COMPASSKC

CITY SERVICES AT YOUR FINGERTIPS

CITY OF KANSAS CITY, MISSOURI

How to Submit Plans Guide

COMPASS KC is a web portal where you can apply for and search plans, request inspections, apply for and search permits, code cases, and licenses, as well as pay fees online (more online options will be added as they become available). You can access the City of Kansas City's COMPASS KC web portal from kcmo.gov.

Though any person may access public information in COMPASS KC, account holders, such as contractors, developers, and owners, will have expanded access to conduct business necessary to their trade or profession. By establishing an account and creating a login to COMPASS KC, customers have access to tools which allow them to conduct financial transactions, apply for plans, access records and submit service requests of various types related to their project, all from a desktop computer or mobile device such as a tablet or smartphone.

Current COMPASS KC Guides

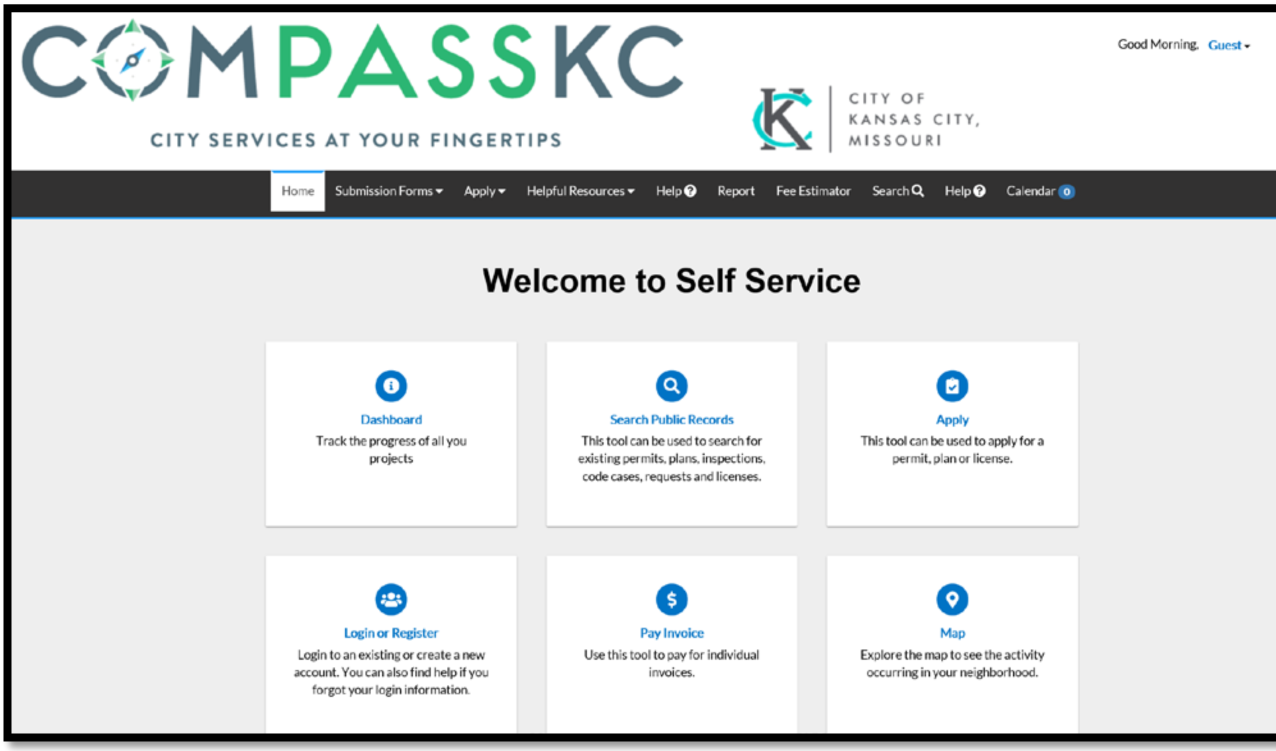
https://www.kcmo.gov/city-hall/departments/city-planning-development/compass-kc-the-new-permitting-system

- **Inspection Requests & Status:** Inspections may be requested online **(not all departments offer this option at this time. If the option does not appear contact the specific department for clarification),** providing both the City and customer with a record of the request. Customers can review the status of scheduled and completed inspections in real-time.
- **How to Apply for Permits:** Any customer who has created an account may apply for building, burn, special event, etc. as well as pay for permit fees online. Pay fees online for permits.
- **How to Submit Plans:** Customers will submit electronic plans. Check on status, review comments, resubmit plan revisions, pay fees online for plans.
- **How to Register:** Customers can establish and account to complete online applications.
- **How to Search:** Search existing permits, plans, code cases, inspections.
- **Licensing module:** Customers can submit electronic applications and manage licenses required to perform work or business within the city.

Already a Registered Compass User? - Skip to Page 5 for instructions to Submitting a Plan application.

COMPASS KC Home

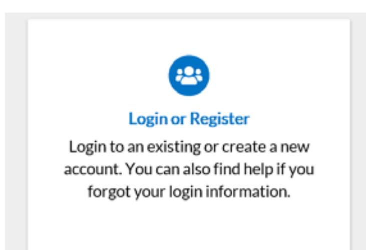
There is no fee for this online service.



Setting Up Your Account

For a full range of services, it will be necessary to set up an account. (see Registration guide for detailed instructions)

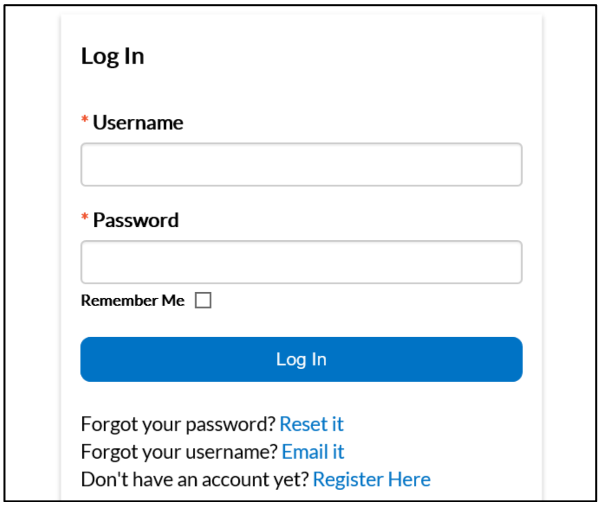
Login to COMPASS KC



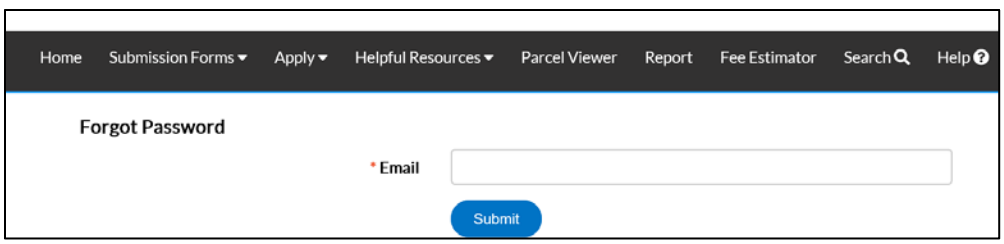
1. Enter your **username** and **password**.
2. Mark the **Remember me** checkbox to have the system remember your credentials.
3. Click **Log In**.

Recover Log In credentials

1. Select the **Log In** option on the **Home** screen.

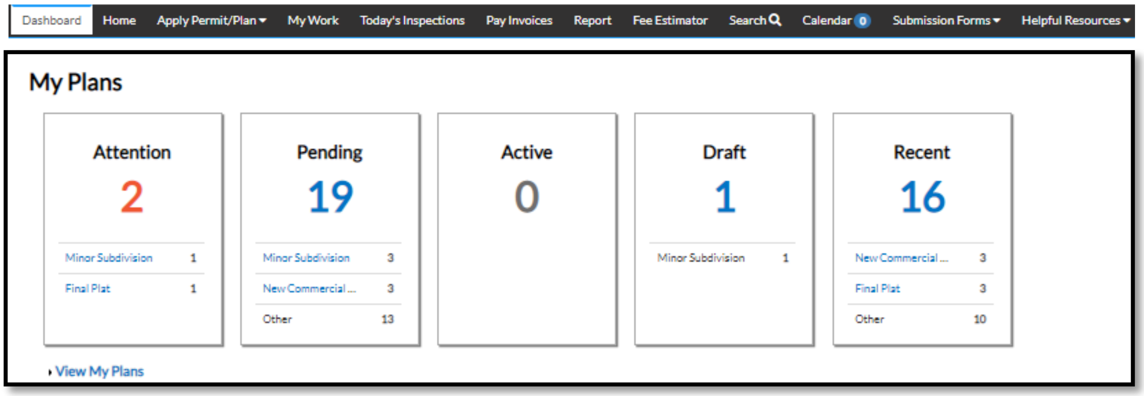


2. Select "**Forgot your password? Or Forgot your username?**".
3. This page will be redirected to a Forgot Password/Username screen.



4. Enter your account email address.
5. Click **Submit**.
6. An email will be sent to the address that was given.
7. Open the email and click **Reset**.
8. You will be redirected to a COMPASS KC window where a new password or username can be entered and confirmed.

Dashboard

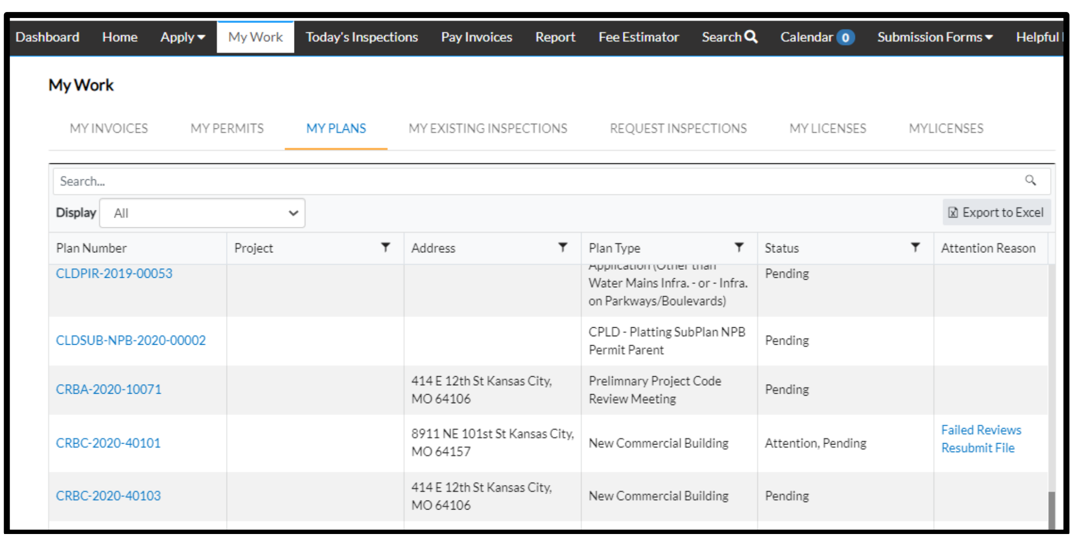


COMPASS KC provides the ability for users to see a visual representation of data on the dashboard. Users can see data for plans, inspections, licenses, and invoices. Users can click on the icons to access projects/case information. The dashboard and the My Work sections displays data that is contextual to the logged in user.

Navigation of the dashboard icons:

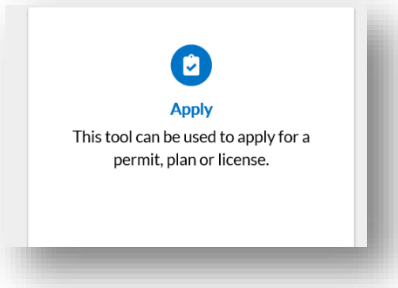
1. Click **Attention** icon to view listing of cases that require additional action.
2. Click **Pending** icon to view listing of cases that require additional action or that are under review.
3. Click **Active** icon to view listing of cases that are in active status.
4. Click **Draft** icon to view saved applications in draft status.
5. Click **Recent** icon to view the cases that have been recently applied for.
6. Click **View My Plans** to view a list of the corresponding Plans. Each case will list Type and Status. To view detail on a specific case, select the corresponding number on the left-hand side of screen.

Case information can be accessed directly under the **My Work** tab:



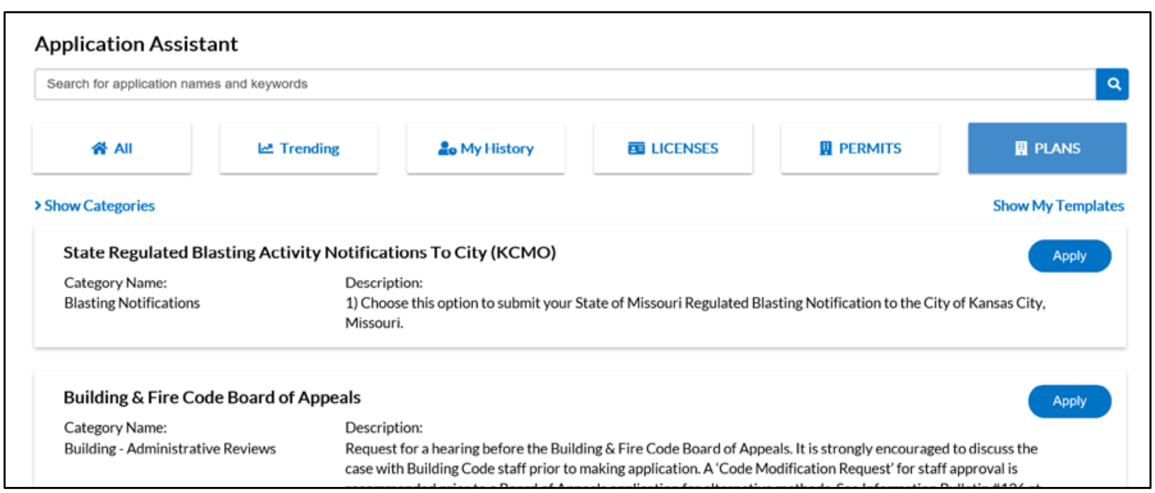
Submitting a Plan Application

1. Registered users will click **Apply** menu to see available application types.



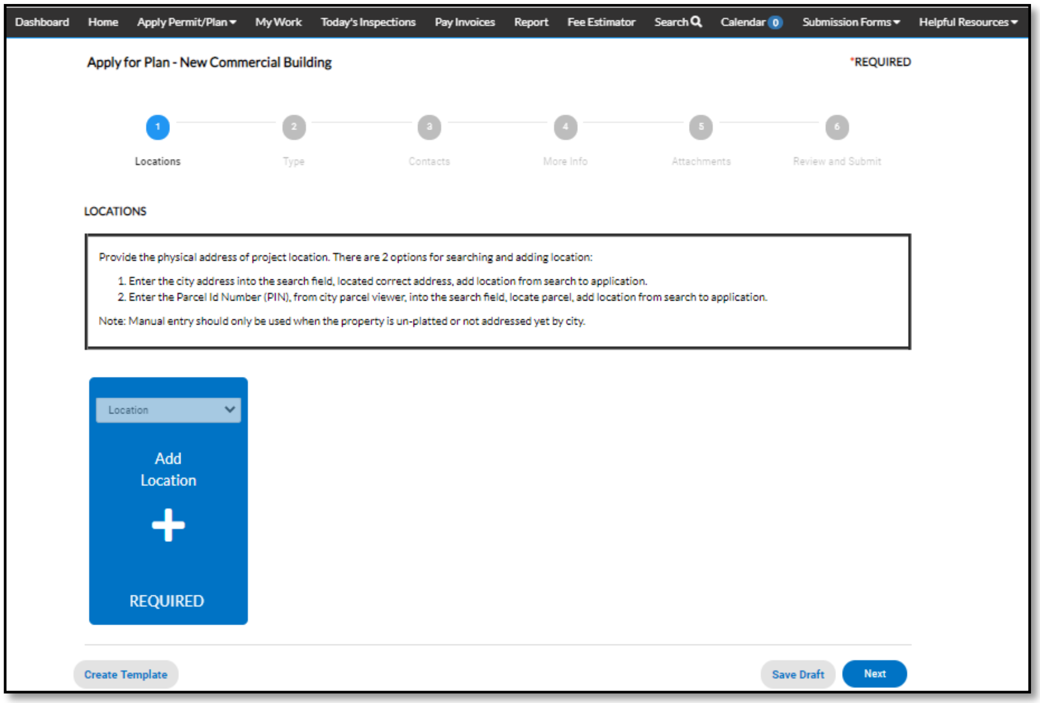
The Application Assist screen will appear(below). To search for the types of plan applications, there are multiple options:

- Type the name of the application in the search for application names and keywords and select search
- Select the Plans tab PLANS to view full list of all applications types. Scroll through options and click Apply Apply next to the desired application.
- Scroll through all applications types either by using the “All” tab or by selecting Show Categories option › Show Categories (located under the tabs).
- Trending tab lists the top applications throughout the City.
- My History tab displays application types applied for by logged in applicant.



Note to begin application select the Apply icon to the right of the application type.

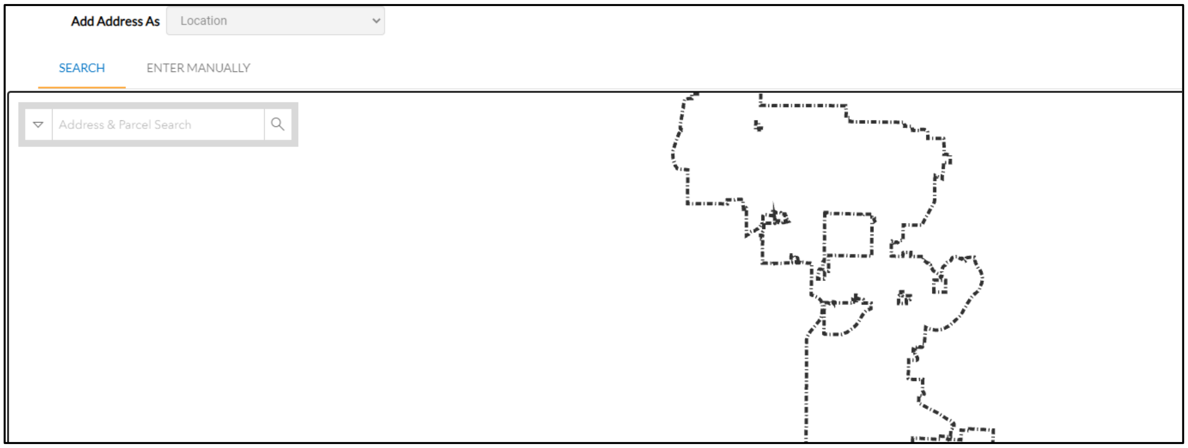
2. The **Apply for Plan** screen will open, **Type** of application chosen will default at the top of screen. (*) denotes Required field for the application type. An application progress bar is located under the application type. Additional instructions provided on adding locations in text box above icon.



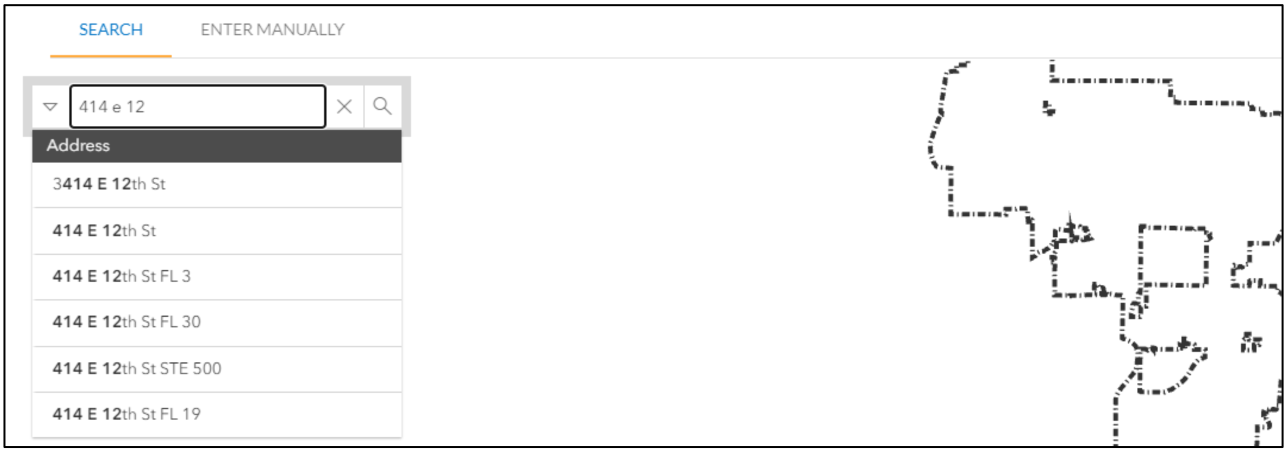
3. The **Locations** screen will open, the application progress bar is located under the application type. **Add Location:** Select on the **+** in the center of the **Add Location** card.

4. The **Add Address As** screen will appear. Enter the full address and click on the magnifying glass.

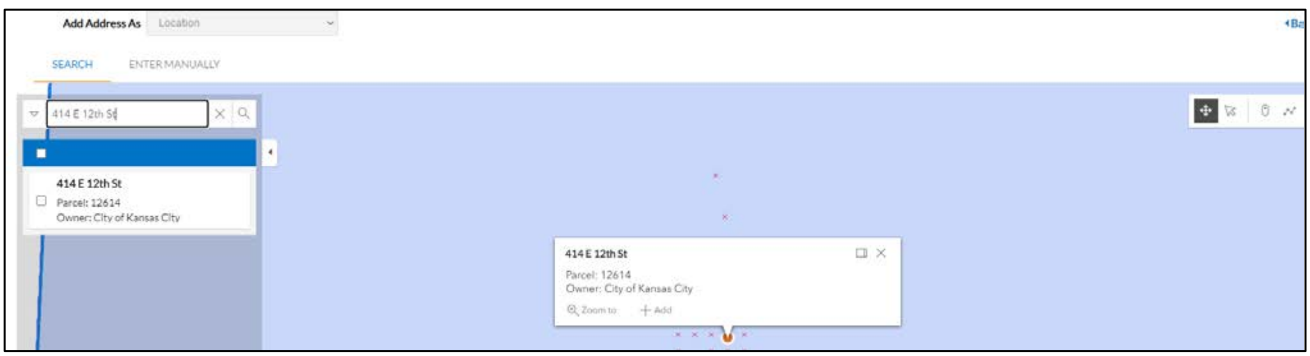
   Tip: When entering the address, do not use periods. Write E instead of East, and St instead of Street. Please include "th", "nd" and "rd" to the end of numbered streets. Example: 123 NE Maple Ave or 508 W 23rd Rd.



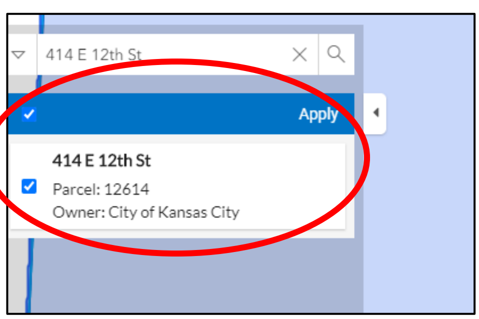
5. A list of addresses containing the search criteria will appear below the search field.

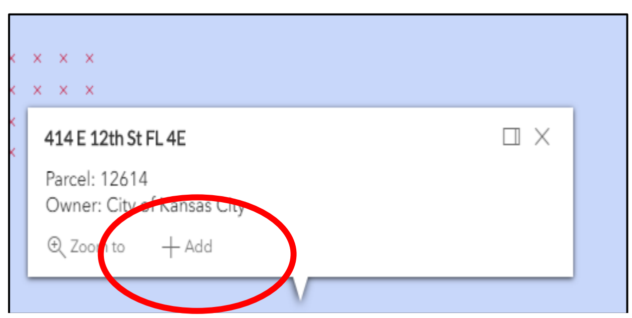


6. Select the address to add to the application. The map (on right) will zoom to the location.

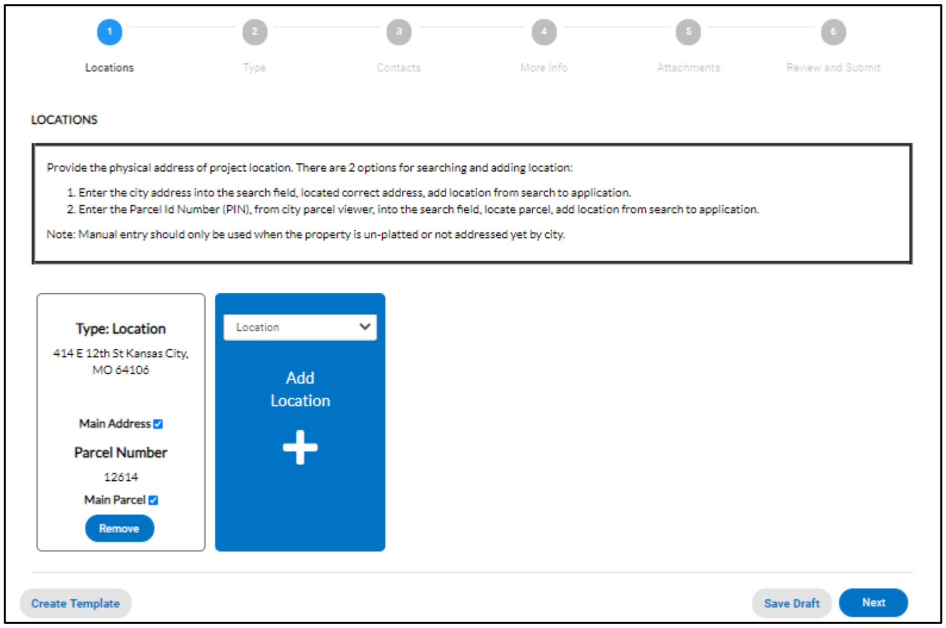


7. Select the box to the left of correct address and select **Apply** in the upper left-hand corner **OR** select the "**+ Add**" option from the address information located on the map.

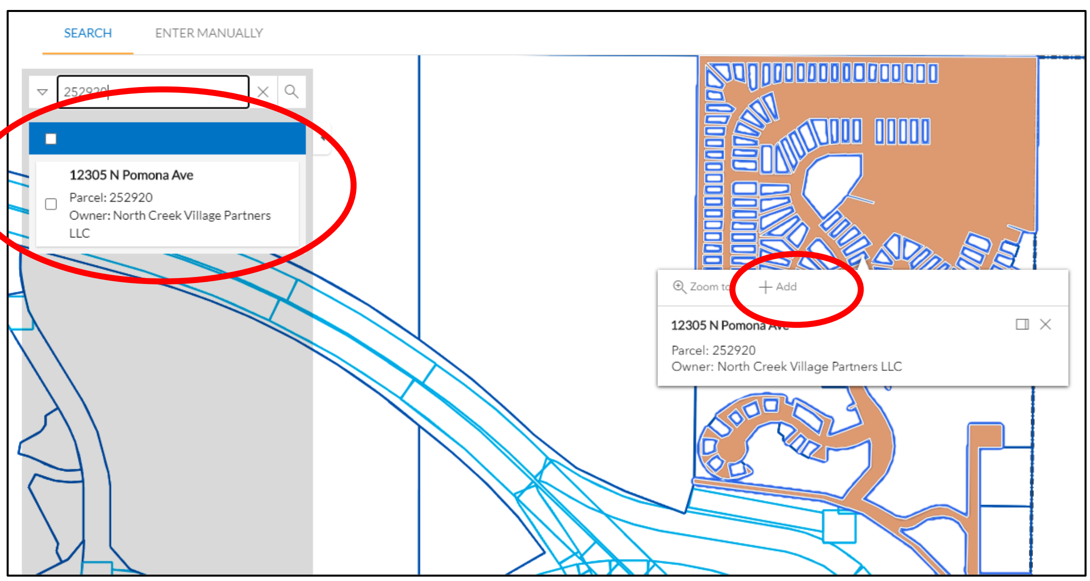




8. Location will be attached to application. Select the **Next** option at the bottom of screen. If the wrong address was added select remove and then repeat the Add Location process to add the correct address.

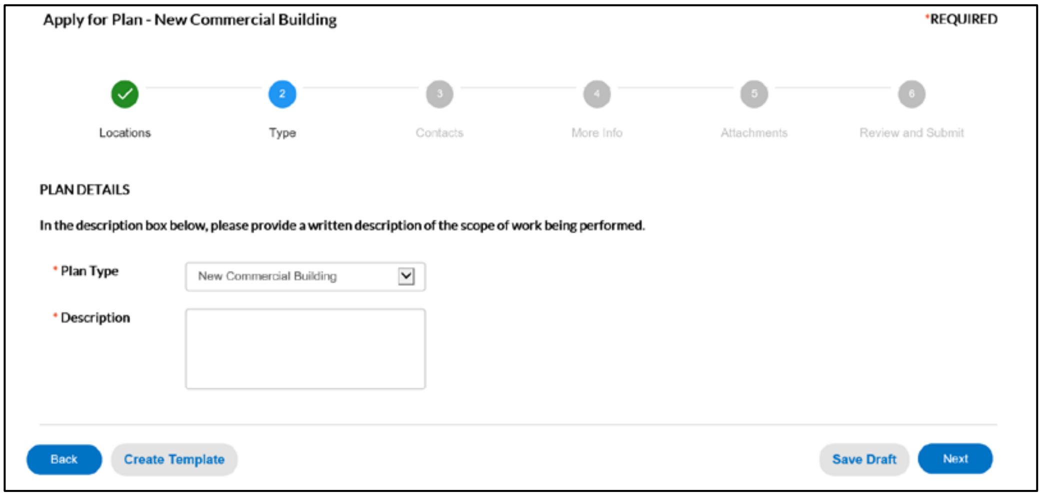


9. If a location address has not been assigned by City staff, OR if the application requires Parcel Identification Number (PIN) enter the PIN number into the search bar. *NOTE: City PIN's can be found by using the City's parcel viewer.*



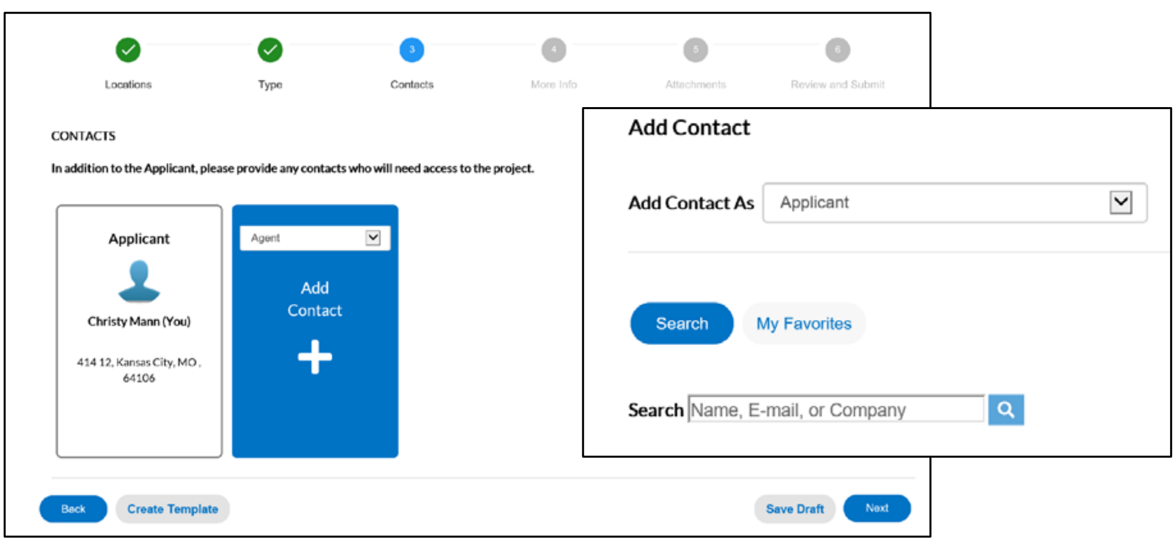
10. If Address is not located in using search function, choose **Enter Manually**. Add in the complete address for the location. The street number, street name, city and postal code are required. Select Submit.
Note: Manual entry should only be used when the property is un-platted or not addressed yet by city. Inaccurate addressing delays processing.

11. **Description:** Enter a description of the work in this field. Select the **Next** option at the bottom of screen.



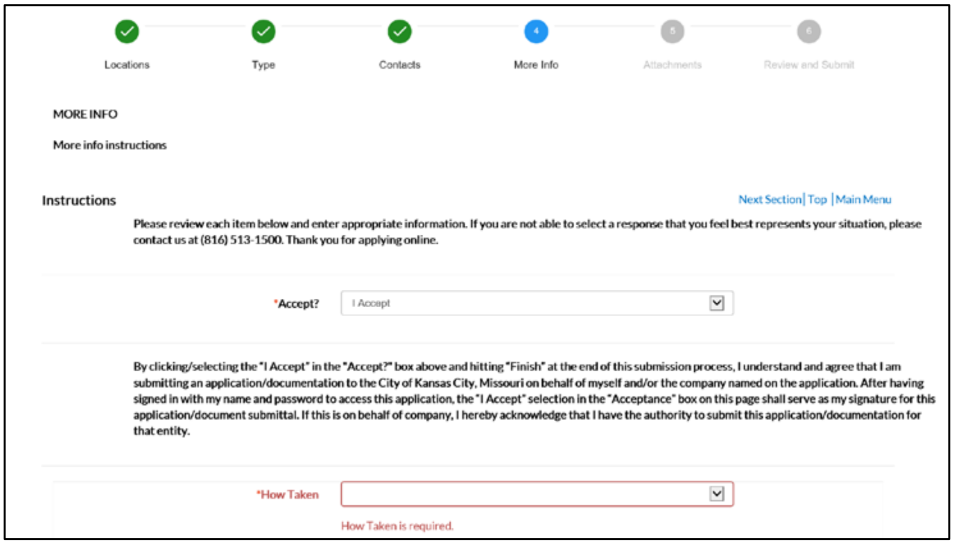
12. **Contacts:** The registrant's contact information will default to the first Contact card listed. If there are additional contacts that need to be added to the Plan that is being applied for, select the **Add Contact +** icon. **Note:** frequently used contacts can be saved to **My Favorites**.

13. Choose contact type, from the **Add Contact As** dropdown box. In the search box, type in Name, Email, or Company name and select the magnifying glass to search the Contacts in COMPASS KC for an existing contact. If the person, email or company is an existing contact click **Add** to add the contact to the application. If contact does not exist in Contacts, have the contact register in Compass. **Note:** Add all contacts that will need access to the case.

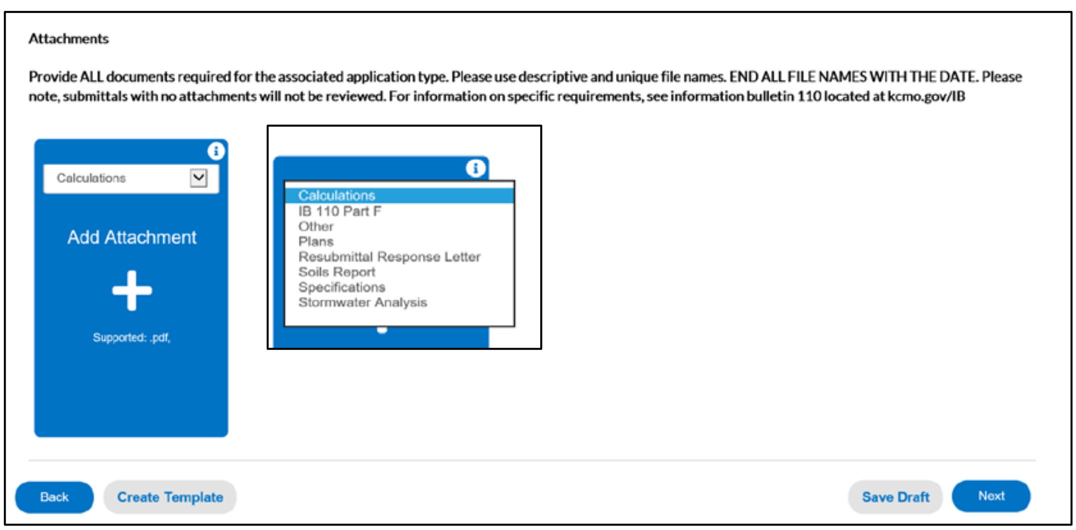


14. If additional Contacts are **required** by application type, they must be added to move to the next step. After all contacts are added select the **Next** option at the bottom of screen.

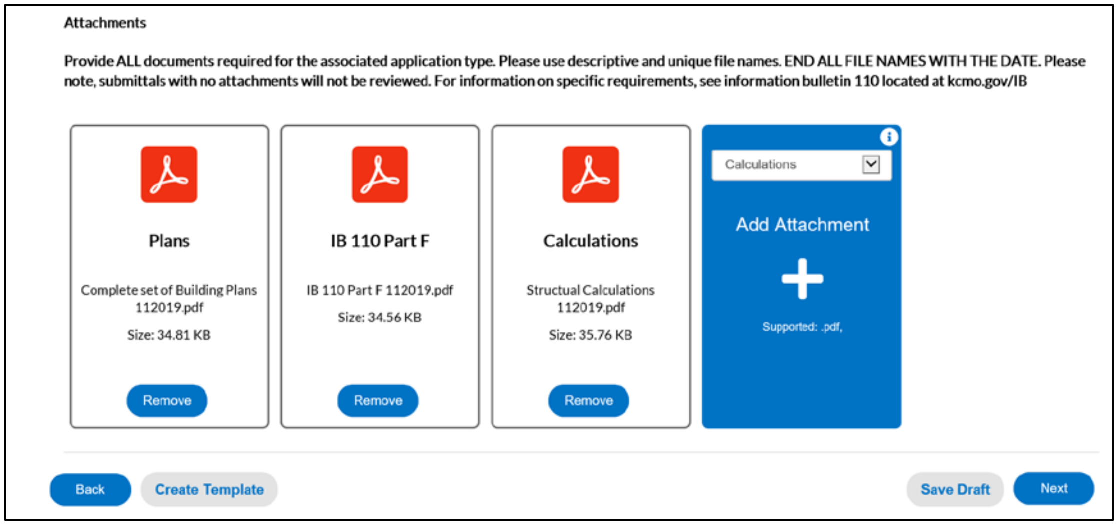
15. The **More Information** page will appear. These fields are customized by the System Administrator. Supply information as requested for the application type selected. Required items are denoted in red. After all information for application is entered, select the **Next** option at the bottom of screen.



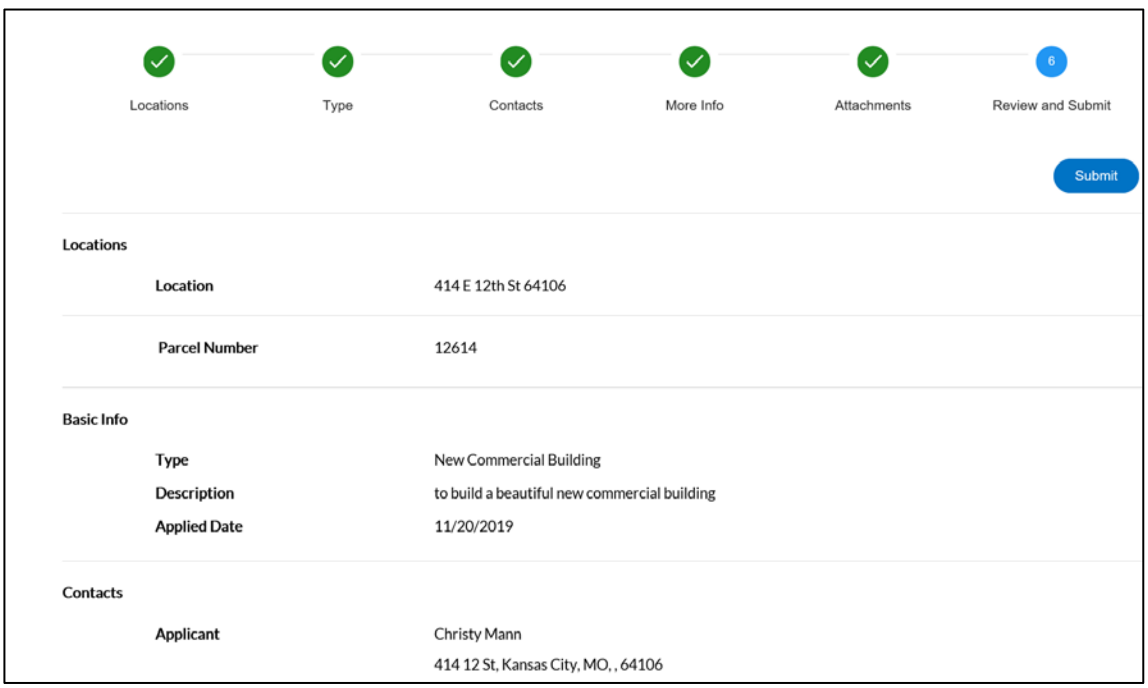
16. The **Add Attachments** page appears:
   1. In the drop-down field select the type (i.e. Calculations, Plans, Soils Report….) of the document attaching. ***NOTE:*** the information icon above drop-down box provides information on the document type selected.
   2. Select the **Add Attachment +** card to browse documents located on applicant's computer. **Please use unique names INCLUDING date for all attachments.**
   3. Repeat the steps, until all required documents are attached (Plan types may have required documents that must be attached in order to have a complete submittal.)



Documents attached will appear on the Attachments screen. To remove attachment, select the **Remove** option at the bottom of item to remove. Select the **Next** option at the bottom of screen.

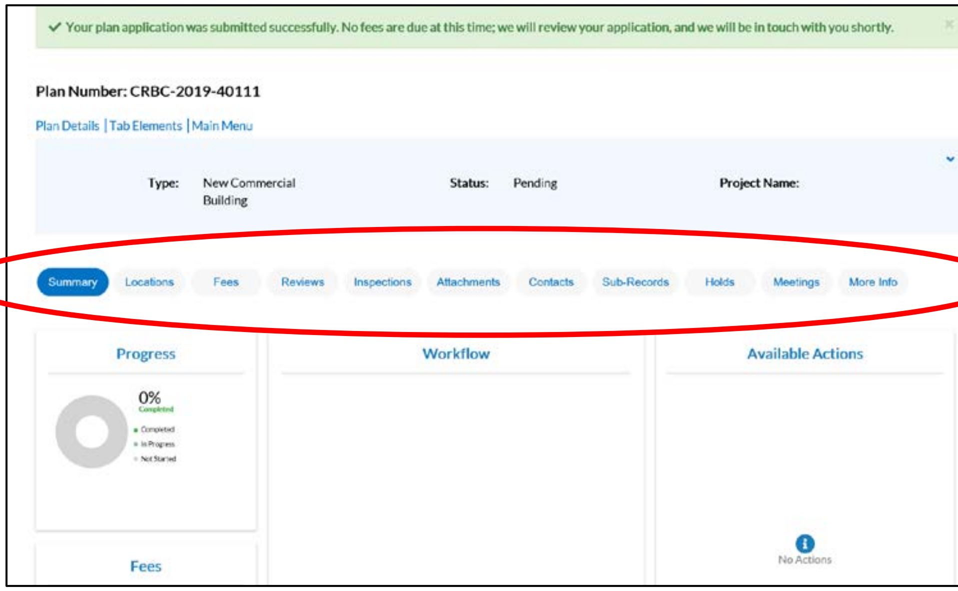


4. **Review and Submit** screen will appear. Review all application information including the attachments before submitting application. Complete applications will aid in meeting the approval turnaround times. If the application is complete select the **Submit** option.

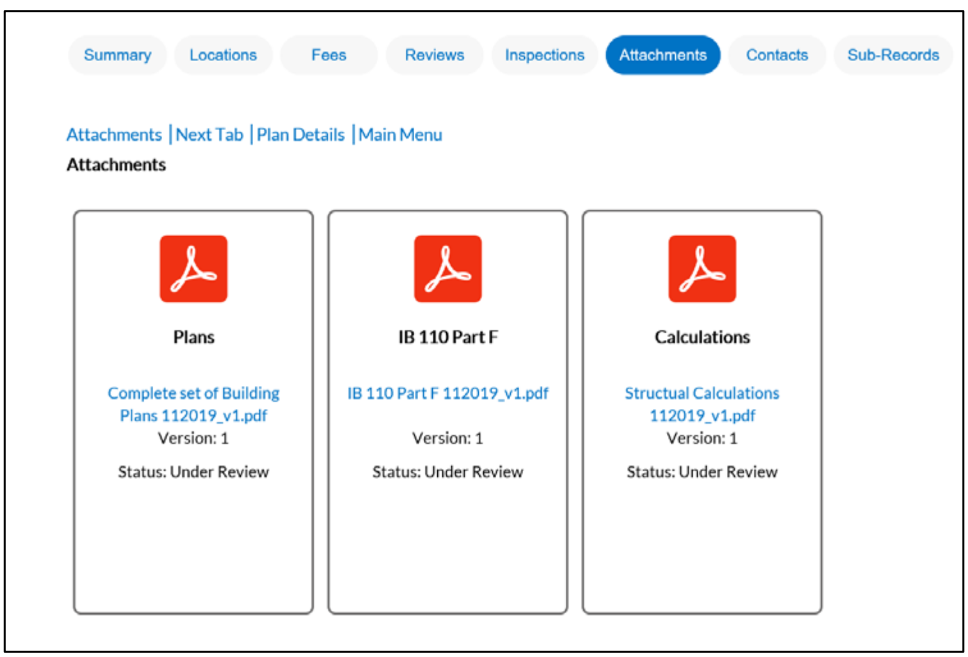


5. If the application is not complete select **Save Draft:** The citizen may click on the Draft status circle on the **Dashboard** to resume their Plan.

6. The application status notification will appear at the top of the screen. The system will automatically generate a Plan Number assigned to the case. Applicants can review information details of the application by selecting the tabs on the case. Once the application is reviewed and found complete, notifications will be sent to the contacts on the case with direction on next steps in the process.



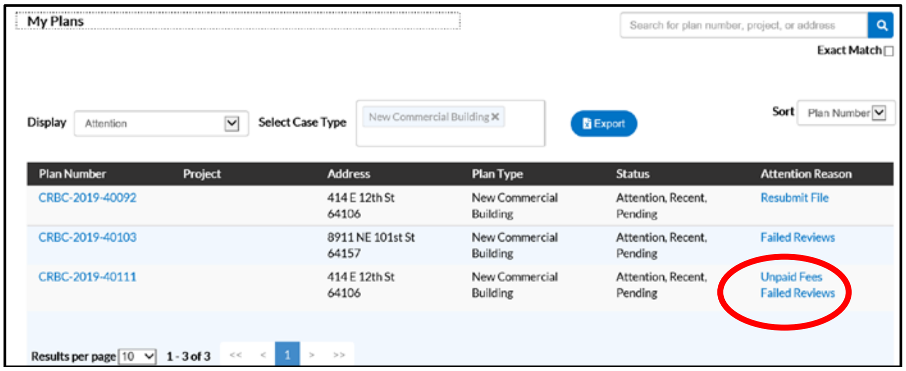
7. All information provided during the application process is now stored under the corresponding tab. Attachments uploaded are now found under the Attachments tab and show a status of **Under Review.** **<u>Case is locked until review is completed.</u>**



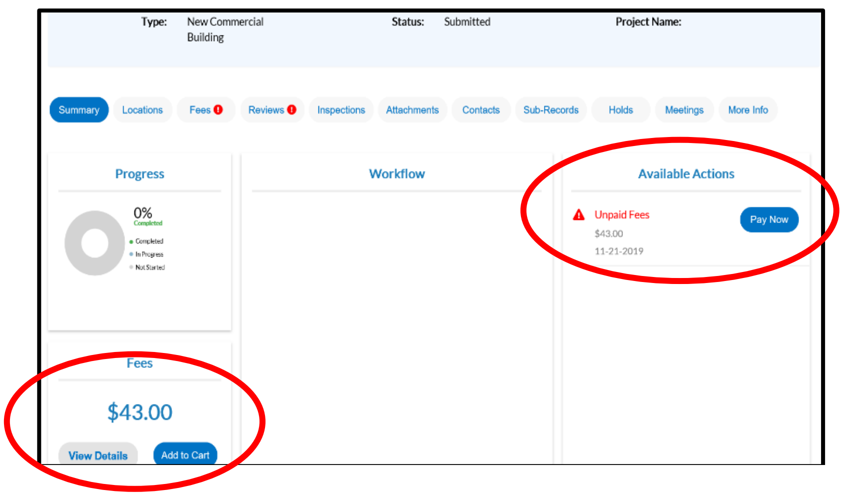
Paying Fees

To Pay Fees on a Plan the applicant will need to wait until the application submitted has been approved. The case manager will build invoice for fees and a notification is sent to the contacts on the case.

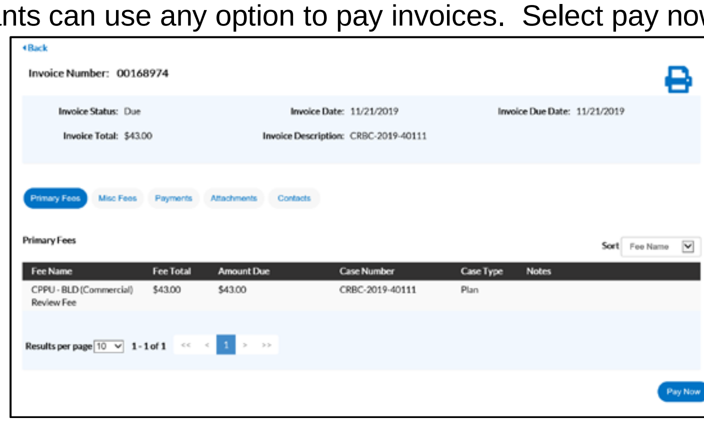
1. From the **Dashboard** navigate into the **Attention** section of **My Plans** and select the plan requiring payment. Select the Plan Number, with Unpaid Fees, to open the case details.



2. From the Plan details, navigate to the Available Actions or the Fees sections to pay fees.

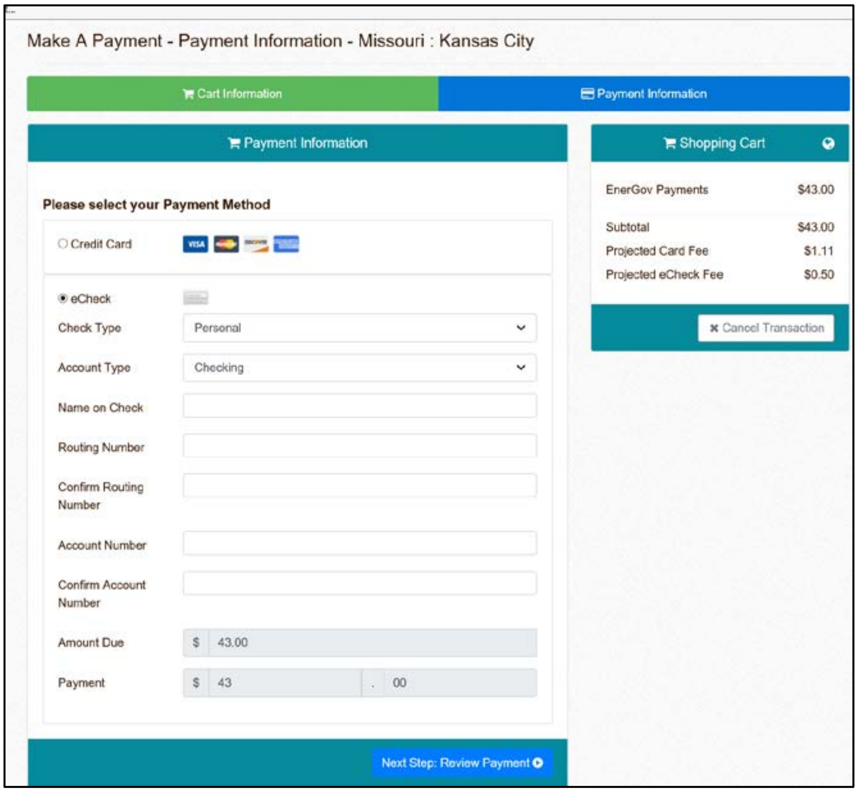


3. Select the **Fees** tab, note the red dot on the Fees tab (demotes action required), additionally, under **Available Actions** section there is a **Pay Now** option, and under the **Fees** section there is a **Add to Cart** option. Applicants can use any option to pay invoices. Select pay now option.



4. From this screen you can review the invoice information, print invoice using the Print icon at the top of invoice. When ready to pay select Pay Now option at the bottom of the screen.

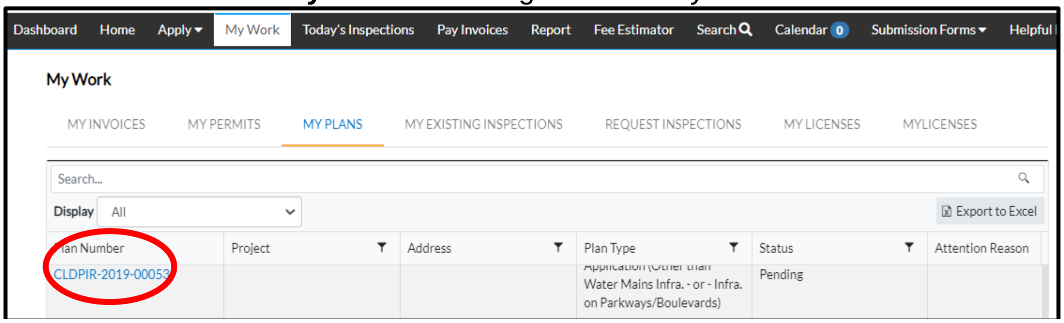
5. Select the payment method, eCheck or credit card, to make payment. Select Review Payment option when completed.



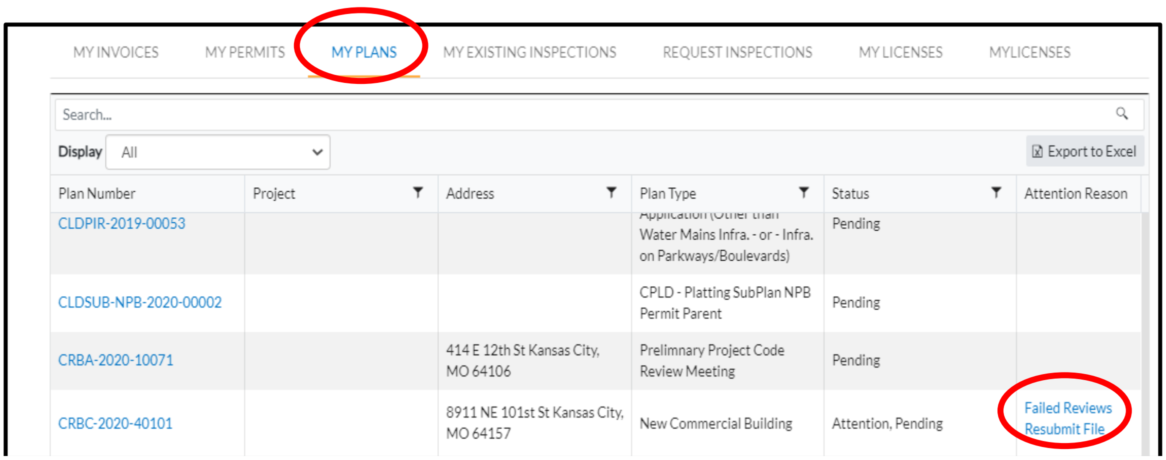
6. Follow on screen instruction to complete the transaction before exiting.

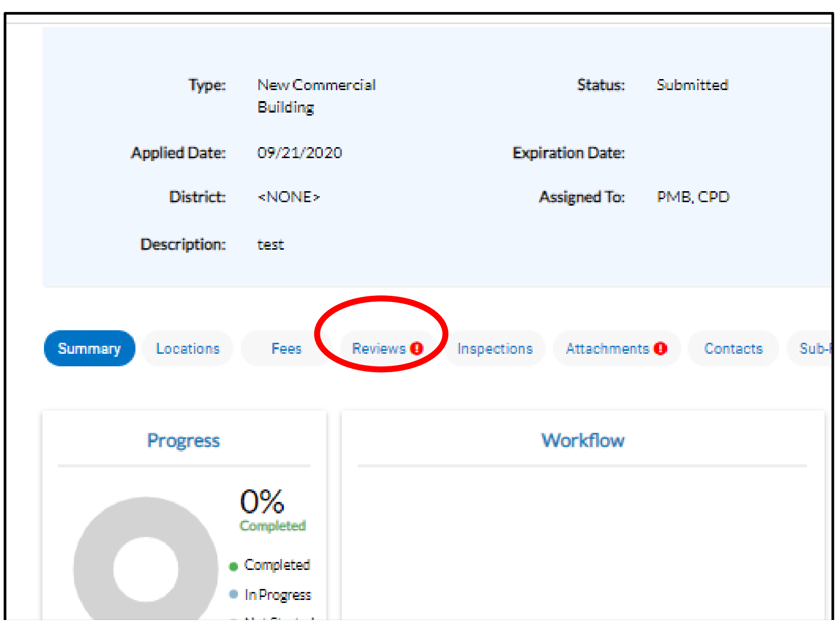
Reviewing plan comments and Resubmitting Revised Plans - How to Upload Additional Documents

1. From the **Dashboard or the My Work tab** navigate to the My Plans section.

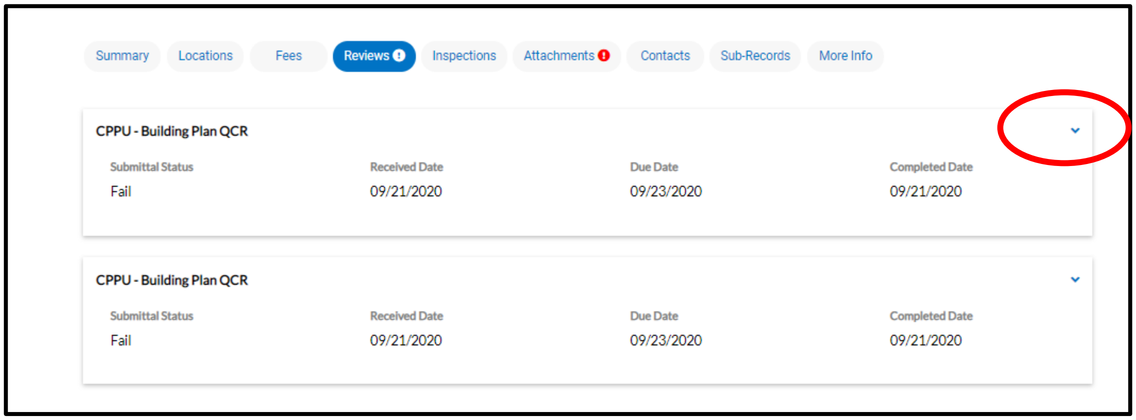


2. Locate plan number, select the **Failed Reviews** link under Attention Reason column to review plan comments. Additionally, plan review comments can be accessed from the details page by selecting the **Reviews** tab (the red dot denotes items that need attention on the case).

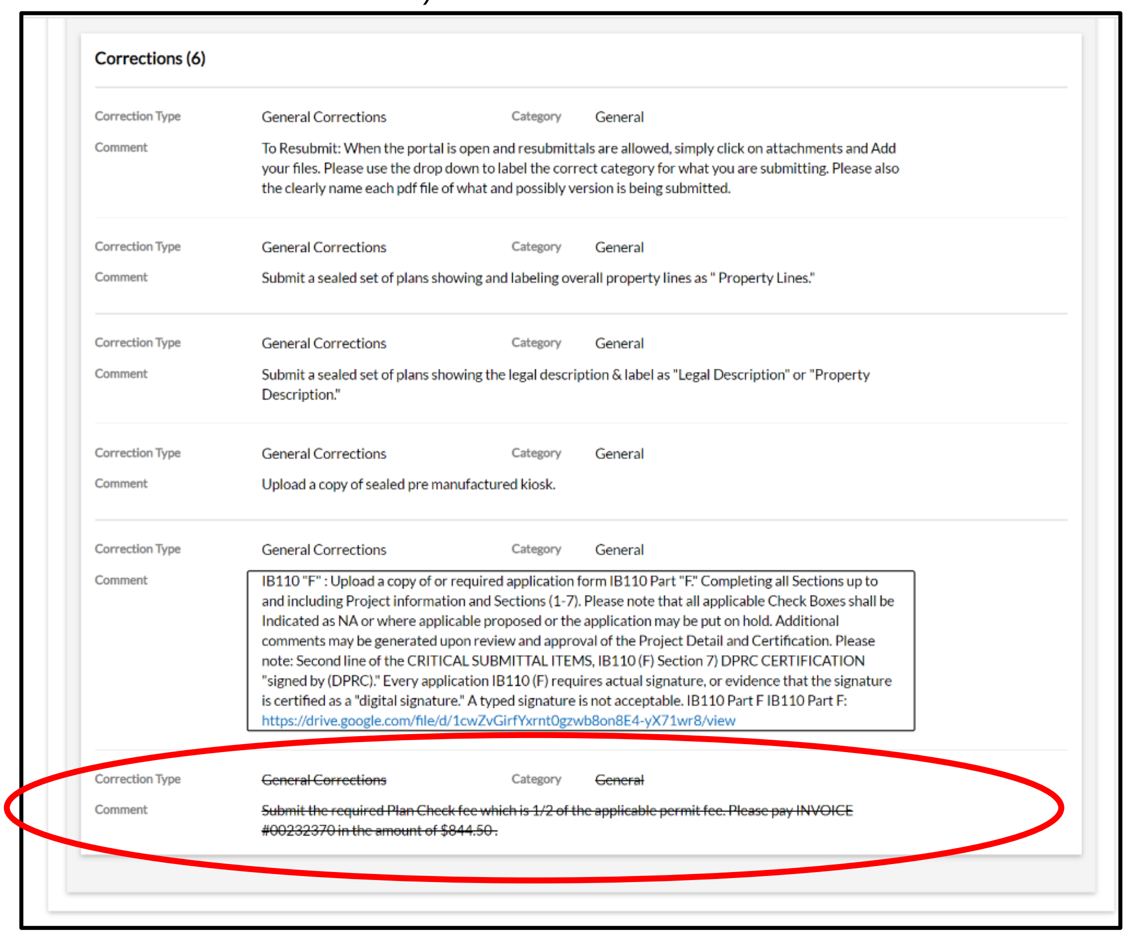




3. Under each review, use the down arrow on the right to expand or close comments section. Review all corrections and comments made by each reviewer. Items listed in the comments will need to be addressed in the resubmittal documents.

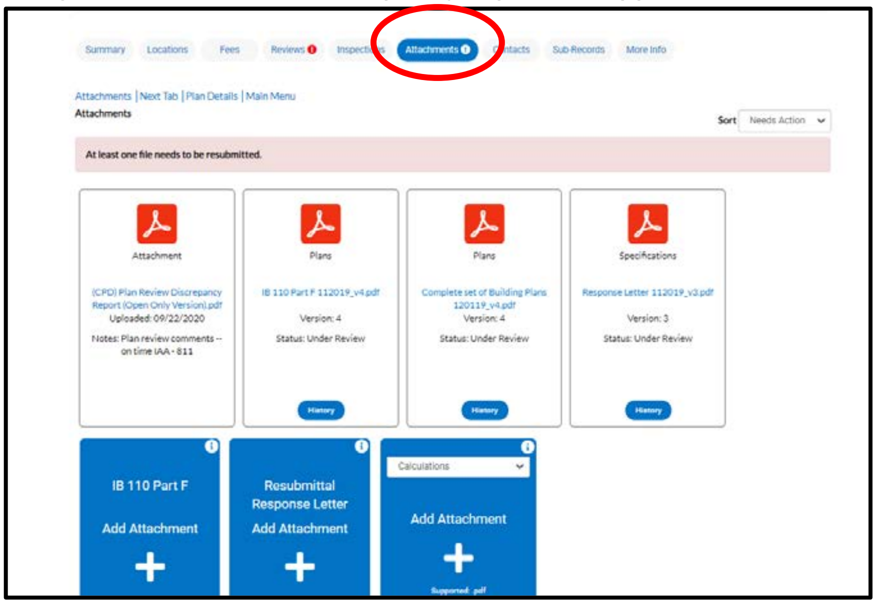


4. Corrections will appear with type, category, and comments. If plans have been reviewed multiple times the corrections that have been addressed will appear crossed out in the corrections tab (as shown at the bottom of screen below).



Address all corrections and complete the required resubmittal letter prior to resubmitting documents.

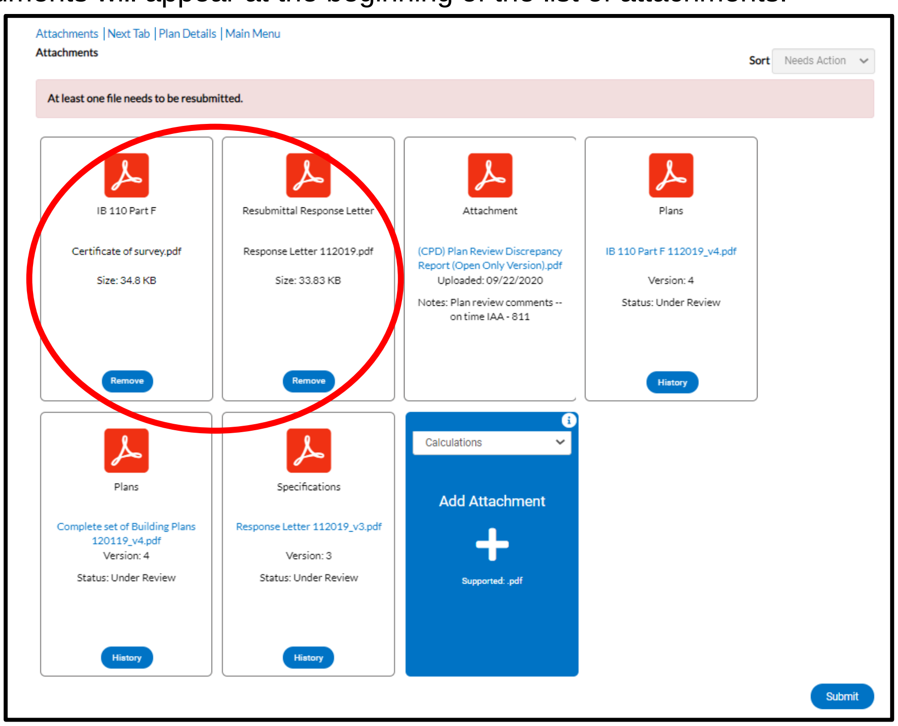
5. To attach documents to the case, navigate the **Attachments** tab. All attachments previously submitted, including the Plan Review Discrepancy report will appear.



6. Select the drop down to select the type of the document you are attaching, then select **Add Attachment +** card to browse documents located on applicant's computer.

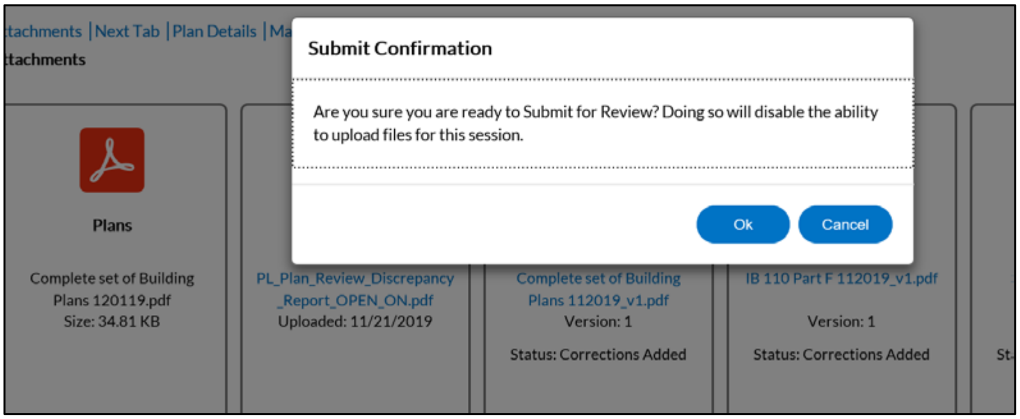
NOTE - Do not change the name of documents when resubmitting, change the DATE to denote the document is a resubmittal.

7. The new documents will appear at the beginning of the list of attachments.

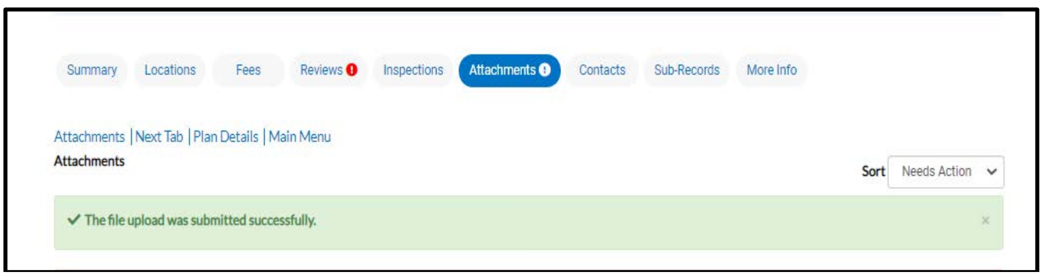


8. Upload additional documents as needed. When all documents are uploaded, select **Submit** at the bottom of the screen.

9. A Submit confirmation screen will appear. If ready to submit select OK. Once submitted the case will again be locked until the review is completed.



10. If uploaded is successful you will receive the following message: A notification will be sent when review has been completed.



Approved Plans

Final stamped approved plans will be located under the Attachments tab upon approval.

Assistance

If you require technical assistance with COMPASS KC, select the **Site Issues** link at the bottom of Home page to email detailed issues to support team.