### Client Self Service Overview Guide

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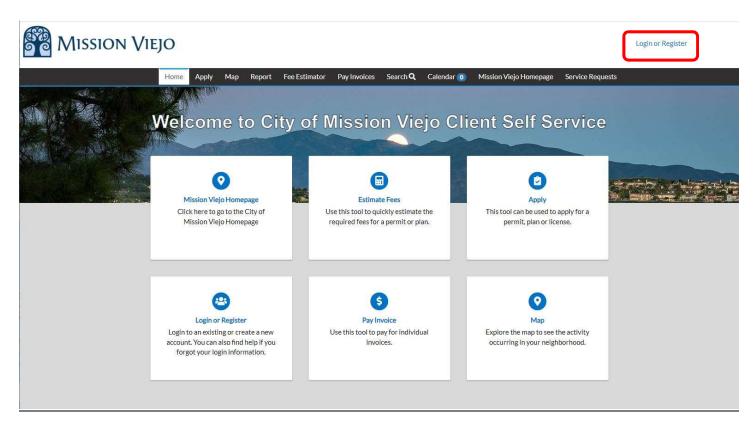
#### About This Guide

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.

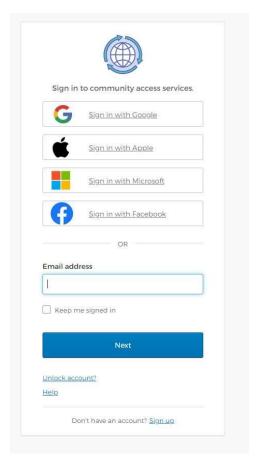
Additional guides are available to assist with an introduction to the site, how to apply, requesting inspections, and revising/updating applications.

#### Create an Account

Visit <a href="https://portal.cityofmissionviejo.org/energovprod/selfservice">https://portal.cityofmissionviejo.org/energovprod/selfservice</a> and select Login or Register.

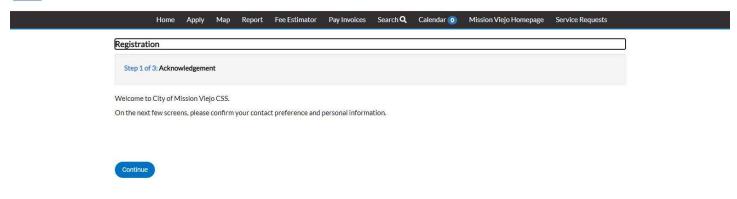


Select how you would like to sign in and click Next.

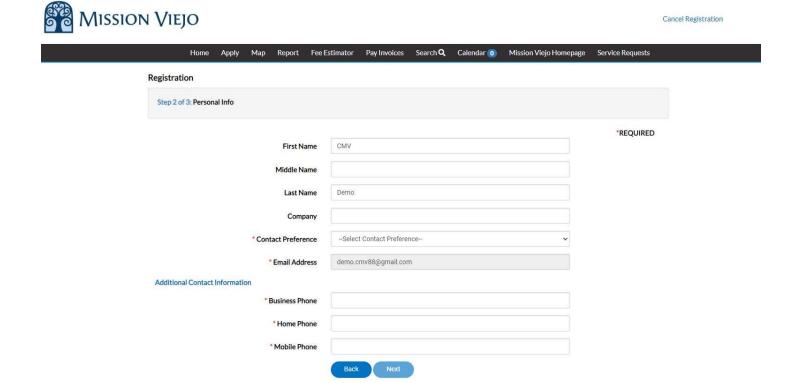


Select Continue to confirm the acknowledgement.

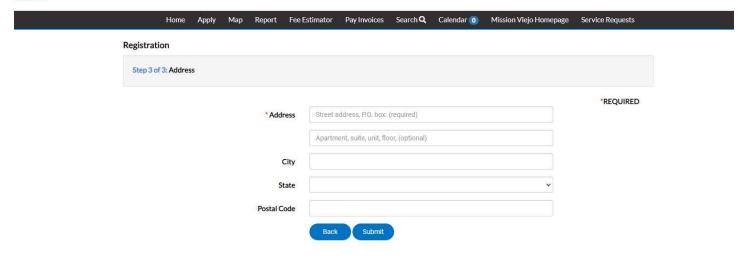




Enter your personal information and select next.



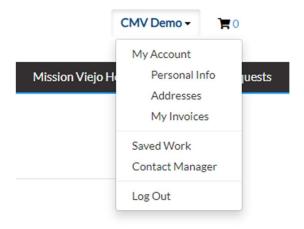




Your account has now been created and you will be redirected to your personal dashboard.

#### **Account Information**

Select your name in the upper right corner. This will give you access to your personal information.



#### My Account

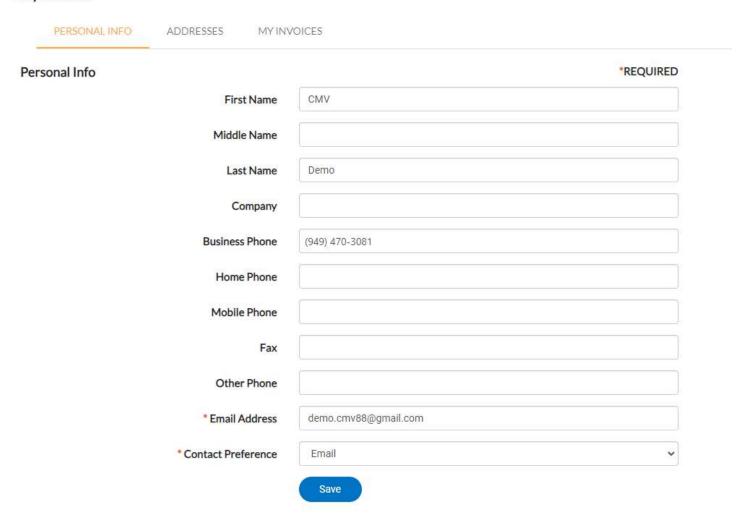
Under My Account, you have three different options; Personal Info, Addresses, and My Invoices

## My Account PERSONAL INFO ADDRESSES MY INVOICES

#### Personal Info

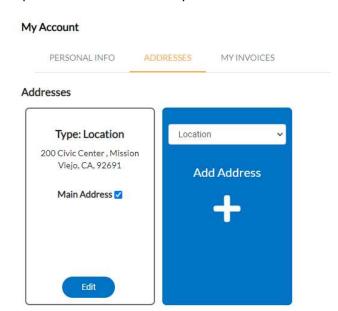
Update your information in this section.

#### My Account



#### Address

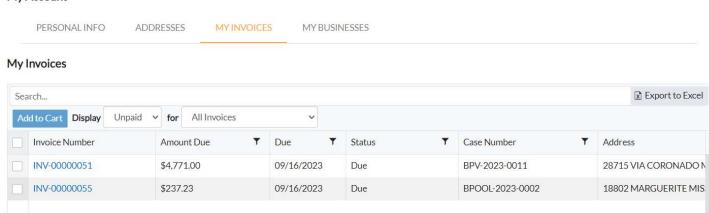
Update or add addresses to your account.



#### My Invoices

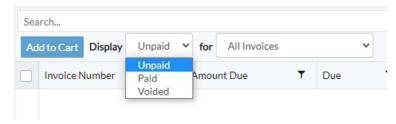
This will display current and past invoices.

#### My Account

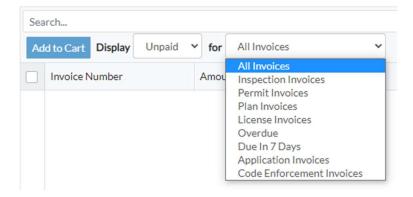


You can search for invoice or filter to view invoices.

#### My Invoices



#### My Invoices



#### My Businesses

Currently nothing shows up here

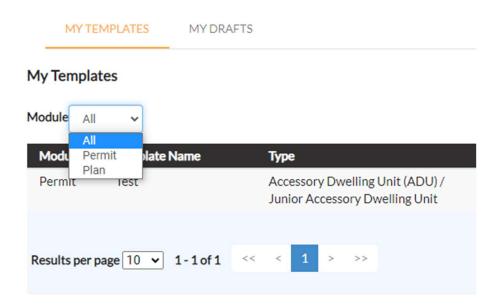
#### Saved Work

In Saved Work you can view your Templates or Drafts

# Saved Work MY TEMPLATES MY DRAFTS My Templates

In both sections, you can filter using the drop down between All, Permits, and Plans.

#### Saved Work

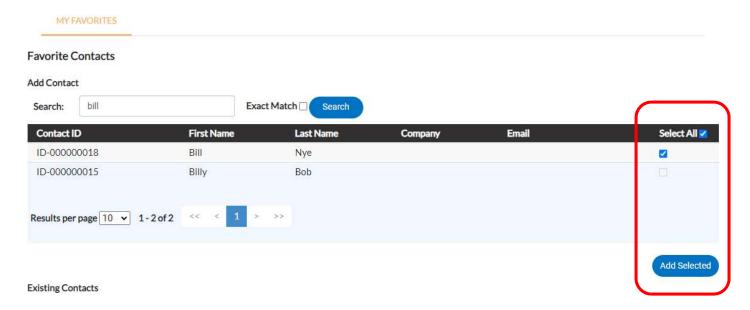


#### Contact Manager

This section allows you to manage your Favorite Contacts. In the search, you can enter a full or partial name to select your contact.

#### Contact Manager MY FAVORITES **Favorite Contacts** Add Contact Search: bill Exact Match Search Company Select All ■ Email Contact ID First Name **Last Name** ID-000000018 Bill Nye ID-000000015 Billy Bob Results per page 10 v 1-2 of 2 Add Selected **Existing Contacts** Contact ID First Name **Email Last Name** Company All No records to display.

Select the contact you want to add to your Favorites by selecting the check box or Select All. Then Click Add Selected.



To Remove a Favorite, select the check box or Select All. Then click Remove Selected.

#### **Existing Contacts**



#### Log Out

This will you out of the system. It is highly recommended that you log out when done with your session, especially if you are using a shared computer.