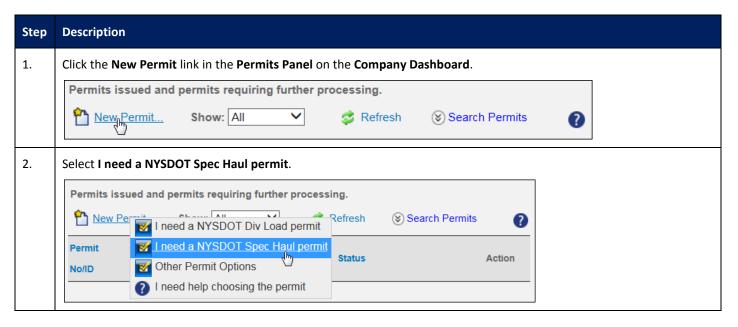
Order a Permit that Requires a Route Survey - Service Bureau

This Training Packet details the steps needed for a Service Bureau User to create a permit application that requires a Route Survey.

Please note that the process order for Route Surveys is different in HOOCS than it was in Permits Automation. In HOOCS, it is intended for the user to obtain a route in HOOCS before performing the **Route Survey**.

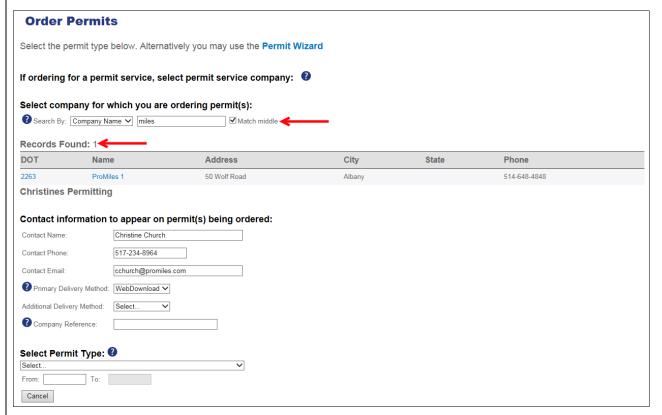
Please also note that for HOOCS routing, it is recommended that the user first enter an Origin and Destination on the *Enter a Route* screen. Once the route is reviewed, only then add Via Points or Via Highways to modify the route if the provided route is not suitable to the user.



3. The *Order Permits* screen will be displayed.

Enter the **Company Name** or **USDOT Number** of the company for whom the permit is being ordered in the **Search By:** field.

Note: The *Search* function will auto-find results matching the entry as the first characters are typed. If the first part of the search is unknown, check the box for **Match middle**. For instance, if the user is searching for a company with the word "miles" in the name but is unsure of the first word in the company name, check **Match Middle**, select **Company Name**, and enter the word miles. All company names with the word miles anywhere in their company name will be displayed.



4. Select the Company **Name** from the **Records Found**.

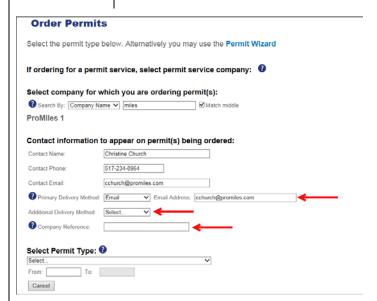
Note: If a company is not selected, the permit will be issued in the name of the Permit Service and cannot be transferred.

5. Choose a **Primary Delivery Method** and optionally an **Additional Delivery Method** from the associated dropdown lists. If the delivery method information does not populate, enter the necessary information. If the information does populate from the saved customer information but needs to be changed for this permit application, enter the updated information.

Note: The saved Contact Information will pre-populate from the **Company Information**. Complete the fields that were not populated, if necessary. The **Additional Delivery Method** and **Company Reference** are optional fields.

Additional Delivery Method An optional field on the permit application that enables the customer to enter a secondary delivery option for the Permit PDF after issuance.

Company Reference An optional field on the permit application that enables the customer to associate a permit to a particular job, job number, or some other internal tracking reference. This field is searchable and reportable.



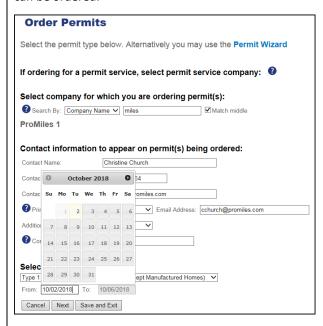
Note: A **Delivery Method** of **Email** must be selected for the Service Bureau to receive notifications about the Route Survey approval.

6. Entering a **Company Reference** for this permit application is optional. The **Company Reference** enables the user to associate a permit to a particular job, job number, or some other internal tracking. This option is not required and has been provided as a service to HOOCS companies. If information is entered in the **Company Reference** field, the user will be able to search for all permits associated to that reference. Reports can also be generated using that reference.

Description Step 7. Select the Permit Type from the Select Permit Type dropdown list. After choosing a Permit Type, the **Next** and **Save and Exit** buttons will be displayed beneath the selected Permit Type. **Order Permits** Select the permit type below. Alternatively you may use the Permit Wizard If ordering for a permit service, select permit service company: Select company for which you are ordering permit(s): Search By: Company Name ✓ miles ☑ Match middle ProMiles 1 Contact information to appear on permit(s) being ordered: Contact Name: Christine Church Contact Phone: 517-234-8964 cchurch@promiles.com Contact Email: Primary Delivery Method: Email Email Address: cchurch@promiles.com Additional Delivery Method: Select... Select Permit Type: 0 Type 1 − Single Trip − General Moves (Except Manufactured Homes) ∨ From: 10/02/2018 To: 10/06/2018

8. Enter the start date for the permit by clicking in the **From** field and selecting a date from the calendar.

Note: The start date cannot be earlier than today and is limited by the Permit Type as to how many days in advance it can be ordered.

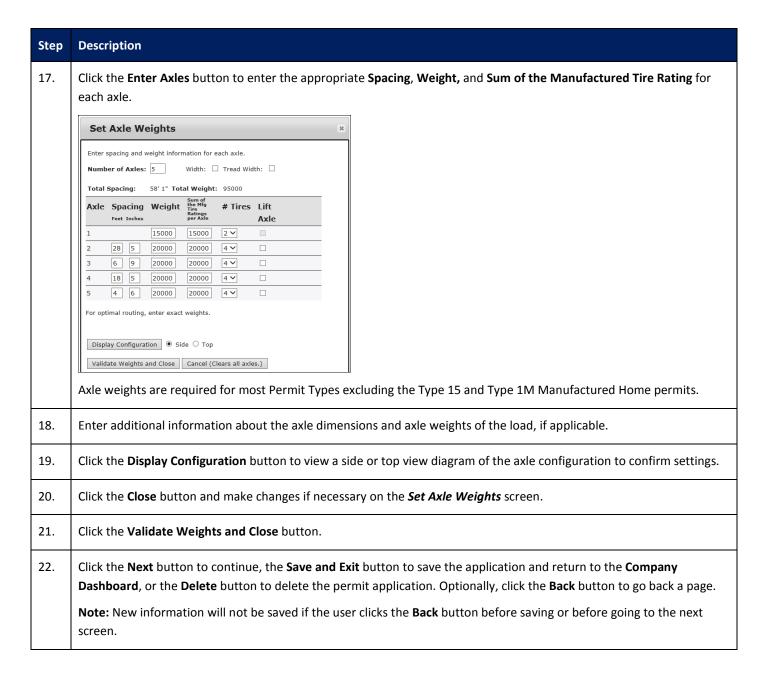


Cancel Next Save and Exit

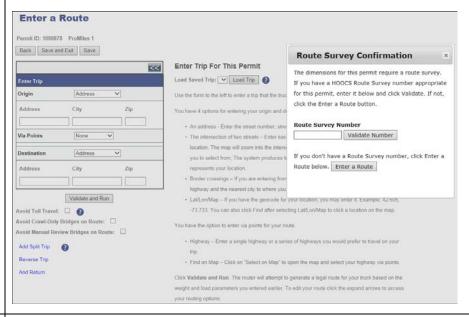
The End Date will automatically populate in the **To** field based on the Permit Type requested.

9. Click the **Next** button to proceed with the permit application or click the **Cancel** button to cancel without saving the permit application. Click the **Save and Exit** button to save the permit application for later processing and exit to return to the **Company Dashboard**.

Description Step 10. The Truck and Load Information screen will be displayed. Note: When the company name is displayed in blue throughout the permit application, it is a hyperlink to access the HOOCS Company Management Portal screen. **Order Permits** ProMiles 1 Use the form below to fill in truck and load information. Add Vehicle Inventory Unit/Rig Number State ? Vehicle Type ? Unit + Select... 🗸 ✓ Select.. Commodity Type: **Load Description: Serial Number: -- Select One --☐ I attest that the load is non-divisible. ☐ I attest that hauling multiple items does not create an additional over-dimension. Load Parameter Feet Inches **Load Parameter** ? Loaded Front o/Hang Loaded Width ? Loaded Rear o/Hang Loaded Height **?** Coaded Weight Loaded Length Enter Axles Trailer Length Back Next Save and Exit Delete Permit Enter information about the vehicle and load. If the Vehicle has been saved in the Company Data, choose that vehicle 11. from the Vehicle Inventory dropdown list. HOOCS will pre-populate the known information about the vehicle into the form. Note: For optimal routing, enter exact load dimensions. 12. Select a Commodity Type from the dropdown list. 13. Enter a description in the **Load Description** field. 14. Enter a serial number in the Serial Number field. Note: If there is not an applicable serial number for the load being hauled, enter NA in the Serial Number field. 15. Select the Attest Statement that applies to the load being hauled. 16. Enter the **Load Dimensions** for the load being hauled. Note: At this time, the state has determined that any load exceeding one of the following dimensions will trigger a Route Survey: Height: 13' 11", Length: 100' 0", Width: 15' 11".



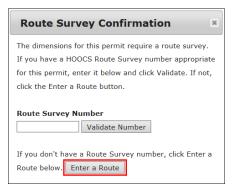
23. The **Enter a Route** screen and **Route Survey Confirmation** window will be displayed.



24. Click the **Enter a Route** button to enter a route for the permit requiring a Route Survey.

Note: Companies are able to reuse an approved **Route Survey** for the same route for vehicles with the same or smaller dimensions within 30 days of the **Route Survey's** initial approval. If the load dimensions are the same or smaller, and the route is the same, enter the approved **Route Survey Number** and click the **Validate Number** button. The **Route Survey** must be valid for all dates the permit is valid.

For the scenario in this training, the user does not have an approved **Route Survey**.



The Route Survey Confirmation screen will close and the Enter a Route screen will be displayed.

25. Enter the routing information and generate a route by clicking the **Validate and Run** button. The **Trip Results Panel** will be displayed.

Note: It is recommended that the user first enter an Origin and Destination on the *Enter a Route* screen. Once the route is reviewed, only then add Via Points or Via Highways to modify the route if the provided route is not suitable to the user. This will assist the user in finding an approved HOOCS route.

Note: When the system doesn't have any problems with the information entered, the **Trip Results Panel** will display the route. Review the route and driving directions. Expand the **Enter Trip Panel** to make any changes. Changes will require the user to click the **Validate and Run** button to update the route.

If the route cannot be generated due to restrictions, the system will display a **Failed to generate trip** message with restriction information.

Failed to generate trip on leg #: 1 because of 10546: BRIDGE 7708160: WALDEN AVE UNDER RAILROAD

The system was unable to generate a route for your trip. This is most likely due to construction restrictions or low overhead obstructions. Please continue to the next screen and enter your payment information. Your application will be forwarded to a HOOCS permit specialist for routing and issuance. Your account will not be charged until the permit has been issued. The final permit will be sent to you upon issuance. You can adjust your trip or continue your order to have your trip reviewed

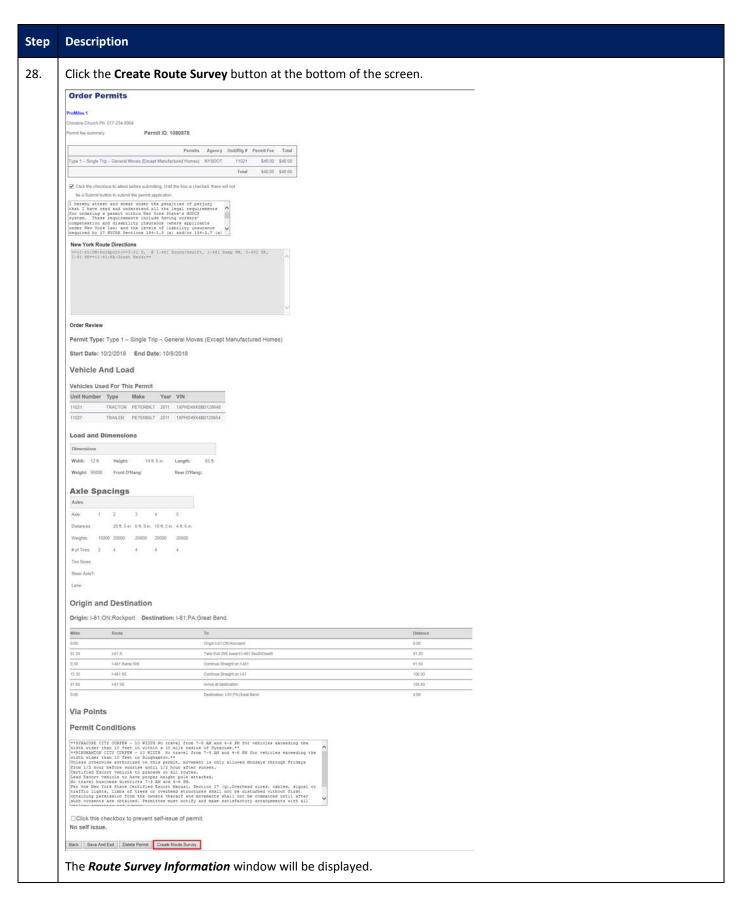
The user can click the **Expand Chevron** icon to expand the **Enter Trip Panel** and edit the route if they would like. It is recommended that the user first enter an Origin and Destination on the **Enter a Route** screen. Once the route is reviewed, only then add Via Points or Via Highways to modify the route if the provided route is not suitable to the user. This will assist the user in finding an approved HOOCS route.

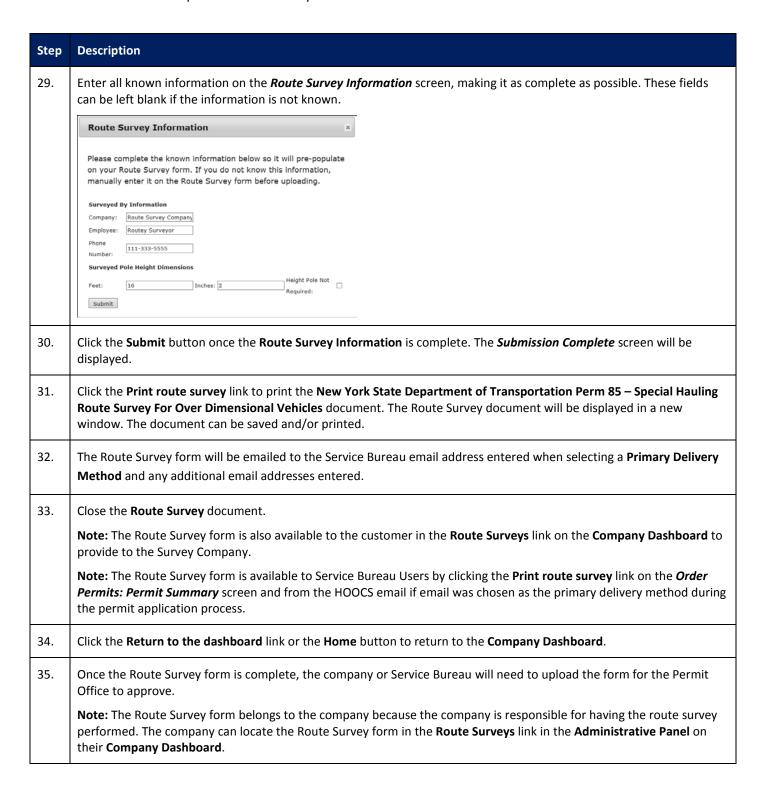
Note: If the user is unable to generate the desired route, click the **Permit Notes** button in the **Navigation Bar**. Enter the details for the desired route and click the **Add Note** button. Click the **continue your order to have your trip reviewed** link. This will submit the permit application to the Permit Office. At this point, the Permit Office will review the permit application and attempt to find an acceptable route. Once the NYSDOT User generates a route, the Route Survey form will be created and emailed to the Service Bureau. When the Service Bureau receives the Route Survey form, and has the company complete the information, the Service Bureau will need to upload the completed form for the Permit Office to approve. The Route Survey approval will be emailed to the permit Primary Delivery Method email address.

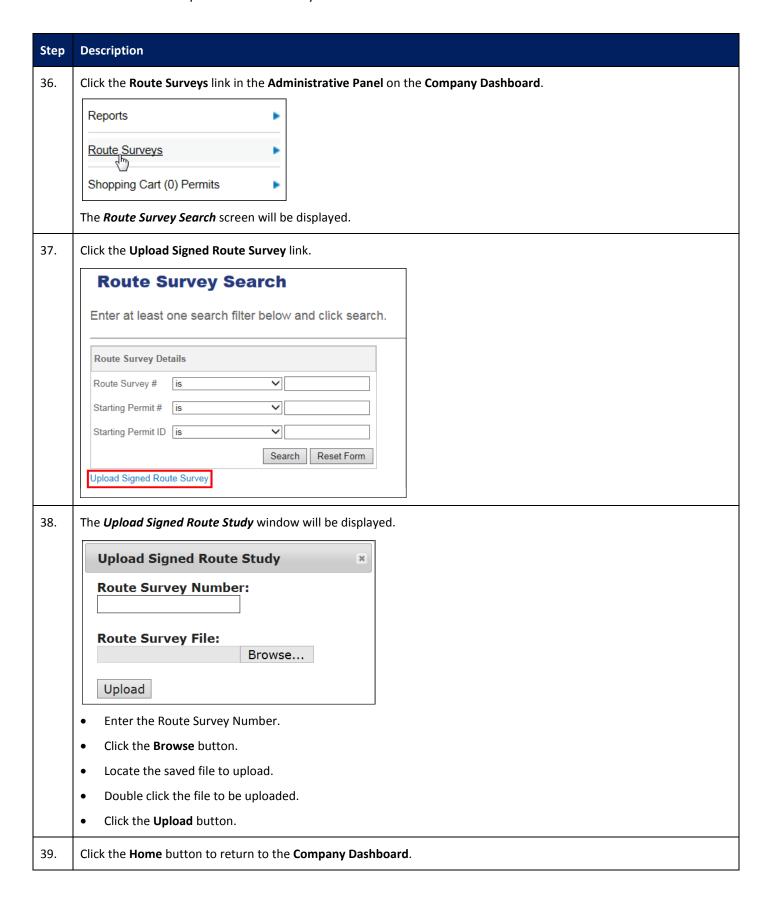
Note: The Route Survey form is also available to the customer in the **Route Surveys** link on the **Company Dashboard** to provide to the Survey Company.

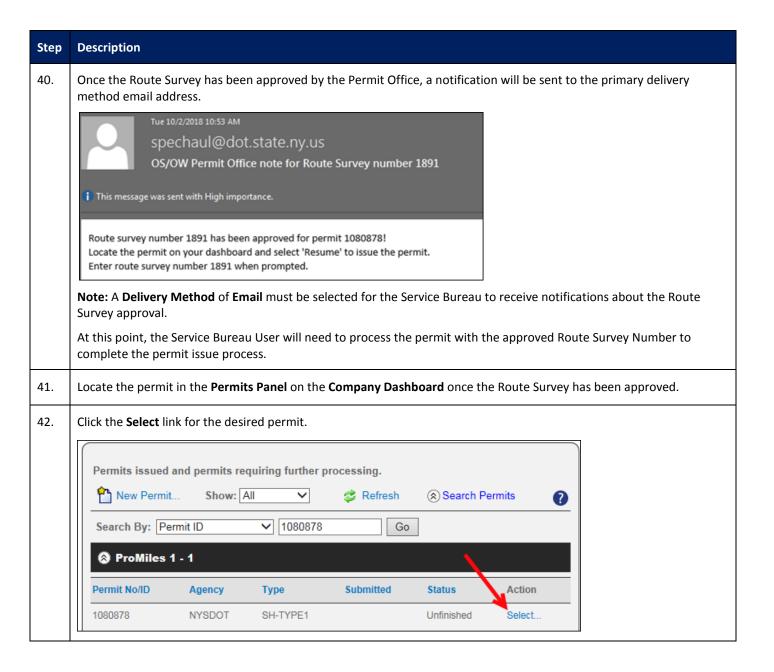
The following steps for completing the permit application are not applicable unless there is a route.

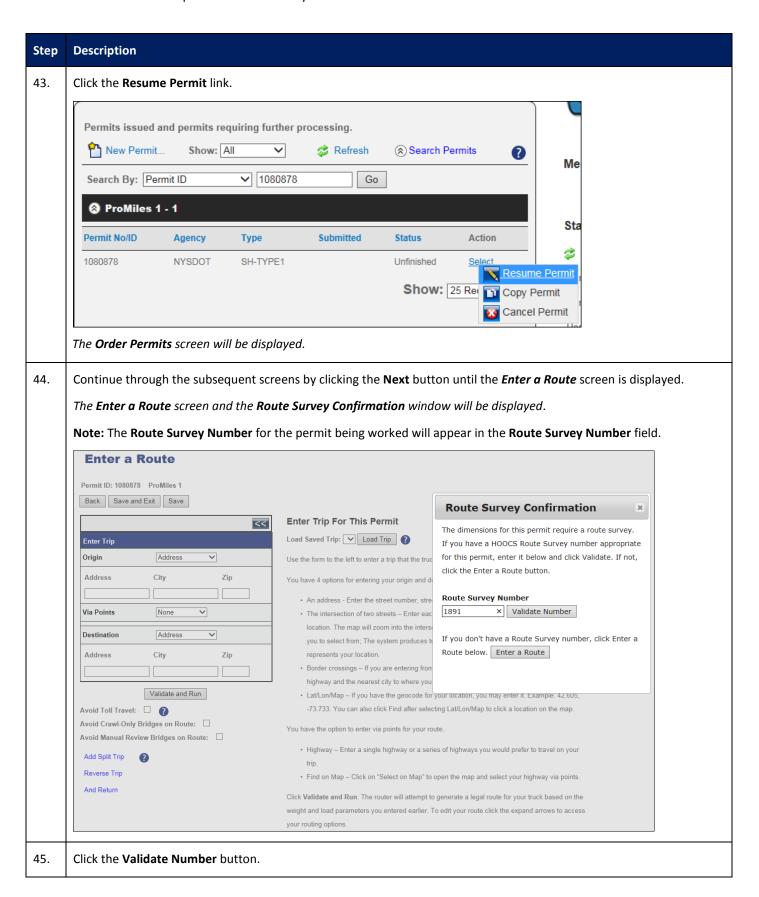
- 26. After reviewing the route and driving directions, click the **Next** button. The **Permit Summary** screen will be displayed.
- 27. Read and check the box attesting to understanding the rules and requirements for ordering a HOOCS permit.











Description

Step

46. HOOCS will attempt to validate the Route Survey. If the validation is successful, a confirmation message will be displayed letting the user know that the Route Survey is valid.

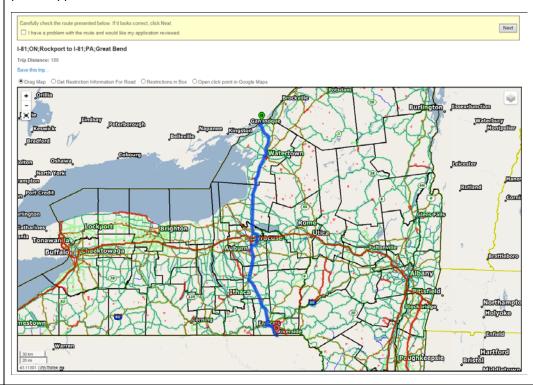


Note: If the validation fails after clicking the **Validate Number** button, a message will be displayed letting the user know that the Route Survey has not been approved or is not valid for this route.

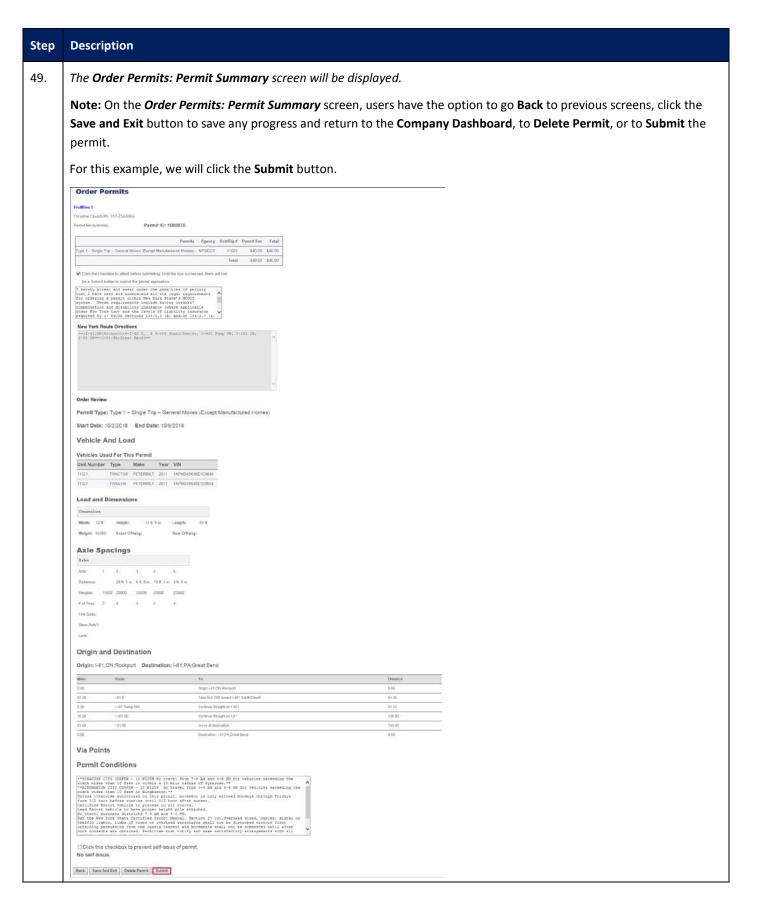
47. Click the **OK** button.

The **Trip Results Panel** will be displayed.

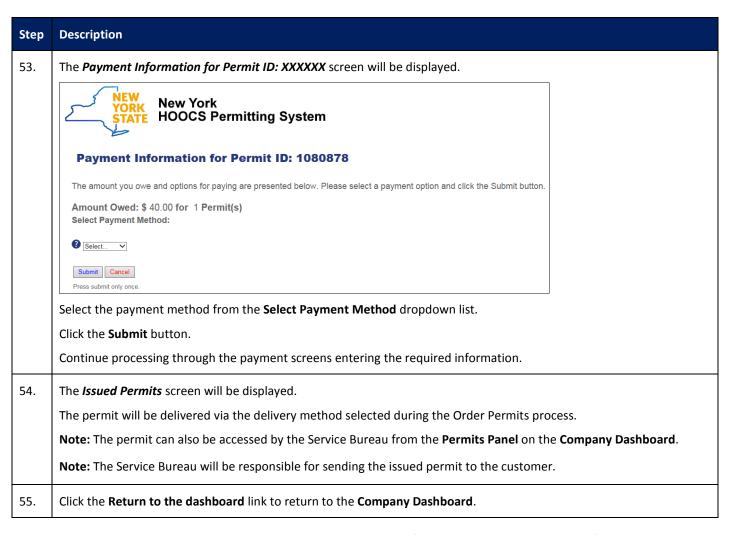
Note: The user is not able to change the route for this permit. If a new route is needed, the user must start a new permit application.



48. Click the **Next** button.



Description Step 50. The Order Permits: Permit Submission Successful screen will be displayed. **Order Permits** Christine Church Ph: 517-234-8964 Permit ID: 1080878 Permit Submission Successful! Your permit has been submitted. The permit(s) generated for this order are listed below. To view or check the status of your permit, return to the Dashboard. · Return to the dashboard The following permits have been approved. Permit ID Pay for the permits now From this screen, the user can Return to the dashboard or Pay for the permits now. If the user does not pay for the permit at this time, it can be paid by the start date from the **Shopping Cart**. Note: If the permit was not approved when the user clicked Submit due to the permit being outside of self-issue limits, the user will receive a message stating that the permit has been enqueued for further processing and the Pay for permits now link will not be available. The permit will be listed in the Permits Panel. Once the permit has been approved by a NYSDOT User, the status of the permit application will be Pending Payment, and the permit will be located in the Service Bureau's **Shopping Cart** for payment. 51. Click the Pay for the permits now link. 52. The **Pay for permits** screen will be displayed. Click the Pay For Verified Permits button. Pay for permits. The following permits have been authorized and are verified for payment and/or final processing: 1080878 Pay For Verified Permits Cancel



Note: Service Bureaus are able to reuse an approved **Route Survey** for the same company and route for vehicles with the same or smaller dimensions within 30 days of the **Route Survey's** initial approval. If the load dimensions are the same or smaller, and the route is the same, enter the approved **Route Survey Number** and click the **Validate Number** button on the **Enter a Route** screen. The **Route Survey** must be valid for all dates the permit is valid.