC/MCP (until PIC/MCP submits report to client and DOB)
- Complete inspections in Tertius and add notes
- Submit for PIC/MCP review and issuance to the client and DOB

See Any Reports

The user can see any of the agency's reports, assign a new PIC/MCP, modify date and time of an inspection event, and can assign a new inspector.

Upload Special Inspection or Miscellaneous Documents

The user can upload documents to projects.

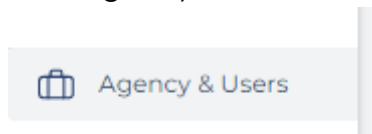
Schedule Inspections

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

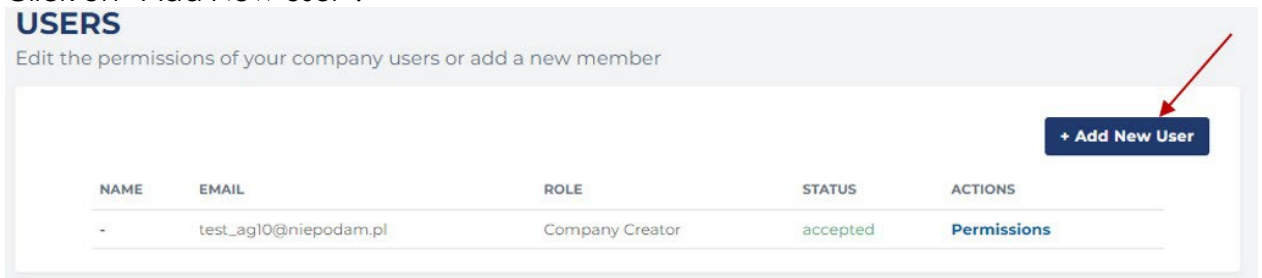
Setting Roles And Permissions For Invited Users

Invite a New Agency User/Set Roles and Permissions

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.
5. If you add an inspector or PIC/MCP profile, fill out their inspector or PIC/MCP, fill out their profile after they've accepted the invitation. Only users who have an inspector/PIC/MCP profile filled out will show up in the list to be assigned to an inspection event.

Remove Users From Agency/Client Company

Any user with “Manage Agency and Users” 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



DEPARTMENT OF BUILDINGS

1100 4th Street SW, Washington, DC 20024

dob.dc.gov | dob@dc.gov | 202.671.3500



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