DEPARTMENT OF PLANNING
Cayman Islands Government

CommunityWorks
ONLINE PLANNING SYSTEM

Department of Planning (DOP) | Government Administration Building (GAB)

www.planning.ky/ops

info@planning.gov.ky

345-244-6501

TOPICS COVERED

CLICK ON A TOPIC OR SUBTOPIC TO JUMP TO THAT SECTION
SELECT THE COMMUNITY WORKS ICON IN THE TOP RIGHT ANY TIME TO RETURN TO THIS SLIDE

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GENERAL OVERVIEW

Scope and Terminology

SYSTEM SCOPE

The Community Works Online Planning System (CW OPS), previously the Online Planning System (OPS), is a secure cloud-based community development platform hosted in the Cayman Islands. CW OPS is designed for the support of Cayman development. All stakeholders involved in development through the Department of Planning have access to and benefit from this digital planning system.

Community Works gives administrators and staff the digital tools to efficiently manage numerous projects across multiple agencies. The system allows end-users to apply for and track the progress of planning projects, permits, and inspections from the Department of Planning (DOP).

Features Include

Online application for permits and projects	Upload electronic plans / drawings and other relevant documents	Request inspections and plan reviews, track their progress
Record Progress provides overview of status on project	System and email notifications for all stakeholders	Downloadable copies of invoices, issued certificates, and permits
Quick access navigation to frequently used record and actions	Add Professionals to your team	Primary List visual in Dashboard of all records relevant to user

TERMINOLOGY

- **Current Planning (CP)** – The section of the Department of Planning that deals with processing Planning Permission (Projects, in CW OPS).

- **Building Control (BC)** – The section of the Department of Planning that deals with processing building (and other types of) permits.

- **Block and Parcel** – the legal mechanism to uniquely describe and delineate a piece of property. All Planning records must be linked to a Block and Parcel number. The system allows applicants to identify a primary Block and Parcel number for a record, this is the Block and Parcel number that will be used in the search/sort function.

- **File** – A holder for all records that correspond to development activities on a particular property (block and parcel number). A file can be composed of many Current Planning projects and Building Control permits. Every record in the system must have a file (F) number.

- **Record** – A record in our system is the name we use to classify any type of application that the Department processes.

  - A Current Planning Project (P, PAD, RZ-numbers), a Building Control Permit (B, BF, AE, D, G, LPG, D, E, EV, R-numbers), a Code Enforcement Case (CE-number) or an Inquiry Letter (Trade and Business Licence, Zoning Inquiry; TBLL, ZIQ-numbers).

- **Permit** – the document issued after the Building Control plan reviews are completed and all drawings are deemed to be in code compliance. This allows construction to commence

- **Project** – the name given to a record that represents an application for planning permission (P-number usually). See Current Planning definition above.

- **Permit Final**:

  - **Certificate Types:** Once all inspections are completed and approved, a construction project needs to be officially signed-off by the Director of Planning.

  - Structures that are habitable should receive a **Certificate of Occupancy**

  - Other ancillary structures should receive a **Certificate of Completion**

  - Elevators should receive a **Certificate of Operation**

  - Other minor permits are simply **'closed'.**

SYSTEM ACCESS

Account Types, Creation, and Login

ACCOUNT TYPES

THERE ARE TWO LEVELS OF CUSTOMER ACCESS TO THE SYSTEM. THE MORE COMMON IS THE "CORPORATE" LEVEL OF ACCESS (COMPANY/SHARED LOGIN). THERE IS ALSO THE "PROFESSIONAL" LEVEL OF ACCESS (PERSONAL LOGIN).

Corporate Account

- Previously known as, "Business Account" in OPS. The functionality of this account type has not changed, simply the name.

- All application records and attached application forms require a "Corporate Account" (linked to a business) to be included for submission.

Professional Account

- Previously known as, "Contractor Account" in OPS. The functionality of this account type has not changed, simply the name.

- The benefit of a "Professional" (personal) login is for those people who either work for multiple companies and need their own access independent of any Corporate account, or for those persons who only project-manage certain jobs within large companies.

- As a Professional with your own login, you will need to select a Business when filling out any forms in OPS.

Corporate Users and Professionals should have one or multiple licence or specialty types assigned to them. The list of licence types (Business Discipline) will be displayed to you when you register.

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ACCOUNT CREATION

- If you are a new user, go to www.planning.ky/ops and select the "Register" button.

- Follow the prompts on the OPS Registration page to complete your registration.

- Once you complete the required fields you will see a confirmation screen. The Department of Planning will contact you shortly with account information.

ONLINE TOOLS

ONLINE PLANNING SYSTEM

Allows users to apply for permits online, and to track permit-related plan reviews and inspections.

☑ Register   🔒 Login

OPS Registration

Thank you for your submission, we will be in contact shortly.

Business Name

Business/Owner/Applicant Name

Primary Contact Person *

Primary Contact Person

Email

Email Address

Alternate Email

Alternate Email

Phone

Phone

Island

Island...

The Online Planning System is for all stakeholders in the building process. What is your role?

Role

If you have a Trade and Business License, please enter it here. Otherwise, type "N/A" in the field

Trade and Business No.

If you have an existing license from the Electrical Board or the Water Authority, please enter it here. Otherwise, type "N/A" in the field.

Existing License Number (EBE/WAC/BB)

Physical Address

Physical Address

PO Box

PO Box

Postal Code

Postal Code

SUBMIT

Login and Forgot Password

- You can bookmark the link www.dop.secure.ky to easily locate the login link.

- It's also available thru www.planning.ky at the top right of the main menu bar titled "OPS Login" .

- Once at the login screen, enter your Username and Password and select Sign-In at the bottom.

- If this is your first-time logging in, you may be asked to reset your password.

- If you are logging-in on a computer you trust, you can select the "Remember Me" box for faster logins in the future.

- If you have forgotten your password, select "Forgot Password" you will be asked to input your username.

  - The email address associated with your username will be sent a "Reset Password" link.

  - The link expires in 5 min.

  - The link will allow you to set and confirm a new password and then log you into the system.

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Quick Start Guide

Dashboard

SHOWS A HIGH-LEVEL OVERVIEW OF ALL THE RECORDS YOU ARE ASSOCIATED WITH.

- The Record File Hierarchy card on the left of the Dashboard is an interactive list.

- The Files are the "container" for the records to which you are associated.

- Clicking on a File will expand it to show the records it contains.

- Selecting a record will populate the right side of your dashboard with "snapshot" information on that record.

- From this snapshot view you can,

  - View / Open Inspections, Plan Reviews, and Documents

  - Add new work using the actions drop down.

  - Open the record to see full details using the ⬈ icon.

Quick Access | Navigation

- Use the header bar "Community Works" icon to return to home

- Select the "Add New" button to Submit a New Application (Corporate Users only) or add an Inspection / Plan Review (Professional and Corporate Users) to an existing record.

- Use the "View Notifications" bell to see notification relative to records you are associated with.

- Select the "Push Pin" button to quickly access a "Pinned" record.
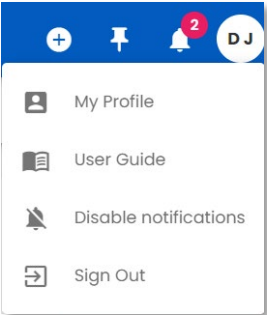
- Select the initials at the top right to access your user profile, help, manage notification preferences, or logout.

My Profile

User Guide

Disable notifications

Sign Out

Pin Record

- The action of "pinning a record" is like a virtual bulletin board to which you are "pinning" items of importance for easy access. And removing them when they are no longer critical.

- If you are working on many different records, but need quick access to just a few, use the pinning feature to keep track of those critical records.

- To pin a record,

  1 Select the "Push Pin" in the Record Snapshot from your Dashboard.

  2 Open the Details pop-up using the "i" button on the far left of the table row in the "My Jobs" search results table. The "Pin" icon can be selected or unselected in the top row of the Details pop-up.

  3 If a Record is opened, the header of Record View shows the "Pin" icon to be selected or unselected.

- Pins turn **green** when selected and are **grey** when unselected.

- Use the "Push Pin" button third from right in the Quick Access Header at the top of the screen to "Pin" a record.

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CB-P22-0061
CB-B22-0027

← CB-B22-0027

PERMIT | BUILDING PERMIT - CAYMAN BRAC | 101C45

Actions ⌄

2

Details:

Record No.	CB-B22-0027
Record Class	PERMIT
Record Subclass	BUILDING PERMIT
Record Status	
Status	Started
Block & Parcel	101C45
Island	CAYMAN BRAC
Type Group	
Description	
Ownership	PRIVATE
Land Condition	VACANT LAND
Owner	Annie Tate

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← CB-B22-0027

PERMIT | BUILDING PERMIT - CAYMAN BRAC | 101C45 -

| OVERVIEW | ACTIONS | PLAN REVIEW (3) | INSPECTIONS (4) |

Record Progress

⌄ Application Submission

PLAN REVIEWS (GENERAL BUILDING - GENERAL)
i100722-144603-34 (NEW)

Notifications

In the Quick Access Header Bar there is a "Bell" icon that has a red circle with a number in it.

- This is your notifications center.

- Here you will receive updates on actions related to records you are associated with.

- You can use the [↗] icon to open the form or action listed in the notification.

- The teal circle with initials in it denotes which account holder originated the record.

[🗑] When you no longer need to have the notification in your "inbox", select the black trash can to remove it.

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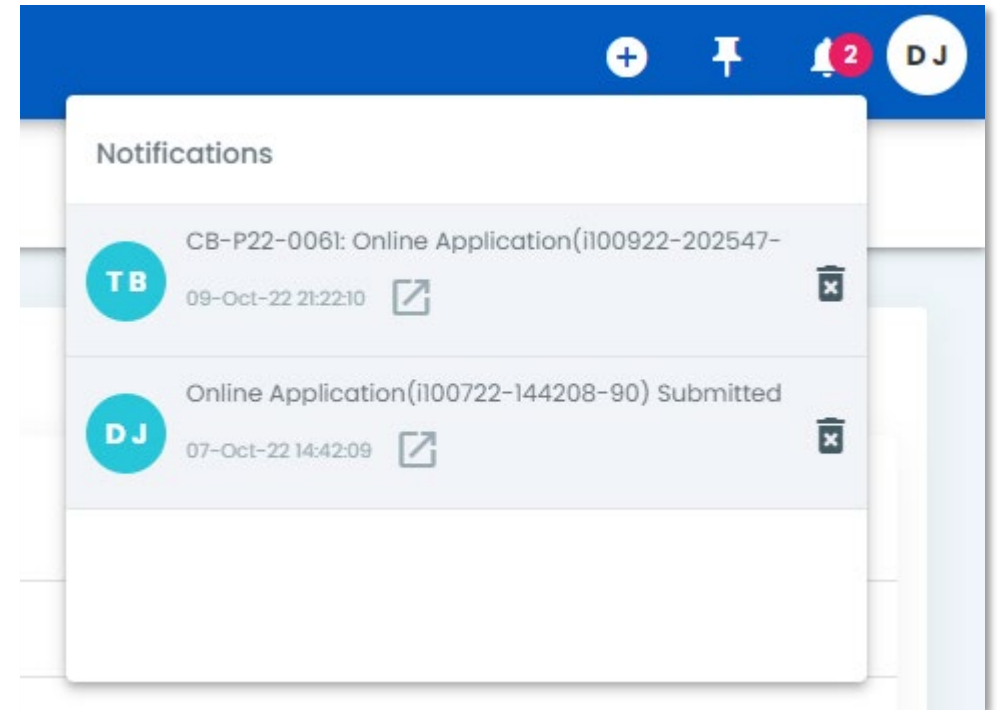
User Account

In the Quick Access Header Bar, the last icon on the right is a circle with initials in it. This is the User Account Menu.

- This User Guide is linked to the **User Guide** section.

- The third option in the User Account menu is a toggle between **Disable and Enable Notifications.**

- Use the **Sign Out** button at the bottom of the User Account menu to log out of Community Works OPS.

- To manage your account, select **My Profile.**

  - The profile section will show details about your account. This page allows you to update your initials, display name, email address, phone number, and password. Select **Save** after making changes.
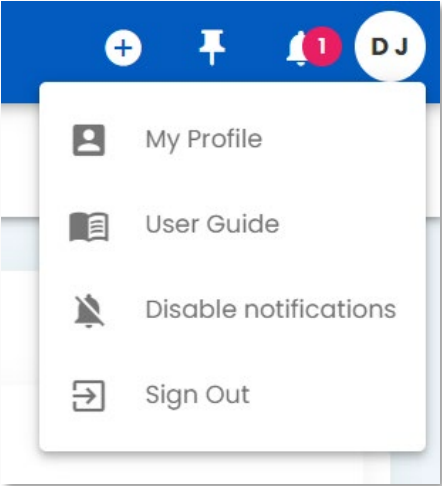
Quick Access | Add New

CommunityWorks

- Corporate Users can select the "Add New" button to Submit a New Application or add an Inspection / Plan Review to an existing record.

- Professional Users can select the "add new" button to add an inspection / plan review to an existing record

- Select the box below to see detailed steps of that process.

Submit New Application

Inspection/Plan Review

Corporate Users

Submit New Application

Add Inspection / Plan Review

Professional Users

Add Inspection / Plan Review

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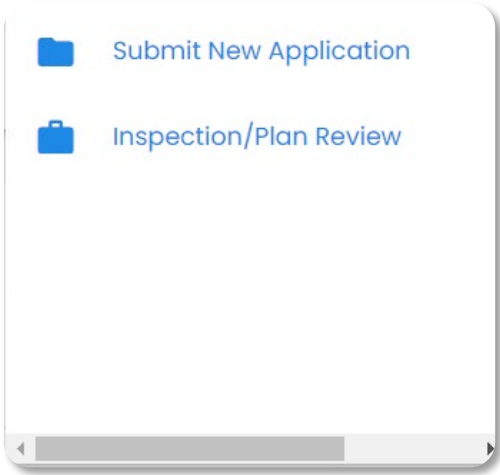
Quick Access | Submit New Application

The Online Application Request Form is divided into nine sections. Details about each step are on the following pages of this guide, select a step to jump to the page that explains it.

Online Application Request Form

1 APPLICATION TYPE — 2 RECORD TYPE — 3 GENERAL INFORMATION — 4 ABOUT YOU — 5 LOCATION — 6 STRUCTURE — 7 ASSIGNMENT — 8 DOCUMENT — 9 REVIEW

| Application Type | Record Type | General Information | About You | Location | Structure | Assignment | Document | Review |

17
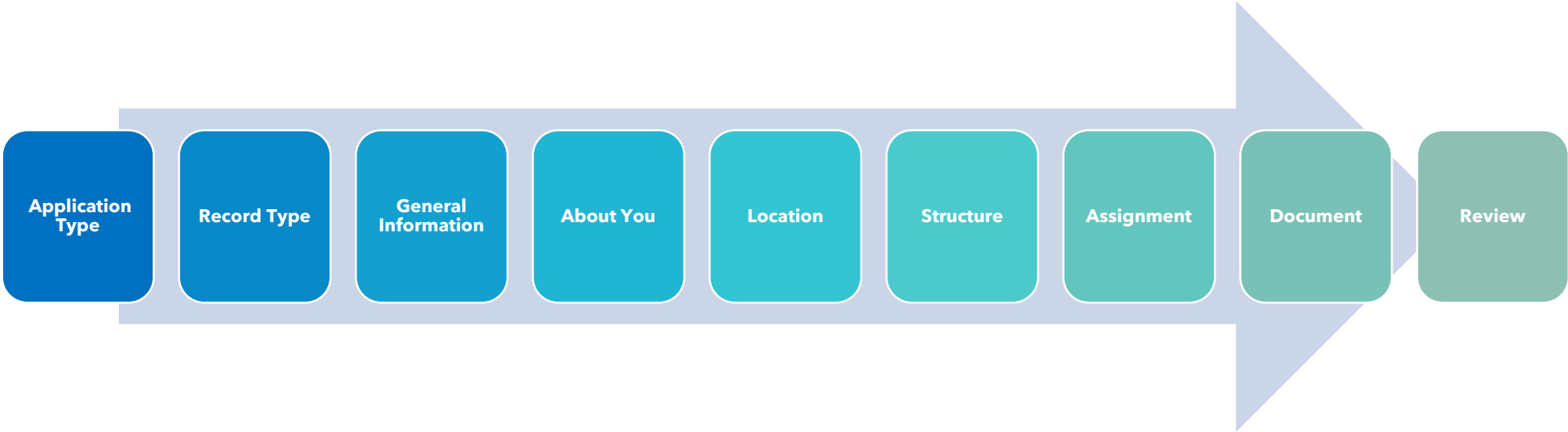
Submit New Application | Application & Record Type

- The first step is to select which type of application you are applying for.
  - **Project (Planning Permission)**
    - Any new development proposal for which you need planning permission. (Apartment, House, Fence, Land Clearing, Subdivision etc.)
  - **Permit**
    - Application for permission to build following planning permission (Some exceptions apply; solar panel and some electrical works.)
  - **Third Party Program Permit**
    - Application for permission to build that has been pre-approved by an authorized third party
  - **Inquiry Letter**
    - Zoning Inquiry letter (due diligence property background check)
    - Restriction Removal Letter (Requesting removal of Land Register restriction as related to compliance with planning conditions.)
  - Once you have selected the appropriate application type, select "Next" and you will proceed to the Record Type selection.
- The second step is to select which Record Type your application is. These options will be different based on the Application Type you selected in Step 1.
- Once you have selected the appropriate Record Type, select "Next" and you will proceed the General Information section.

Online Application Request Form

1 APPLICATION TYPE — 2 RECORD TYPE —

I am applying for... *

○ PROJECT (PLANNING PERMISSION)

○ A THIRD PARTY PROGRAM PERMIT

○ PERMIT

○ INQUIRY LETTER

Next

Submit New Application | General Information

- In the General Information section, you will be asked basic details regarding the location, property type, ownership type, property use, estimated project cost, and other details. The specific questions differ based on your selections in Step 1 and 2.

- As with all forms, question with a red asterisk (*) are required fields. You will not be able to move forward without answering these questions.

- If there are questions at this step that you need to step away to find the answer to you may select "Save and Leave" at the bottom and return to the form later.

- Once you have filled in all the required fields you proceed to the next step by selecting "Next" at the bottom.

- The system will save your work as you go, you only need to "save" if you plan to "Save and Leave" in order to gather more information before completing the form

Online Application Request Form

APPLICATION TYPE — RECORD TYPE — 3 GENERAL INFORMATION

What Island is the site located on? *

○ LITTLE CAYMAN

○ GRAND CAYMAN

◉ CAYMAN BRAC

Planning / Building Control classification *

◉ DOCK, SEAWALL, DAVIT, BOAT LANDING

Classification of property / use

◉ RESIDENTIAL

○ COMMERCIAL

○ INDUSTRIAL

○ INSTITUTIONAL

Submit New Application | About You

- The "About You" step covers information about the people and businesses involved in the project.

- Each application must have detail on the Agent, Applicant, and Owner.

  - **Agent** | The primary contact on the record, must be a Corporate account. (Previously, business).

  - **Applicant** | The person who the submission is being done on behalf of.

  - **Owner** | The owner of the property where application is occurring. In many cases this is also the applicant.

- Optional "team members" for whom you may include details are the Project Manager and the Project Designer

  - **Project Manager** | This is a Professional account holder. Considered the main Professional contact for the record.

  - **Project Designer** | A back up "agent". Must be a corporate account. Only applicable if the Project Designer differs from the agent.

- Once you have filled in all the required fields you proceed to the next step by selecting "Next" at the bottom.

Online Application Request Form

APPLICATION TYPE — RECORD TYPE — GENERAL INFORMATION — 4 ABOUT YOU

Agent*

Project Manager

Project Designer

Email

Submit New Application | Location

- The Location section allows you to select the Block & Parcel(s) associated with the project.

- Select "Add Location" to see the "Add Location" pop-up.

  - Use search filters for "LandRef" to search by Block or Parcel

  - Narrow your search down by identifying the Island using the "Island" drop down.

  - Select the "Select" arrow at the right of the table row to add a Block & Parcel number to your locations.

- You may identify one Block & Parcel as the primary location by putting the "primary" toggle in the on (purple) position

- If the project is searched for within CW OPS using "Block & Parcel" as a search filter, the "primary" Block & Parcel will be used.

- If a Block & Parcel is added that you wish to remove, use the pink trash can button at the far right of the table row to delete it.

- Once you have added all the Block & Parcel numbers necessary, proceed to the next step by selecting "Next".

Submit New Application | Structure

- In the Structure section you may add names and descriptions of the structures involved in the project.

- Select "Add Structure" to view the "Add Structure" pop-up.

- Select a Structure option from the Structure drop down.

- Describe the structure in the Description text box.

- Save your work using the "Save" button to return to the application form.

- Once you have added all the relevant structures, select "Next" to proceed or "Save and Leave" to save your work and return later to complete the application.

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Submit New Application | Assignment

The Assignment step is where you Assign team members to the project.

- All users added here, Corporate or Professional, will be given access to this record and notified of its progress and related actions.

- Any user that needs to be able to submit application or request inspections / plan reviews related to this record should be added here.

- As the agent, you will be able to manage Assignment to this record later, outside of the form.

- Use the button to add Professional and Corporate users at the bottom of the table. These buttons will display p-pop-ups to search and add their respective user types.

    - Search filters include, Name, Type and Island.

    - Use the Select arrow at the right of the table row to Assign (add) the user to the record.

- Use the pink trash can at the far right of the Assignment Table to remove users.

- Once you have added all the relevant structures, select "Next" to proceed or "Save and Leave" to save your work and return later to complete the application.

Submit New Application | Document

Upload documents associated with your application here.

- Select the "Add Document" button to view the Document upload page.

- In the Document Upload page, select the "Upload Files" button to add documents to the "Upload Bay".

  - You can select multiple files at a time from your system's file browser or drag and drop files into the bay.

  - Use the pink trash can to remove unwanted documents before saving.

- On the right side of the of the Document Upload page are two subtabs, BASIC and ADVANCED. Use these to provide DOP with information related to the documents you are uploading.

  - Documents uploaded in bulk will be given the same corresponding BASIC and ADVANCED data.

  - Documents of differing Types, Subtypes, Statuses, or Structure Name should be uploaded separately.

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Submit New Application | Document

- Select "Save" below the "Upload Bay" to save the documents to the application.

  - You will be returned to the Document Section of the Application where you will see the File uploaded including the documents you added.

  - Select "Add Document" to add additional documents

  - Select "Next" to proceed.

  - Select "Save and Leave" to save your work and return later.

Submit New Application | Review

- The Review step allows you to see all the information added and review it for errors or omissions.

- At the bottom of the page, you will be given four options,

  - **Back**

    - To review previous pages

  - **Preview Fees**

    - A Fee overview page will be displayed from which you can return to the application

  - **Accept & Proceed**

    - If selected, a confirmation pop-up ensuring you intend to Submit this application will appear. Select yes or no.

    - Selecting "Yes" will submit the application. The system will give you a notification at the bottom of the screen in a black pop-up alerting you that the application has been submitted.

    - Additionally, you will see a notification in your Notification center (the bell at the top right of your screen.)

  - **Save & Leave**

    - Save your work and return later. Form is not submitted.

Submit New Application | Payment

- Once submitted, the progress of new applications can be tracked through the "Track New Applications" tab on the left menu bar.

- Once the application status changes to Approved (accepted by DOP) you can make a payment.

- Select the magnifying glass icon on the right end of the table row to view the Record.

- Select the three blue lines in the top right corner of the application form, then "Fees & Payment" to view fees and make a payment.

- Select the payment method you prefer to complete the payment.

- A payment pop-up will come up to enter payment method information.

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Submit New Application | Payment

Once payment has been processed you will see a summary page with the option to Download an invoice or go back to the application.

i101022-141927-57

JKT (balance: $500.00)   DOP-7591-101022-141951-14 `CREATED`

✎ PROCEED PAYMENT   ② DONE

Order Number: DOP-7591-101022-141951-14
Tracking Id: i101022-141927-57
Txn Date: 31-Dec-69
Total Amount: $56.25
Record Number: B22-0620
Land Ref : 20456
Project Name : Duplex Test AET
Applicant : Charlie Wilson
Memo :

Description	Unit	Amount	Quantity	Total
OPS Service Transaction- Electronic	per submission	$10.00	1	$10.00
File Retention Fee	per submission	$25.00	1	$25.00
DISCHARGE PERMIT - Apartment buildings not registered as a Condominium group	By the per apartment	$20.00	1	$20.00
Duplex - Area B	square foot	$1.00	1	$1.00
IFF - Gross floor area of the development and any extension thereto - AREA C	square foot	$0.25	1	$0.25

Back To Application   ⬇ **Download Invoice**

Submit New Application | Download Invoice

- See a sample "Downloaded Invoice" here.
- Invoice downloads to a .pdf for easy sharing and printing

Add New Work | Inspections or Plan Reviews

- Use the "Add New" button in the Quick Access menu bar at the top of the page to add new work, either an Inspection or Plan Review, to an existing record.

- Selecting "Inspection / Plan Review" will bring up the "Add Work" pop-up.

- Use this pop-up to identify which record you want to apply the work to.

- Use the Selection arrow at the right of the search results table to select the record.

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Add New Work | Inspections or Plan Reviews

- Next you will identify the work type, category, and subtype from three subsequent drop-downs.

- Once you have made your selections, click "Proceed" to create the form.

- There will be a black pop-up at the bottom of your screen to alert you that the work has been created.

- The system will then take you to the request form to fill in further details.

- All required details have red asterisks (*)

- Once the all required details are filled in you can use the ≡ button in the top right to Submit. After confirming that you *do* want to Submit, one of two things will happen;

  - If payment is not required, a black notification box will appear at the bottom stating that your form was successfully submitted

  - If there are fees associated with your request, you will be taken to the payment page.

Add Work: INSPECTIONS ✕

✏ Choose Record   ② Select Work Type

WORK TYPE *
INSPECTIONS

Category *
PLUMBING

Type *
ROUGHIN / DWV - (Plumbing Inspection Request Form)

[Proceed]

SUBMIT (Payment)
Fees
Activities

INTERIM ELECTRICAL INSPECTION REQUEST FORM (ELECTRICAL | MAINS) 🪙   i101022-123713-29 NEW

DETAIL   SIGNATURE   DOCUMENT

Preferred Inspection Date*   10/19/2022

DATE OF SUBMISSION   10-Oct-22

IR Origin   JKT Development

Client Ref

APPLICANT INFORMATION

Add New Work | Payment

- After selecting Submit (Payment) you will see the payment screen.

- Select the Payment Option you prefer

- A payment pop-up will come up for you to enter payment information.

Add New Work | Payment

- Once payment is completed you will see the completed summary page to the right.

- You have the option to go "Back to the Application" or "Download the Invoice"

- See invoice sample on next page.

ZHENYA XIA (balance: $500.00)

DOP-7591-101122-110001-5   `CREATED`

✎ PROCEED PAYMENT   ② DONE

Order Number: DOP-7591-101122-110001-5
Tracking Id: i101122-105925-54
Txn Date: 31-Dec-69
Total Amount: $135.00
Record Number: CB-B22-0027
Land Ref : 101C45
Project Name : Junie House
Applicant : June Thomas
Memo :

Description	Unit	Amount	Quantity	Total
OPS Service Transaction- Paper based	each insp.	$25.00	1	$25.00
OPS Service Transaction- Electronic	per submission	$10.00	1	$10.00
Re- inspection after two inspections	each insp.	$100.00	1	$100.00

Back To Application   ⬇ **Download Invoice**

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Add New Work | Payment

- See a sample "Downloaded Invoice" here.
- Invoice downloads to a .pdf for easy sharing and printing

Navigation

Menu Bar | Corporate Account

THE MAIN MENU BAR AT THE LEFT OF THE SYSTEM OUTLINES YOUR NAVIGATION THROUGH COMMUNITY WORKS OPS.

Dashboard

• Shows a high-level overview of all the records you are associated with.

My Jobs

• Powerful search tool to find records you are associated with.

Activity

• Details the plan reviews, inspections and other actions taken on all associated records.

Financial Tracking
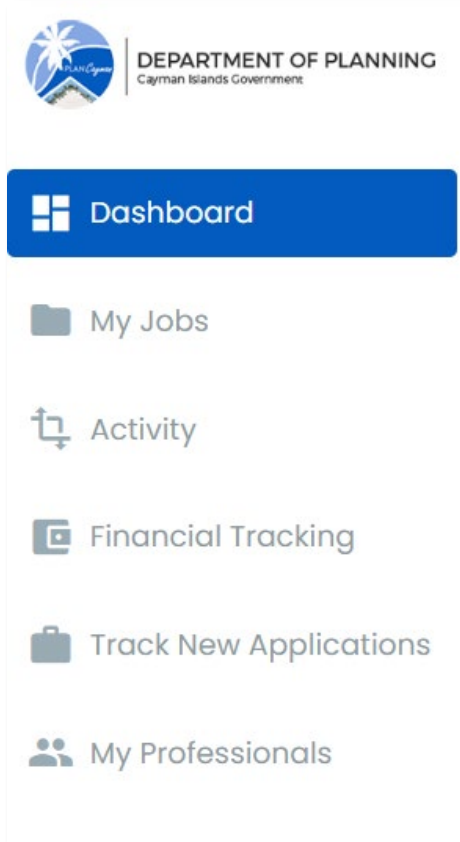
• Shows financial information for associated records.

Track New Applications

• Tracks the status applications originated by you (Corporate User).

My Professionals

• Manage the Professionals on your "team".

Menu Bar | Professional Account

THE MAIN MENU BAR AT THE LEFT OF THE SYSTEM OUTLINES YOUR NAVIGATION THROUGH COMMUNITY WORKS OPS.

DEPARTMENT OF PLANNING
Cayman Islands Government

- Dashboard
- My Jobs
- Activity
- Financial Tracking

Dashboard

• Shows a high-level overview of all the records you are associated with.

My Jobs

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Activity

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Financial Tracking
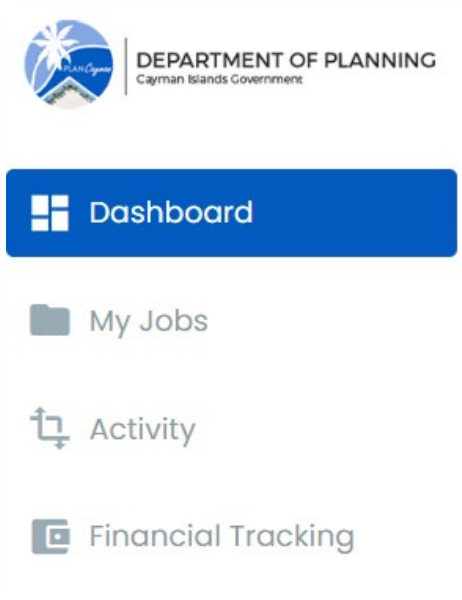
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- From this snapshot view you can,

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  - Add new work using the actions drop down.

  - Open the record to see full details using the ⬈ icon.

My Jobs

A POWERFUL SEARCH TOOL TO FIND RECORDS YOU ARE ASSOCIATED WITH

- The My Jobs section is the main search function in Community Works OPS.

- You can use the Search Records bar to find Records you are associated with.

- Click in the search bar to view this list of search filters.

- Record Class, Subclass, Type, Subtype, Construction Type, and Occupancy Type are all filters you can select from a list.

- You can also narrow your search further by typing in details relevant to Record Number, Project Name, File Number, Parent Record Number, Block and Parcel, Owner, Applicant and then selecting that filter.

My Jobs

A POWERFUL SEARCH TOOL TO FIND RECORDS YOU ARE ASSOCIATED WITH

- The search results table can be set your match your preferences using the [icon] icon.

    - Select fields using the "All Columns" drop down.

    - Rearrange their order by dragging the Title's card into the preferred order.

    - Settings update automatically. Exit to view.

- Use the [icon] icon to download a .csv file of returned search results.

- View summary details on a record with the [i] icon.

- Open to full Record View with the [🔍] icon.

- Use the [⋮] icon to "add a Sub-Record" or "Disconnect" your account from the record.

RECORDS | Record View

RECORD VIEW IS THE HOME FOR ALL INFORMATION REGARDING A PARTICULAR RECORD.

- The "overview subtab" contains a snapshot of the progress made on the record, this is the **Record Progress Card**

  - Here you can expand / condense step categories to see the required work within each category and its current progress status

  - To begin work from the Record Progress card, select the magnifying glass

- Activity Log

  - A real-time log of all activities on the record

RECORDS | Record View - Header Bar

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PERMIT | BUILDING PERMIT – GRAND CAYMAN | **20B71 – ISLAND HOLDINGS LTD**

Toggle through summary details of a record using the icon bank in the header bar of the record view. The text below the icon bank lists (from left to right) the record class, record subtype, Island, primary block and parcel, and the applicant.

⬈ Open the record view in a new tab	🗎 Code Reference
📌 Pin / Unpin the record	🔒 Lock record
🔖 View and navigate record hierarchy	≡ View File Location (physical)
••• See description and summary details	🗃 View File Contents (multiple records)
📅 See dates relevant to the record	⊘ Void record

RECORDS | Record View | Actions

The actions subtab in Record View shows a comprehensive list of Actions applied to the record.

RECORDS | Record View | Plan Review

The Plan Review subtab in Record View shows all Plan Reviews associated with the record in a table. Here you can also add new Plan Reviews by selecting the "Actions" button at the top left of the table.

RECORDS | Record View | Inspections

The Inspections subtab in Record View shows all Inspections associated with the record in a table. Here you can also add new Inspections by selecting the "Actions" button at the top left of the table.

RECORDS | Record View | Decision

The Decision subtab in Record View shows all Decisions associated with the record in a table.

RECORDS | Record View | Information

THE INFORMATION SUBTAB IN THE RECORD VIEW HOLDS AN EXPANDED VERSION OF ALL THE DETAILS REGARDING THAT RECORD.

- **General |** View Record details as entered on form

- **Specific information |** View Record details as entered on form

- **File Location |** View details about the File Number and physical location of the file and its container.

- **Agent & People |** View details about the users and people associated with the record

- **Location** | Use the location section to add additional blocks and parcels to the record or to change which block and parcel is the primary one (used for search results).

- **Building** | Use the Building Detail section to add new Structures to the record or edit details on existing ones

RECORDS | Record View | People

THE PEOPLE SUBTAB IN THE RECORD VIEW DETAILS THE TEAM OF PEOPLE WITH ACCESS TO THIS RECORD.

- The table is separated into two sections, corporate and professional to distinguish between users with corporate account access and those with professional account access.

- Click here for details on capabilities based on account type.

- Corporate Users, as the originator of a Record, can;

  - Add Corporate and Professional users to a record using the Actions > Add drop-down selection

  - Remove users from a record using the detail "dots" icon at the right end of the table row

  - Set / Remove the Agent using the detail "dots" icon at the right end of the table row

  - Manage Document access from the user level using the detail "dots" icon at the end of the table row

RECORDS | Record View | Documents

The Documents subtab in the Record View gives access to any documents associated with the record.

Refresh Data

Download Table

Add Document(s)

Set Table Preferences

Document Details Pop-up

Open Document View Page

RECORDS | Record View | Policy

- The policy subtab in Record View shows the rules applied to actions taken on this record based on which Record Guide the record uses.
- As a Corporate or Professional User this is a view only page.

RECORDS | Financial Tracking

- The Financial Tracking subtab in Record View shows all financial actions that have occurred on a Record.

- This is a view only page.

- If an invoice is available for viewing it will be linked to the ⓘ button at the left of the payment row.

	Date	Num	Name	Paid	Amount	Open Balance
ⓘ	27-May-19	70053	Ingram Brothers Architecture	Yes	–$10.00	$0.00
ⓘ	23-May-19	70027	Ingram Brothers Architecture	Yes	–$10.00	$0.00

RECORDS | Record View | Certificate

The Certificate subtab in Record View shows Certificates issued for the Record.
Users can view and download issued Certificates from the table.

Activity

DETAILS THE PLAN REVIEWS, INSPECTIONS AND OTHER ACTIONS TAKEN ON ALL ASSOCIATED RECORDS

- **There are two sections in Activity,**
  - **Plan Review / Inspection**
    - This is a search results table that can be used to search for Plan Reviews and Inspections applied to records you are connected to.
    - Use the Search bar to filter your search.
  - **Action**
    - This is a search results table that can be used to search for Actions occurring on record you are connected to.
    - Use the Search bar to filter your search.
- Search results table can be downloaded to a .csv file using the ⬇ icon.
- Refresh data using the 🔃 icon.
- View details pop-up using the ⓘ icon.
- Mange table preferences using the 🗒 icon.
- Open Activity with the 🔍 icon .

RECORDS | Record View | Financial Tracking

- The Financial Tracking subtab gives an overview of payments for the record.
- Use the search filters to narrow your search.
- Use the download button at the far right of the invoice row to download an invoice

Corporate Account | Track New Applications

TRACK THE PROGRESS OF THE NEW APPLICATIONS YOU HAVE ORIGINATED.

- Use the Search New Applications bar to filter your search.

- Filters include Record Number, Tracking ID, and Submission Dates

- As with all other search result tables in Community Works OPS, you can navigate the page using the following tools.

  - Search results table can be downloaded to a .csv file using the ⬇ icon.

  - View details pop-up using the ⓘ icon.

  - Mange table preferences using the 🗒 icon.

  - Open form with the 🔍 icon .

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Corporate Account | My Professionals

MANAGE THE ACCOUNTS YOU TYPICALLY WORK WITH ON PROJECTS; THESE ARE YOUR TEAM MEMBERS.

- Select the Actions drop-down then "Add" to connect Professionals to your account.

- This was previously called "Add a Contractor" for Business users.

- In the "Professionals" pop-up use search filters to narrow your search.

  - Search filters include, Name, Type and Island.

  - Use the Select arrow at the right of the table row to connect the professional to your account.

- In the My Professionals table you can use the 🗑 icon to disconnect a Professional from your account.

My Professionals

Actions ⌄

DISPLAY NAME	TYPE		PHONE	EMAIL ADDRESS	STATUS	
Professional	ARCHITECT			Professional@abc.ky	Active	🗑
Lynn	PROJECT MANAGER	ELECTRICIAN	,	Lynn@abc.ky	Active	🗑

@CommunityWorks

Thank you for taking the time to familiarize yourself with our system.

✉ Department of Planning (DOP) | Government Administration Building (GAB)

🖥 www.planning.ky/ops

📧 info@planning.gov.ky

📞 345-244-6501