Tertius User Guide

For Customers and Third-Party Agencies

Contents

Tertius Introduction

Tertius is a online marketplace where DC customers (project owners) are able to connect with Third-Party Inspection Agencies (TPIA) and invite TPIAs to work on their projects. Through Tertius, DCRA will be providing a platform where customers can obtain inspections on their open permits in order to close the respective permit per DC regulations. The Tertius application is built to facilitate access for customers to utilize and choose a TPIA that best suits their needs in order to complete/close their respective permits. Tertius also provides ease of scheduling inspections, uploading and reviewing reports with all documentation in an accessible location for all stakeholders.

Get Started

Refer to this section for instructions on login/registration.

Register for Tertius

Note: As a third-party agency, you will need to be invited to Tertius by DCRA and use the email address where you got the invitation to register.

Requirements

Select a password for your account. It must comply with the following:
- At least 8 character(s)
- At least 1 number(s)
- At least 1 symbol(s)
- At least 1 lowercase letter(s)
- At least 1 uppercase letter(s)
- Does not contain part of username
- Does not contain 'First name'
- Does not contain 'Last name'

Steps

Step 1: Log in to Access DC
Refer to your Tertius invitation email and click on https://tertius.dcra.dc.gov/, once in Tertius click log in on the top right corner of the screen. A new window will open prompting you to log in to Access DC. To register with Access DC:

1. Select the Register button on the Tertius homepage.
2. Select the Register with Access DC button.
3. Choose the sign-up option.
4. Enter the email address where you received the invitation to register for Tertius, password, first name, last name, and mobile phone number.
5. Receive the verification email and verify your email address as directed. Remember to check your spam folders. If you do not receive a verification email, please contact accessdc.dcra@dc.gov.
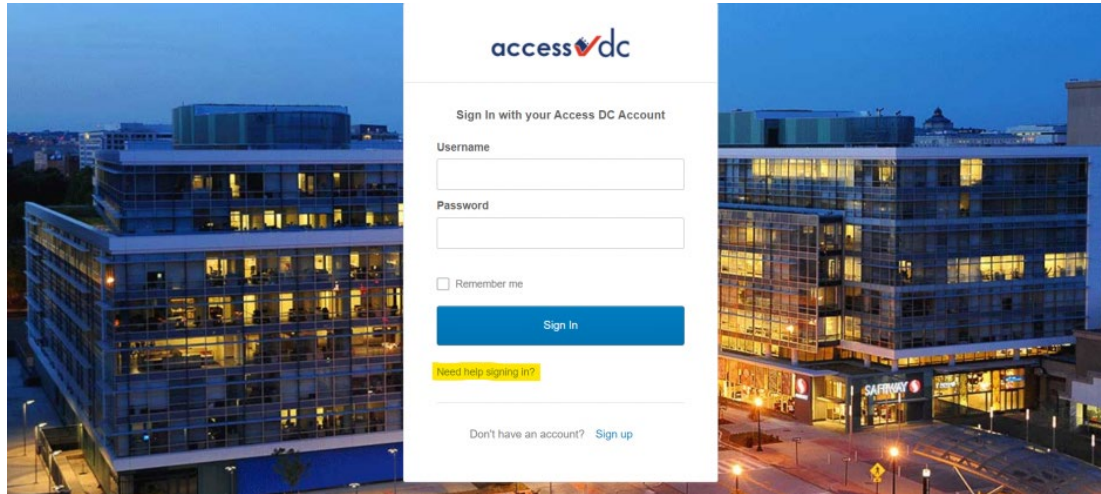
Step 2: Access Tertius
After you verify your email address in Access DC, you will be redirected to your Tertius account.
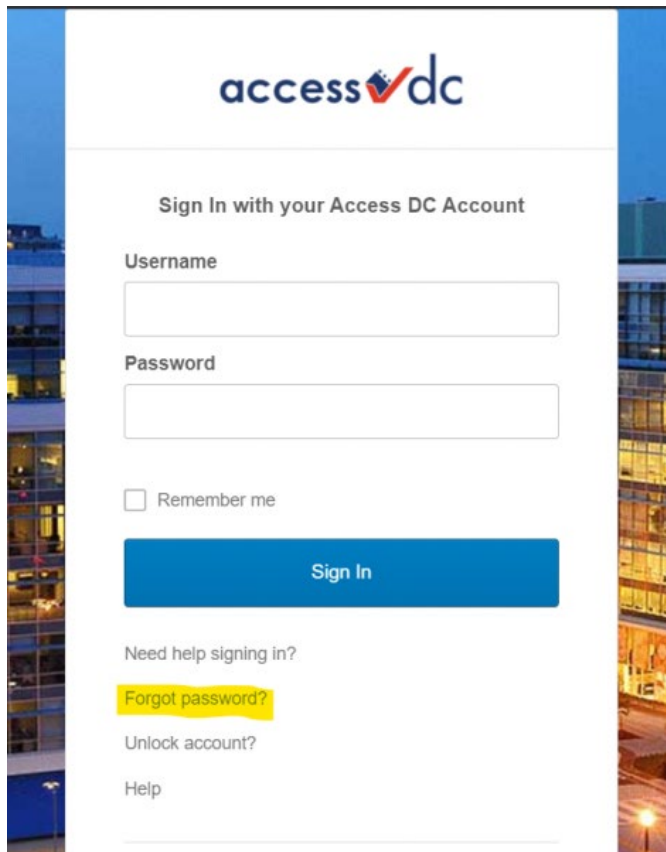
Reset Password

If you forget or need to change your password, visit Access DC and select the "Need help signing in?" option.

Step 1: Select Need help signing in

Step 2: Select Forgot password

Step 3: Enter email and

- if you provided a recovery phone number, reset via SMS or Voice Call
- if you did not provide a recovery phone number, reset via Email

Log in to Tertius

Requirements

If you don't have one yet, follow the steps in this section:
- [Register for Tertius](#)

Steps

Follow these steps to log in to Tertius:

1. Visit https://tertius.dcra.dc.gov/
2. Select Log In at top right.
3. Sign In with your Access DC Account.
4. You will be navigated to the Dashboard

For Customers

Get to know your Dashboard

Requirements

- [Log in to Tertius](#)

Steps

Following log in, you are navigated to the Dashboard, where an overview and the latest information on your projects can be found.

Note: Find the Dashboard from anywhere in the system by selecting the Dashboard button at top left.

Navigate from the Dashboard:
- **Create Project**
- **Request Proposals**
- **Receive proposals**: Proposals received for proposal-based projects.
- **Schedule inspections**: Review Inspections scheduled for accepted and started projects.
- **Reports**: Review submitted Inspection Reports.
- **Menu**: the main menu is at left. Here, access the Dashboard, projects, messages, payments, and user profile.
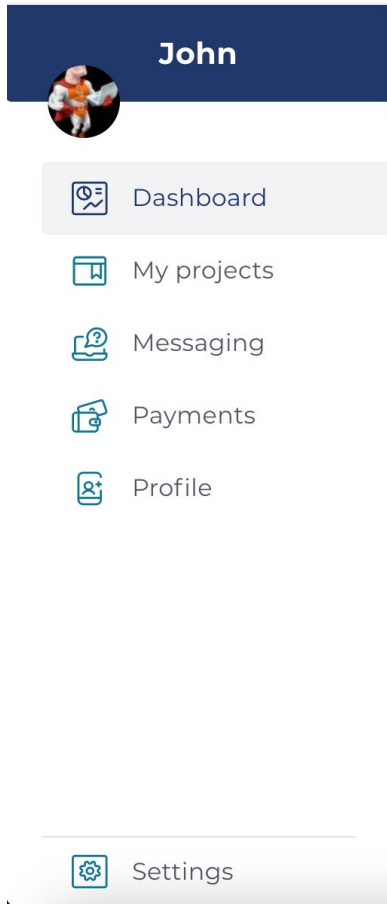
Find an Inspector
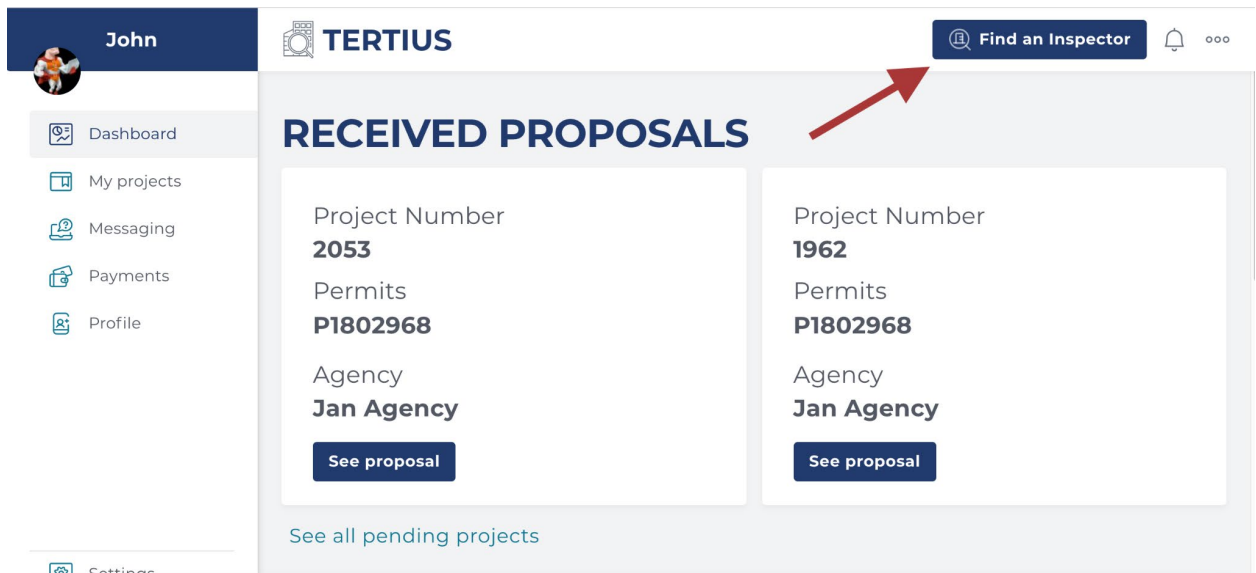
To find an Inspector, first create and submit a project by following the steps below.

Requirements

- [Log in to Tertius](#)

Steps

To search for an Inspector you will need to:

2. Complete the form with the address of the property under construction and Tertius will provide a list of associated open permits. Fields include:
   a. Street Number
   b. Street Number Suffix
   c. Street Name - If the address is a numbered street, please include the "th", "rd", "st", etc. as in 4th Street SW. If the street name includes North, South, East or West, spell out the words, e.g. North Capitol. Please use the full street name, abbreviations are not accepted.
   d. Street Type
      Unit Number
   e. Quadrant
   f. Zip Code
3. Select Continue.

Step 2: Select your permits
1. Accept the Project Terms by checking the checkbox.
2. Select a permit. Tertius displays all open permits for the address. Select any available permit. Permits for which an agency has already been assigned are also listed but you cannot select them. The scope and the list of Inspection types for that permit are displayed.

Check the permit numbers.

☐ P1903248
Cannot be picked, has Agency assigned already

Back   **Add Details**

Check the permit numbers.

☐ **B2101808**

☐ **B2101926**

Back   **Add Details**

3. Select the Add details button.

Step 3: Specify inspection details
1. **When**: Select when you need the Inspection. Select:
    a. Short-term projects: Add preferred time period.
    b. Long-term projects: Add preferred time period.
2. **Additional information**: Add relevant details for the Inspection Agency. For example, "Project will be phased," "Project may have a Conditional Occupancy," etc.
3. **Site contact**: Add contact information for the person responsible at the construction site.
    a. Name
    b. Email Address
    c. Phone Number: format +1 NXX-NXX-XXXX
4. Select Review Project Details: Review and/or edit your entry.

REVIEW AND CONFIRM REQUEST
Check the details of the project you created.

⊙ **ADDRESS**
73 G
ST
SW

⚲ **CUSTOMER**
John Doe

SELECTED PERMITS

BUILDING B2101808

Inspection types (25)   ⌄

This permit includes
TEST Renovating Bathroom and Shower

Edit Permits

PROJECT TIMELINE

Short-term

📅 Oct 3, 2021 - Oct 9, 2021

Edit Time

SITE CONTACT

Mary Smith

✉ mary@email.com

📞 +12345678998

Edit Site Contact

Step 4: Browse agency profiles

1. Below the project details, find a list of available third-party agencies. All agencies listed have the qualifications for the inspection services you specified.
2. Find buttons for each agency depending on services available: Fixed Price, Proposal, or both. Select the best option:

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JAN AGENCY
See Profile

a. **Fixed-Price** construction is more suitable for
   - small projects or
   - a small number of permits and
   - When you need the inspection to be scheduled **as soon as possible**.
   - Only send **one request at a time**
   - The agency has **one hour to accept and schedule**. After one hour or a rejection from the agency, send another fixed-price or proposal-based project.

FIXED PRICE

ⓘ Click on the request inspections button below if you would like to accept this fixed price. **You can only send one fixed price request at a time**. If the agency can do the inspection in the provided time frame they'll schedule inspections in an hour. Otherwise, you can try to book another agency.

Agency:
JAN AGENCY

PROJECT number:
5562

Fixed Price Booking Terms:

test

Price list:

ⓘ Every inspection type under the permits selected for a fixed price project will be performed with the following price list.

Building Permit - $14.00 / inspection
~~Plumbing Permit~~ - $10.00 / inspection

Cancel   Confirm

b. The **Proposal Based**
 ● Send **multiple requests at a time** to selected agencies based on the profile.

PROPOSAL

ⓘ You can request a proposal from the agencies and accept the one that is the best for you.

You are about to send
JAN AGENCY
a request for proposal for
PROJECT NUMBER 5562

Cancel   Confirm

 ● Select Request Proposal and Confirm.

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4. Review your received proposals and accept the agency that best suits your needs.
5. Find all projects and explore details and statuses under Projects.

Projects

Once you have selected your inspection agency and accepted a proposal, view and manage your projects under My Projects. My Projects is organized by tab:

- **Pending**
  Find a list of projects you requested proposals for but have not yet accepted here. It also shows projects for which you have requested a fixed price and the agency hasn't accepted your fixed price project request. Review the search results of available inspection agencies for a project by selecting See Inspectors.
- **Confirmed**
  Find a list of projects for which you have received and accepted the proposal. Select the View and Manage button to explore details and contact the third-party agency to schedule an Inspection.
- **Completed**
  Find a list of finished projects. Find details by selecting the Details button.

Cancel a project

Steps

Projects may be cancelled BEFORE an inspection is scheduled.
- If you **have not accepted a proposal for the project**, cancel by selecting the Cancel Project button next to it under the Pending tab.

- If you **accept a proposal for the project and there is an inspection event scheduled,** only DCRA can cancel the project. Select the View and Manage button next to it under the Confirmed tab. Then, select Cancel project. Complete the form, including an explanation for the cancellation. Then, select Request Cancel. DCRA will review your cancellation request and make a determination. Per DCRA policy a project cannot be cancelled or change inspection agencies once a third-party inspection agency begins a project.

SCHEDULED INSPECTIONS

The table shows your inspection jobs scheduled by your agency. Contact your inspection agency to modify or cancel an inspection job.

📅 **Jun 25, 2021 - Jul 30, 2021**

DATE	TIME	PAY	STATUS	REPORT	PAYMENT
Jul 6, 2021	7:00am - 11:00am	$0.00	In Progress	Open Report	

Contact Agency to Schedule Inspection

Request Cancel Project

When there is inspection scheduled, the project may only be canceled by an administrator

Describe why you need to cancel this project
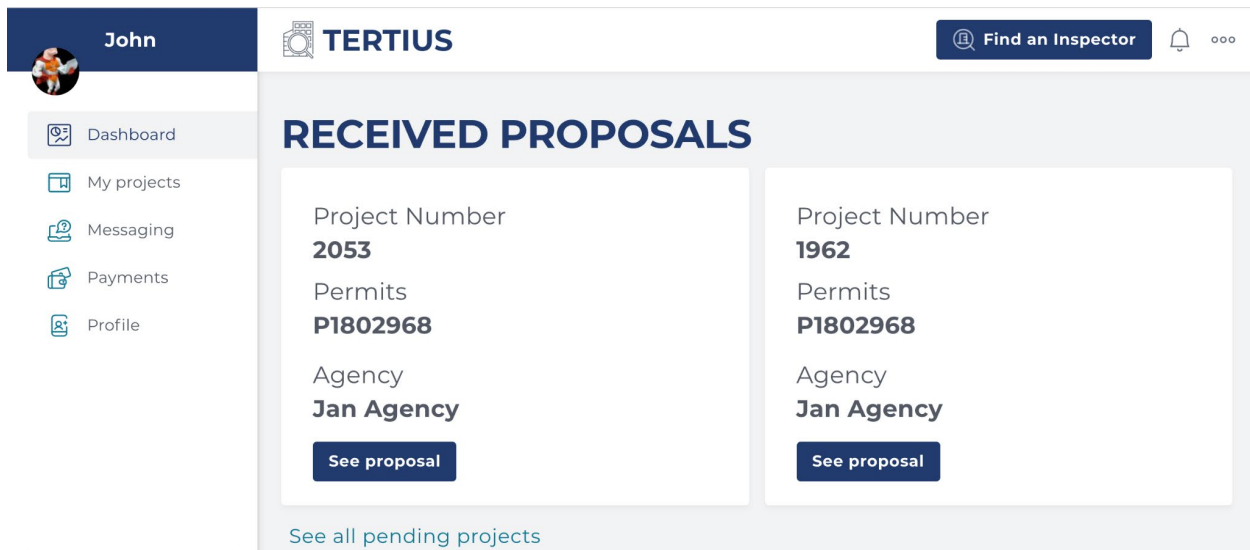
Type here...

0/1000

Request

Manage and Accept Proposals

Requirements

- Get to know your Dashboard
- Find an Inspector
- Send a Message
- Submit a Payment

Steps

1. Select See Proposal.
2. View the detailed information provided in the proposal, including the type of [payment arrangement](#)

PAYMENT ARRANGEMENT

Multiple Inspections Payment
Inspection events are added to an invoice and payment is requested on a regular basis agreed upon between client and agency

ESTIMATED BUDGET

$100.00

test

Project Details   ⌄

Please contact us if you have any questions or need more information. Otherwise, you may accept our proposal and finalize booking your inspection.

Reject proposal   **Accept Proposal**
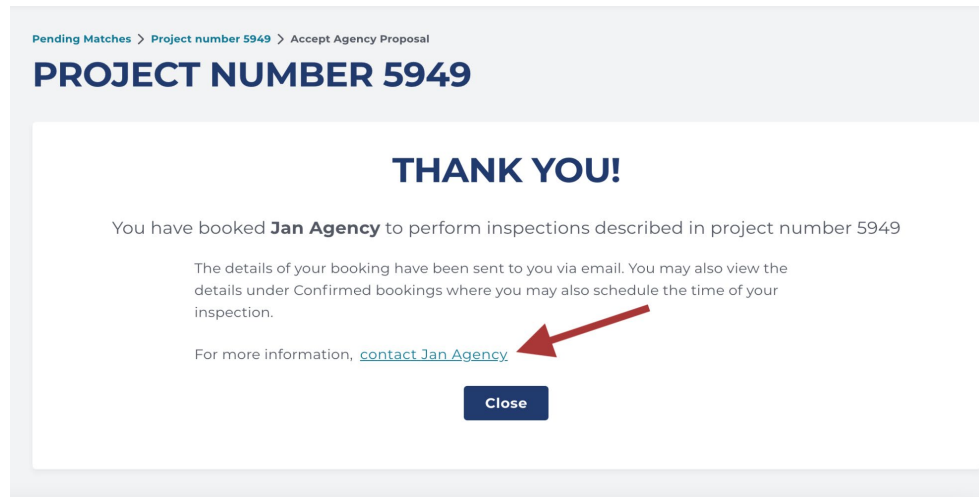
Thank you for your business.

Jan Agency   💬

3. Following proposal review:

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a. **Accept** it: select Accept proposal and complete the checkout process. Find details related to the payment process in the Submit Payment

b. **Reject** it: Select Reject proposal and confirm.

Send a Message

Chat with any third-party agency already contacted and find previous conversations under Messaging. Locate prior conversations using the Search Messages field.

Inbox
Find contacts for any project under Inbox. To start a conversation, select the contact card and type in the chat box. Check Include an Admin to copy DCRA on the conversation. To move a conversation from the Inbox to Archived, select Archive This Conversation.

Archived
Find your archived conversations under Archived. Select a contact card to view the conversation and the Restore this conversation link to move it back to the Inbox.

Submit Payment

Requirements

- [Get to know your Dashboard](#)
- [Find an Inspector](#)
- [Manage and Accept Proposals](#)

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Payment arrangements

There are two payment arrangement types, which the third-party agency specifies in the proposal:

- **Multiple Inspections Payment**: The client pays for inspections in groups or by phase as agreed upon with the third-party agency.
- **Single Inspections Payment**: The third-party agency requests payment after each inspection event.

Payment methods

There are two payment method options:

- **Credit card**: Enter card information and the payment will be charged accordingly.
- **eCheck** (or ACH: Automated Clearing House): Add bank account information and the payment will be electronically transferred from your account to the third-party agency's. Both methods require a transaction fee, but eCheck is lower (no more than $5). Because of the lower fee, eCheck is a better option for larger payments.

Add a credit card or bank information

Depending on the payment method you must add either a credit card, for credit card payment or a bank account for eCheck payment.

Steps

1. Go to Payments, select the Payment information tab.
2. Select Add new Credit/Debit Card, enter your credit card number, expiration date, and CSV.

3. Select Add Card.
4. Find all cards entered on your Payment information page. Delete a card by selecting the trashcan icon next to it and confirming.

Connect new bank account

Click on Connect a new bank account, choose your bank and follow the instructions.

Edit your Profile

Requirements

● [Register for Tertius](#)

Steps

To edit your profile, completed the fields:
● Profile photo: Upload a profile photo (5 MB max). Your photo can be changed anytime.
● First name
● Last name
● Contact phone
● Email

For Third-Party Agencies

Get to know your Dashboard

Requirements

● [Log into Tertius](#)

Steps

Following log in, you are navigated to the Dashboard. Here, find the latest information on your projects.

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Navigate from the Dashboard: