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NOTE: Not all requests require an account. There are some requests that are set-up as anonymous.

As we continue to add additional content to the Hub, each request may be set-up differently but the overall functionality generally applies to all requests as noted in this guide.

Need help?   Contact the area responsible for your request.   *Page | 1*

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Site Access

You can access the Customers & Utilities Connection Hub by the following:

- Go directly to the site at: https://cuc.csu.org
- Go to www.csu.org > Scroll to the links at the end of the homepage > Under "Building & Development", select "Customers & utilities connection hub"
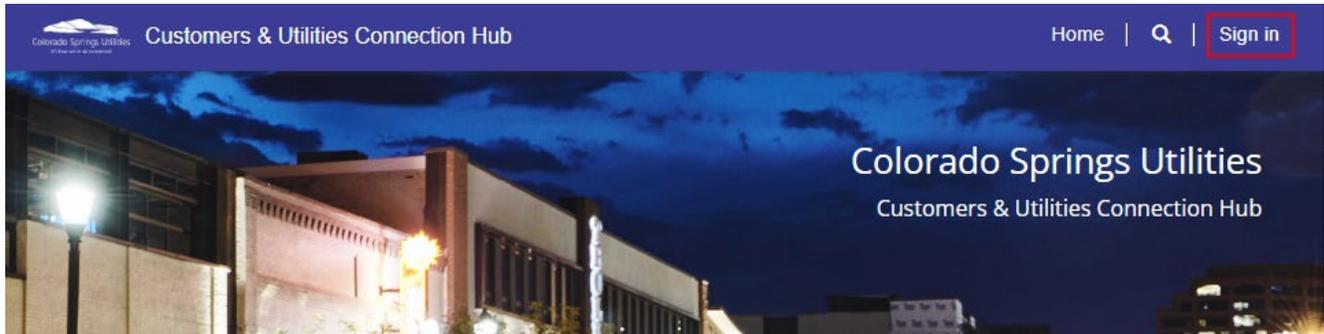

- Customers & Utilities Connection Hub Home page

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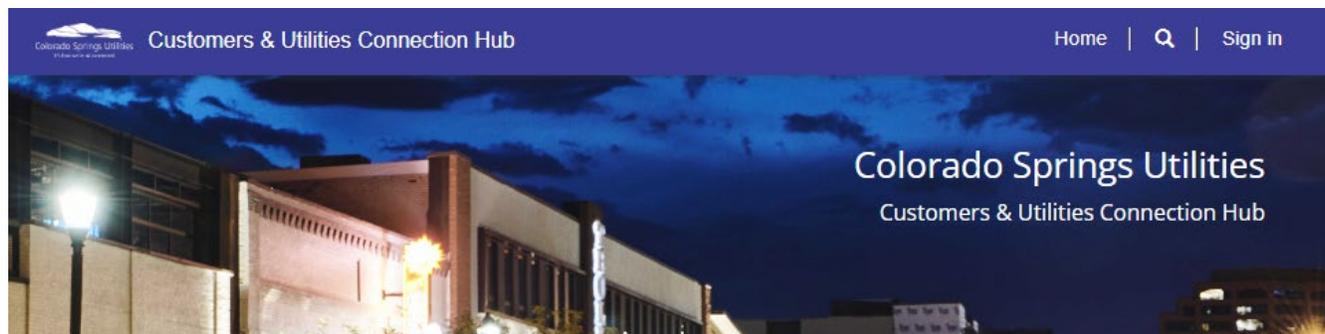
Create an Account / Sign In

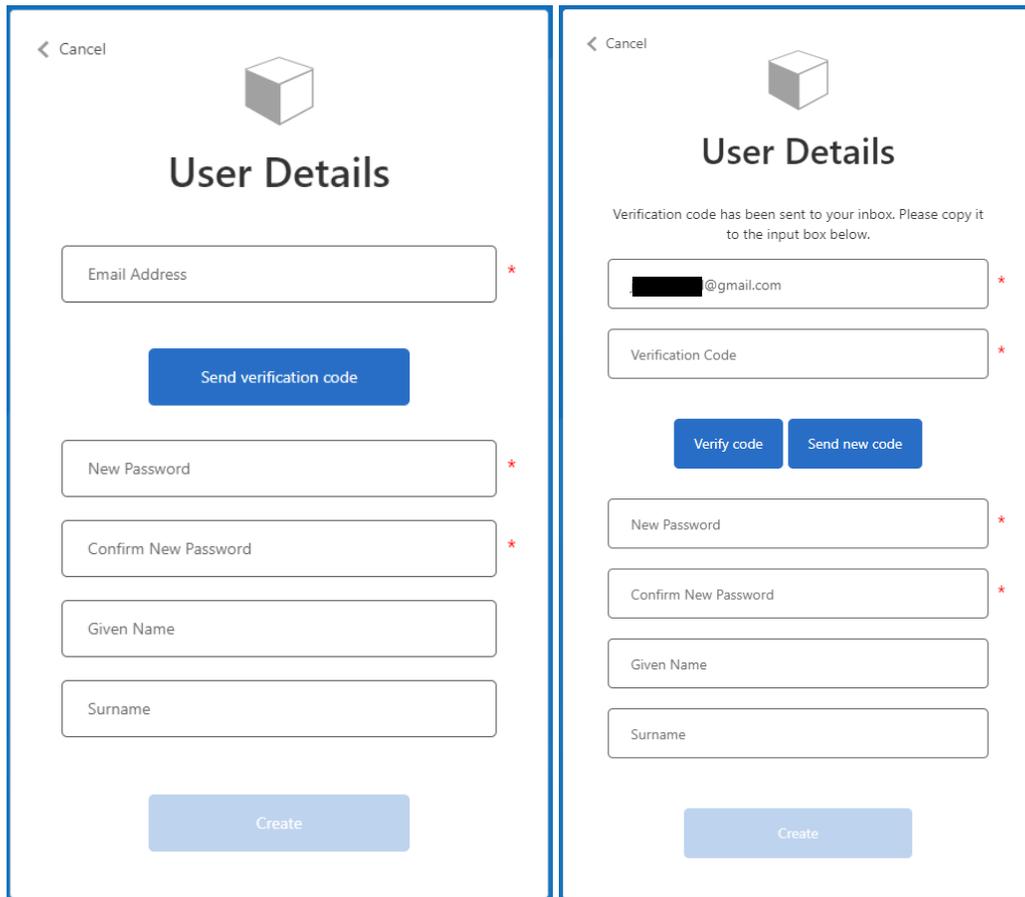- Click "Sign In" which will take you to through following screens.

- To create an account for the first time, click the "Sign up now" link and complete the following screens/details.
  - We are asking that you create individual accounts versus a general account at this time. The hub does have the functionality to allow for accounts linked to an organization which would allow sharing of information across the organization but that is something we are looking into for a future phase.
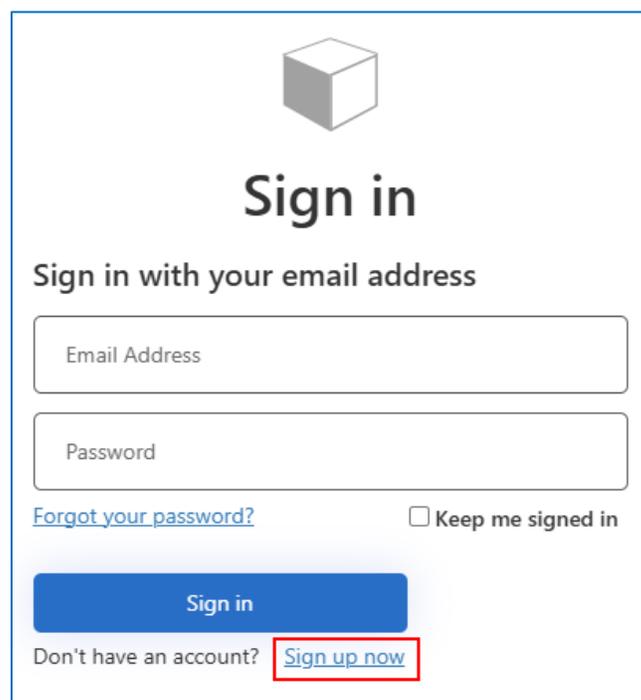
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- Enter your email address and click "Send verification code".
- Check your email for the verification code (the email will come from Microsoft on behalf of Colorado Springs Utilities B2C), enter the code from the email into the "Verification Code" field, and click "Verify code".
- The red asterisks are required fields.

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- Once verified, the next screens will pop-up.
- Create a password and confirm the password.
- You are not required to enter the "Given Name" and "Surname" fields here as this is Microsoft's process and doesn't link this information over to the Customers & Utilities Connection Hub.
  - If you would like to provide the information, enter your first name in the "Given Name" field and your last name in the "Surname" field.
- Click the "Create" button.
- You will then need to verify your email again. Click on the "Send verification code" button.
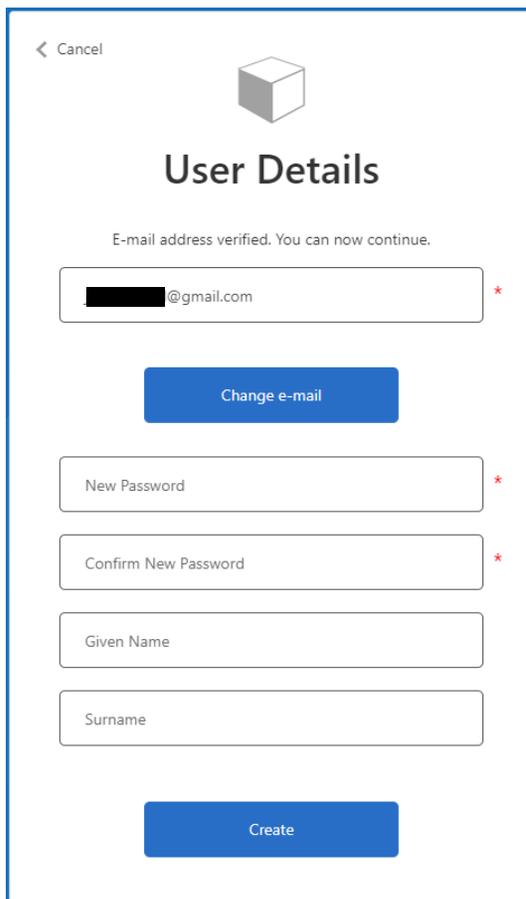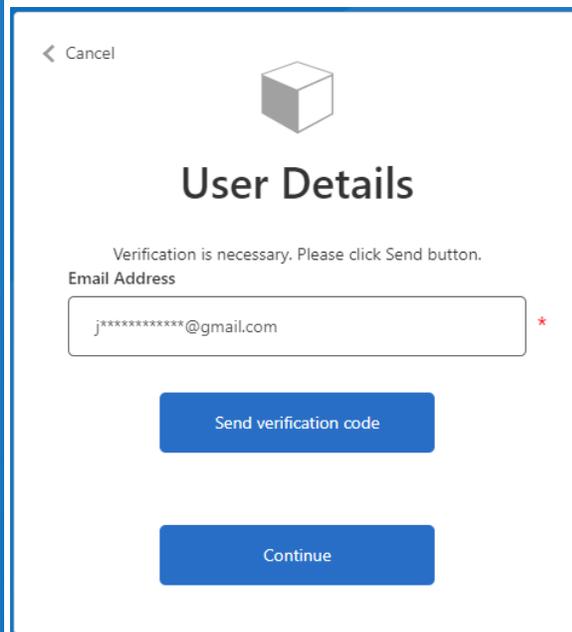
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- Check your email for the verification code (the email will come from Microsoft on behalf of Colorado Springs Utilities B2C), enter the code from the email into the "Verification Code" field, and click "Verify code".
- Once verified, click the "Continue" button.
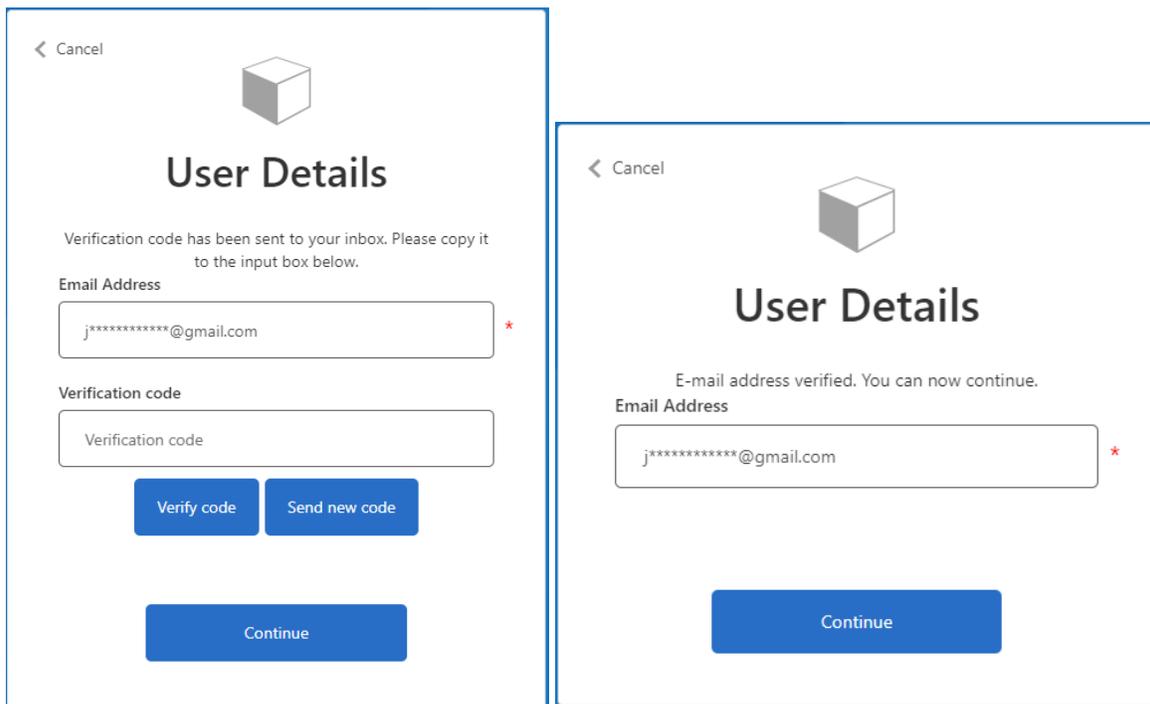
- You will then be prompted to enter your email again in the Hub (we are looking into the number of times that an email submittal and verification need to happen).
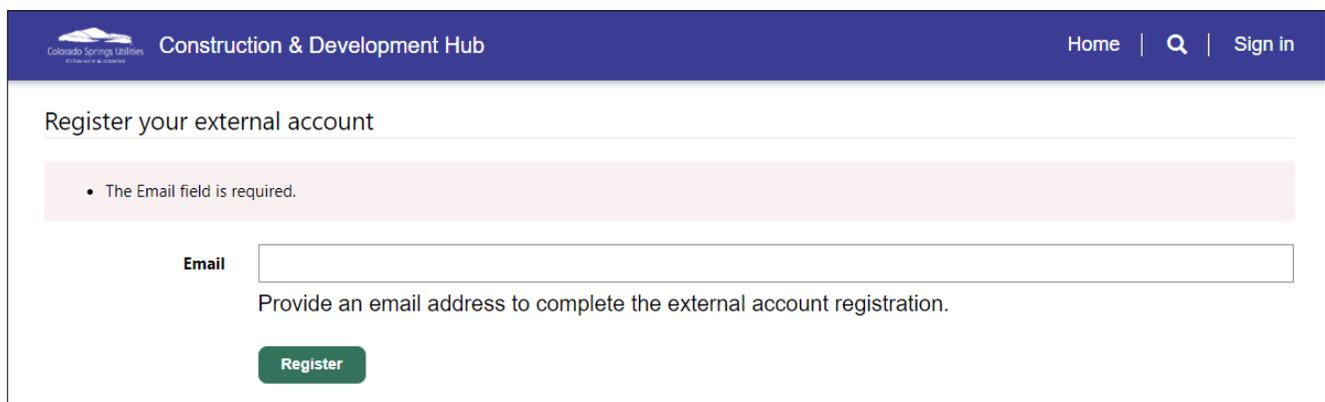
Need help?   Contact the area responsible for your request.   *Page | 6*

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- Complete your profile. First Name, Last Name, Email, Business Phone, and Organization Name. Fields with an asterisk are required.

Home > Profile

Profile

Jessica Thiel

Profile

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number will not be displayed on the site.

Your **Organization** and **Title** are optional. They will be displayed with your comments and forum posts.

Your Information

First Name *	Last Name *
Jessica	Thiel

E-mail *	Business Phone *
▮▮▮▮@gmail.com	Provide a telephone number

Organization Name	Title
CUC CSU	

Nickname	Web Site

Public Profile Copy

Preferred Language

How may we contact you? Select all that apply

- ☑ Email
- ☑ Fax
- ☑ Phone
- ☑ Mail

Update

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- If you have already created an account, click "Sign In" to log-in to your account.
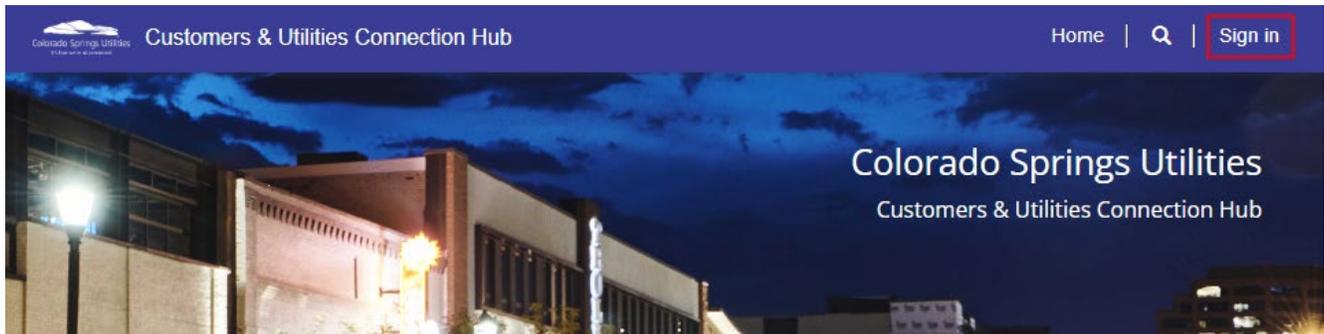
- You can update your profile by clicking on the dropdown arrow to the right of your name in the top right corner of the header.
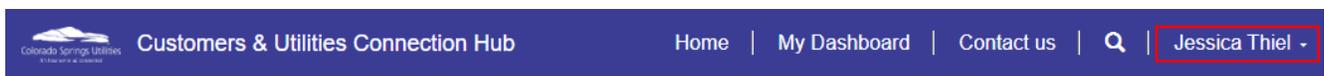
- Option to stay signed in for 90 days:
  - At log-in: Check "Keep me signed in". You will then sign-in with your Multi-Factor Authentication (MFA). As long as you don't sign-out of the Hub, clear the cache/history, or use a different computer etc., the system will only make you complete the MFA every 90 days.

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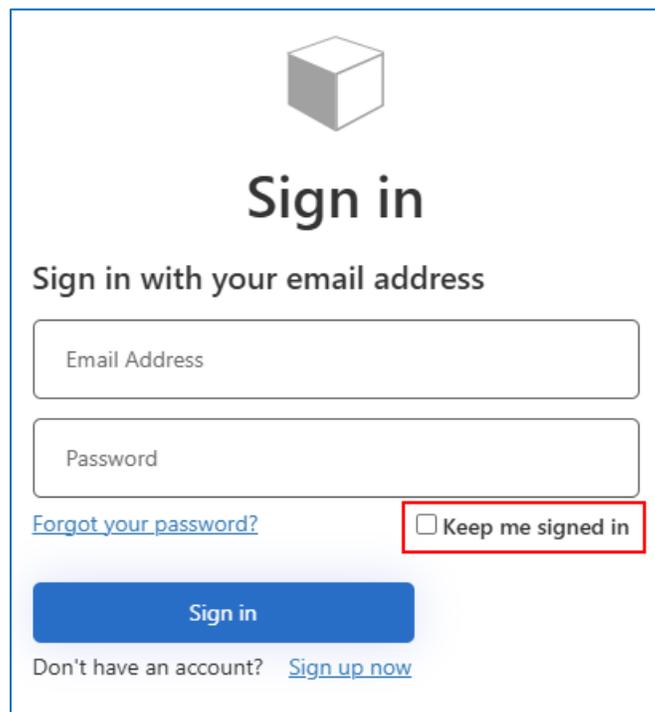
My Dashboard Overview

- You can find and check the status of your submittals on the "My Dashboard" page.
- The link to the "My Dashboard" page is in the header and on the "Home" page.
- "My Dashboard" does not display requests that are set-up as anonymous forms on the site.

Need help? Contact the area responsible for your request. *Page | 9*

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- "My Dashboard" shows your projects that have been saved for later, submitted, returned to you from a reviewer, and completed. The dropdown arrow to the right of the record gives you the options of what you can do with the record.
    - Unsubmitted and Returned section: Projects that you have saved for later and projects that have been returned to you from a reviewer.
        - Save for Later records can be edited or canceled.
        - Returned records can be partially edited depending on the request. For some, you may only be allowed to add comments and upload a new attachment(s).
            - You can view the comments from the reviewer on the Attachments page under Comments.
    - Submitted section: Projects that you have submitted.
        - Once submitted, you will be able to view the submittal but cannot edit it.
        - If there are changes to the submittal after you've submitted it that you need changed, please let your reviewer know or contact that area responsible for your request.
    - Completed section: Projects that have been completed or cancelled.
        - Completed records cannot be changed, but Construction Plans can be Reinstated (changes after approvals/complete) (Previous system for Construction Plans called it "Revision to Original").
- Generally, email notifications are sent when a project is submitted and when the status updates. If the option to add additional emails is provided, updates will be emailed to you and to those that you entered under the Email Notification section of the submittal.
- The "Owner" column shows who is assigned to your project.
    - If the "Owner" shows SYSTEM, the project hasn't been processed by CSU yet.
    - You can find contact information on the Contact Information page found under Additional Resources & Links. Generally, you will also receive contact info in the email sent when it has been assigned.
- "My Dashboard" updates in real time.

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My Dashboard

Submit a Request   **Contact Us - Feedback Form**

The dropdown arrow to the right of the record provides the option to view, edit, cancel or reinstate the record depending on the status.

Unsubmitted and Returned

.This is your "Save for later" and CSU returned to you submittals.
To see CSU comments, choose Edit in the dropdown arrow to open the record. The Comments section is on the lower portion of the page.
To resubmit, choose Edit in the dropdown arrow to open the record. Add comments and attachments, as needed, and click the Submit button.
To submit a Save for Later request, choose Edit in the dropdown arrow to open the record. Make changes, add comments and attachments, and click the Submit button.
To cancel and delete a Save for Later request, choose Cancel in the dropdown arrow.

Request Type ↑	Project Name	Request Status	Created On ↑	
Construction Plan	Test Construction Plan - Jessica	Save for Later	9/1/2023 8:51 AM	⌄

Submitted

The Due Date is a target date for a typical submittal. Not every Request Type will have a due date.
To view your submittal, choose View in the dropdown arrow which will open the record. You cannot make changes to these records in this status.

Request Type ↑	Project Name	Request Status	Submitted Date ↑	Due Date	Owner
There are no records to display.					

Completed

To view your submittal, choose View in the dropdown arrow which will open the record.
For Wastewater Master Facility Forms (WWMFF) and Hydraulic Grade Line (HGL) Requests, review comments for more information.
To revise and resubmit an approved WWMFF or Construction Plan, choose Reinstate in the dropdown arrow to open the record. Add comments and attachments, as needed, and click the Submit button. Please detail the revisions made in the comments section.

Request Type ↑	Project Name	Request Status	Submitted Date ↑	Owner	
Sign Review	1234 Test Way	Complete	9/5/2023 1:18 PM	Jessica Thiel	⌄

Need help?   Contact the area responsible for your request.   *Page | 11*

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Submit a Request

- To submit a request, click on "Submit a Request" on the "Home" page. There's also a button on the "My Dashboard" page.
- DO NOT SUBMIT DUPLICATE PROJECTS. We are using one record for the request and transferring that record back and forth to streamline the data and access. If you need to make changes to a record after it has been submitted, please let your reviewer know or contact that area responsible for your request.

- The "Submit a Request" button will take you to the following page.
- Click on the type of request you are submitting which will take you to that request's specific form. Generally, each form takes you through three (3) pages.
  - A general information page.
  - A request specific info page.
  - An attachments page which also has a place for comments.
- More buttons/forms will be added to this page as they come online.

Need help?   Contact the area responsible for your request.   *Page | 12*

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Submit A Request
PLEASE DO NOT SUBMIT DUPLICATE PROJECTS.

General Development Requests

For questions or help with submittals, contact UDS Admin at UDSAdmin@csu.org or 719.668.8259.

Ask a General Project Question / Meeting	Service Availability Letter
Easement Review	Sign Review

Customer Contract Administration Requests

For questions or help with submittals, contact Customer Contract Administration at CCA@csu.org or 719.668.8111.

Hydrant/Temporary Water Permit Application

Water & Wastewater Requests

For questions or help with submittals, contact UDS Admin at UDSAdmin@csu.org or 719.668.8259.

If you need a record that was closed out prior to end of August 2023 or if you need to make changes after a request has been submitted, please contact UDS Admin.

Construction Plan Review	Hydraulic Grade Line Request	Wastewater Master Facility Form
Land Use Review	Theoretical (Modeled) Fire Flow Report	

Electric & Gas Requests

For questions or help with submittals, contact UDS Admin at UDSAdmin@csu.org or 719.668.8259.

Electric & Gas Requests - COMING SOON

Special Event Requests

For questions or help with submittals, contact eventrequest@csu.org or 719.668.4424.

Watershed Special Event Applications

Need help?   Contact the area responsible for your request.   *Page | 13*

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- • Below is an example of the Attachments and Comments page which many request forms will .
- • To attach files, click the Add Files button.
  - o To access existing files or folders, click on the Name of the file which is a link.
  - o Review the attachment requirements which vary per request.
- • To submit comments, click the Add Comment button.
- • Your comments and CSU comments will show under the Comments section.
- • You have the options to save the request for later, submit it, or cancel it which will <u>delete</u> the record.
  Note: once a request has been submitted, you will not be able to delete the record.

Attachments

To facilitate the processing of your request, please submit your attachments as follows:

- • Individual file size should not exceed 18 MB with maximum total upload of 50 MB
- • File name should not contain special characters (&,$,# etc.)
- • Combine all construction plan sheets into one PDF document
- • Please name your attachments accordingly:
  - o Plans: Project Name_Address or Intersection_YYYYMMDD

Request Documents (click on Name link to download file)

◉ Add files   📁 New folder

Name ↑	Modified
📄 Project Test 3_121 S Tejon_20230614.pdf (33 KB)	9/1/2023 8:52 AM

Comments

Comments

◉ Add comment

👤 3 days ago Modified on 9/8/2023 1:25 PM	**Jessica Thiel ➔ Jessica Thiel** resubmitting Created by # Portals-Development Services	
👤 6 days ago Modified on 9/5/2023 2:11 PM	**Jessica Thiel ➔ Jessica Thiel** DO NOT CHANGE FROM IN QUE FOR REVIEW Created by # Portals-Development Services	

Previous   Cancel   Save for Later   Submit

Review Submittals & Submit a Resubmittal or Revision - My Dashboard

- From My Dashboard, the dropdown arrow to the right of the record provides the option to View, Edit, Cancel, or Reinstate the record depending on the request type and status.

My Dashboard

Submit a Request   Contact Us - Feedback Form

The dropdown arrow to the right of the record provides the option to view, edit, cancel or reinstate the record depending on the status.

Unsubmitted and Returned

.This is your "Save for later" and CSU returned to you submittals.
*To see CSU comments, choose Edit in the dropdown arrow to open the record. The Comments section is on the lower portion of the page.
*To resubmit, choose Edit in the dropdown arrow to open the record. Add comments and attachments, as needed, and click the Submit button.
*To submit a Save for Later request, choose Edit in the dropdown arrow to open the record. Make changes, add comments and attachments, and click the Submit button.
*To cancel and delete a Save for Later request, choose Cancel in the dropdown arrow.

Request Type ↑	Project Name	Request Status	Created On ↑	
Construction Plan	Test Construction Plan - Jessica	Save for Later	9/1/2023 8:51 AM	⌄

Submitted

*The Due Date is a target date for a typical submittal. Not every Request Type will have a due date.
*To view your submittal, choose View in the dropdown arrow which will open the record. You cannot make changes to these records in this status.

Request Type ↑	Project Name	Request Status	Submitted Date ↑	Due Date	Owner	
Hydraulic Grade Line Request	Test HGL - Don/Jessica	Submitted	8/30/2023 11:38 AM			⌄

Completed

*To view your submittal, choose View in the dropdown arrow which will open the record.
*For Wastewater Master Facility Forms (WWMFF) and Hydraulic Grade Line (HGL) Requests, review comments for more information.
*To revise and resubmit an approved WWMFF or Construction Plan, choose Reinstate in the dropdown arrow to open the record. Add comments and attachments, as needed, and click the Submit button. *Please detail the revisions made in the comments section.*

Request Type ↑	Project Name	Request Status	Submitted Date ↑	Owner	
Construction Plan	Construction Plan Test - Jessica	Complete			⌄
Sign Review	1234 Test Way	Complete	9/5/2023 1:18 PM	Jessica Thiel	⌄

Need help?   Contact the area responsible for your request.   *Page | 15*

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- Your Save for Later requests can be edited and submitted by choosing Edit in the dropdown arrow or cancelled by choosing Cancel. Cancel deletes the record.
- For requests that have been returned to you by CSU for information, corrections, etc., you can resubmit your request with additional updates, attachments and comments by selecting Edit in the dropdown arrow.

- Submitted requests can only be viewed. Choose View in the dropdown arrow.
- If you need to make changes to a record after it has been submitted, please let your reviewer know or contact that area responsible for your request.

My Dashboard

Submit a Request   **Contact Us - Feedback Form**

The dropdown arrow to the right of the record provides the option to view, edit, cancel or reinstate the record depending on the status.

Unsubmitted and Returned

.This is your "Save for later" and CSU returned to you submittals.
To see CSU comments, choose Edit in the dropdown arrow to open the record. The Comments section is on the lower portion of the page.
To resubmit, choose Edit in the dropdown arrow to open the record. Add comments and attachments, as needed, and click the Submit button.
To submit a Save for Later request, choose Edit in the dropdown arrow to open the record. Make changes, add comments and attachments, and click the Submit button.
To cancel and delete a Save for Later request, choose Cancel in the dropdown arrow.

Request Type ↑	Project Name	Request Status	Created On ↑	
Construction Plan	Test Construction Plan - Jessica	Save for Later	9/1/2023 8:51 AM	˅

Submitted

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Request Type ↑	Project Name	Request Status	Submitted Date ↑	Due Date	Owner	
Hydraulic Grade Line Request	Test HGL - Don/Jessica	Submitted	8/30/2023 11:38 AM			˅
						☑ View

Completed

To view your submittal, choose View in the dropdown arrow which will open the record.
For Wastewater Master Facility Forms (WWMFF) and Hydraulic Grade Line (HGL) Requests, review comments for more information.
To revise and resubmit an approved WWMFF or Construction Plan, choose Reinstate in the dropdown arrow to open the record. Add comments and attachments, as needed, and click the Submit button. Please detail the revisions made in the comments section.

Request Type ↑	Project Name	Request Status	Submitted Date ↑	Owner	
Construction Plan	Construction Plan Test - Jessica	Complete			˅
Sign Review	1234 Test Way	Complete	9/5/2023 1:18 PM	Jessica Thiel	˅

Need help?   Contact the area responsible for your request.   *Page | 17*

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- Completed records can be viewed by choosing View in the dropdown arrow. Generally, these records cannot be changed once complete.
- Construction Plans and Wastewater Master Facility Forms can be revised and resubmitted by choosing Reinstate. This is for changes after approvals/complete. Previous system for Construction Plans called it "Revision to Original".
  - If you choose Reinstate, please provide details of the revisions in the Comments section.

Need help?   Contact the area responsible for your request.   Page | 18

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Other Hub Resources

- There are helpful links in the Additional Resources & Links section on the "Home" page.

- You can send feedback to us via the "Contact us" link in the header. There's also a button at the top of the "My Dashboard" page.

Need help? Contact the area responsible for your request.   *Page | 19*

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Notes & Frequently Asked Questions

Our goal is to make it easier for our customers to do business with us. Our aim is to make the submittal process more efficient, allow customers to track their projects, provide point of contact information, and improve our internal coordination.

We welcome all feedback on the Customers & Utilities Connection Hub and our processes. Please submit any feedback or questions to jthiel@csu.org.

Notes:

- The new platform is Microsoft 365 based. This means that our platform will stay up to date with Microsoft enhancements.
- The new platform is an in-house product therefore updates can be completed promptly instead of having to request updates through a contractor.
- You will see updates to the CSU.org > Building & Development page.
- You will see updates to the CSU.org > Permits, Applications & Forms page as we make updates to the documents and forms.

Questions:

- Are electric and gas requests now going through this site?
    - Not at this time. Electric and gas will continue their existing processes. Field Engineering is included in our Phase 2 improvements.
- Can I pay fees online through the hub?
    - Not at this time.
- Will I receive a confirmation email?
    - Generally, yes.
- What if consultants, engineers, etc. change during the submittal? How do we access those submittals and remove their access to the submittals?
    - You will need to contact us and we can move the submittals over to a new person.
- How are you tying information together? For example, the Hydraulic Grade Line request to a Construction Plan?
    - We are now requiring Tax Schedule Numbers (TSN) which we use as a common link, but we also understand that TSNs may change over time or there may be multiple or partial TSNs for a project. Many of the online requests we're adding to the solution will be within the same platform which will allow for better search functionality.
- What if I need to get a hold of someone immediately on a review?
    - You should try contacting your reviewer first or the contact information provided for that request. You can find contact information on the Contact Information under the Additional Resources & Links section and general contact information on the Submit a Request page.
- What if I have changes to a request after I submitted it?
    - If there are changes to the submittal after you've submitted it that you need changed, please let your reviewer know or contact that area responsible for your request.

Need help?   Contact the area responsible for your request.   *Page | 20*

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