

# Overview of the Customer-Facing Portal

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## Navigation

URL: [www.citizenserve.com/cliftonpark](http://www.citizenserve.com/cliftonpark)

### Login or Register

1. From the Home Page, click on Login in the upper-right corner
2. If you have an existing username and password, enter the information and login
  - a. If you forgot either your username or your password, click on the corresponding link. You should receive an email within a few minutes with further instructions.
3. If you need to register for an account
  - a. Click on Register
  - b. Fill out the registration form
  - c. Click Save

## To Submit a New Request

1. From the My Account page, click on the corresponding module or application you wish to submit *(instructions are intentionally generic - page layout may vary)*
  - a. Alternatively, you can click on Services at the top of the page, select your service, then choose Apply Now from the buttons on the left

2. Enter information for the application

NOTE: Required fields will be preceded with a red like ( | )

NOTE: If you are required to enter an address, you can perform a partial address search. For instance, search for "1 wash" to search for "1 S Washington Ave"

NOTE: Default maximum upload size per document is 25mb. There is no limit on total number of documents. Document upload speed is limited by applicant's internet upload speed.

3. Once all information is filled out, click on Submit. The application will take a few seconds to process, then notify you with a pop up once submitted.

You should receive a confirmation email within a few minutes.

4. If required, you will be taken to a payment page to pay any applicable application fees. Fill out the form and click Submit.

## To View a Previously Submitted Request

1. From the My Account page, click on View My Requests from the options on the left.
2. In the top drop-down field, select your service (e.g. Permits, Licenses)
3. Click on your permit, license, or file number to view your submitted request

You can view various review activities, inspections, and documents using the tabs on the request (as applicable)

NOTE: If you do not see a request that you expect, you are likely not listed as the applicant or a contact on the request (additional contact visibility may vary).

## To Make a Payment

1. Open your request (see To View a Previously Submitted Request)
2. Select Make a Payment from the options on the left
3. Fill out the payment form and Submit

You should receive an email confirmation within a few minutes

NOTE: If you do not see the option to pay, possible reason may include:

1. You have a \$0.00 balance due
2. The status of your permit/license currently does not allow for payment
3. Payment are not allowed for that permit/license type

## To Request an Inspection

1. Open your request (see To View a Previously Submitted Request)
2. Select Request an Inspection from the options on the left
3. Fill out the payment form and Submit

You should receive an email confirmation within a few minutes