

# Client Self Service Overview Guide

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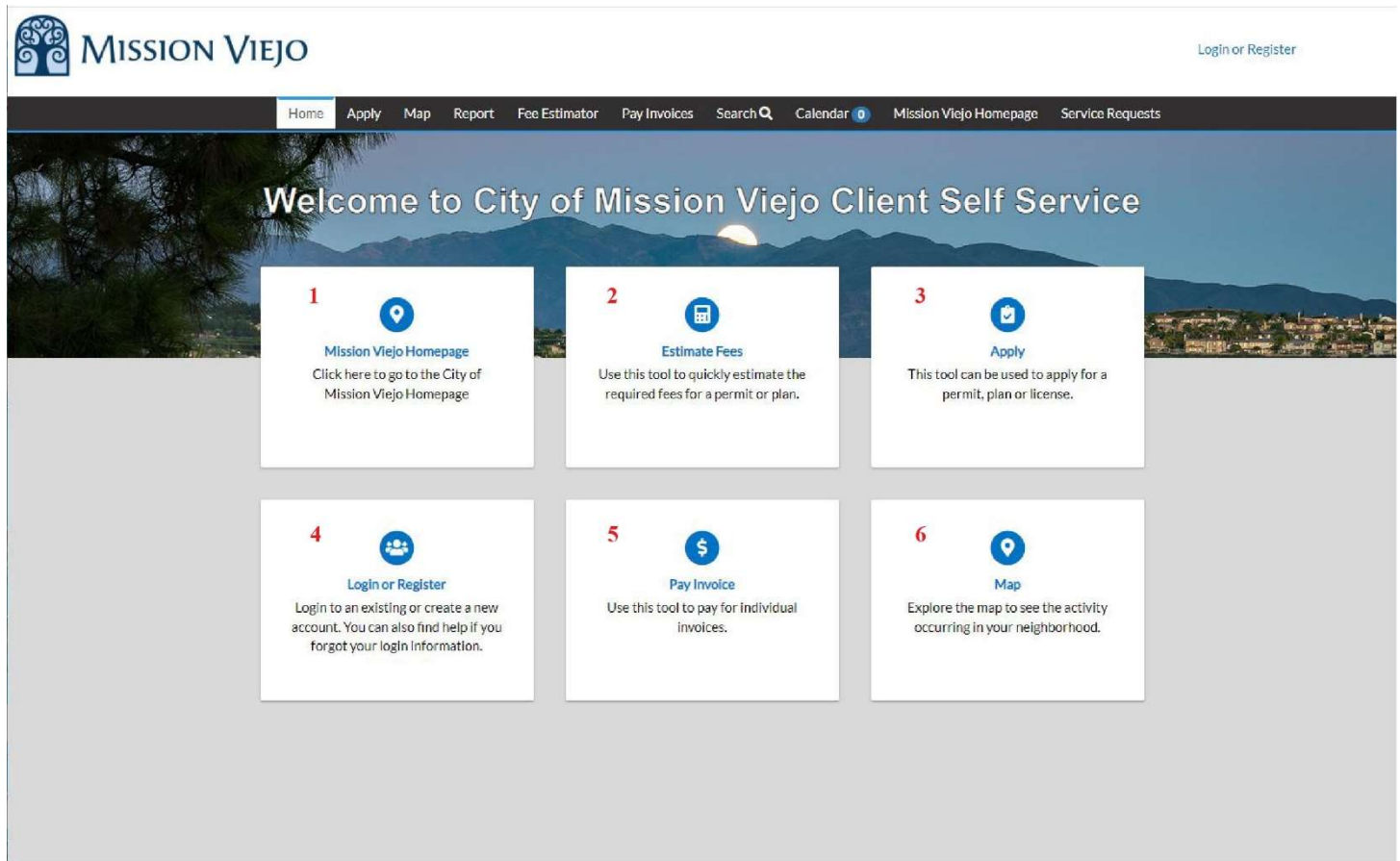
## About This Guide

This guide is to help assist you navigate the new Client Self Service system with the City of Mission Viejo. Permit and Plans will now be submitted online using this system. The City recommends that you review all of the guidelines and paperwork before you start the application process to ensure you select the correct application.

Additional guides are available to assist with creating your account, requesting inspections, and revising/updating applications.

## Client Self Service Dashboard

The Home Screen has many of the same options as the tool bar that is across the screen as you navigate the site. See the Menu Overview section for additional details.



1. Return to the City's website
2. Estimate Permit and Plan fees
3. Apply for Permits and Plans
4. Login or Register – Your permits and plans are saved under your login. You can also pay invoices and see your past history in your account.
5. Pay an Invoice by searching by number
6. Map – You can view what is happening at various properties around the City

# My Dashboard

This is the hub for all of your requests with the City.



CMV Demo  0

- Dashboard
- Home
- Apply
- My Work
- Map
- Report
- Fee Estimator
- Pay Invoices
- Search 
- Calendar 
- Mission Viejo Homepage
- Service Requests

## My Permits

Attention <b>0</b>	Pending <b>0</b>	Active <b>0</b>	Recent <b>0</b>	Draft <b>0</b>
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[View My Permits](#)

## My Plans

Attention <b>0</b>	Pending <b>0</b>	Active <b>0</b>	Recent <b>0</b>	Draft <b>0</b>
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[View My Plans](#)

## My Inspections

Requested <b>0</b>	Scheduled <b>0</b>	Closed <b>0</b>
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[View My Inspections](#)

## My Invoices

Current <b>0</b>	<b>\$0.00</b>
Past Due <b>0</b>	<b>\$0.00</b>
<b>Total</b> <b>0</b>	<b>\$0.00</b>

[View My Invoices](#)

## Menu Overview



MISSION VIEJO

CMV Demo -  0

Dashboard

Home

Apply

My Work


Map

Report

Fee Estimator

Pay Invoices

Search 

Calendar 

Mission Viejo Homepage

Service Requests

1

2

3

4

5

6

7

8

9

10

11

12

1. Dashboard – This item will bring you back to your personal dashboard.
2. Home – Return to the Mission Viejo Client Self Service page.
3. Apply – This section allows you to apply for the various services.
4. My Work – A list of the requests you have made.
5. Map – Search for addresses or parcels. You can see the records for the address or parcel. You can also filter and export the records in this view.
6. Report – Shows all of the Public Reports.
7. Fee Estimator – Estimate your permit and plan fees.
8. Pay Invoices – Search your invoices to pay online.
9. Search – Allows you to search for permits, plans, inspections, code cases, requests and projects.
10. Calendar – The Calendar view shows your inspections scheduled, plans and permit expiration dates and when invoices are due.
11. Mission Viejo Homepage – Visit the City's main website.
12. Service Requests – Create Service Requests, track those you have submitted, or contact the City for requests.

## Apply for Services

During the application process you can save your work or return to the previous screen using the Back button. If you close your browser window or leave the application screen without saving, you will lose all of your unsaved work.

From the Application Assistant you can search, scroll, or search by the different categories


The screenshot shows the Mission Viejo website's Application Assistant. At the top left is the Mission Viejo logo. The top right shows 'CMV Demo' and a shopping cart icon with '0'. A dark navigation bar contains links: Dashboard, Home, Apply (highlighted), My Work, Map, Report, Fee Estimator, Pay Invoices, Search, Calendar, Mission Viejo Homepage, and Service Requests. Below the navigation bar, the 'Application Assistant' section has a search bar and a 'Help me choose' link. There are five filter buttons: All (selected), Trending, My History, PERMITS, and PLANS. Below these are links for 'Show Categories' and 'Show My Templates'. Three application categories are listed, each with an icon, category name, description, and an 'Apply' button.

**Application Assistant** Help me choose

Search for application names and keywords

**All** Trending My History PERMITS PLANS

[Show Categories](#) [Show My Templates](#)




**Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit** Apply

Category Name: Building and Safety Division

Description: Use this application to apply for an Accessory Dwelling Unit or a Junior Accessory Dwelling Unit. There will be one unit per application/set of plans.

Proposed work to the main dwelling unit and/or additional ADU/JADU units will be a separate submittal under the appropriate application.

Please provide a detailed and accurate scope of work. This same scope of work should also be listed on the cover page for projects that require plans to be submitted. Projects may require a separate submittal and permit, with additional fees, if information is missing from your application/description box.




**Architectural/Structural Building Permits off of a Master Plan (MEP Included)** Apply

Category Name: Building and Safety Division

Description: Use this application to apply for an architectural/structural building permit from an architectural/structural master plan (MEPs included). Each building will need it's own application/permit and will have separate fees and requirements. Please be sure to list the address, building number, unit number(s) and phase on each application.

Applications for solar/photovoltaic permits from a master plan or stand alone MEP permits from a master plan can be found below.

Please provide a detailed and accurate scope of work. This same scope of work should also be listed on the cover page for projects that require plans to be submitted. Projects may require a separate submittal and permit, with additional fees, if information is missing from your application/description box.



**Architectural/Structural Master Plan (MEP included)** Apply

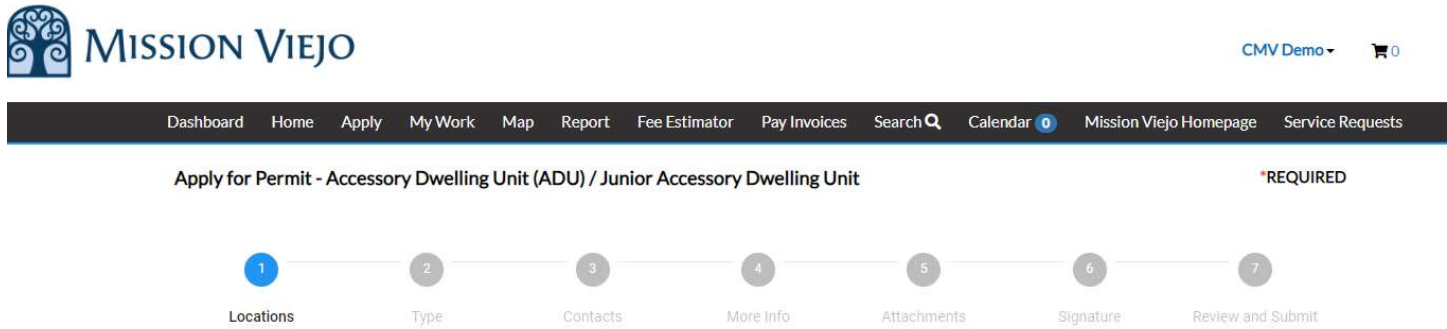
Category Name: Building and Safety Division

Description: Use this application to apply for an Architectural/Structural Master Plan (MEP included). Be sure to include all associated addresses, unit numbers and building numbers. Please note that all permits associated with the master plan will have separate applications with additional fees and requirements.

Applications for solar or stand alone MEP master plans can be found below.

5

After you select Apply, the number of steps will be outlined at the top of the screen.



The number of steps and information requested will vary based on what you the plan or permit you are requesting.

As you proceed through the process, you can go back and return to previous steps. Any data entered will be saved during your session until you leave the Client Self Service System. If you need to leave your session, select Save Draft from the bottom right side of the screen.



## Locations

Select Add Locations, this will bring you to map to search for your address.



MISSION VIEJO

CMV Demo - 0

Dashboard Home Apply My Work Map Report Fee Estimator Pay Invoices Search Calendar Mission Viejo Homepage Service Requests

### Apply for Permit - Parking Permit

\*REQUIRED



#### LOCATIONS

Please provide your home address.

Location

Add Location

REQUIRED

Create Template

Save Draft

Next

When searching for an address you can use street number or street name. It may be easier to search by the street name.



Add Address As Location

Back to Application

SEARCH

El Modena

Address & Parcel Search

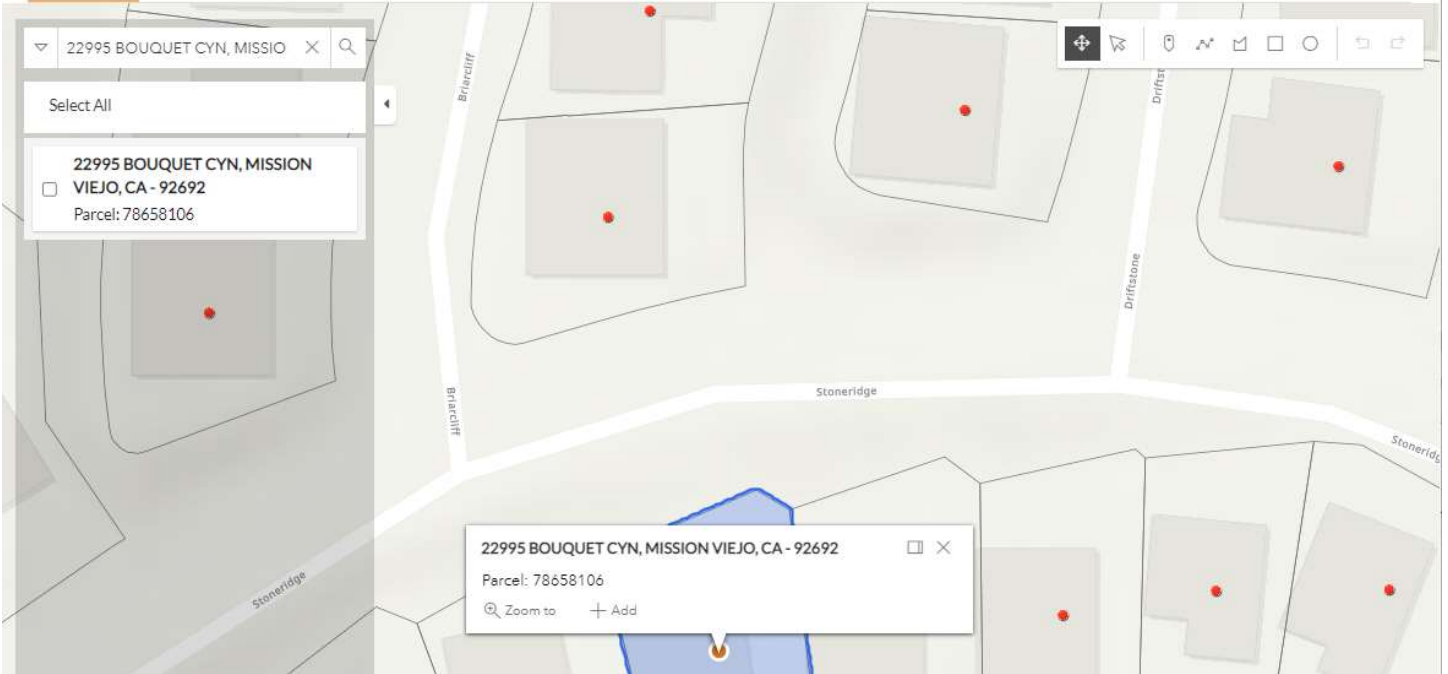
When you have found the location, check the box next to the property.



Add Address As

[Back to Application](#)

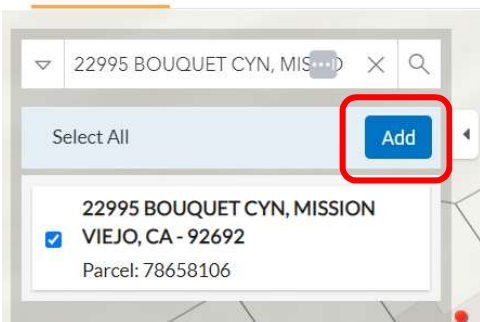
SEARCH



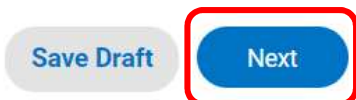
Select Add.

Add Address As

SEARCH



Select Next to continue to the next section.



## Type

Complete the required information for your permit type. For the Valuation section only enter numbers and decimals.



### Apply for Permit - Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit

\*REQUIRED



#### PERMIT DETAILS

Please provide a detailed and accurate scope of work. This same scope of work should also be listed on the cover page for projects that require plans to be submitted. Projects may require a separate submittal and permit, with additional fees, if information is missing from your application/description box.

\* Permit Type

\* Description

\* Square Feet

\* Valuation

[Back](#) [Create Template](#) [Save Draft](#) [Next](#)

Select Next to continue to the next section.

[Save Draft](#) [Next](#)

## Contacts

Select Add Contact to the names for this plan/permit. Complete all required contacts.

Dashboard Home Apply My Work Map Report Fee Estimator Pay Invoices Search Calendar Mission Viejo Homepage Service Requests

Apply for Permit - Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit \*REQUIRED

Locations Type **Contacts** More Info Attachments Signature Review and Submit

### CONTACTS

Please be sure that all contact information is complete, current and up to date.  
Contractor or Owner-Builder contact information will be required prior to permit issuance. Please enter that information now if you have it.

**Applicant**

CMV Demo (You)

200 Civic Center , Mission Viejo, CA , 92691

**Primary Project Contact**

Add Contact

REQUIRED

**Property Owner**

Add Contact

REQUIRED

**Architect**

Add Contact

OR

**Designer**

Add Contact

OR

**Engineer**

Add Contact

REQUIRED

Applicant

Add Contact

[Back](#) [Create Template](#) [Save Draft](#) [Next](#)

Search for your contact, Enter one Manually, or select a contact from your favorites. Once you enter a contact, it will be saved in your account and you can search for the contact by name. To manage your contacts, see the Account Information section of this guide.

[◀ Back to Application](#)

## Add Contact

Add Contact As : Primary Project Contact

Search

When searching, you can use a portion of their first or last name. Click Add to select the contact.

### Add Contact

Add Contact As

Search

Sort

Favorite	First Name	Last Name	Company	Email	Action
<input type="button" value="☆"/>	Billy	Bobb			<input type="button" value="Add"/>
<input type="button" value="☆"/>	Sally	Borne			<input type="button" value="Add"/>
<input type="button" value="☆"/>	Bobby	Brown			<input type="button" value="Add"/>

Results per page  1 - 3 of 3

When all contacts have been added, select next to continue the application.

### Apply for Permit - Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit

\*REQUIRED



#### CONTACTS

Please be sure that all contact information is complete, current and up to date.

Contractor or Owner-Builder contact information will be required prior to permit issuance. Please enter that information now if you have it.

<p><b>Applicant</b></p> <p><b>CMV Demo (You)</b></p> <p>200 Civic Center, Mission Viejo, CA, 92691</p>	<p><b>Primary Project Contact</b></p> <p><b>John Smith</b></p> <p>Remove</p>	<p><b>Property Owner</b></p> <p><b>Suzy Lopez</b></p> <p>Remove</p>	<p><b>Architect</b></p> <p><b>Billy White</b></p> <p>Remove</p>
<p><b>Applicant</b></p> <p><b>Billy White</b></p> <p>Remove</p>	<p>Applicant</p> <p>Add Contact</p>		

Back Create Template Save Draft **Next**

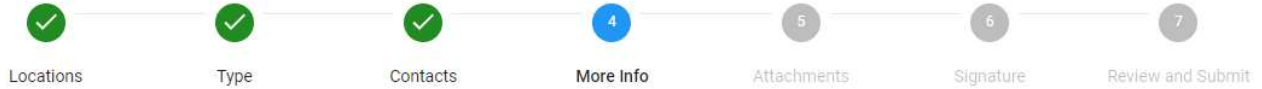
## More Info

The More Info section is very specific to the permit or plan you are submitting. Complete all the required information and click Next. Most of the information is required in this section.

Depending on the application, you may need to scroll within the screen or add rows of information.

### Apply for Permit - Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit

\*REQUIRED



#### MORE INFO

Please fill in all of the custom fields. If a custom field does not apply to your project, please type or choose "not applicable" or enter the number "0".

#### Construction Info

[Next Section](#) | [Top](#) | [Main Menu](#)

\*Primary Address

ADU/JADU Address

\*Occupancy Classification

\*Type of Construction

Occupant Load

\*Use (Residential)

\*Sprinklered/

\*Square footage of main dwelling

\*Quantity of Existing ADU/JADUs on the Parcel

Note, some applications have different requirements.

Some applications require additional rows to be added.



Residential Air Handler/Furnace BTU per unit Details	
At least one row of information is required. Click +Add Row to begin.	
+ Add Row	
	BTU

**Attachments**

Various attachments are required for different applications. It is recommended that you review the Permit and Plan chart for the required attachments. Electronic signatures are acceptable on these forms.

Acceptable types of attachments are listed. If an item is required to be a PDF and you have it in a different format, you should be able to Print it as a PDF on your computer.

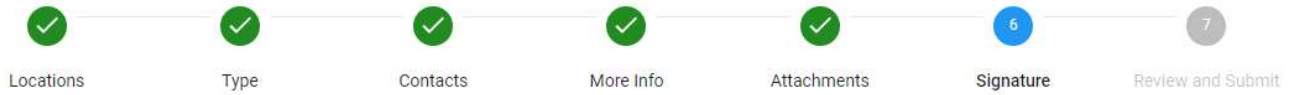


## Signature

Some applications require a signature. A signature can be signed on the screen or you can enable type to sign feature.

### Apply for Permit - Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit

**REQUIRED**



#### SIGNATURE

I certify that I have read this application and state that the information provided is correct, and that I am the owner, contractor, or the duly authorized agent of the owner/contractor. I agree to comply with all City and State laws relating to building construction. I hereby authorize representatives of the City of Mission Viejo to enter upon the property for inspection purposes.

I will ensure that items requiring inspections will not be covered without inspection approval by the City Building Inspector. I also understand that the permit will expire if inspections are not scheduled every 180 days.

All work shall conform to the current CBC, CRC, CPC, CMC, CEC, Energy, Green codes and city ordinances.

\* Please type your name as consent to electronically sign this application.

Billy Bob

Enable Type Signature

CMV Demo  
August, 03 2023

X Draw Signature Here

Clear

Back

Create Template

Save Draft

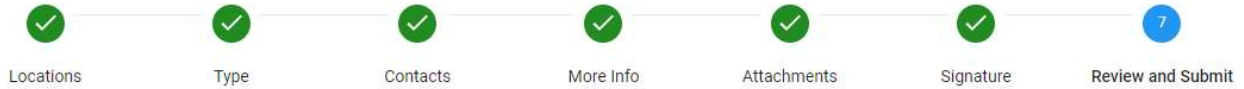
Next

## Review and Submit

You will have the opportunity to review your application. If a correction is needed, use the Back button to return to the section that needs updating. When your application is complete, click submit.

### Apply for Permit - Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit

\*REQUIRED



Submit

#### Locations

Location 23891 VIA FABRICANTE , MISSION VIEJO, CA 926913138

Parcel Number 80932103

#### Basic Info

Type Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit

Description test

Square Feet 10

Valuation 100.00

Applied Date 08/03/2023

#### Contacts

Applicant CMV Demo  
200 Civic Center , Mission Viejo, CA , 92691

Primary Project Contact Billy Bob

Property Owner Sally Jim

Architect Jane Doe

A confirmation screen will let you know that your application was submitted. This screen will also send you an email.

✔ Your application was successfully submitted!

Thank you for submitting the application. We will process and notify you when the permits are ready to be picked up.

[Continue to permit](#)

## Create a Template

If you apply for the same type of permit often, you can create a template for future reference.

[Back](#)

[Create Template](#)

[Save Draft](#)

[Next](#)

Enter a Name for your Template and select Save Template.

### Create Template

\*Please enter a template name

Note: Locations and attachments cannot be saved in a template

[Save Template](#) [Cancel](#)

A confirmation screen will let you know that your template has been saved correctly.

### Success

Save has been successful.

[Go to My Templates](#) [Ok](#)

Select Go to My Templates to view your saved templates.

### Saved Work

MY TEMPLATES MY DRAFTS

### My Templates

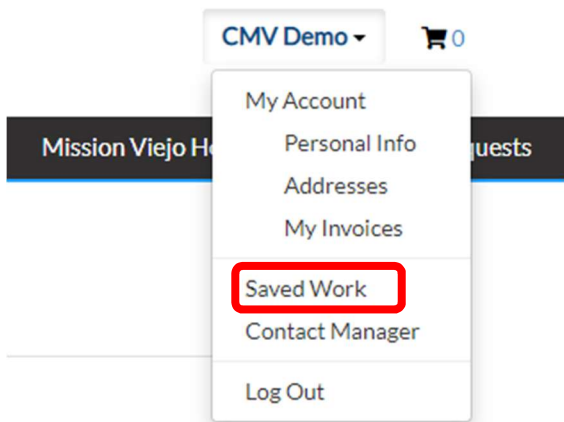
Module All

Sort Template Name

Module	Template Name	Type	Last Update	Action
Permit	Test	Accessory Dwelling Unit (ADU) / Junior Accessory Dwelling Unit	08/03/2023 04:20 PM	<a href="#">Use</a> <a href="#">Update</a> <a href="#">Delete</a>

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You can find your templates under your account. Select your name in the top Right corner and select Saved Work.



This will bring you to your drafts and templates.

### Saved Work

MY TEMPLATES MY DRAFTS

### My Templates