Contractor Portal Quick Start Guide

Table of Contents

Contractor Portal Quick Start Guide

1. Overview

To access the new ePZB online Portal go to URL: https://www.pbcgov.org/ePZB.Admin.WebSPA/#/

Over time, more and more of the business interactions you have with PZ&B will become available on this portal. For now, Contractors may **Renew your Licenses** and **Update your Insurance** after following some set up steps. Below is an overview of the set up and renewal steps. Detailed instructions for each step follow this Overview page.

Apartment Repair Technicians may apply for their certification online. New State Contractor enrollments can also be submitted.

Register a New Account
You will create an Account for yourself

- This is something you only need to do one time.
- Registering an Account will allow you to do business with PZ&B that is specific to you and your licenses/certifications.
- Once you have Registered and then Linked your Licenses to your Account (Contractors only), you may Renew your License.

Link My Licenses (Contractors only)
You will Link your Licenses to the Account you have created

- This is something you only need to do one time for each of your existing Licenses and any new Licenses you may obtain in the future.
- Linking your Licenses to your Account must be performed before you can Renew your Licenses online.

Renew My Licenses
You may then submit your renewal online. PZ&B will then process the renewal. You may monitor the status of your renewal, resubmit, and pay fees via the online portal.

- After Registering your Account and Linking your Licenses, you may Renew your Licenses online as follows
  - From the portal, you submit your renewal online
    - You will see the renewal fees that are due and may pay them at any time during the renewal process.
  - You will receive an email when there is a status change (Returned, Renewed, Rejected)
  - After you have submitted your renewal, you may visit the portal at any time to:
    - View the status (In-Review, Returned, Accepted – Pending Payment, Renewed, Rejected)
    - If it has been returned, you may view the Return Reasons and then resubmit the renewal after you have made the required corrections
    - Pay your fees online. Your license will not be Renewed until it has been Accepted by PZ&B and the renewal fees have been paid. Note that you still have the option to pay your fees by check.

Contractor Portal Quick Start Guide

Update Insurance

If you are Renewing your license, the Insurance will be updated as part of that process. However, Insurance (Bond, General Liability, Workers Comp Insurance and Workers Comp Exemption) may also be updated outside of the Renewal Process.

- The Update Insurance process follows the same steps as License Renewal. You submit the Insurance Updates and it is either Returned, Accepted or Rejected. The Return, Acceptance or Rejection is communicated back to you via email and is also available on the portal.

Apply for New License
Currently, there are two options under Apply for New License:

- Apartment Maintenance Technicians can apply online for their certification.
- State Contractors can now register new licenses with Palm Beach County online.

2. Renew My County Contractor License

The steps below will guide you through the County Contractor Renewal process.

- Have you created and activated an Account? (One-time step you will not have to do again)
- Have you linked your County license to your Account? (One-time step you will not have to do again)
- Initiate your Renewal Request
- Track progress of your Renewal Request.
- Print your Renewed License

2.1 Have you created and activated an Account? (One-time step you will not have to do again)

If you have already created and activated an Account, please skip to step 2.2 – "Have you Linked your License to your Account?"

You must create an Account to interact with the Online Portal. The Online Portal is where you will initiate your Renewal request, stay informed of its progress and print your license when the renewal process is complete.

A Contractor must create the account using their First and Last name as it appears on their license. Accounts should not be created under other names, such as office managers, etc.

2.1.1 Create Your Account

Click the **Register Now** button, complete the User Registration screen and click the **Create Account** button.

Contractor Portal Quick Start Guide

2.1.2 Activate Your Account

You will receive an email containing an **Activation Link** that must be clicked to complete the registration process. **You will not be able to log in to your account** until you have clicked the **Activation Link**. This is a security measure to ensure your email is the one that is actually registered to the account.

Upon successful activation you may sign in.

2.2 Have you linked your County Contractor license to your Account? (One-time step you will not have to do again)

If you have already linked your County Contractor license to your Account, please skip to step 2.3 – "Initiate Renewal Request"

You must link your existing County Contractor license to the Account you have created.

2.2.1 Log in to your Account

2.2.2 Open your Profile. Click the **Menu** button ☰ **Menu** , then click the **My Profile** button 🔳 My Profile

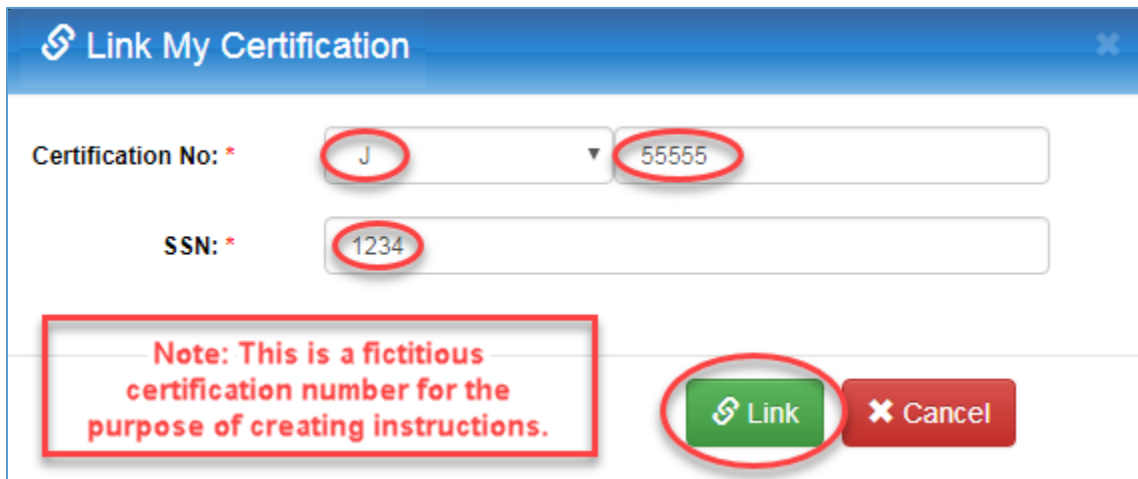**2.2.3 Link your License.** Click **Link My Certification** button 𝒮 Link My Certification . This opens a pop-up where you enter your **Certification Number** and verify with last four digits of your **SSN**. Then click the **Link** button to link the Certification Number to your Account.

You will then see the **Certification** has been added to the bottom of the **Edit Profile** screen and is now successfully linked to your account

2.3 Initiate your Renewal Request.

After you initiate your Renewal request you will be informed of its progress by email.

2.3.1 Go to Renew License. Click the **Menu** button ☰ **Menu** , then click the **Contractors Certification** menu ✱ Contractors Certification ⌄ and then the **Renew License** menu *Renew License*

2.3.2 Initiate your Renewal. If you have multiple licenses, you must first select the license you wish to renew. The first license is selected by default.

Click the **Renew License** button [RENEW LICENSE]

Please read the instructions and click the **Start Renewal** button [Start Renewal] to proceed.

2.3.3   Complete all tabs

2.3.3.1 Qualifier tab

Click or tap the **Qualifier** tab.

License Info section. This displays your Certification Number and the New Expiration date that will take effect once the Renewal process has been completed. Enter all required fields and click the **Save** button [Save].
The **Save** button will not be enabled until all required fields are entered.

Contractor and Company sections. To modify any of the Contractor details, click the **Edit** button [Edit]. You may then make changes and click the **Save** button [Save].

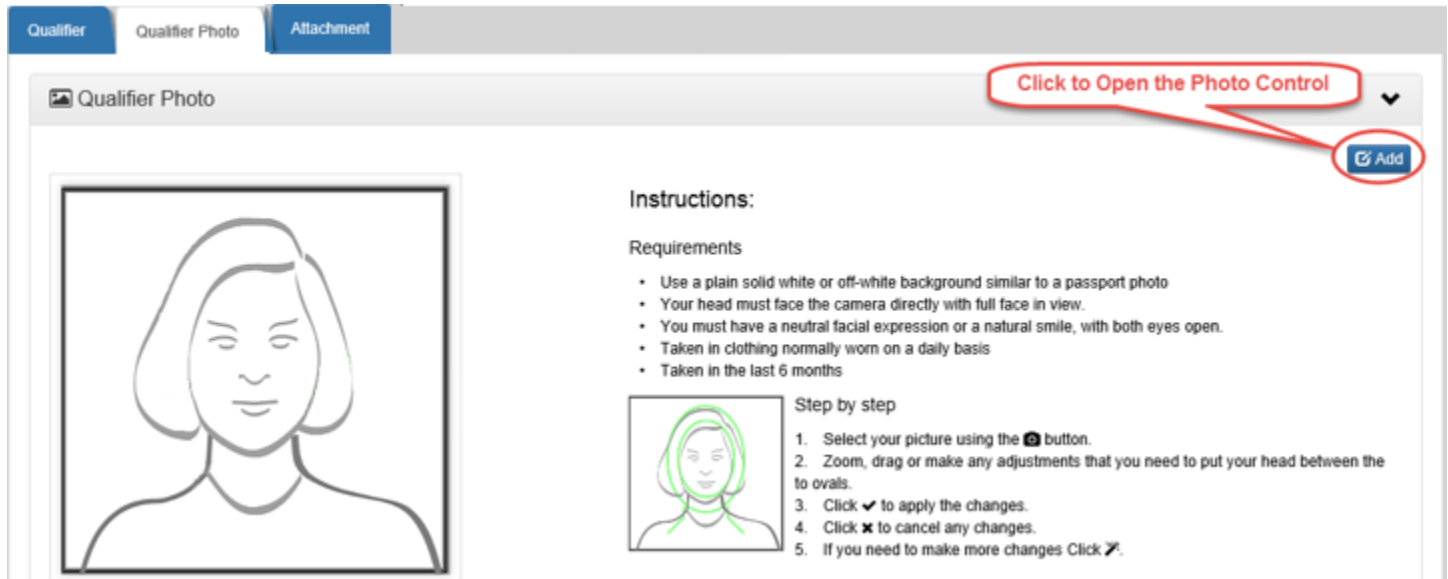Note: you must save all changes before you may proceed to another tab.

2.3.3.2 Qualifier Photo tab

Click or tap the **Qualifier Photo** tab.

Click the [✏ Add] button to open the Photo Control.

Click the [📷] button and navigate to the location of the photo.

The photo must be an image file (.jpg, .png, .gif, .tiff, etc.) You can upload the photo by any of the following ways:

Desktop:

- Double click on the photo file.
- Select the photo file and click the Open button.

Phones and Tablets:

- Click on the Photo Control and use the Camera/Gallery/Photo Library.

Once the photo is in the Control, you can use the edit tools (move, crop, etc.) to center your head in the blue border if necessary. When you are satisfied with the photo, click ✔ to apply the changes. Click the **Save** button ± Save to save.

2.3.3.3 Carrier Info tab

Click or tap the **Carrier info** tab.

- Clicking the Reset button ⟲ Reset prior to Save will return the data to their original values.
- Clicking the Delete button ✖ Delete will remove the insurance entry.
- Click the Save button ± Save to save your changes. Note that all expiration dates must be in the future.

Contractor Portal Quick Start Guide

2.3.3.4 Attachment tab

Click or tap the **Attachment** tab.

On Desktops you may drag and drop a file into the folder icon. **IMPORTANT:** <u>Take care to drop the file directly on the folder</u>. The folder will appear to open when the document is dragged over it. Dropping the file outside the folder replaces the entire screen and you will need to log back in.

On Phones and tablets you click the folder and are prompted to take a photo or use the photo gallery.

IMPORTANT: <u>Please keep the name of the file you attach to less than 50 characters</u>. If you can specify a name for the file, try to use something meaningful that identifies its content, like "Insurance", "Drivers License" etc. The meaningful name is not mandatory, but it is helpful during the review process.

Click the **Submit** button to submit your Renewal for review. Review the Summary page and scroll down to the "**I agree**" checkbox. Click "I agree" and the Submit button .

Contractor Portal Quick Start Guide

Click the Pay Now button [Pay Now] to make your Online Payment or click the Pay Later button to bypass Online Payment if you will be paying at a later time.

2.4 Track the progress of your Renewal Request.

You will receive an email that your Renewal has been Accepted or that it has been Returned if more information is needed to complete your renewal. You may also login to your Account at any time to check the status of your Renewal.

2.4.1 Go to Renew License. Click the **Menu** button [≡ Menu], then click the **Contractors Certification** menu [✸ Contractors Certification ⌄] and then the **Renew License** menu.

2.4.2 See your Renewal Status. Under Recent Activity you will see the status of your Renewal.

- Status of **Draft** means you have started but not yet submitted your Renewal request. Click the [⟳ Click to Continue] button, complete the request and click the Submit button.
- Status of **In-Review** means it is being processed by Contractor Certification staff.
- Status of **Returned** means it has been returned to you. Click the [⟳ Click to Continue] button, make the requested changes (Reasons for the Return are displayed at the top of this screen) and Submit again.
- Status of **Renewed** means your Renewal has been accepted and you may print your renewed license.

2.5 Print your Renewed License.

Once you have been informed your Renewal has been Accepted, the last step is to login to your Account and print your license. **You will not receive a license through the mail.**

2.5.1 Go to Renew License. Click the **Menu** button [≡ Menu], then click the **Contractors Certification** menu [✸ Contractors Certification ⌄] and then the **View/Print License** menu [View/Print License].

2.5.2 View License Info. Click the **View License Info** button [ⓘ VIEW LICENSE INFO] to view info and to see the **Print Certificate** button.

2.5.3 Print your License. Click the **Print Certificate** button [🖨 Print Certificate]. Your license will be generated and you may then print it. You may print your license as many times as you wish.

3. Renew My Journeyman License

The steps below will guide you through the Journeyman Renewal process.

- Have you created and activated an Account? (One-time step you will not have to do again)
- Have you linked your Journeyman license to your Account? (One-time step you will not have to do again)
- Initiate your Renewal Request
- Track progress of your Renewal Request.
- Print your Renewed License

3.1 Have you created and activated an Account? (One-time step you will not have to do again)

If you have already created and activated an Account, please skip to step 3.2 – "Have you Linked your License to your Account?"

You must create an Account to interact with the Online Portal. The Online Portal is where you will initiate your Renewal request, stay informed of its progress and print your license when the renewal process is complete.
A Journeyman must create the account using their First and Last name as it appears on their license. Accounts should not be created under other names, such as office managers, etc.

3.1.1 Create Your Account

Click the **Register Now** button, complete the User Registration screen and click the **Create Account** button.

Contractor Portal Quick Start Guide

3.1.2 Activate Your Account

You will receive an email containing an **Activation Link** that must be clicked to complete the registration process.
You will not be able to log in to your account until you have clicked the **Activation Link**. This is a security measure to ensure your email is the one that is actually registered to the account.

Upon successful activation you may sign in.

3.2 Have you linked your Journeyman license to your Account? (One-time step you will not have to do again)

If you have already linked your Journeyman license to your Account, please skip to step 3.3 – "Initiate Renewal Request"

You must link your existing Journeyman license to the Account you have created.

3.2.1 Log in to your Account

3.2.2 Open your Profile. Click the **Menu** button ☰ Menu, then click the **My Profile** button 🖼 My Profile

3.2.3 Link your License. Click **Link My Certification** button 🔗 Link My Certification . This opens a pop-up where you enter your **Certification Number** and verify with last four digits of your **SSN**. Then click the **Link** button to link the Certification Number to your Account.

You will then see the **Certification** has been added to the bottom of the **Edit Profile** screen and is now successfully linked to your account

3.3 Initiate your Renewal Request.

After you initiate your Renewal request you will be informed of its progress by email.

3.3.1 Go to Renew License. Click the **Menu** button ☰ Menu, then click the **Contractors Certification** menu
⚙ Contractors Certification ⌄ and then the **Renew License** menu Renew License

3.3.2 Initiate your Renewal. Click the **Renew License** button ⟳ RENEW LICENSE

Contractor Portal Quick Start Guide

3.3.3 Complete all tabs

3.3.3.1 Qualifier tab

Click or tap the **Qualifier** tab.

License Info section. This displays your Certification Number and the New Expiration date that will take effect once the Renewal process has been completed.

Journeyman section. This displays the Journeyman details.
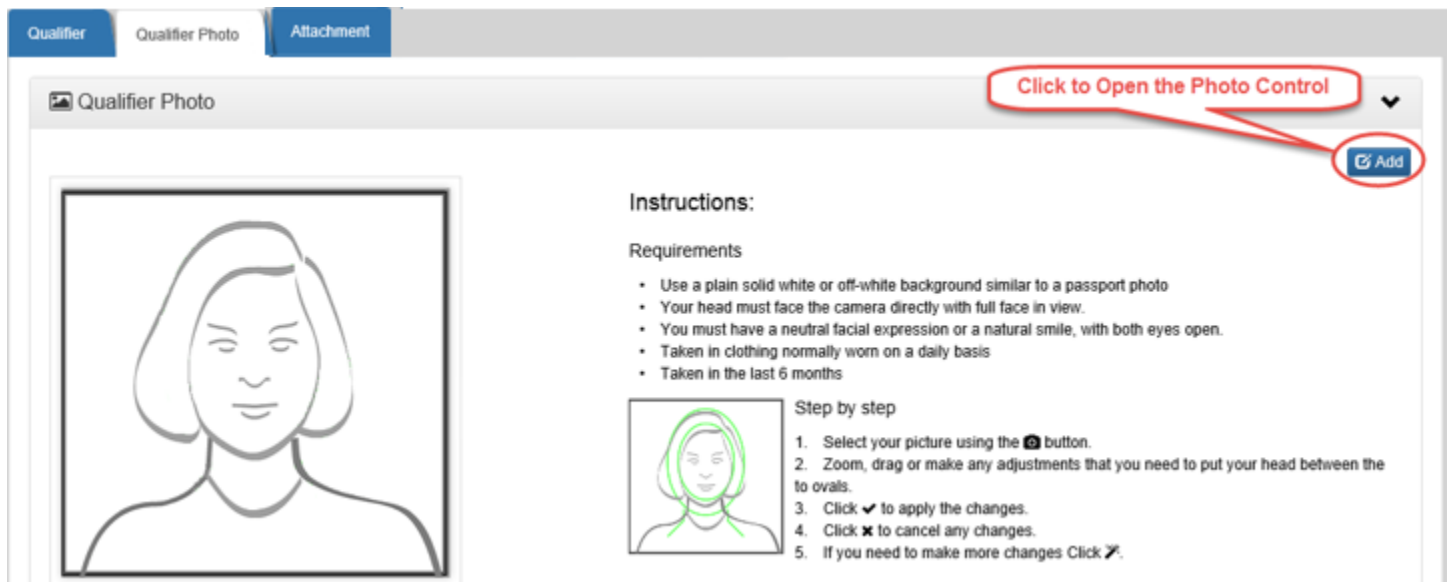
To modify any of the Journeyman details, click the **Edit** button ☑ Edit . You may then make changes and click the

Save button ⬇ Save .

Note: you must save all changes before you may proceed to another tab.

3.3.3.2 Qualifier Photo tab

Click or tap the **Qualifier Photo** tab.

Click the ☑ Add button to open the Photo Control.

Contractor Portal Quick Start Guide

Click the [📷] button and navigate to the location of the photo.
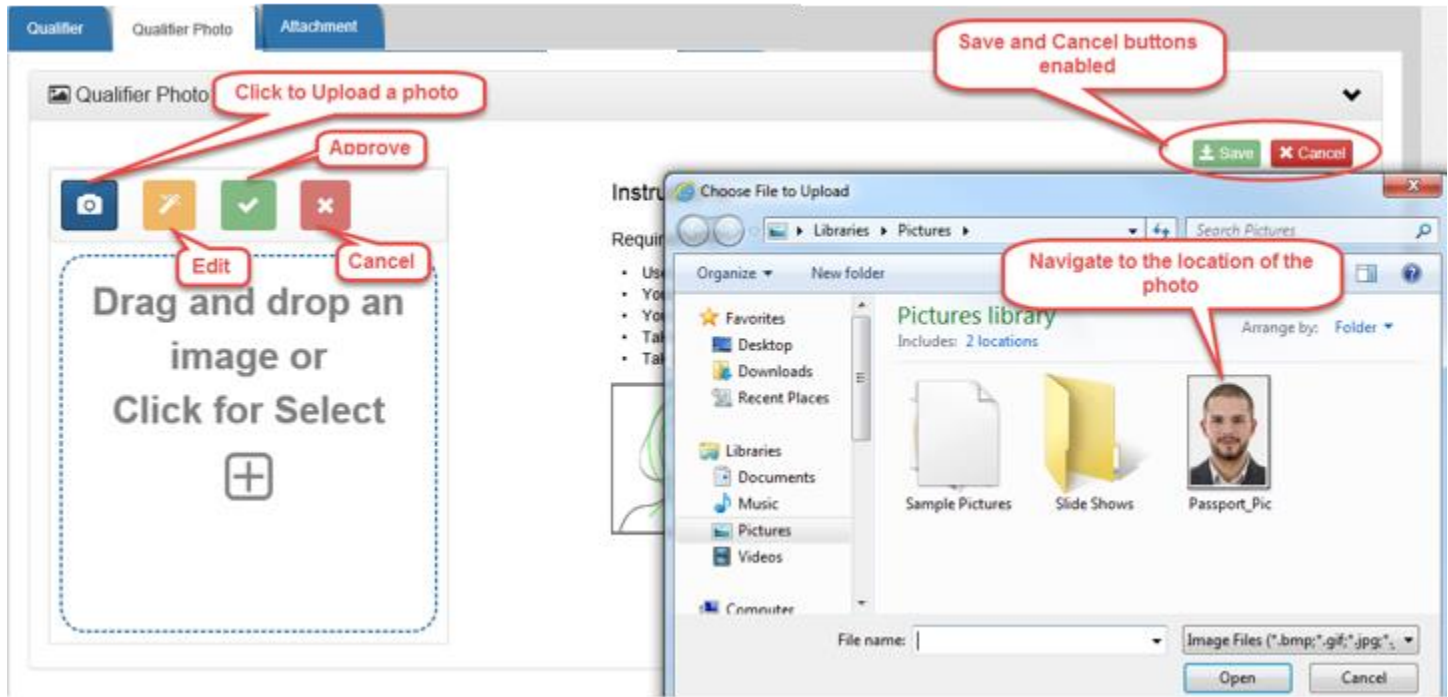
The photo must be an image file (.jpg, .png, .gif, .tiff, etc.) You can upload the photo by any of the following ways:

Desktop:

- Double click on the photo file.
- Select the photo file and click the Open button.

Phones and Tablets:

- Click on the Photo Control and use the Camera/Gallery/Photo Library.
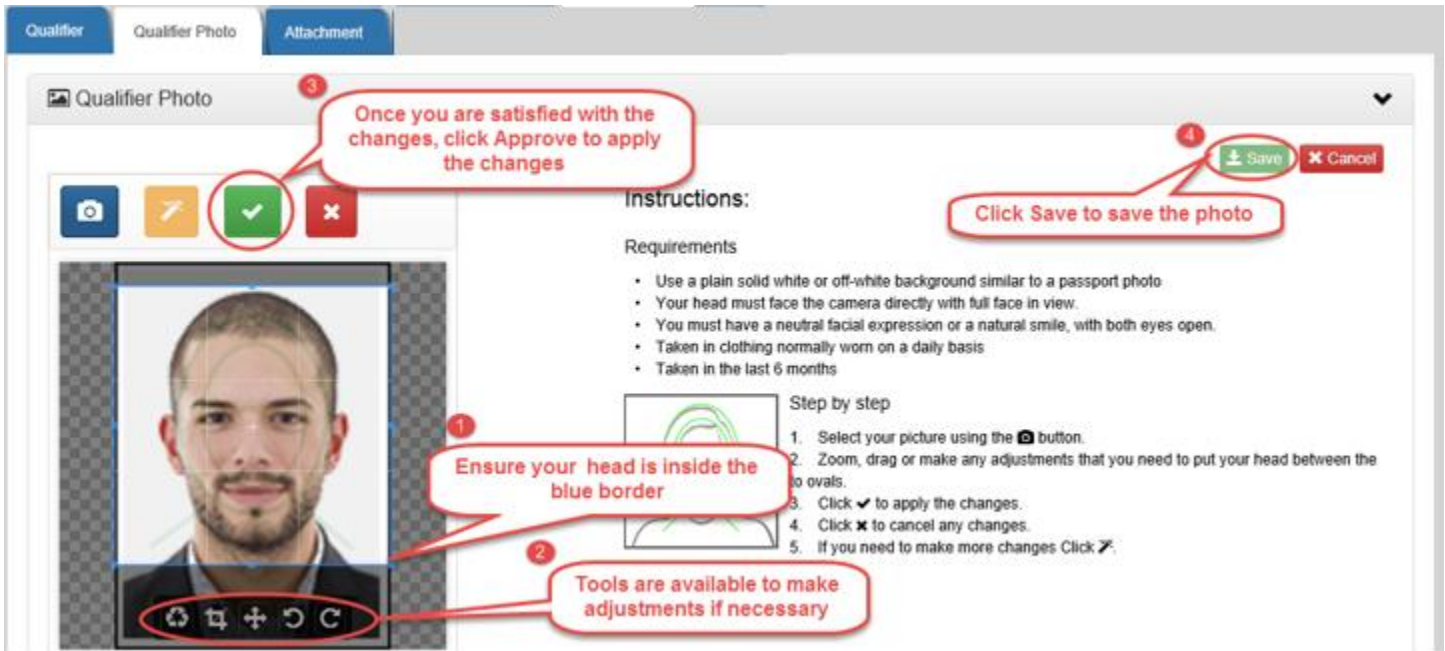
Once the photo is in the Control, you can use the edit tools (move, crop, etc.) to center your head in the blue border if necessary. When you are satisfied with the photo, click [✓] to apply the changes. Click the **Save** button [± Save] to save.

3.3.3.3 Attachment tab

Click or tap the **Attachment** tab.

On Desktops you may drag and drop a file into the folder icon. **IMPORTANT:** Take care to drop the file directly on the folder. The folder will appear to open when the document is dragged over it. Dropping the file outside the folder replaces the entire screen and you will need to log back in.

On Phones and tablets you click the folder and are prompted to take a photo or use the photo gallery.

IMPORTANT: Please keep the name of the file you attach to less than 50 characters. If you can specify a name for the file, try to use something meaningful that identifies its content, like "Insurance", "Drivers License" etc. The meaningful name is not mandatory, but it is helpful during the review process.

Click the **Submit** button to submit your Renewal for review

3.4 Track the progress of your Renewal Request.

You will receive an email that your Renewal has been Accepted or that it has been Returned if more information is needed to complete your renewal. You may also login to your Account at any time to check the status of your Renewal.

3.4.1 Go to Renew License. Click the **Menu** button ☰ Menu , then click the **Contractors Certification** menu ⚙ Contractors Certification ⌄ and then the **Renew License** menu.

3.4.2 See your Renewal Status. Under Recent Activity you will see the status of your Renewal.

- Status of **Draft** means you have started but not yet submitted your Renewal request. Click the
  ↻ Click to Continue button, complete the request and click the Submit button.
- Status of **In-Review** means it is being processed by Contractor Certification staff.
- Status of **Returned** means it has been returned to you. Click the ↻ Click to Continue button, make the requested changes (Reasons for the Return are displayed at the top of this screen) and Submit again.
- Status of **Renewed** means your Renewal has been accepted and you may print your renewed license.

Contractor Portal Quick Start Guide

3.5 Print your Renewed License.

Once you have been informed your Renewal has been Accepted, the last step is to login to your Account and print your license. **You will not receive a license through the mail.**

3.5.1 **Go to Renew License.** Click the **Menu** button ☰ Menu, then click the **Contractors Certification** menu ❋ Contractors Certification ⌄ and then the **View/Print License** menu View/Print License.

3.5.2 **View License Info.** Click the **View License Info** button ❶ VIEW LICENSE INFO to view info and to see the **Print Certificate** button.

3.5.3 **Print your License.** Click the **Print Certificate** button 🖨 Print Certificate. Your license will be generated and you may then print it. You may print your license as many times as you wish.

4. Update My Insurance

Insurance may be updated for both County and State Contractors at any time.
The steps below will guide you through the Insurance Update process.

- Have you created and activated an Account? (One-time step you will not have to do again)
- Have you linked your license to your Account? (One-time step you will not have to do again)
- Initiate your Insurance Update Request
- Track progress of your Insurance Update Request
- View your Updated Insurance information

4.1 Have you created and activated an Account? (One-time step you will not have to do again)

If you have already created and activated an Account, please skip to step 4.2 – "Have you Linked your License to your Account?"

You must create an Account to interact with the Online Portal. The Online Portal is where you will initiate your Insurance Update request and stay informed of its progress until the Insurance Update process is complete.
A Contractor must create the account using their First and Last name as it appears on their license. Accounts should not be created under other names, such as office managers, etc.

4.1.1 Create Your Account

Click the "**Register Now**" button and complete the User Registration screen and click the "**Create Account**" button.

4.1.2 Activate Your Account

You will receive an email containing an **Activation Link** that must be clicked to complete the registration process.
You will not be able to log in to your account until you have clicked the **Activation Link**. This is a security measure to ensure your email is the one that is actually registered to the account.

Upon successful activation you may sign in.

4.2 Have you linked your license to your Account? (One-time step you will not have to do again)

If you have already linked your license to your Account, please skip to step 4.3 – "Initiate your Insurance Update Request"

You must link your existing license to the Account you have created.

4.2.1 Log in to your Account

4.2.2 Open your Profile. Click the **Menu** button ☰ **Menu**, then click the **My Profile** button 🖼️ My Profile

4.2.3 Link your License. Click **Link My Certification** button 🔗 Link My Certification . This opens a pop-up where you enter your **Certification Number** and verify with last four digits of your **SSN** or your **PIN** as instructed on the screen. Then click the Link button to link the Certification Number to your Account.
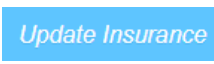
You will then see the **Certification** has been added to the bottom of the **Edit Profile** screen and is now successfully linked to your account

4.3 Initiate your Insurance Update Request.

After you initiate your Insurance Update request you will be informed of its progress by email.

4.3.1 Go to My License. Click the **Menu** button ☰ **Menu**, then click the **Contractors Certification** menu
⚙️ Contractors Certification ∨ and then the **Update Insurance** menu Update Insurance
4.3.2 Initiate your Insurance Update.
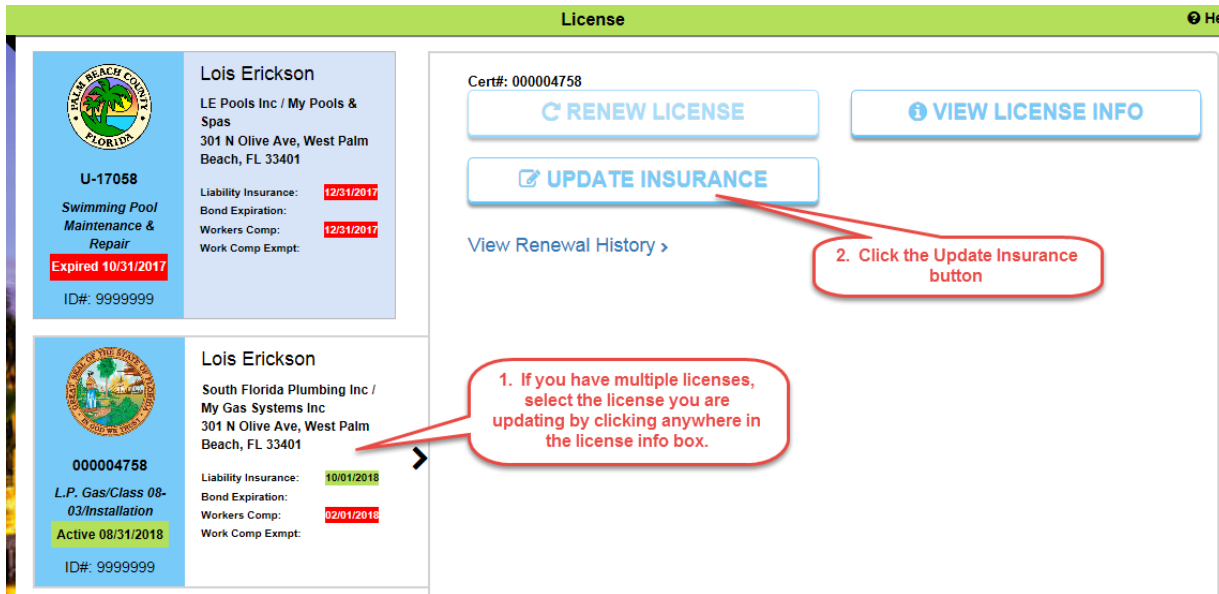
4.3.3 Complete all tabs

4.3.3.1 Carrier Info tab

Click or tap the **Carrier info** tab.

Enter the Carrier Info and use the buttons as follows:

- Clicking the Reset button ⟳ Reset prior to Save will return the data to their original values.
- Clicking the Delete button ✖ Delete will remove the insurance entry.
- Click the Save button ⬆ Save to save your changes. Note that all expiration dates must be in the future.

4.3.3.2 Attachment tab

Click or tap the **Attachment** tab.

On Desktops you may drag and drop a file into the folder icon. **IMPORTANT:** Take care to drop the file directly on the folder. The folder will appear to open when the document is dragged over it. Dropping the file outside the folder replaces the entire screen and you will need to log back in.

On Phones and tablets you click the folder and are prompted to take a photo or use the photo gallery.

IMPORTANT: Please keep the name of the file you attach to less than 50 characters. If you can specify a name for the file, try to use something meaningful that identifies its content, like "Insurance", "Drivers License" etc. The meaningful name is not mandatory, but it is helpful during the review process.

Click the **Submit** button to submit your Insurance Update request for review

4.4 Track progress of your Insurance Update Request.

You will receive an email that your Insurance Update has been Accepted or that it has been Returned if more information is needed to complete your Insurance Update. You may also login to your Account at any time to check the status of your Insurance Update.

4.4.1 Go to My License. Click the **Menu** button [≡ Menu] , then click the **Contractors Certification** menu [✳ Contractors Certification ⌄] and then the **Update Insurance** menu.

4.4.2 See your Insurance Update Status. Under Recent Activity you will see the status of your Insurance Update.

- Status of **Draft** means you have started but not yet submitted your Update Insurance request. Click the [↻ Click to Continue] button, complete the request and click the Submit button.
- Status of **In-Review** means it is being processed by Contractor Certification staff.
- Status of **Returned** means it has been returned to you. Click the [↻ Click to Continue] button, make the requested changes (Reasons for the Return are displayed at the top of this screen) and Submit again.
- Status of **Accepted** means your Insurance Update is complete.

5. Enroll State Contractor

The steps below will guide you through the first time Enrollment of a State Contractor with Palm Beach County. After you complete this one time Enrollment, you may Renew your license and Update your Insurance in the future using the same online account.

- Have you created and activated an Account? (One-time step you will not have to do again)
- Initiate your Enrollment Request
- Track progress of your Enrollment Request.
- View your Enrolled License.

5.1 Have you created and activated an Account? (One-time step you will not have to do again)

If you have already created and activated an Account, please skip to step 5.2 – "Initiate your Enrollment Request"

You must create an Account to interact with the Online Portal. The Online Portal is where you will initiate your Renewal request, stay informed of its progress and view your enrolled license when the enrollment process is complete.
A State Contractor must create the account using their First and Last name as it appears on their license. Accounts should not be created under other names, such as office managers, etc.

5.1.1 Create Your Account

Click the "**Register Now**" button and complete the User Registration screen and click the "**Create Account**" button.

User Registration

Email:*	
	Confirmation and Instructions will be sent to this E-mail. If you do not receive the profile activation email within 1 hour, please check your SPAM folder.
Confirm Email:*	
Password:*	
Confirm Password:*	
First Name:*	
Middle Name:	
Last Name:*	
Suffix:	
Contact Phone:*	(__)__-____
Address:*	UNITED STATES
	Street Address
	City
	Florida
	Zip

Complete the fields on the screen and then check the box for "I'm not a robot"

| Company Name: | |

☐ I'm not a robot — reCAPTCHA Privacy - Terms

&+ Create Account   **✕ Cancel**

Contractor Portal Quick Start Guide

5.1.2 Activate Your Account

You will receive an email containing an **Activation Link** that must be clicked to complete the registration process. **You will not be able to log in to your account** until you have clicked the **Activation Link**. This is a security measure to ensure your email is the one that is actually registered to the account. **Note: If you do not receive this email soon after registering, please check your Junk and Spam folders.**

Upon successful activation you may sign in.
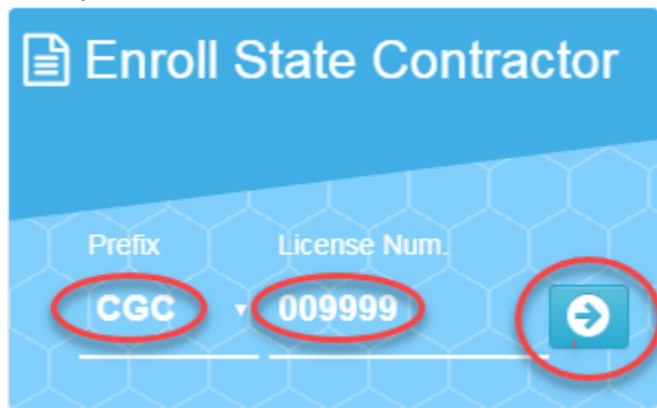
5.2 Initiate your State Enrollment Request.

After you initiate your State Enrollment request you will be informed of its progress both by email or by logging into your Account.

5.2.1 Go to My License. Click the **Menu** button [☰ Menu], then click the **Contractors Certification** menu

[⚙ Contractors Certification ⌄] and then the **Apply for New License** menu [Apply For New License]

5.2.2 Initiate your Renewal.

Enter your State License "**Prefix**" and "**License Number**" in the Enroll State Contractor fields. Click the **continue arrow**.

📄 Enroll State Contractor

Prefix: CGC
License Num.: 009999
[→]

Please Read the Instructions and click the **Start Enrollment** button [Start Enrollment]

5.2.3 Complete all tabs

5.2.3.1 State Contractor Info tab

Click or tap the **State Contractor Info** tab.

Building Permits section. Enter the **Primary** or **Fee Sub Permit** number of your PBC Building permit. This is to confirm you will be performing work in unincorporated Palm Beach County.

You will receive a **Valid Checkmark** [✓ Valid] once the system has validated the Primary/Fee Sub permit.

Contractor Portal Quick Start Guide

State Contractor Info section. This system automatically populates the State License "**Prefix**" and "**License Number**" you entered when you initiated the enrollment.

Complete the remaining fields and click the **Save** button .
Note: The Save button is not enabled until you have entered all required fields (designated by a red asterisk *).
Note: you must save all changes before you may proceed to another tab.

After clicking **Save** it will be replaced with an **Edit** button , click it and you may then make changes and click the **Save** button .

5.2.3.2 Applicant tab

Click or tap the **Applicant** tab.

Complete the fields and click the **Save** button .

After clicking **Save** it will be replaced with an **Edit** button , click it and you may then make changes and click the **Save** button .

5.2.3.3   Company tab

Click or tap the **Company** tab.

Complete the **Company** fields and click the **Save** button .

After clicking **Save** it will be replaced with an **Edit** button , click it and you may then make changes and click the **Save** button .

The **DBA** section appears after the Company section has been saved.

Next complete the **DBA** fields and click the **Save** button

After clicking **Save** it will be replaced with an **Edit** button , click it and you may then make changes and click the **Save** button .

5.2.3.4   Carrier Info tab

Click or tap the **Carrier info** tab.

Enter the Carrier Info and use the buttons as follows:

- Clicking the **Reset** button ⟲ Reset prior to Save will return the data to their original values.
- Clicking the Delete button ✖ Delete will remove the insurance entry.
- Click the **Save** button ⬆ Save to save your changes. Note that all expiration dates must be in the future.

5.2.3.5 Attachment tab

Click or tap the **Attachment** tab.

On Desktops you may drag and drop a file into the folder icon. **IMPORTANT:** Take care to drop the file directly in the designated area. Dropping the file outside the designated area replaces the entire screen and you will need to log back in.

On Phones and tablets you click the designated area and are prompted to take a photo or use the photo gallery.

IMPORTANT: Please keep the name of the file you attach to less than 50 characters. If you can specify a name for the file, try to use something meaningful that identifies its content, like "Insurance", "Drivers License" etc. The meaningful name is not mandatory, but it is helpful during the review process.
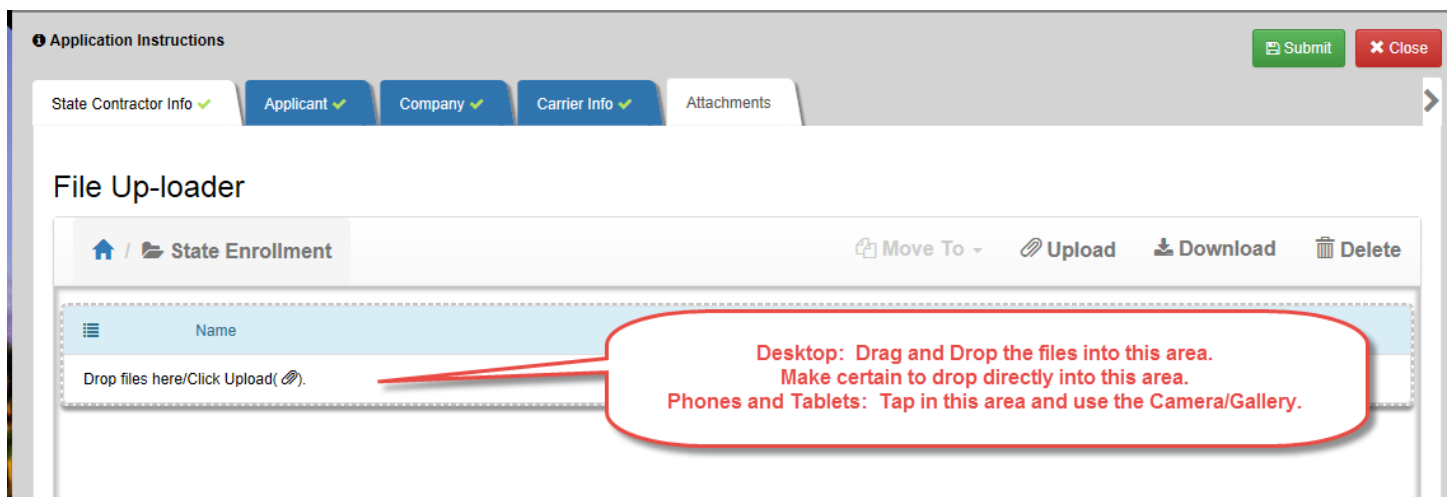
Click the **Submit** button 🖫 Submit to submit your State Enrollment for review.

You will see your Enrollment Request under **Pending/Recent Applications** with a status of **In-Review**.

5.3 Track progress of your State Enrollment Request.

You will receive either an email that your State Enrollment request has been **Accepted** or that it has been **Returned** if more information is needed to complete your Enrollment. You may also login to your Account at any time to check the status of your Enrollment.

5.3.1 Go to My License. Click the **Menu** button ☰ **Menu** , then click the **Contractors Certification** menu

⬡ Contractors Certification ⌄ and then the **Apply for New License** menu **Apply For New License**

5.3.2 See your State Enrollment Status. Under "Pending/Recent Applications" you will see the status of your Enrollment.

- Status of **In-Review** means it is being processed by Contractor Certification staff
- Status of **Returned** means it has been returned to you. Click the ⟳ Click to Continue button, make the requested changes (Reasons for the Return are displayed at the top of this screen) and Submit again.
- Status of **Approved** means your Enrollment is complete and you may pull permits and view your license.

5.4 View your State Enrolled License.

Once you have been informed your Application has been **Accepted** you may use your license to pull permits. You may login to your Account and view your license information. This step is not necessary, but is a good way to verify your information is correct.

5.4.1 Go to My License. Click the **Menu** button ☰ **Menu** , then click the **Contractors Certification** menu

⬡ Contractors Certification ⌄ and then the **View/Print License** menu *View/Print License* .

5.4.2 View License Info. Click the **View License Info** button ⓘ **VIEW LICENSE INFO**   to view your license info.

6. Apply for Apartment Maintenance Technician Certification

The steps below will guide you through the Apartment Maintenance Technician Certification process.

- Have you created and activated an Account? (One-time step you will not have to do again)
- Initiate your Application Request
- Track progress of your Application Request.
- Print your License

6.1 Have you created and activated an Account? (One-time step you will not have to do again)

If you have already created and activated an Account, please skip to step 6.2 – "Apply for Apartment Maintenance Technician Certification"

You must create an Account to interact with the Online Portal. The Online Portal is where you will initiate your Apartment Maintenance Technician Certification application request, stay informed of its progress and print your license when the application process is complete.

An Apartment Maintenance Technician applicant must create the account using their First and Last name as it appears on their license. Accounts should not be created under other names, such as office managers, etc.

6.1.1 Create Your Account

Click the **Register Now** button and complete the User Registration screen and click the **Create Account** button.

6.1.2 Activate Your Account

You will receive an email containing an **Activation Link** that must be clicked to complete the registration process. **You will not be able to log in to your account** until you have clicked the **Activation Link**. This is a security measure to ensure your email is the one that is actually registered to the account.

Upon successful activation you may sign in.

6.2 Apply for Apartment Maintenance Technician Certification

Click the **Menu** icon and you will see the side menu.

Click on the **Contractor Certification** menu and then **Apply For New License**.

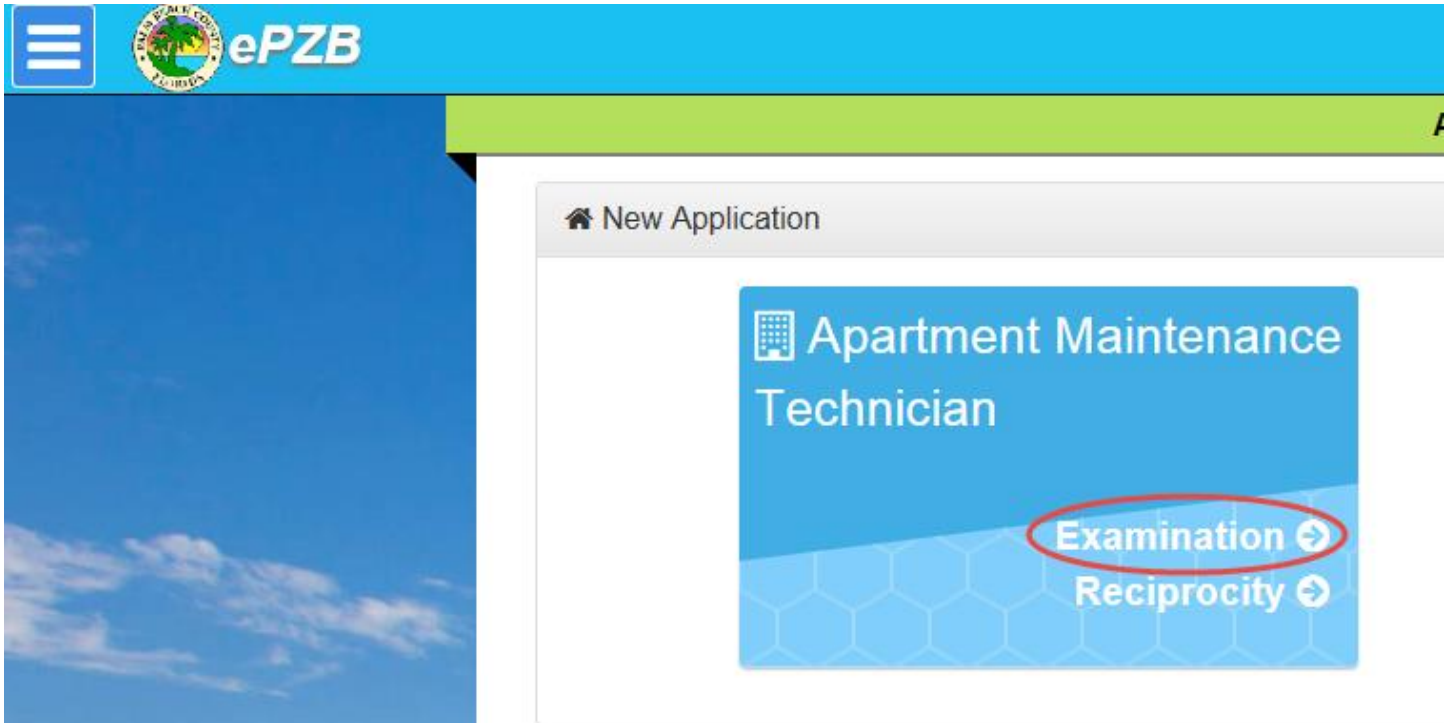This opens the **Apply for New License** page. Click the **Examination** link under **Apartment Maintenance Technician** to begin an application.

Clicking **Examination** opens the **Application Instructions** page. Please read the instructions and click the **Start** button to proceed. This opens the **Apartment Maintenance Technician Exam** page.

6.3 Complete the Application information and Submit

6.3.1 Applicant tab

Click or tap the **Applicant** tab.

Enter your Full Legal Name, Citizenship Status, Residential Address, and Contact Information and click the **Save** button.

 A check mark will appear on each tab indicating you have completed entering information on that tab.

✔ Applicant

Once saved, to edit any of the entered data, click the **Edit** button.

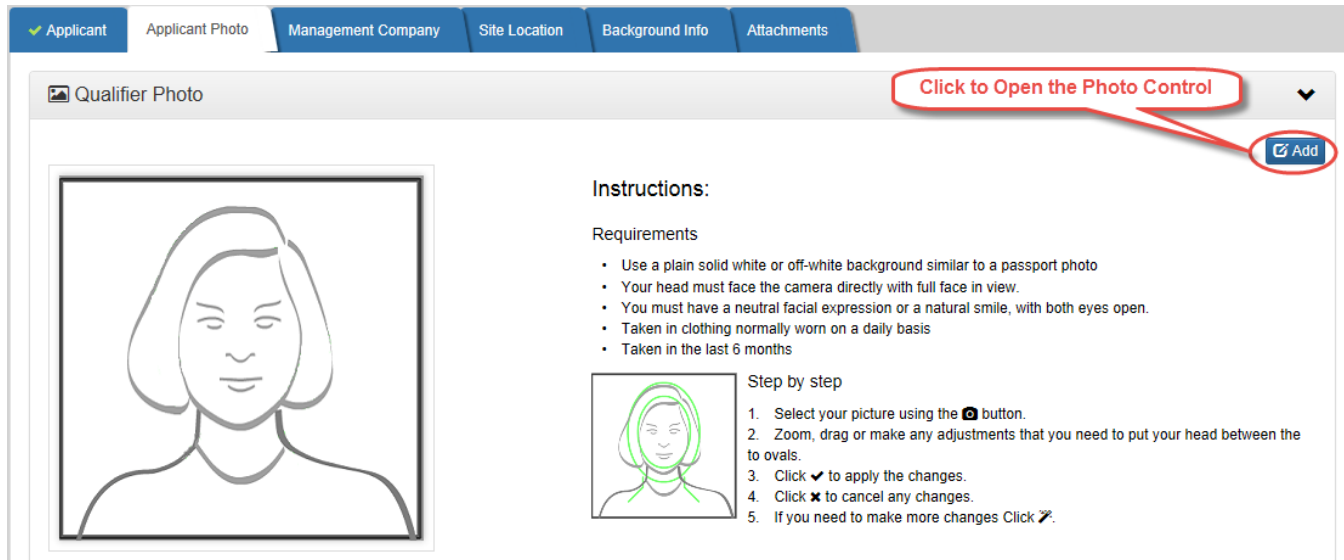Note: you must save all changes before you may proceed to another tab.
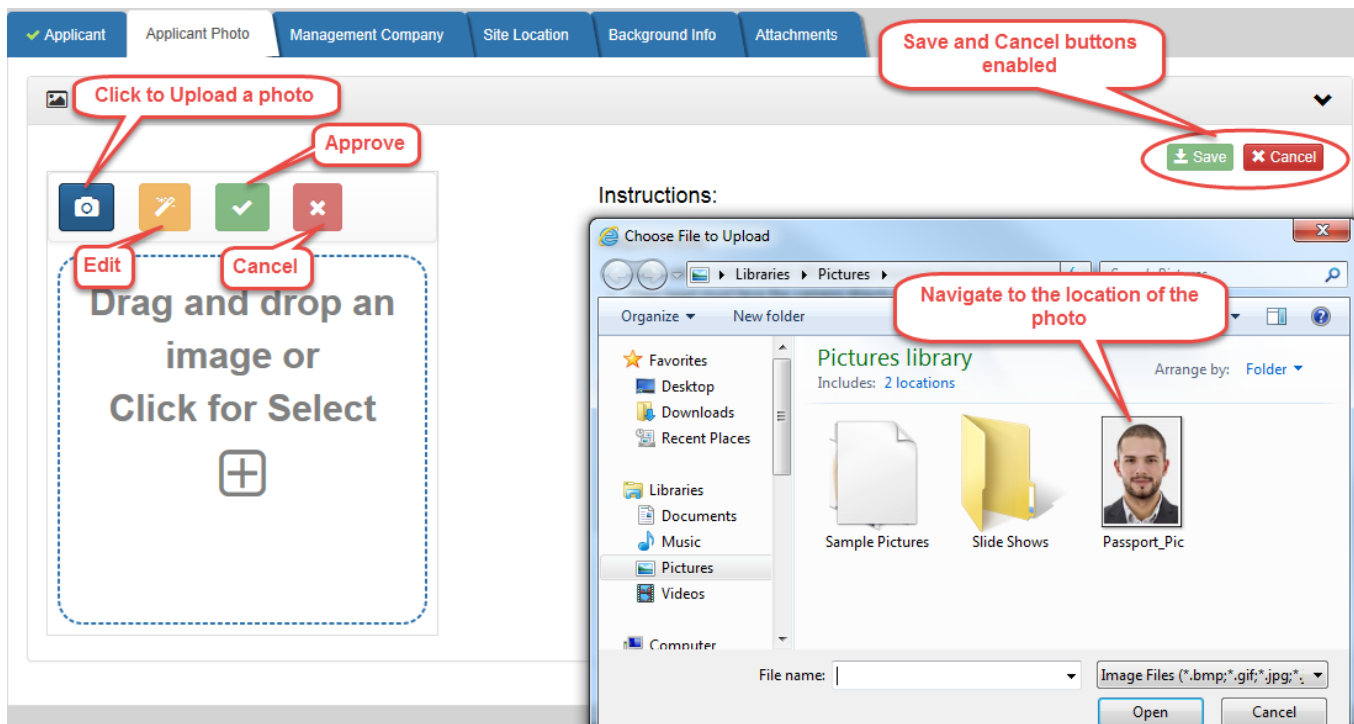
6.3.2 Applicant Photo tab

Click or tap the **Applicant Photo** tab.

Click the **Add** button to open the Photo Control.

Click the button and navigate to the location of the photo.
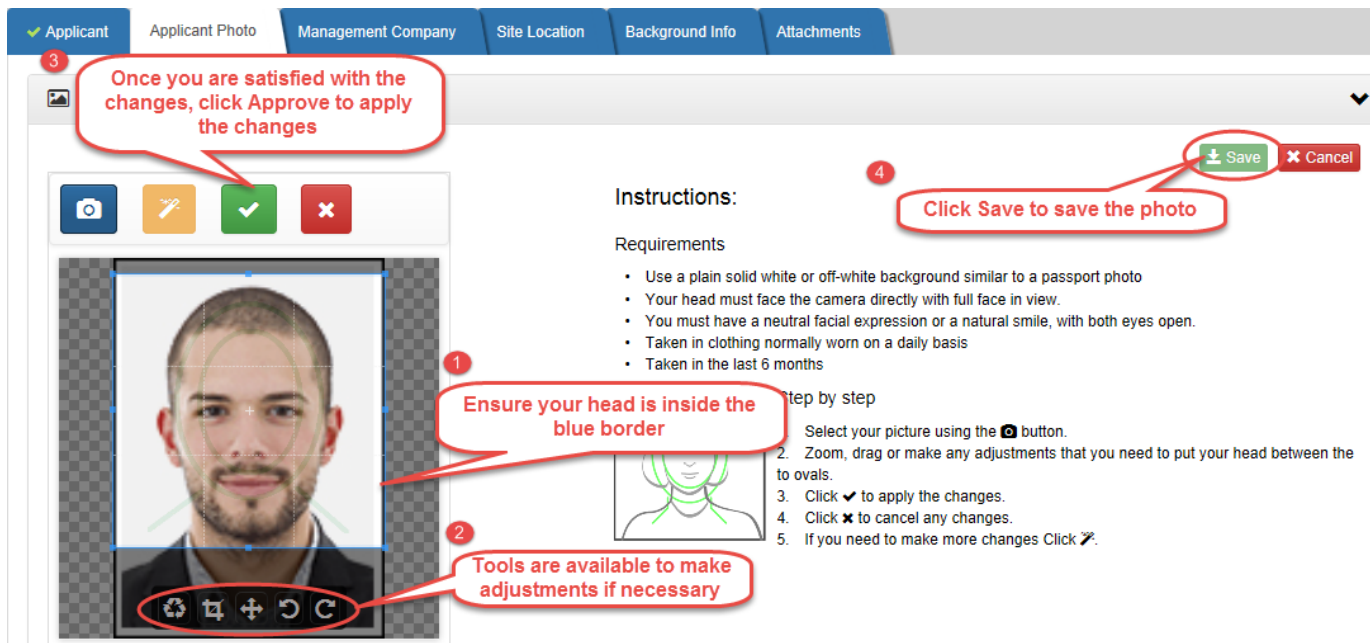
Contractor Portal Quick Start Guide

The photo must be an image file (.jpg, .png, .gif, .tiff, etc.) You can upload the photo by any of the following ways:

Desktop:

- Double click on the photo file.
- Select the photo file and click the Open button.

Phones and Tablets:

- Click on the Photo Control and use the Camera/Gallery/Photo Library.

Once the photo is in the Control, you can use the edit tools (move, crop, etc.) to center your head in the blue border if necessary. When you are satisfied with the photo, click ✔ to apply the changes. Click the **Save** button ⬇ Save to save.

- Clicking the **Save** button will also replace the Save button with Delete 🗑 Delete and Edit ✏ Edit buttons.
- Clicking **Edit** allows you to make further changes to the photo you had saved.
- Clicking **Delete** will discard the photo you had saved.

6.3.3 Management Company tab

Click or tap the **Management Company** tab. Enter the Property Management Information and use the buttons as follows:

- Click the Save button [± Save] to save your changes.
- Clicking the Cancel button [✖ Cancel] will return the data to their original values.
- After Saving, if you wish to modify any data, click the Edit button. [☑ Edit]

6.3.4 Site Location tab

Click or tap the **Site Location** tab. Enter the Site Location information and use the buttons as follows:

- Click the Save button [± Save] to save your changes.
- Clicking the Cancel button [✖ Cancel] will return the data to their original values.
- After Saving, if you wish to modify any data, click the Edit button. [☑ Edit]

6.3.5 Background Info tab

Click or tap the **Background Info** tab. Enter your response to each of the Background Questions. Any 'No' response will cause an Offense section to appear. Enter the Offense details. Click the Add More button [+ Add More] to add an additional Offense section if needed.

- Click the Save button [± Save] to save your changes.
- Clicking the Cancel button [✖ Cancel] will return the data to their original values.
- After Saving, if you wish to modify any data, click the Edit button. [☑ Edit]

6.3.6 Attachment tab

Click or tap the **Attachment** tab.

On Desktops you may drag and drop a file onto the 'Drop files here' message.

On Phones and tablets you click the paper clip icon [📎] and are prompted to take a photo or use the photo gallery.

IMPORTANT: Please keep the name of the file you attach to less than 50 characters. If you can specify a name for the file, try to use something meaningful that identifies its content, like "Affidavit", "Drivers License" etc. The meaningful name is not mandatory, but it is helpful during the review process.

Contractor Portal Quick Start Guide

Desktop: Drag and Drop the files onto the 'Drop files here or click the paper clip upload icon' message. Or you may click "Upload" to navigate to the files.
Phones and tablets: Click on the paper clip icon and use the Camera/Photo Gallery

6.3.7 Submit Application

Click the **Submit** button to submit your Application for review. The Terms and Conditions page must be acknowledged by clicking the checkbox at the bottom or the page. Once acknowledged, the Submit button will become enabled.
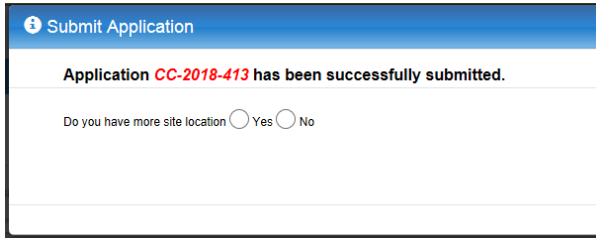
6.3.7.1 Additional Site Locations

If you have additional site locations, click the Yes radio button to copy the data entered in the following tabs to a new application:

- Applicant
- Applicant Photo
- Management Company
- Background Info

Site Location and Attachments tabs must be completed to submit the new application.
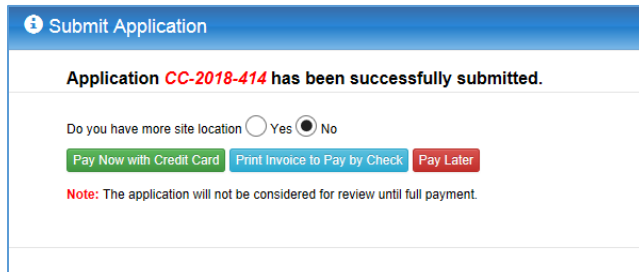
6.3.7.2 No Additional Site Locations

If there are no additional site locations, click the No radio button. You will be presented with three options:

- Pay Now with Credit Card – This option will take you to the Shopping Cart where you may pay by credit card.
- Print Invoice to Pay by Check – This option will take you to the Fees tab where you can Print an Invoice.
- Pay Later – This option will return you to the main Apply for New License screen.
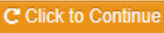
6.4 Track progress of your Apartment Maintenance Technician application request.

You will receive either an email that your Apartment Maintenance Technician application request has been **Accepted** or that it has been **Returned** if more information is needed to complete your Application. You may also login to your Account at any time to check the status of your Application.

6.4.1 Go to View/Print License. Click the **Menu** button [Menu], then click the **Contractors Certification** menu [Contractors Certification] and then the **View/Print License** menu.

6.4.2 See your Apartment Maintenance Technician application Status. Under Recent Activity you will see the status of your Application.

- Status of **In-Review** means it is being processed by Contractor Certification staff
- Status of **Returned** means it has been returned to you. Click the [Click to Continue] button, make the requested changes (Reasons for the Return are displayed at the top of this screen) and Submit again.
- Status of **Approved** means your Application is complete.

6.5 View your Apartment Maintenance Technician License.

Once you have been informed your Application has been **Accepted** you may view it online. You may login to your Account and view your license information. This step is not necessary, but is a good way to verify your information is correct.

6.4.1 Go to View/Print License. Click the **Menu** button [≡ Menu] , then click the **Contractors Certification** menu [✱ Contractors Certification ⌄] and then the **View/Print License** menu [View/Print License]

6.4.2 View License Info. Click the **View License Info** button [ⓘ VIEW LICENSE INFO] to view your license info.

6.5 Print your Apartment Maintenance Technician License.

Once you have been informed your Application has been Accepted, the last step is to login to your Account and print your license. **You will not receive a license through the mail.**

6.5.1 Go to View/Print License. Click the **Menu** button [≡ Menu] , then click the **Contractors Certification** menu [✱ Contractors Certification ⌄] and then the **View/Print License** menu [View/Print License]

6.5.2 View License Info. Click the **View License Info** button [ⓘ VIEW LICENSE INFO] to view info and to see the **Print Certificate** button.

6.5.3 Print your License. Click the **Print Certificate** button [🖶 Print Certificate] . Your license will be generated and you may then print it. You may print your license as many times as you wish.

7. First Time User

For now, this portal cannot be used for new County Contractor Applications. You may only **Renew/Re-Enroll your Licenses** and **Update your Insurance.** Below are instructions for the "First Time User".

If you are applying for the new **Apartment Repair Technician Certification**, see Step 2 – Register a New Account below

7.1 Account creation and responsibilities

The Contractor creates a single account. Contractors are responsible for:

- Linking their license(s) to their account
- Renewing their licenses. This is because the Contractor is electronically acknowledging the renewal and updates to their license.
- Updating their insurance, bond and Worker's Compensation policies

** **Office Managers should not create accounts on behalf of contractors.**
If you are a first time user you will need to complete the following **one-time** set up step(s).

7.2 Register a New Account. First you must register an account using an email that you would like the PZ&B Contractor Certification Division to use for communications with you.

Contractor Portal Quick Start Guide

To start the **Register Account** steps:

- Click the **Menu** icon [≡] in the upper left of the page.
- Click the **"Register Now"** button [👤+ Register Now] and follow the instructions in the **Help** link on the **"User Registration"** page.

(Linking applies only to Contractors)

7.3   Link your Certification(s) to your Account. Linking your certification(s) to your account will allow you to perform your Certification Renewals, update your Insurance (outside of the Renewal process) and check the status of your license. State Contractors will need their PIN. County Contractors and Journeymen will need the last four digits of their SSN to complete the Linking steps.

To start the **Link your Certification(s)** steps:

- You must first Register and Sign in
- Click the **Menu** icon [≡] in the upper left of the page.
- Click the **"My Profile"** button [📇 My Profile] and then follow the instructions for linking my license(s) to my account in the **Help** link on the **"Edit Profile"** page.

7.4 License Related Activities. After you have linked your license(s) you can perform the following activities.

- Click the **Menu** icon [≡] in the upper left of the page.
- Click the menu **"Contractors Certification"** [⚙ Contractors Certification ⌄] which will expand to show more menu items. Then click menu **"View/Print License"** [My License] which opens the **"License"** screen.
- On the **"License"** screen you can perform the following activities
  - **Renew License.** You can renew your license if it is eligible to do so.
  - **Update Insurance**. You may update your insurance.
  - **View License Info**. You may view the details of your license.
  - **Print Certificate.** You may print your Certificate of Competency.

8. Register a New Account

Go to URL: https://www.pbcgov.org/ePZB.Admin.WebSPA/#/

8.1. Account creation and responsibilities

The Contractor creates a single account. Contractors are responsible for:
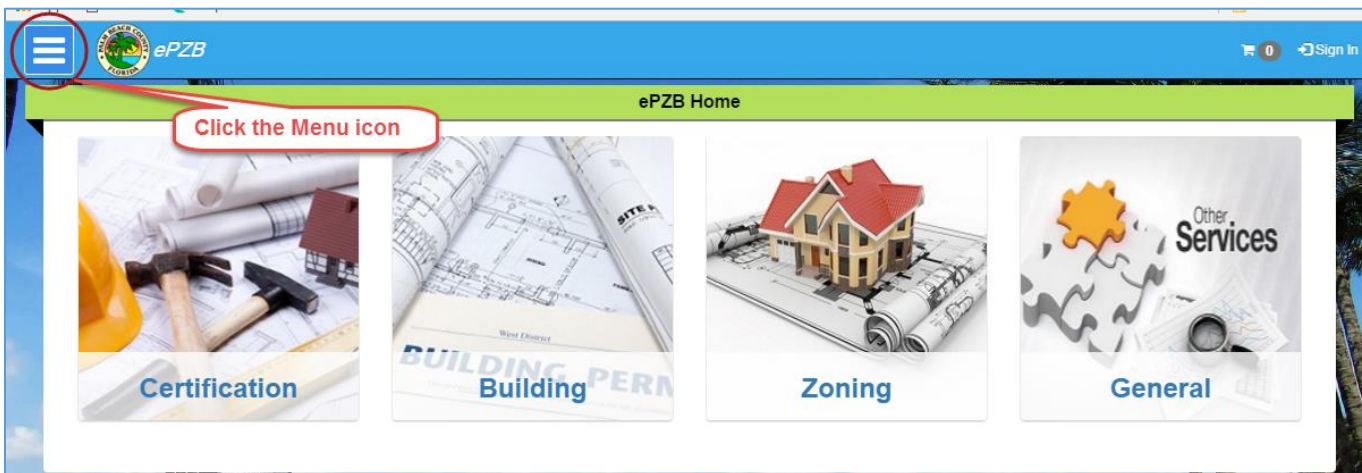
- Linking their license(s) to their account
- Renewing their licenses. This is because the Contractor is electronically acknowledging the renewal and updates to their license.
- Updating their insurance, bond and Worker's Compensation policies

** Office Managers should not create accounts on behalf of contractors.
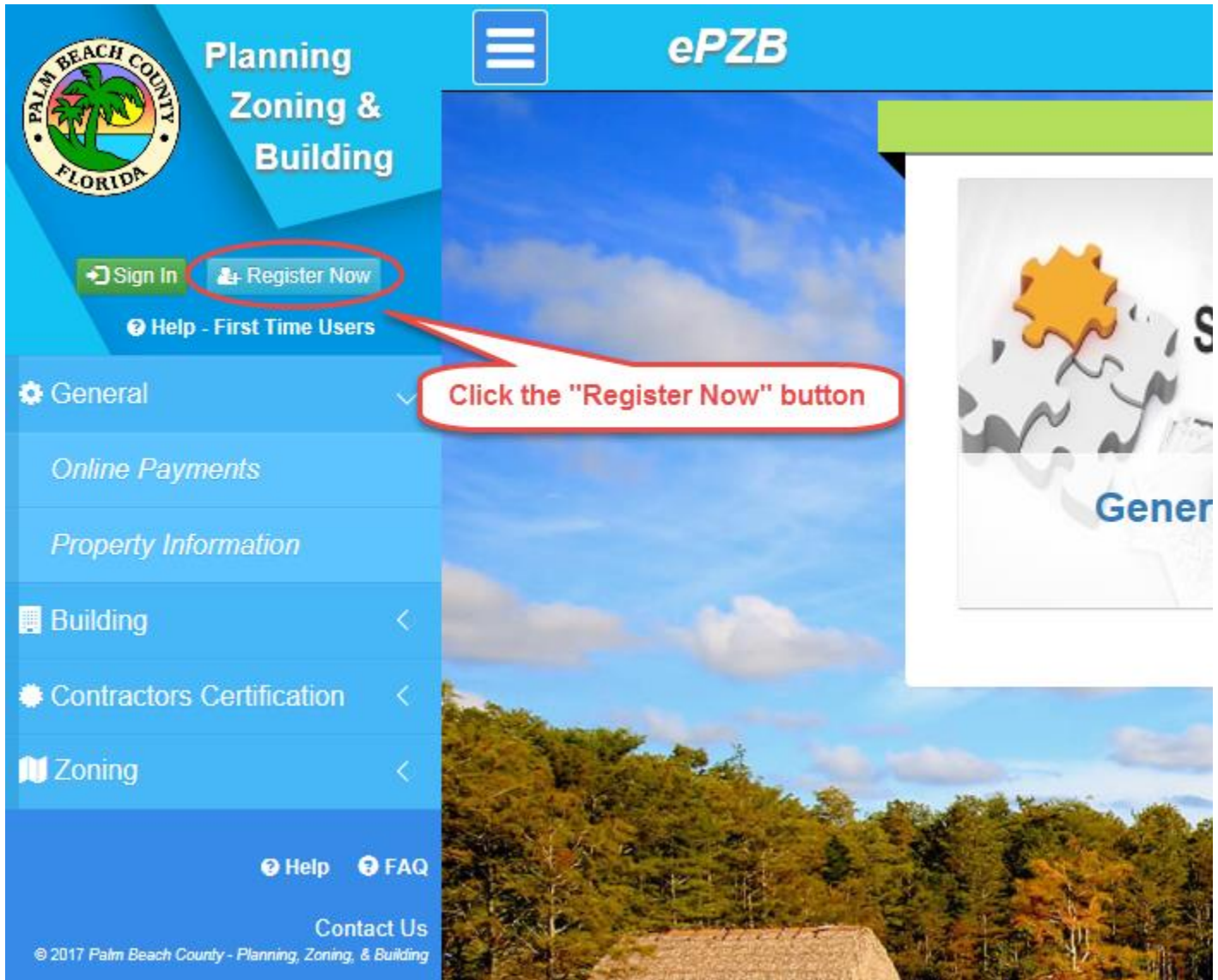
8.2. Register the Account

Complete the following steps to Register a New Account

Click the **Menu** icon and you will see the side menu.

Contractor Portal Quick Start Guide

Click the **"Register Now"** button and you will see the **"User Registration"** screen. Complete the fields on the screen (required fields have a red asterisk) and check the box next to **"I'm not a robot".**

Check the **"I'm not a robot"** checkbox. Follow the instructions, if any, until you see a green check appear in the checkbox. Click the "**Create Account**" button .

You will receive a message pop-up similar to the following…

Contractor Portal Quick Start Guide

You will receive an email containing an **Activation Link** that must be clicked to complete the registration process.

You will not be able to log in to your account until you have clicked the **Activation Link**. This is a security measure to ensure your email is the one that is actually registered to the account.

The **email will look something like this**…

From: No-Reply@co.palm-beach.fl.us [mailto:No-Reply@co.palm-beach.fl.us]
Sent: Monday, October 03, 2016 12:52 PM
Subject: Welcome to Palm Beach County ePZB Online Portal

Your email will appear here   **Click this link to activate your account**

You have registered with the ePZB Online Portal as user id: GregZA@outlook.com Please click on the link to activate your account
http://localhost/ePZB.Admin.WebSPA/#/confirmRegistration/dde6259e-b8db-4f34-8403-076a096329eb
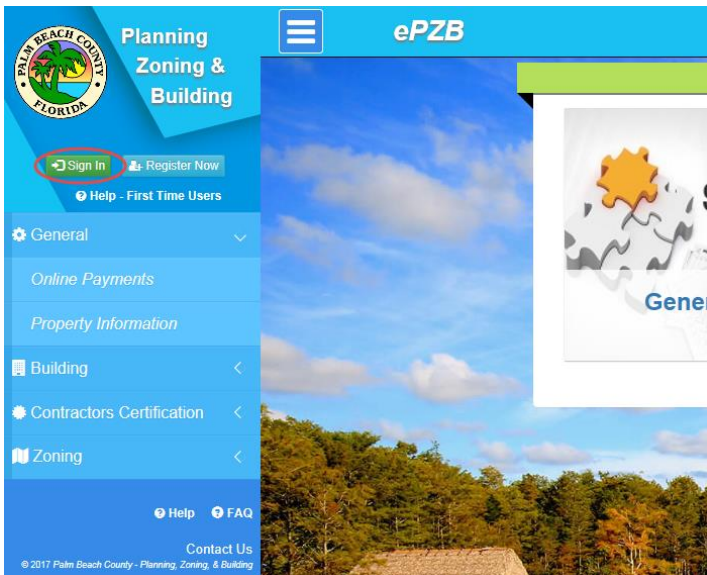
8.3. Activate the Account

Clicking the **Activation Link** completes the Registration process. Upon successful activation you will see the following message and you may sign in.

Your account has been successfully activated. Please Sign In to continue

8.4 Sign In

Click the **Menu** icon ☰ and you will see the side menu.

Click the **"Sign In"** button 🔑 Sign In and you will see the **"ePZB Login"** screen. Enter your **User Name (email)** and **Password** and click the **Log In** button.
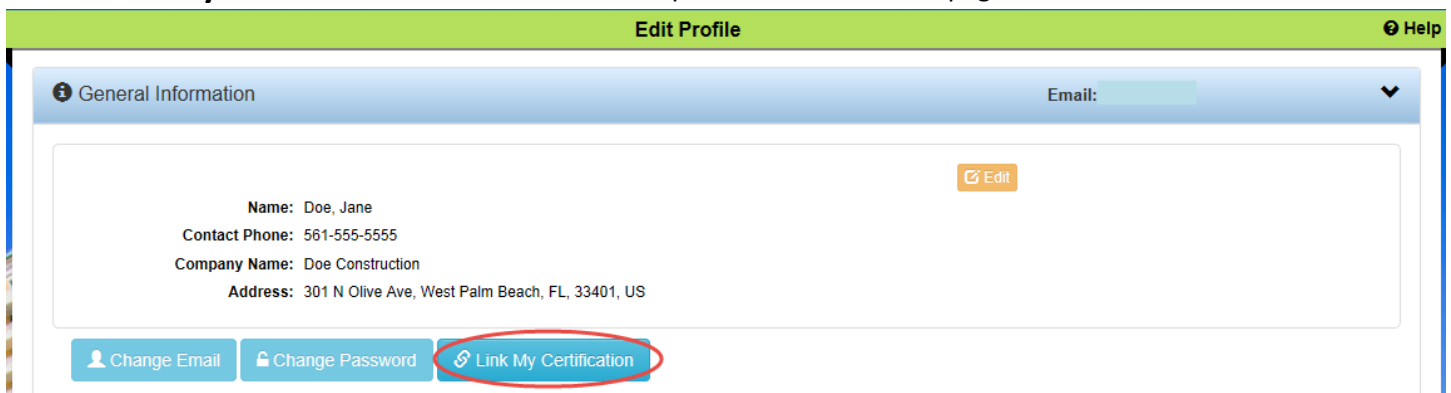
9. Link My License(s) to My Account

9.1. Go to "My Profile" page

Click the **Menu** icon [≡] and you will see the side menu.

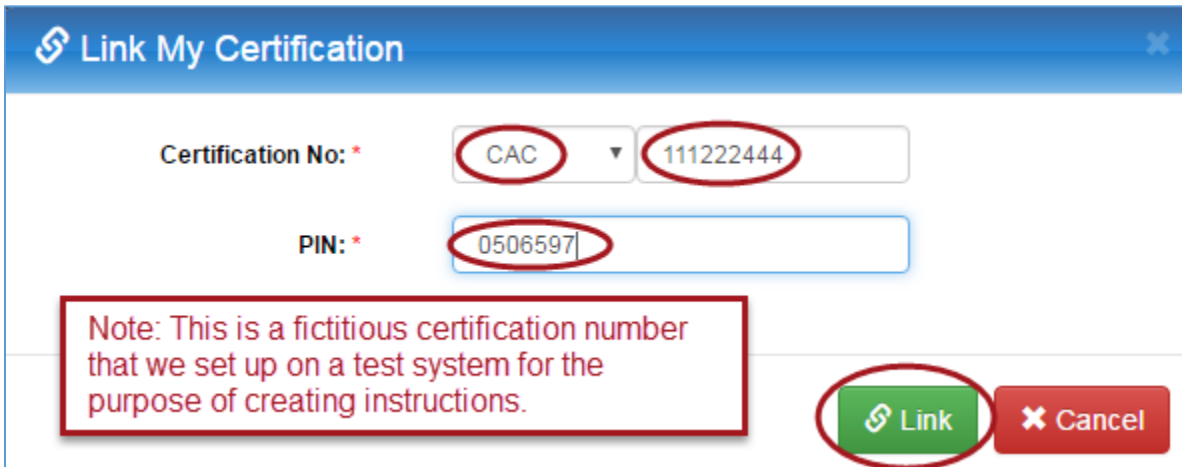Click on the **"My Profile"** button [⊞ My Profile] to open the **Edit Profile** page

9.2. Search and Link My License to My Account

Click the **Link My Certification** button [⌀ Link My Certification]. This opens a pop-up where you Search for your **Certification Number** and verify with either your **PIN** (for State Contractors) or last four digits of your **SSN** (for County Contractors and Journeymen). Then click the Link button to link the Certification Number to your Account.
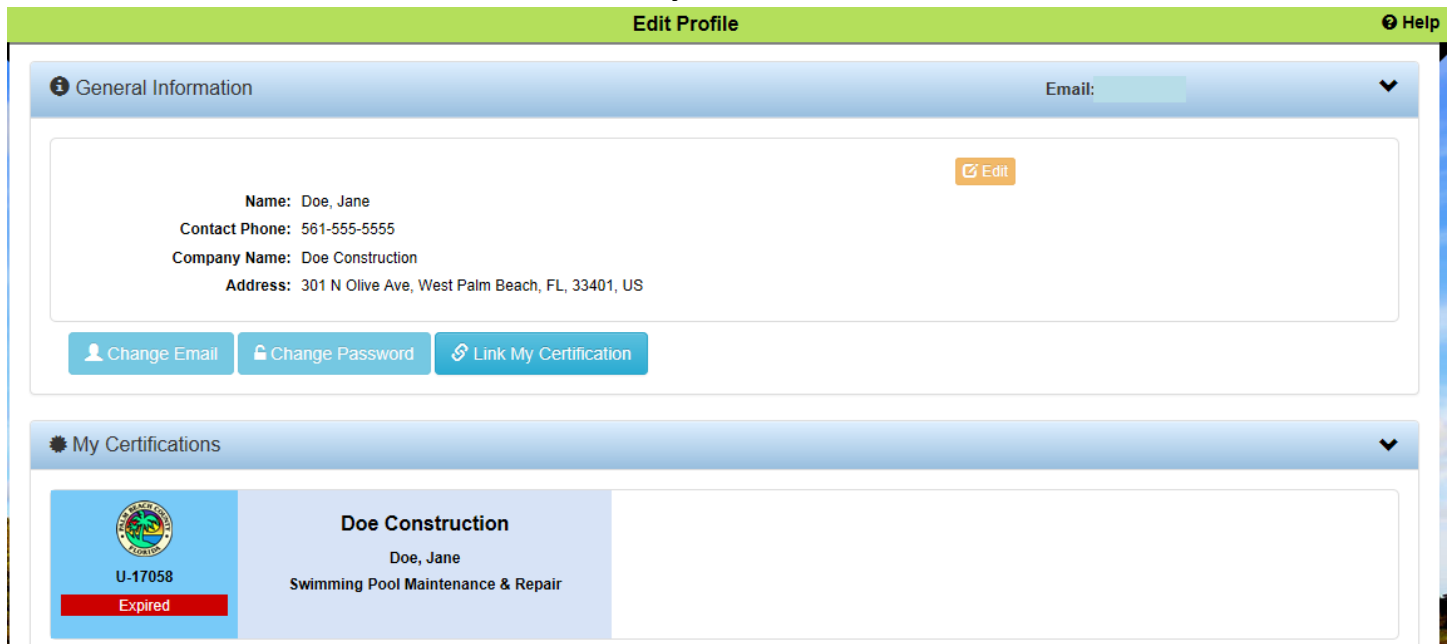
You will then see the **Certification** has been added to the bottom of **Edit Profile** screen and is now successfully linked to your account.

If you have more Licenses to link, just click the **Link My Certification** button again and repeat the steps.

9.3 Account Management

Click the Change Email button and follow the steps to change your email.

Click the Change Password button and follow the steps to change your password.

Click the Edit button to modify your contact information.

10. Renew My License

10.1 Go to "Renew License" page

Click the **Menu** icon ☰ and you will see the side menu.

Click on the **Contractor Certification** menu and then **Renew License**.

This opens the **License** page. Click the **Renew License** button to initiate an online renewal

Contractor Portal Quick Start Guide

10.2 Contractor Renewal - Complete the Renewal information and Submit

Clicking **Renew License** opens the **Renewal Instructions** page. Please read the instructions and click the **Start Renewal** button to proceed. This opens the **Renewal** page.

10.2.1 Qualifier tab

Click or tap the **Qualifier** tab.

License Info section. Enter the BTR information and click the **Save** button [Save].

Contractor and Company sections. To modify any of this information, click the **Edit** button [Edit]. You may then make changes and click the **Save** button [Save].

Note: you must save all changes before you may proceed to another tab.

10.2.2 Qualifier Photo tab

Click or tap the **Qualifier Photo** tab.

Click the **Add** button to open the Photo Control.

Click the [camera] button and navigate to the location of the photo.

The photo must be an image file (.jpg, .png, .gif, .tiff, etc.) You can upload the photo by any of the following ways:

Desktop:

- Double click on the photo file.
- Select the photo file and click the Open button.
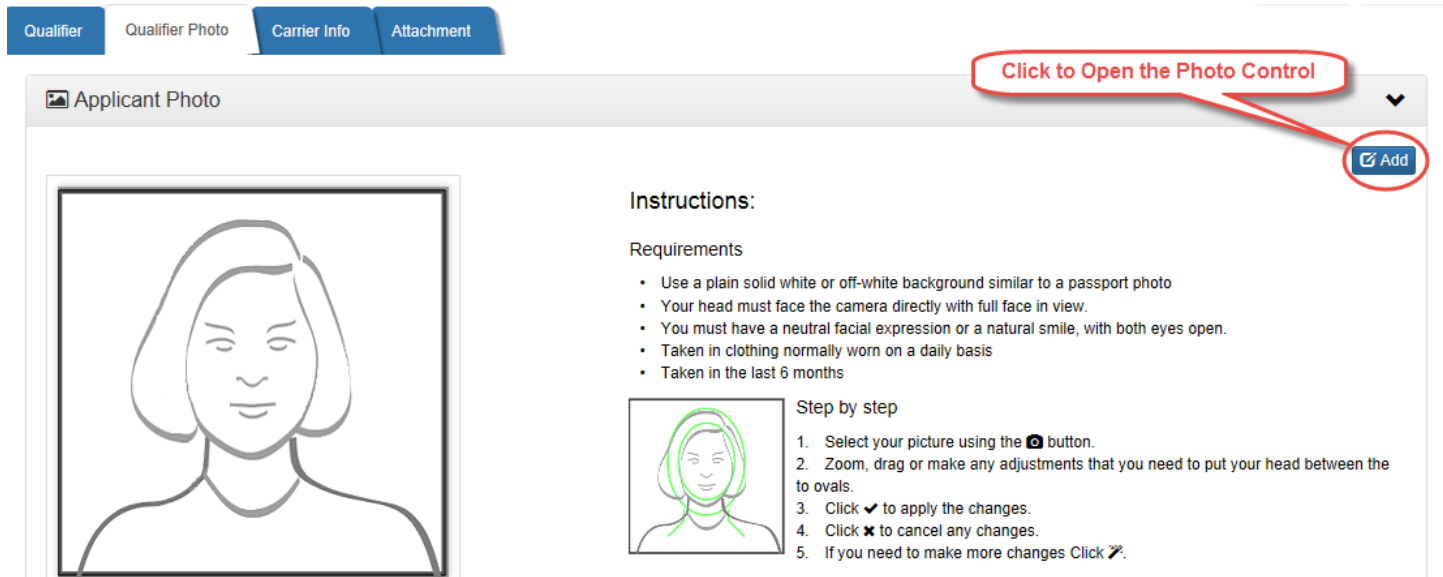
Phones and Tablets:

- Click on the Photo Control and use the Camera/Gallery/Photo Library.

Once the photo is in the Control, you can use the edit tools (move, crop, etc.) to center your head in the blue border if necessary. When you are satisfied with the photo, click ✔ to apply the changes. Click the **Save** button ⬇ Save to save.

- Clicking the **Save** button will also replace the Save button with Delete 🗑 Delete and Edit ✏ Edit buttons.
- Clicking **Edit** allows you to make further changes to the photo you had saved.
- Clicking **Delete** will discard the photo you had saved.

10.2.3 Carrier Info tab

Click or tap the **Carrier info** tab if present. State and County Contractors will have a Carrier tab, while Journeymen will not.

Enter the Carrier Info and use the buttons as follows:

- Clicking the Reset button 🔁 Reset prior to Save will return the data to their original values.
- Clicking the Delete button ✖ Delete will remove the insurance entry.
- Click the Save button ⬇ Save to save your changes. Note that all expiration dates must be in the future.

10.2.4Attachment tab

Click or tap the **Attachment** tab.

On Desktops you may drag and drop a file into the folder icon. **IMPORTANT:** Take care to drop the file directly on the folder. The folder will appear to open when the document is dragged over it. Dropping the file outside the folder replaces the entire screen and you will need to log back in.

On Phones and tablets you click the folder and are prompted to take a photo or use the photo gallery.

IMPORTANT: Please keep the name of the file you attach to less than 50 characters. If you can specify a name for the file, try to use something meaningful that identifies its content, like "Insurance", "Drivers License" etc. The meaningful name is not mandatory, but it is helpful during the review process.

Click the **Submit** button to submit your Renewal for review

You can click on the cart icon at the top of the screen to make your online payments.

10.3 Journeyman Renewal - Complete the Renewal information and Submit

Clicking **Renew License** opens the **Renewal Instructions** page. Please read the instructions and click the **Start Renewal** button to proceed. This opens the **Renewal** page.

10.3.1 Qualifier tab

Click or tap the **Qualifier** tab.

License Info section. This displays your Certification Number and the New Expiration date that will take effect once the Renewal process has been completed.

Journeyman section. This displays the Journeyman details.

To modify any of the Journeyman details, click the **Edit** button ![Edit] . You may then make changes and click the **Save** button ![Save] .

Note: you must save all changes before you may proceed to another tab.

10.3.2 Qualifier Photo tab

Click or tap the **Qualifier Photo** tab.

Click the [Add] button to open the Photo Control.

Click the [camera] button and navigate to the location of the photo.

The photo must be an image file (.jpg, .png, .gif, .tiff, etc.) You can upload the photo by any of the following ways:

Desktop:

- Double click on the photo file.
- Select the photo file and click the Open button.

Phones and Tablets:

- Click on the Photo Control and use the Camera/Gallery/Photo Library.

Once the photo is in the Control, you can use the edit tools (move, crop, etc.) to center your head in the blue border if necessary. When you are satisfied with the photo, click ✔ to apply the changes. Click the **Save** button 📥 Save to save.

- Clicking the **Save** button will also replace the Save button with Delete 🗑 Delete and Edit ✏ Edit buttons.
- Clicking **Edit** allows you to make further changes to the photo you had saved.
- Clicking **Delete** will discard the photo you had saved.

10.3.3 Attachment tab

Click or tap the **Attachment** tab.

On Desktops you may drag and drop a file into the folder icon. **IMPORTANT:** <u>Take care to drop the file directly on the folder</u>. The folder will appear to open when the document is dragged over it. Dropping the file outside the folder replaces the entire screen and you will need to log back in.

On Phones and tablets you click the folder and are prompted to take a photo or use the photo gallery.

IMPORTANT: <u>Please keep the name of the file you attach to less than 50 characters</u>. If you can specify a name for the file, try to use something meaningful that identifies it's content, like "Insurance", "Drivers License" etc. The meaningful name is not mandatory, but it is helpful during the review process.

Click the **Submit** button to submit your Renewal for review

You can click on the cart icon at the top of the screen to make your online payments.

11. Update Insurance

11.1 Carrier Info tab

Click or tap the **Carrier info** tab.

Enter the Carrier Info and use the buttons as follows:

- Clicking the Reset button ![Reset] prior to Save will return the data to their original values.
- Clicking the Delete button ![Delete] will remove the insurance entry.
- Click the Save button ![Save] to save your changes. Note that all expiration dates must be in the future.

11.2 Attachment tab

Click or tap the **Attachment** tab.

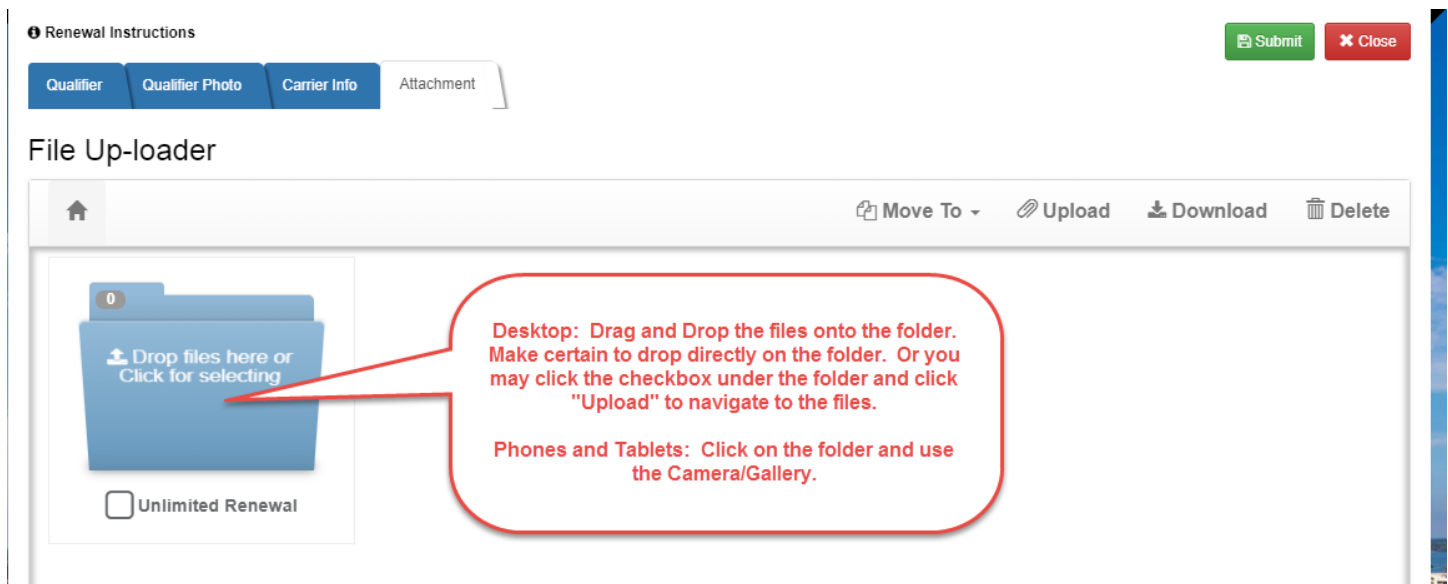**On Desktops** you may drag and drop a file into the folder icon. **IMPORTANT:** Take care to drop the file directly on the folder. The folder will appear to open when the document is dragged over it. Dropping the file outside the folder replaces the entire screen and you will need to log back in.

On Phones and tablets you click the folder and are prompted to take a photo or use the photo gallery.

IMPORTANT: Please keep the name of the file you attach to less than 50 characters. If you can specify a name for the file, try to use something meaningful that identifies its content, like "Insurance", "Drivers License" etc. The meaningful name is not mandatory, but it is helpful during the review process.

Contractor Portal Quick Start Guide

11.   FAQs and Troubleshooting

11.1   General

1. Can I use the portal from my phone and tablet? Which browsers can I use?

    A: Yes, you can use a PC, laptop, phone or tablet. It has been tested on IE11, Edge, Chrome, Firefox and Safari.

2. Can I still pay by check even though I submitted my renewal online?
    A: Yes, you can mail a check. Please include your certification license number and/or the CCREN number that was generated when you submitted your renewal. Paying online speeds up the process, but is not required.

3. Can State Contractors, County Contractors and Journeymen all use the online portal?
    A: Yes, State, County and Journeymen are all encouraged to use the online portal. It saves time for both you and county staff!

4. Phone Number and Zip Codes do not display the digits in the order I have entered them.

    A: This is a known issue when using some android keyboards with auto complete turned on. Disabling auto complete should resolve this problem.

11.2   Registering My Account

5. I registered an account but I cannot login. I get the message "Invalid username or password. Please try again."

    This can result from two conditions

    1. You are mistyping either your User Name and/or Password. Remember, your User Name is the email you used when registering. If you cannot remember your password, click "Forgot Password" to receive an email that allows you to reset your password.

    2. When you Registered your Account you should have received an email that contains an activation link. **You must click the activation link before you can log in**. This is a security measure to ensure the email owner acknowledges the account activation.

6. I Registered an Account and it said I will receive an activation email, but I have not.

    A: Try checking your Spam and Junk folders. Sometimes emails with links are redirected there. If you still cannot find your email, enter your username on the login screen and click "Resend Activation" which will send another email.

11.3   Linking My Licenses to My Account

7. I need my PIN to link My License, but I do not have it. How do I get a new one?
    A: You must contact the Contractors Certification division at 561-233-5525 to have a new PIN issued.

8. When Linking my License, I get a message "The PIN entered does not match our records".

    A: Your PIN is a 7 digit number and you must enter the leading zeros. For example, if your PIN is '0011223' you cannot enter just '11223'. This is a security measure to make it more difficult to guess a PIN.

9. When Linking my License, it says it is already linked to another account.

> A: A License may be linked to only one Account. It should be linked only to the Account created by the Contractor. If you find one of your licenses has already been linked, contact the Contractors Certification division at 561-233-5525 for assistance.

10. When Linking my license, I receive a message that the license I am linking does not have a contractor contact email.
> A: The license you are attempting to link to does not have an email on file with the Contractors Certification division. In order to link a certification, it must have an email on file. The email should be the contact email for the contractor, not the company they work for or other individuals. Please contact the Contractors Certification division at 561-233-5525 or via email so they may enter an email for your license. Once the email is on file, you may complete the link.

11.4   Renewing My License

11. I cannot see the menu item "Renew License" under "Contractor Certification" in the side menu.

> A: You will not see the "Renew License" menu until you have linked your certification(s) and have logged in.

12. On the Attachment tab, when I drag a file into a folder the file image opens and replaces the entire screen. I then have to log back into the Portal.

> A: When you drag a file onto a folder it must be dropped directly on the folder. The visual key is to look for the folder to "open" and then drop the file. If you do not drop the file onto the folder the browser functionality causes it to replace the entire screen. This is something that is inherent to the browser, so take care when dragging and dropping.