

# IMS USER GUIDE FOR AGENCIES

THIS STEP-BY-STEP GUIDE SHOWS HOW TO REVIEW PERMITS AND PROJECTS USING KOOTENAI COUNTY'S IMS SYSTEM

## ACCOUNT SET UP AND/OR LOGIN

All new users will need to set up a new iMS account, even if they had an eTrakit account.

1. Select 'Register as a New User'. There are multiple spots to select this option.

The screenshot shows the IMS login interface. At the top right, there is a 'Register' button. Below the header, the text 'Please Log In' is displayed. There are input fields for 'Email' and 'Password', and a 'Stay Logged In' toggle set to 'No thanks'. A green 'Log in' button is at the bottom center. At the bottom left, there is a 'Register as a New User' link. A blue box highlights the 'Register as a New User' link, and a blue arrow points from it to the 'Register' button at the top right. Another blue box highlights the 'Register New User' text, and a blue arrow points from it to the 'Register' button. The footer includes 'Home | Kootenai County, Idaho' and '© 2021 - Intuitive Municipal Solutions, LLC'.

2. Fill out the spots for email address and password and click 'Register'

The screenshot shows the 'Register for Access' page. It features a form with the following fields: 'Full Name' (filled with 'Mary Shaw'), 'Email' (filled with 'mshaw@kcgov.us'), 'Password' (filled with '\*\*\*\*\*'), and 'Confirm password' (filled with '\*\*\*\*\*'). A red error message below the password field reads: 'At least 6 characters, 1 special character, 1 number, 1 uppercase, 1 lowercase'. A green 'Register' button is at the bottom center. A blue box highlights the 'Register' button, and a blue arrow points from it to the 'Click 'Register'' text. The footer includes 'Back to Login', 'Home | Kootenai County, Idaho', and '© 2021 - Intuitive Municipal Solutions, LLC'.

3. Tell Community Development your account was created. A staff member will need to 'promote' your account and link it to your agency. Please contact the staff member who asked you to create your account or Craig Davidson at [cdavidson@kcgov.us](mailto:cdavidson@kcgov.us).

#### 4. Login

Please Log In

Email

Password

Stay Logged In  No thanks

Click Log In

Log in

[Register as a New User](#)

[Forgot Password?](#)

[Continue as Guest](#)

[Home](#) | [Kootenai County, Idaho](#) © 2021 - In

### VIEWING REVIEWS

- To view your assigned reviews, navigate to your Tasks list



- You may need to change your view settings if reviews do not show up. Try selecting ‘\*\*\*ME including Roles\*\*\*’ for the user and ‘All (Including Unscheduled)’ for the time frame.

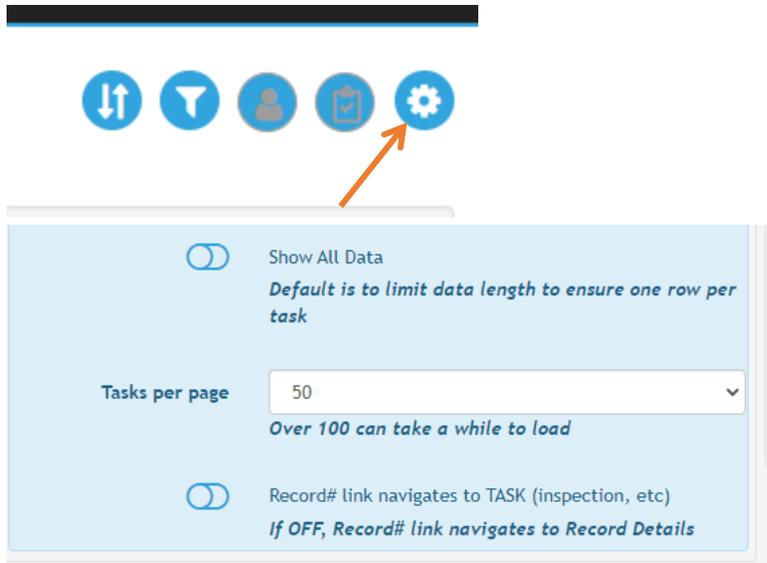
## Tasks

\*\*\*ME including Roles\*\*\* All (Including Unscheduled)

- Clicking a review will automatically open the review, not the permit or project. You can navigate to the record by selecting its record number:

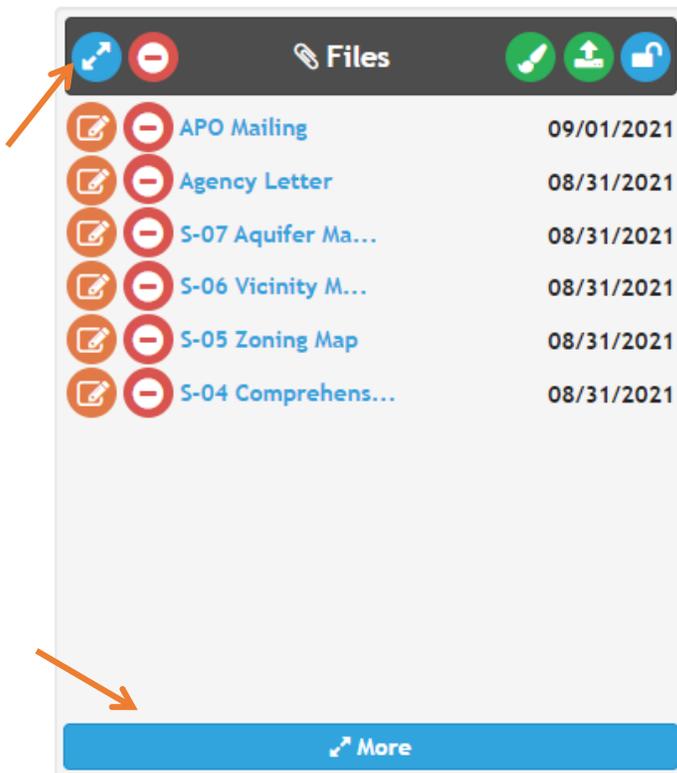


You can also change the default setting to open the record instead of the review when selecting a record from your Tasks list by changing a task setting

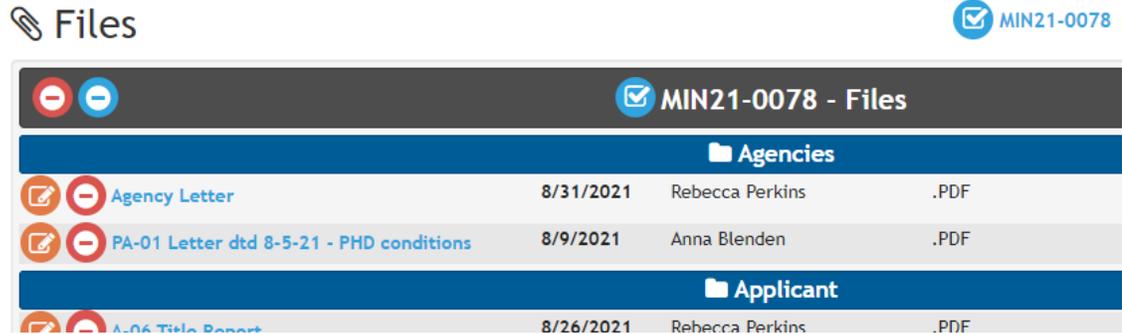


## NAVIGATING RECORDS

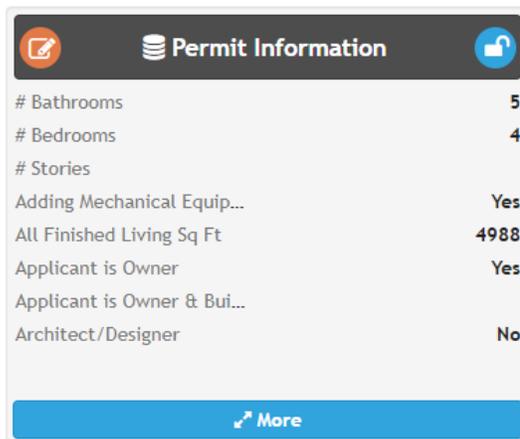
- Uploaded files are located in the Files tile. Expand the tile to see them organized.



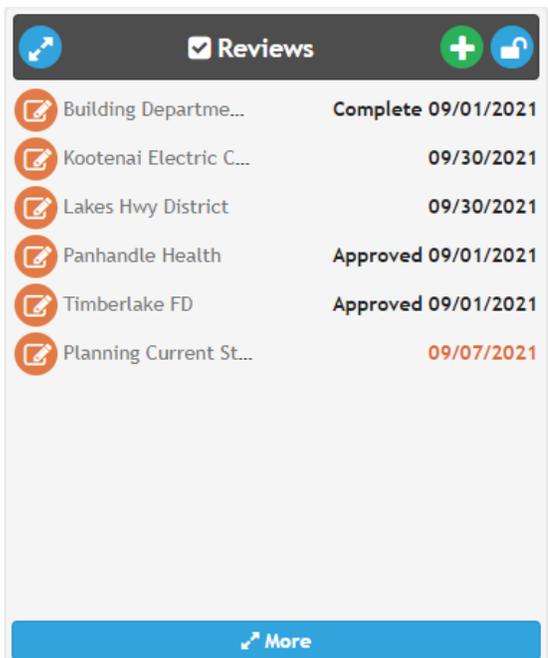
- For Projects most information will be found in the Basic Information tile or in the Files. The Agency Letter will be located under a header labeled 'Agencies'



- For Permits, other important information is located in other tiles, such as Permit Information. Expand this to see more information about the project



- To open your review again, either navigate back to your Tasks list or open it from the Reviews tile.



## RESULTING REVIEWS

### REVIEW STATUS

Use these six statuses. Always result a status when you are done with a review

- **Approved:** No conditions or changes to submittals needed.
- **Approved with Conditions:** approved if certain conditions will be met. For projects, these conditions will likely be included in the Order of Decision specifically. For permits, these may be what you will be looking for at final review.
- **Missing Information:** Need more information, such as application submitted to your agency.
- **Returned for Corrections:** Changes needed prior to approval, such as change to initial plat or new site plan showing an approach in a different location.
- **Pending:** Default status if you have not completed review.
- **Out of Jurisdiction:** This property is not in your agency's jurisdiction. This should be minimally used for projects, but occasionally, for example, Kootenai County staff may be told a property is in Avista's service area but it is actually in KEC's area.

Do not use these statuses.

- **Complete:** This does not tell us whether you approve the application or not.
- **Denied:** If conditions cannot be met or the applicant is not willing to meet conditions, this status can be used.

**Please note, if you change your review status, a review date is automatically entered and your review will not show up in your Tasks list again.** Delete the review date to keep the review in your list.

### REVIEW UPLOADS

If you need to upload a file to the record, you can do so from your review. The file will be added to the Files tile.



Doing so links the review and the file together in the review as well as in the Files tile

