



PERMIT MANAGER HELP GUIDE FOR EXTERNAL USERS

Jan 18, 2023

Version 1.0

CONTENTS

INTRODUCTION	4
ABOUT PERMIT MANAGER.....	4
THIS HELP GUIDE.....	4
NAVIGATION OF THE PERMITTING SYSTEM	5
DASHBOARD PAGE	5
NEW PERMIT	5
SEARCH	5
<i>Search By ID.....</i>	5
<i>Search By Criteria.....</i>	6
PAYMENTS	6
<i>Bond Payments.....</i>	6
<i>Application Payments.....</i>	6
MANAGEMENT	7
<i>Users</i>	8
<i>Edit User Details.....</i>	8
<i>Company profile.....</i>	9
<i>Fleets.....</i>	9
<i>Insurance.....</i>	9
<i>Welcome Banner.....</i>	10
<i>Bond Accounts.....</i>	10
COMPANY MANAGEMENT.....	12
<i>Editing Company Profiles.....</i>	12
USERNAME PASSWORDS.....	12
<i>Reset Password by An External User.....</i>	12
USERNAMES	13
<i>Executive User Privileges</i>	13
<i>Associate User Privileges.....</i>	14
<i>Executive Username Set Up.....</i>	14
NEW PERMIT	15
NEW PERMIT – SINGLE TRIP	15
<i>Route Planner</i>	16
<i>Application Completion Page – Single Trip Permit.....</i>	17
<i>Permit Details</i>	17
NEW PERMIT – MONTHLY PERMIT.....	17
<i>Application Completion Page - Monthly Permit.....</i>	18
<i>Permit Details</i>	19
NEW PERMIT – ANNUAL PERMIT	19
<i>Application Completion Page – Annual Permit.....</i>	19
<i>Permit Details</i>	20
APPLICATION ID.....	20
PERMIT DETAILS	20
<i>Permit Details – Action Tabs.....</i>	21

Permit Details – Screen Warnings..... 21

General Information - Permit Details 22

SEARCH **23**

 APPLICATION 23

Search by ID..... 23

Search by Criteria..... 23

APPENDIX A: GLOSSARY..... **23**

 COMPANY INFORMATION..... 23

 BRANCH INFORMATION 23

 DASHBOARD DETAILS 24

 STATUS DEFINITIONS 24

 GENERAL INFORMATION 25

 OVERSIZE AND OVERWEIGHT INFORMATION..... 26

 TRUCK INFORMATION 26

 MOBILE OFFICE INFORMATION 27

 MANUFACTURED HOME 27

 HOUSE / OTHER INFORMATION 27

 SEARCH FOR APPLICATIONS 27

 MY COMPANY PROFILE 28

Billing Information 29

Branch Information 29

Branch Contact Information 29

INTRODUCTION

ABOUT PERMIT MANAGER

The Permit Manager application is a web application that allows authorized users the capabilities to manage the *OkiePros* Oversize Overweight Permitting Processes. The Permit Manager will handle routing and permitting.

THIS HELP GUIDE

This Help Guide is intended to be used as a training guide and reference guide for the day-to-day operations of the Permit Manager application by an External User, i.e. A Trucking Company, Permitting Service, or Carrier. It is designed to help the user quickly learn about the application and its features, as well as share tips to help use Permit Manager to its fullest potential.

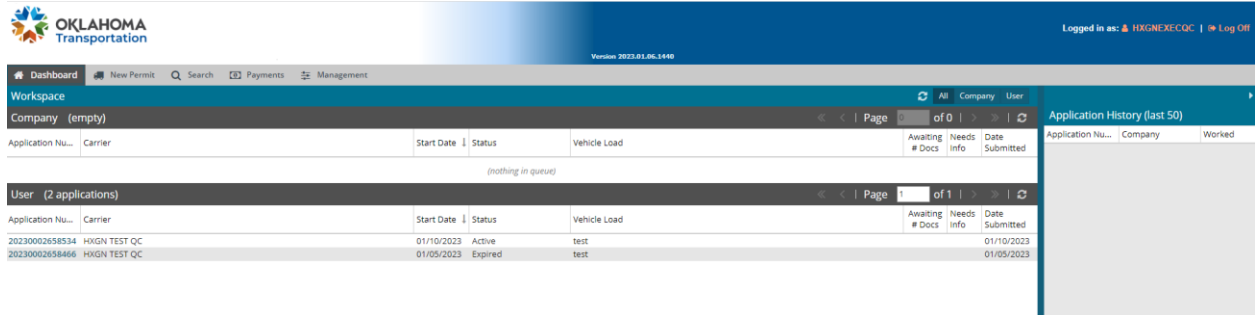
This Guide will instruct how to do the following:

- Company Account Creation
- New Permit
 - Single Route Permits which will integrate the automated routing application
 - Other Permits (Annual, Monthly) where no routing integration is required.
 - Provide necessary automation of workflow and review process.
- Issue Permits
- Manage Company Accounts – bond, insurance, users, fleet, invoicing
- Permit Payments
- Search functions
- On Screen Reporting

Upon completion of the training, the user will be familiar with all the steps necessary to use the *OkiePros* Permitting System.

NAVIGATION OF THE PERMITTING SYSTEM

DASHBOARD PAGE

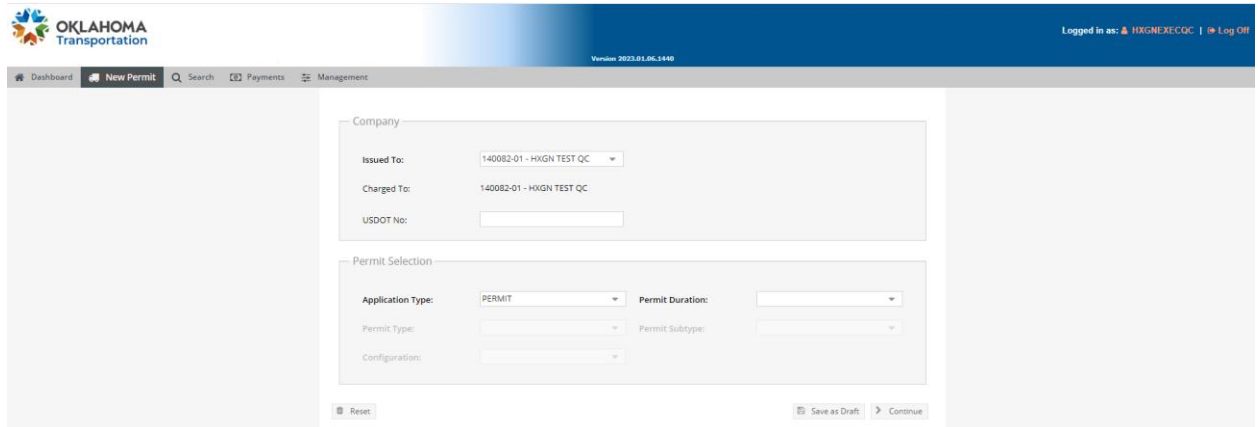


The dashboard shows the following data:

Company (empty)						
Application No...	Carrier	Start Date	Status	Vehicle Load	Awaiting # Docs	Needs Info
nothing in queue						

User (2 applications)						
Application No...	Carrier	Start Date	Status	Vehicle Load	Awaiting # Docs	Needs Info
20230002658534	HXGN TEST QC	01/10/2023	Active	test		01/10/2023
20230002658466	HXGN TEST QC	01/05/2023	Expired	test		01/05/2023

NEW PERMIT



The form contains the following fields:

- Company:** Issued To: 140082-01 - HXGN TEST QC; Charged To: 140082-01 - HXGN TEST QC; USDOT No: [empty]
- Permit Selection:** Application Type: PERMIT; Permit Duration: [empty]; Permit Type: [empty]; Permit Subtype: [empty]; Configuration: [empty]

Buttons: [Reset], [Save as Draft], [Continue]

SEARCH

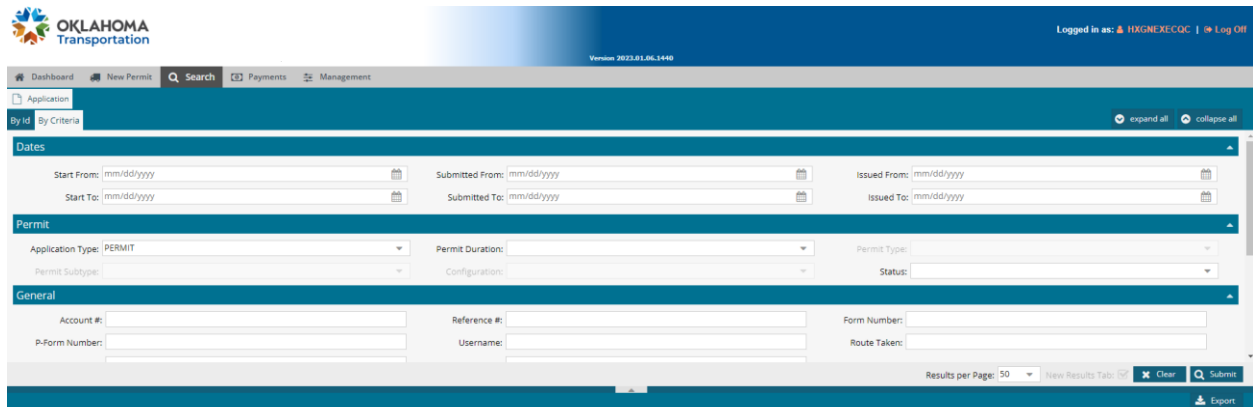
SEARCH BY ID



The search interface includes:

- Navigation: Dashboard, New Permit, Search, Payments, Management
- Search Method: By ID (selected), By Criteria
- Input: Application Number / Permit Number: [text input]
- Actions: Results per Page: 50; New Results Tab: [Clear]; [Submit]; [Export]

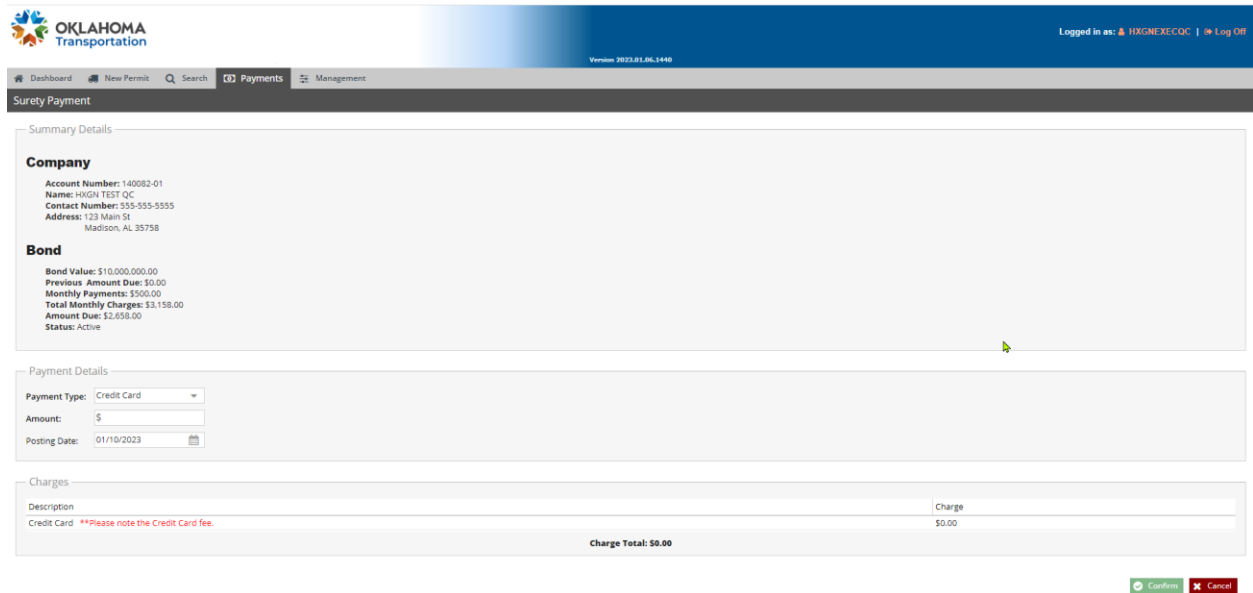
SEARCH BY CRITERIA



PAYMENTS

BOND PAYMENTS

To make Bond payments, the company must have a Bond Account set up. Setting up a Bond account is done by an ODOT official.



APPLICATION PAYMENTS

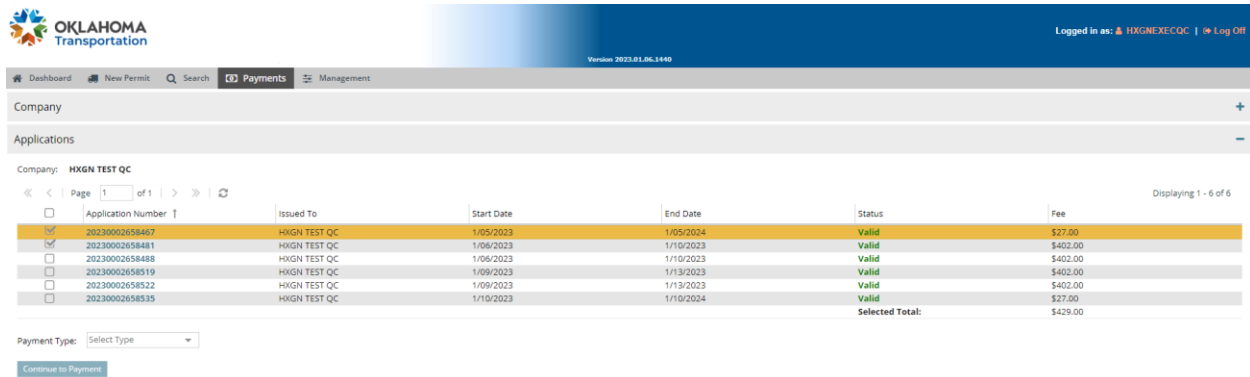
The user may pay for permits that need to be paid to become active/issued permits. Select the Payments Tab and then select Application Payment. The user will be presented with a list of applications that are ready for payment. Select the checkbox of one or as many as ten permits. Select the payment method

- Credit Card
- Bond

Select the Continue to Payment Button, once the Application IDs are selected.

Continue to complete the payment and select Confirm.

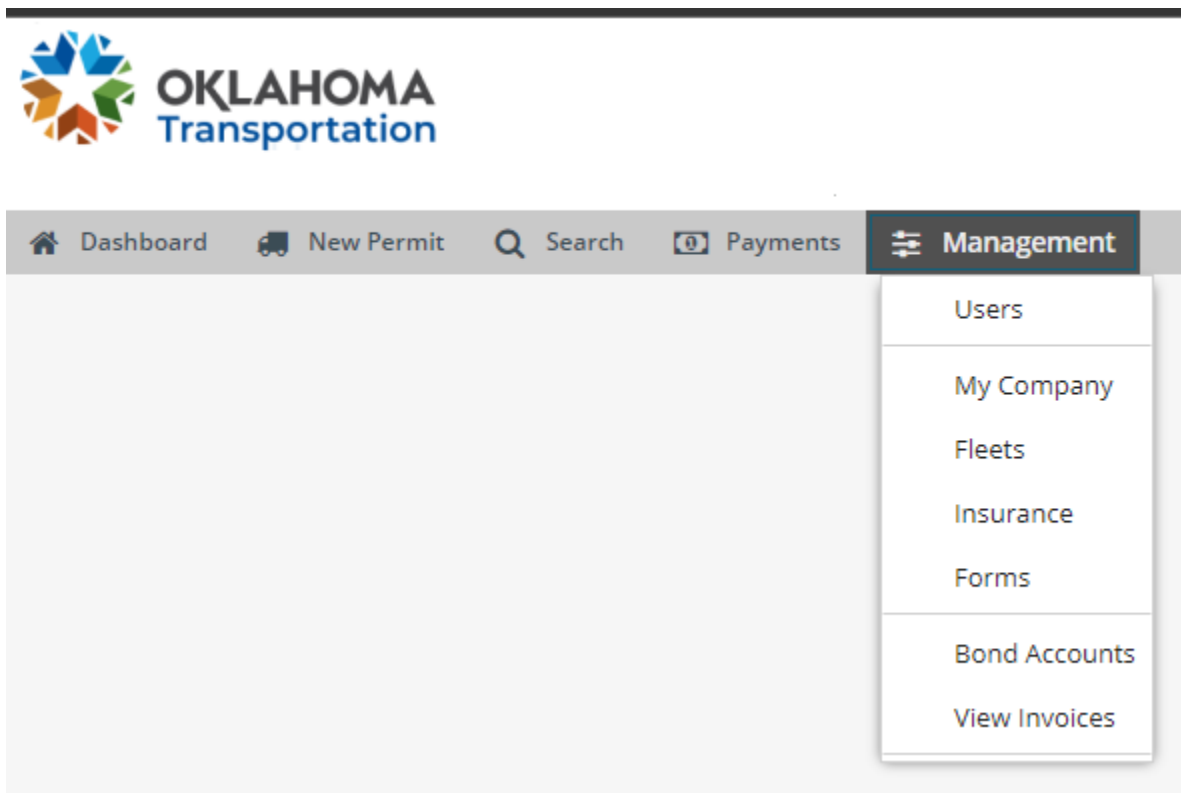
A Toast Notification displays confirming the payment was accepted. The permit is now active and issued.



The screenshot shows the 'Payments Management' page for company 'HXGN TEST QC'. It features a table with columns for Application Number, Issued To, Start Date, End Date, Status, and Fee. The first row is highlighted in yellow and selected. Below the table is a 'Payment Type' dropdown menu and a 'Continue to Payment' button.

Application Number	Issued To	Start Date	End Date	Status	Fee
20230002658467	HXGN TEST QC	1/05/2023	1/05/2024	Valid	\$27.00
20230002658481	HXGN TEST QC	1/06/2023	1/10/2023	Valid	\$402.00
20230002658489	HXGN TEST QC	1/06/2023	1/10/2023	Valid	\$402.00
20230002658519	HXGN TEST QC	1/09/2023	1/13/2023	Valid	\$402.00
20230002658522	HXGN TEST QC	1/09/2023	1/13/2023	Valid	\$402.00
20230002658535	HXGN TEST QC	1/10/2023	1/10/2024	Valid	\$27.00
Selected Total:					\$429.00

MANAGEMENT



The screenshot shows the 'Management' menu in the Oklahoma Transportation system. The menu items are: Users, My Company, Fleets, Insurance, Forms, Bond Accounts, and View Invoices.

USERS

USER MANAGEMENT

The Users may also be able to filter based upon Username or Role. Once a filter is used, then the user will search for matching criteria.

EDIT USERS

Select a filter (External Users), Select a Company Name (User Defined), and Select a Role (Executive). The select *Search Button*. A list of usernames will generate in table of results.

The user may edit information in the user's selection by clicking on the "Pencil" Icon on the right side of the results from the search criteria.

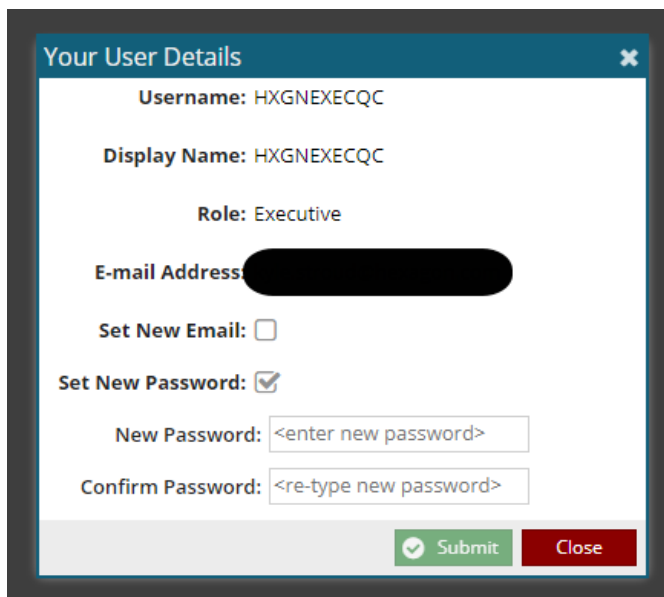
The user may change the User Role, Email Address, Deactivate the Account, Allow Bond Deferral, and Reset Password.

For an Internal User reviewing, editing, or adding an External user, a Company Name is required.

EDIT USER DETAILS

If the user wants to reset their password, click on the Username in the Header of the OkiePros Application (upper right-hand corner). A message will display if the user hovers over the user name. It will display, "View your user details."

A pop-up box will display if the user clicks on the username where a checkbox is available to set a new password. Select the checkbox, enter the password and confirm the password. Select Submit. The user will receive a Toast Notification indicating the password was successfully reset.



The screenshot shows a pop-up window titled "Your User Details" with a close button (X) in the top right corner. The form contains the following fields and options:

- Username:** HXGNEXECQC
- Display Name:** HXGNEXECQC
- Role:** Executive
- E-mail Address:** [Redacted]
- Set New Email:**
- Set New Password:**
- New Password:** <enter new password>
- Confirm Password:** <re-type new password>

At the bottom of the form, there are two buttons: a green "Submit" button with a checkmark icon and a red "Close" button.

COMPANY PROFILE

The Create / Manage Company Profile allows an External User to:

- Billing Information:
 - Contact Information including: name, email, phone, fax
 - Billing Information

FLEETS

Fleet vehicles: Trucks, Trailers, or Offroad vehicles can be saved in a table for fleet management. To start the fleet manager, the user must enter a company name and then a list is populated. The user will need to select the “best match.” Information stored in the list of a specified company’s fleet:

- Unit Number – User Defined Name of the Vehicle – used in the pick list when applying for a permit.
- Vehicle Type: Truck, Trailer, Offroad
- If a Trailer, whether the trailer is a Lowboy or not. A Lowboy trailer is a semi-trailer with two drops in deck height: one right after the gooseneck and one right before the wheels.
- Year
- Make – Vehicle make name such as Ford, GMC, et al.
- Model – optional field
- VIN – 17 characters to identify the vehicle
- Tag Number
- Tag State – the state where the tag was issued

The user can edit and delete records within the fleet manager table.

INSURANCE

Insurance is required for specified permits. The Carrier User must contact ODOT to send them the policy information for either Auto Insurance, General Insurance, or both.

The system allows the entry of Auto Insurance and General Insurance by an ODOT employee. An external user may view the information and review it. If corrections are required, please contact ODOT.

ADD INSURANCE

Currently, the addition of insurance is the sole responsibility of ODOT. Neither Executive Users nor Associate Users may enter insurance information.

EXISTING INSURANCE

If insurance is entered into the system, it will display the information.

DELETE INSURANCE POLICY

Currently, the deletion of insurance is the sole responsibility of ODOT.

WELCOME BANNER

Managed by Internal Users at ODOT. The Welcome Banner displays when logging in. Once the banner has displayed and if the user wants to read the banner, select Notices in the upper right side of the header.

BOND ACCOUNTS

The user may View Payments, Payments and Applications from the Management Tab by selecting Bond Accounts.

VIEW INVOICES

When the user selects the Invoice Tab in Manager, the user is directed to the Invoices page. If Invoices are available, the user may download or email the invoice(s).

BOND ACCOUNTS

The payments section of the Bond Accounts includes a Home View, Payments, and Payments and Applications.

Home

The home tab displays upon entering the Bond Account page. It includes:

- Summary:
 - Bond Value
 - Previous Amount Due
 - Amount Due
 - Remaining Balance
 - Monthly Payments
 - Monthly Charges
 - Monthly Adjustments
- Bonds
 - Number
 - Value
 - Bond Date
 - Close Date
 - Closed
 - Bond Company
- Payments
 - Receipt Number
 - Transaction Date
 - Amount
 - Type – Payment Type
 - Check Number
 - Credit Card Ending

- Authorization
- Fees
- Total (with fees)
- Refunds
 - Transaction Date
 - Amount
 - Application
 - Adjuster

Payments

The items displaying under the payments tab are:

- Payments:
 - Receipt Number
 - Transaction Date
 - Amount
 - Type – Payment Type
 - Check Number
 - Credit Card Ending
 - Authorization (associated with Credit Card Transaction)
 - Fees
 - Total (with Fees)
- Adjustments
 - Transaction Date
 - Amount
 - User – Who made the adjustment
 - Notes

Payments and Applications

The items displaying under the payments and application tab are:

- Payments:
 - Receipt Number
 - Transaction Date
 - Amount
 - Type – Payment Type
 - Check Number
 - Credit Card Ending
 - Authorization (associated with Credit Card Transaction)
 - Fees
 - Total (with Fees)
- Adjustments
 - Transaction Date
 - Amount
 - User – Who made the adjustment

- Notes
- Refunds
 - Transaction Date
 - Amount
 - Application
 - Adjuster – Who made the adjustment
- Permit Applications
 - Application Number
 - Permit Number
 - Charged To – company name who paid for the permit
 - Start Date – when the permit becomes valid
 - Load Description
 - Origin
 - Destination
 - Issued Date
 - Total Fees

VIEW PAST INVOICES

The user may view their company's Invoices based upon the ones available for a month with amounts and ability to download and email.

COMPANY MANAGEMENT

EDITING COMPANY PROFILES

The user may edit a company profile, but the user is not allowed to delete a company profile.

- Login as a Carrier Executive User
- Select Management Tab
- Select My Company
- Select Edit
- Edit a field such as Name or Contact Information
- Select Continue
- Review the changes
- Select Save

USERNAME PASSWORDS

RESET PASSWORD BY AN EXTERNAL USER

- Enter URL to Login Screen
- Enter Username
- Select Forgot Password

- Verify the username is automatically filled in on the page
- Check the box “I’m not a robot.”
- Select Reset Password
- Verify the email contains a URL to set a new password
- Enter New Password and Confirm Password
- Select Update Password
- User can now login with the new password

USERNAMES

Upon creation of a new company profile, a username is automatically sent to the email address entered with the company profile creation. The username is an executive Carrier User Role. As an executive user, the user may add other users to the system. The types of user roles for an external user or Company are: Executive and Associate users.

EXECUTIVE USER PRIVILEGES

An executive user privileges include:

- Dashboard Executive User
 - See login user’s applications
 - See all company applications
- Payments Executive User
 - Make a Bond Payment
- Management
 - Company Profile Executive User
 - Edit Company Information including:
 - Doing Business As
 - Contact Information
 - Address
 - Fleet Management
 - Add, Edit, Delete Fleet Vehicles | Trailers | Off-Road
 - Bond Accounts
 - Review and email Invoices
 - Review Payments for bonds
 - Review Applications for the entire company where permits were charged to bonds
 - View Invoices

ASSOCIATE USER PRIVILEGES

An Associate user privileges include reviewing all the permits and applications created under their username. The associate user has limited ability to access company information including invoices, creating new users, Bond information, Bond payments, application payments, insurance. The user may order forms and view the company information.

- Dashboard Associate User
 - See login user's applications and permits.
 - May not view all company permit applications or permits.
- Management
 - Company Profile Associate User
 - Edit Company Information including:
 - Doing Business As
 - Contact Information
 - Address
 - User may not add any users to their respective company.
 - Fleet Management Associate User
 - Add, Edit, Delete Fleet Vehicles: Truck | Trailers | Off-Road
 - Bond Accounts
 - See Bond Balance on Permit Applications

EXECUTIVE USERNAME SET UP

The Executive Role for a company is established when the new company is created. An executive user may create other users including executive and associate users associated with their respective company. Each username must be a unique username in the application. To create new users, the user must select Management Tab and select the *Users* from the pull-down menu.

Select Add New User and a dialog box will appear with the appropriate fields to enter. Again, all users must have a unique name defined within the OkiePros Application. Each carrier user's role can have access or no access to the Bond for payments of the permits and applications. The password will be sent to the email address used to create the new user. Once the email is sent to the new user, a link to establish the password is provided. Once the password is established, a user may reset password by selecting their username, located in the top right corner of the heading. The user will select the checkbox to reset the password, enter and confirm the new password. Select Submit, note that submit is not available to select unless the passwords entered are identical. An email will be sent to the user to confirm the password was reset.

NEW PERMIT

The ribbon bar contains a button to access the screen to create a new permit.

NEW PERMIT – SINGLE TRIP

- The user selects New Permit
- The user's Company's Name automatically displays
- The user enters the Permit Duration: Single Trip
- The user enters the Permit Type:
 - General
 - Mobile Office
 - Manufactured Home
 - Modular Home
 - House
 - Special Purpose
 - Special Purpose Driveway
 - Oversize
 - Oversize Overweight
- Configuration - The key field that provides the required populated fields for the permit application:
 - Saddle Mount
 - Tractor Semi-Trailer and Trailer
 - Straight Truck
 - Tractor Trailer
 - Truck and Trailer
- Load Description:
 - Manually enter Load Description
- The user will be required to enter optional information
 - Reference Number – Customer's Identifying Number for their internal needs
 - Load Serial # – Customer's Identifying Number for their internal needs.
- Vehicle Dimensions
 - Format for Height, Width, Length, Trailer & Load Length, Front Overhang, Rear Overhang
 - For a 16 feet 6 inches high vehicle, the format would be 16-6
 - For a 16 feet wide vehicle, the format would be 16 or 16-0
 - For a 126 feet 4 inches length vehicle, the format would be 126-4
 - Format for Weight:
 - Gross Weight: is listed in pounds

- Axle Information is listed in Kips: 1000 pounds = 1 KIP, so 120000 lbs = 120 KIPS
- Axle Information
 - Each axle must be defined with
 - Axle Number
 - Axle Weight in KIP Units – 1000 pounds = 1 KIP
 - Axle Spacing
 - # of Tires
 - Tire Size (Optional) unless the steering axle is over 12 KIPS
 - Weight/Latitude In is application generated
 - Movement Attestations
 - Optionally, users can attest to the following:
 - I attest movement can maintain turnpike speed (60 mph)
 - I attest movement can maintain Interstate speed (40 mph)
 -
 - Truck | Trailer Information
 - The user may enter information from a fleet
 - Fleet is available from the Management Tab | Fleets
 - Fleet can be saved on the new permit page by adding the newly created vehicle in the vehicle area.
 - Select Continue to Access Route Planner.

ROUTE PLANNER

- Define and Generate a Safe Route to apply to the permit
 - If a safe route cannot be generated the user may continue to confirm the permit
 - Safe Route is defined as a route where no restrictions are found.
 - Restrictions are honored based upon the vehicle's dimensions.
 - If a prohibited route is the only route generated, the permit will automatically go for review.
 - Prohibited Routes include routes with restrictions.
 - Restrictions are honored based upon the vehicle's dimensions.
 - The user must at a minimum enter:
 - Origin
 - Destination
 - Select Continue and Save to return to complete the permit application process.

APPLICATION COMPLETION PAGE – SINGLE TRIP PERMIT

- The user is directed to the Application Completion Page
 - The user will need to enter the delivery type:
 - Email
 - Fax
 - Pick up
 - Payment Type on Completion of the application page:
 - The user can Pay with Bond if the bond has been established and has enough funds available to use.
 - The user will need to confirm/enter the correct contact information for the delivery type if it is Email or Fax.
 - The user can review the anticipated workflow of the permit – auto approve, application review process, etc.
 - The user can view the inputs to the permit and verify they are correct
 - Select Complete and the user will be directed to a Successful Permit Application Submission dialog, where:
 - An Application ID is assigned
 - User can select Payment if available
 - User can select Permit Details to view the status of the application
 - User can select Dashboard

PERMIT DETAILS

Permit Details is the page that allows the user to view the inputs made on the Permit Application.

- Permit Details include:
 - Payment, if available
 - Duplicate Permit Application to clone the permit information
 - Resend permit if available
 - View Permit to download PDF document if status is Issued or Active

NEW PERMIT – MONTHLY PERMIT

- The user selects New Permit
- The Carrier Name automatically populates
- The user enters the Permit Duration: Monthly Permit
- The Permit Type will be set to Multi-trip
- The Permit Subtype will be set to Oversize
- The Configurations available:
 - Straight Truck
 - Tractor Trailer

- Truck and Trailer
- The user can enter optional information
 - Reference Number – Customer’s Identifying Number for their internal needs
 - Pikepass Number
- The user will be required to enter
 - Start Date – Defaults to current date
 - Duration (Months) – Defaults to 1
 - Load Description
 - Load Serial #
- Vehicle Dimensions
 - Height, Width, Length, and Trailer & Load length will be set automatically
 - Format for Weight:
 - Gross Weight: is listed in pounds
- Truck | Trailer Information
 - The user may enter information from a fleet
 - Fleet is available from the Management Tab | Manage Company Profile
 - Fleet can be saved on the new permit page by adding the newly created vehicle in the vehicle area.
- The user is directed to the Permit Confirmation Page

APPLICATION COMPLETION PAGE - MONTHLY PERMIT

- The user will need to enter the delivery type:
 - Email
 - Fax
 - Pick up
- The user can pay with Bond if the bond has been established and has enough funds available to use.
- The user will need to confirm/enter the correct contact information for the delivery type if it is Email or Fax.
- The user can review the anticipated workflow of the permit – auto approve, application review process, etc.
- The user can view the inputs to the permit and verify they are correct
- Select Complete and the user will be directed to a Successful Permit Application Submission dialog, where:
 - An Application ID is assigned
 - User can select Payment if available
 - User can select Permit Details to view the status of the application
 - User can select Dashboard

PERMIT DETAILS

Permit Details is the page that allows the user to view the inputs made on the Permit Application.

- Permit Details include:
 - Payment, if available
 - Duplicate Permit Application to clone the permit information
 - Resend permit if available
 - View Permit to download PDF document if status is Issued or Active

NEW PERMIT – ANNUAL PERMIT

- The user selects New Permit
- The user enters the Permit Duration: Annual
- The user enters the Permit Type:
 - Round Baled Hay
 - Soil Conservation
 - Tree Length Logs
 - Longer Combination Vehicle
 - Special Combination Vehicle
 - Empty Oversize Trailer
 - Special Purpose Equipment
 - Envelope
 - Special Overload
- The user can enter optional information
 - Reference Number – Customer’s Identifying Number for their internal needs
 - Pikepass Number
- The user will be required to enter
 - Start Date – Defaults to current date
 - Load Description
- Vehicle Dimensions
 - Height, Width, Length, and Trailer & Load length will be set automatically
 - Format for Weight:
 - Gross Weight: is listed in pounds
 - Most are generated with a Maximum Gross Weight.
- Truck | Trailer Information
 - The user may enter information from a fleet
 - Fleet is available from the Management Tab | Manage Company Profile
 - Fleet can be saved on the new permit page by adding the newly created vehicle in the vehicle area.
- The user is directed to the Application Completion Page

APPLICATION COMPLETION PAGE – ANNUAL PERMIT

- The user will need to enter the delivery type:
 - Email

- Fax
- Pick up
- The user can pay with Bond if the bond has been established and has enough funds available to use.
- The user will need to confirm/enter the correct contact information for the delivery type if it is Email or Fax.
- The user can review the anticipated workflow of the permit – auto approve, application review process, etc.
- The user can view the inputs to the permit and verify they are correct
- Select Complete and the user will be directed to a Successful Permit Application Submission dialog, where:
 - An Application ID is assigned
 - User can select Payment if available
 - User can select Permit Details to view the status of the application
 - User can select Dashboard

PERMIT DETAILS

Permit Details is the page that allows the user to view the inputs made on the Permit Application.

- Permit Details include:
 - Payment, if available
 - Duplicate Permit Application to clone the permit information
 - Resend permit if available
 - View Permit to download PDF document if status is Issued or Active

APPLICATION ID

- Login to the Application
- The user will be directed to the Dashboard
- Select an Application ID from the Application History
- If no new applications are present, there are no permits available.
 - Note: Once the user begins applying for permits, the list will start to generate on the dashboard

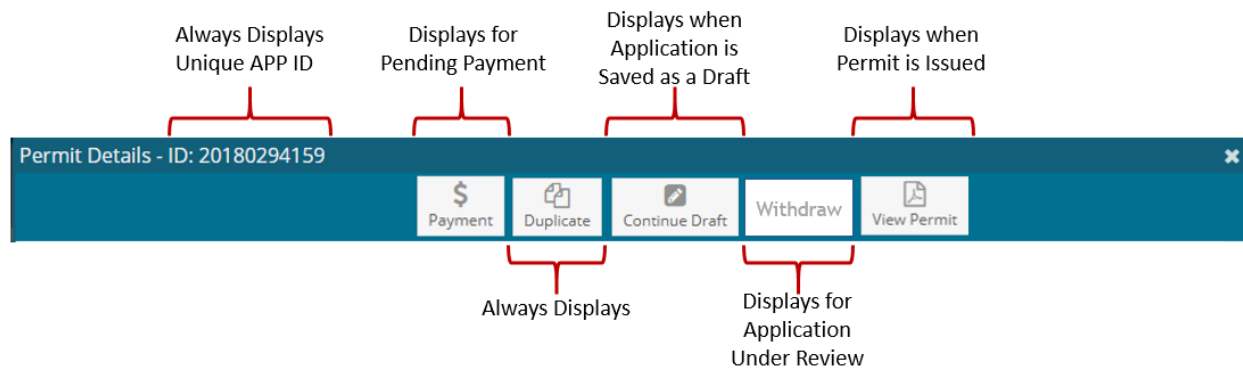
PERMIT DETAILS

- General Information contains:
 - Carrier Branch
 - Contact
 - Vehicle
 - Route

- Fees
- Restrictions
- Supporting Documents
- Status Updates
- Decisions

PERMIT DETAILS – ACTION TABS

External Users have Action Tabs on each Permit Detail Screen. Not all the buttons shown below are available for each Application ID. The number of displayed buttons will depend if the application status is either Active or Active | Issued.



- Payment – Gives the user a button to finish the application by paying for the permit.
- Duplicate – Gives the Internal or External user the ability to clone a permit application.
- Continue Draft – gives the user the ability to continue the Application if the user has saved as a draft during the initial permit application.
- Withdraw – Gives the user the ability to withdraw the application if the application is under review
- View Permit – Allows with Internal or External user the ability to view the permit image.

PERMIT DETAILS – SCREEN WARNINGS

Screening Warnings

- This application is Non-OL1 and has routed on a Turnpike

Screen Warnings give the user information about:

- Reviews Required
 - If a permit application is over specified dimensions, the permit must be reviewed by authorized ODOT Staff.
 - Reviewable Items will be prefaced with two asterisks to identify the issues requiring the review.

GENERAL INFORMATION - PERMIT DETAILS

General Info		
Application #: 20230002658651	Status: Pending Agent Review	Delivery Type: EMAIL
Charged To: HXGN TEST QC		
Issued To: HXGN TEST QC		
Start Date: 01/17/2023	End Date: 01/21/2023	
Duration: SINGLE	Type: GENERAL	Subtype: OVERSIZE AND OVERWEIGH
Configuration: TRUCK AND TRAILER	Reference #:	USDOT:
Walk-In: <input type="checkbox"/>	Form #:	P-Form #:
	Commodity #:	Commodity Description: General
PikePass #:		

The General Information contains:

- Application ID – primary key used in the database and is system generated. The field can never be edited.
- Application Status: Status
 - In Review:
 - If the permit is under review the status will indicate the next role level of review.
 - Active | Issued:
 - If the permit is active and/or issued, the status will indicate the permit is active.
 - Expired:
 - If the end date on the permit is out of date, the status will indicate the permit is expired.
- Delivery Type: Will specify if the permit was delivered via:
 - Fax
 - Email
 - Pickup
- Charged To - The payment was made by either the carrier or permitting service.
- Issued To - The name of the carrier the permit was issued.
- Start Date: The date which the permit becomes valid
- End Date: The last date which the permit can be used.
- Duration:
 - Single Permits – valid for a few days
 - Monthly Permit – valid for month(s)
 - Annual Permit –
- Permit Types:
 - Types vary based on duration and load type

SEARCH

All users can perform different search queries based upon the fields entered.

APPLICATION

SEARCH BY ID

The user can search based upon either an Application ID or a Permit ID. These numbers are unique keys to indicate the information on the permit or application. Application IDs starting with the letter A are Permit Applications.

SEARCH BY CRITERIA

The user can search based upon numerous factors including:

- Dates
- Account Number
- Reference Number
- Username
- Route Taken
- Engineering Key
- Permit Type
- Permit Subtype
- Configuration
- Status
- Vehicle Information
- Payment Information
- Dimensions

APPENDIX A: GLOSSARY

COMPANY INFORMATION

<u>Entry Name</u>	<u>Detail</u>
Account Type	Select the appropriate type of account (whether you are motor carrier, permit service, or a motor carrier corporation).
Company Name	Enter the name of company.
Username	Enter the username that you would like to use for this account.
FEIN	Enter the Tax ID or the Federal Identification Number of company.
USDOT	Enter the USDOT Number, if available.
Driver's License Number	Enter driver's license number. This entry is only applicable if you selected Motor Carrier as account type above.
Driver's License State	Select the state in which driver's license was issued. This entry is only applicable if you selected Motor Carrier as account type above.

BRANCH INFORMATION

Entry Name

Branch Name
 Address Line 1
 Address Line 2
 City
 Postal Code
 State

Detail

Enter the branch.
 Enter the Street Name and Number of this branch.
 Enter additional address information if applicable.
 Enter the city in the branch is located.
 Enter the postal code.
 Select the State the branch is located.

Branch Contact Information

Entry Name

First Name
 Last Name
 Phone Number
 Fax Number
 Email Address

Detail

Enter first name.
 Enter last name.
 Enter phone number (xxx-xxx-xxxx).
 Enter fax number (xxx-xxx-xxxx).
 Enter email address. This address will be used for future correspondences.

DASHBOARD DETAILS

Entry Name

Application ID
 Carrier
 Status
 Start Date
 Vehicle Load

Detail

The system-assigned number for the permit application. This entry is a hyperlink and clicking on this application id will bring up the detailed permit application.
 The name of the carrier for whom the permit application was submitted. This entry is only applicable if the user is logged in as a permit service.
 The status of the permit application. (e.g., Pending Agent Review, Draft, Approved, Active)
 The date on which the permit will be in effect.
 The load that will be transported in using the permit application.

STATUS DEFINITIONS

Status

All Statuses
 Pending
 Active/Issued
 Active
 Revised

Definition

Summary status – Includes all statuses in the system.
 Summary status – includes pending agent review, in agent review, pending manager review, in manager review, pending 3rd party review, in 3rd party review, pending manager review, in manager review, pending final review, in final review.
 Summary status – includes active and issued.
 Permit document exists, application is approved and paid for, today's date is between the start date and end date of the actual permit.
 Revised permits are no longer valid due to changes made to it that required a new application. The newer application supersedes it.

Hold	Temporary status that prevents a permit from being issued until an authorized user manually releases the hold. A good example is the application has been submitted and paid for but the carrier is waiting for delivery of the container to finish the load.
Approved	Permit application has been processed and is ready for payment.
Draft	Permit application that has not been submitted, has been set aside so that the user may complete the application later. Drafts can remain in the system for up to 30 days before they are deleted.
Expired	Status where today's date is beyond the end date of the actual permit.
In Agent Review	An agent is currently reviewing the permit application.
In Manager Review	A ODOT manager is currently reviewing the permit application.
In Final Review	An agent or manager is performing a final review of the permit application.
In Violation	A permit that has a violation assigned to it and is no longer a valid permit.
Issued	Permit document exists, application is approved and paid for, today's date is before the start date of the actual permit.
Pending Agent Review	The permit application is in the agent queue and is waiting for an agent to review the permit application.
Pending Manager Review	The permit application is in the manager queue and is waiting for a manager to review the permit application.
Pending Final Review	The permit application is in Final Review queue and is waiting for a manager to review the permit application.
Rejected	The permit application failed the manual review validation and was rejected. A reject reason will be supplied with the notification.
Submitted	The permit application was submitted and is being processed through the appropriate workflow.
Void	The actual permit was voided in the system the same day it was paid for and the money was returned to the customer.
Credit	The actual permit was voided in the system a day or more after it was paid for and the money was returned to the customer.
Suspended	The actual permit is temporarily marked as inactive due to severe weather conditions.
Revoked	A permit application is no longer needed, or the actual permit is no longer valid and no money is returned to the customer.
Invalid	An actual permit or permit application is no longer considered valid.

GENERAL INFORMATION

<u>Entry Name</u>	<u>Detail</u>
Reference Number	Enter a reference number, if applicable. The value is a carrier referenced item.
Permit Duration	Select the permit duration required.
Permit Type	Select the type of permit required.
Permit Subtype	Select the subtype of permit required.
Configuration	Select the type of vehicle that will be transporting the load.
Start Date	Enter the start date for which the permit will be in effect.
Duration	Select duration of the permit

Walk-in State users can select this box, if it is a walk-in permit application (only applicable if logged in as a State user)

OVERSIZE AND OVERWEIGHT INFORMATION

<u>Entry Name</u>	<u>Detail</u>
Height	Enter the height of the vehicle. (measured in ft-in)
Width	Enter the width of the vehicle. (measured in ft-in)
Trailer and Load Length	Enter the length of the trailer and load. (measured in ft-in) This entry only is applicable for vehicles with trailers.
Total Length	Enter the total length of the vehicle. (measured in ft-in)
Front Overhang	Enter the front end overhang of the vehicle. (measured in ft-in) This entry only is applicable if Vehicle Type selected is <i>Tractor Trailer</i> or <i>Tow Away</i> .
Rear Overhang	Enter the rear overhang of the vehicle, if applicable. (measured in ft-in)
Gross Weight	Enter the gross weight of the vehicle, if applicable. (measured in lbs)
Has Trunnion Axle	Check this box if the vehicle has trunnion axle. (an axle configuration with two individual axles mounted in the same transverse plane)
Interstate Travel	Check this box if the permit is required for interstate travel.
Turnpike Travel	Check this box if the permit is required for turnpike travel.
Number of Axles	Select the number of axles on the vehicle.
Axle Weights	Enter the weight of an individual axle. (measured in kips). The number of entries for axle weights displayed is based on the value entered for Number of Axles.
Axle Spacings	Enter the distance to the next axle on the vehicle. (measured in ft-in) The number of entries for axle spacings displayed is calculated to be one less than the value entered for Number of Axles.

TRUCK INFORMATION

<u>Entry Name</u>	<u>Detail</u>
Make	Select the make of the vehicle.
Year	Enter the year of manufacture.
Tag Number	Enter the license plate/tag number.
Tag State	Select the registered state.

Trailer/Load Information (Conditional)

<u>Entry Name</u>	<u>Detail</u>
Make	Select the make of the vehicle.
Year	Enter the year of manufacture.
Tag Number	Enter the license plate/tag number.
Tag State	Select the registered state.

Lowboy-style Trailer	Check this box if the vehicle has a low-boy style trailer configuration.
Load Serial Number	Enter a load serial number, if applicable.
Load Description	Enter the load description

MOBILE OFFICE INFORMATION

<i>Entry Name</i>	<i>Detail</i>
Year	Enter the year
Make	Select the make of the vehicle. This entry only is applicable if the permit type selected is a mobile office.
Tag Number	Enter the license plate/tag number. This entry only is applicable if the permit type selected is a mobile office.
Tag State	Select the registered state. This entry only is applicable if the permit type selected is a mobile office.

MANUFACTURED HOME

The following entries are only applicable if the permit type selected is a manufactured home. Additionally, only some or all these fields will be required based on your selection of permit sub-type.

<i>Entry Name</i>	<i>Detail</i>
Year	Enter home year if applicable
Make	Enter home make if applicable
Dealer Tag/In Transit Number	Enter the dealer tag/in transit number if applicable
Dealer Tag/In Transit State	Enter the tag/in transit number of the dealer if applicable
Dealer ID	Enter Dealer ID
MVIN Verified	Checkbox asking if MVIN is verified
Owner	Enter Owner
Manufactured Home Tag Number	Enter the manufactured home tag number if applicable
Decal Number	Enter the decal number of home

HOUSE / OTHER INFORMATION

<i>Entry Name</i>	<i>Detail</i>
Eaves Width (ft-in)	Enter eaves width in ft-in format
Type	Enter type

SEARCH FOR APPLICATIONS

<u>Entry</u>	<u>Detail</u>
Application Id	Enter the number assigned to the permit application when it was created/submitted.
Application Type	Only one selection ("PERMIT")
Permit Duration	Select the type of permit. (e.g., "Single-Trip", "Annual")
Permit Type	Select most relevant to user's load
Permit Subtype	Select most relevant to user's load
Configuration	Select the load configuration
Status	Select the status of the permit application. (e.g., "Draft", "Submitted", "Approved")
Start From –	From (MM/DD/YYYY) Enter the first day of the date range in which the permit was initiated. (e.g., "01/22/23"). You can also select the calendar icon next to this field to pick this desired date.
Start To –	To (MM/DD/YYYY) Enter the last day of the date range in which the permit was initiated. (e.g., "01/25/23"). You can also select the calendar icon next to this field to pick the desired date.
Submitted From –	From (MM/DD/YYYY) Enter the first day of the date range in which the permit was submitted. (e.g., "01/10/23"). You can also select the calendar icon next to this field to pick this desired date.
Submitted To –	To (MM/DD/YYYY) Enter last day of the date range in which the permit was submitted. (e.g., "01/15/23"). You can also select the calendar icon next to this field to pick this desired date.
Issued From –	From (MM/DD/YYYY) Enter the first day of the date range in which the permit was issued. (e.g., "01/10/23"). You can also select the calendar icon next to this field to pick this desired date.
Issued To –	To (MM/DD/YYYY) Enter last day of the date range in which the permit was issued. (e.g., "01/15/23"). You can also select the calendar icon next to this field to pick this desired date.
Results per Page	Select the number of results to display on a single page.

MY COMPANY PROFILE

<u>Entry Name</u>	<u>Detail</u>
General	Lists information regarding the company such as Name, Profile Type, Account #, etc.
Billing Info	Contains billing contact information
Branches	Contains information about any company branches
Sub Accounts	Contains information regarding company sub accounts

BILLING INFORMATION

Address – Line 1	Edit the first line of the company's business address, if needed.
Address – Line 2	Edit the second line of the company's business address, if applicable.
City	Edit the company's city of origin, if needed.
State/Province	Edit the company's State, Province, or Country of origin, if needed.
Postal Code	Edit the company's postal code, if needed.
Contact First Name	Edit the first name of the responsible individual, if needed.
Contact Last Name	Edit the last name of the responsible individual, if needed.
Contact Phone Number	Edit the phone number of the responsible individual, if needed.

BRANCH INFORMATION

Branch Name	Edit name of the branch, if needed.
Address – Line 1	Edit the first line of the branch's business address, if needed
Address – Line 2	Edit the second line of the branch's business address, if applicable.
City	Edit the branch's city of origin, if needed.
State/Province	Edit the branch's State, Province, or Country of origin, if needed.
Postal Code	Edit the branch's postal code, if needed.

BRANCH CONTACT INFORMATION

First Name	Edit the first name of the responsible individual, if needed.
Last Name	Edit the last name of the responsible individual, if needed.
Phone Number	Edit the phone number of the responsible individual, if needed.
Email Address	Edit the email address of the responsible individual, if needed.
Fax Number	Edit fax numbers for the branch as necessary and/or add fax numbers using the add fax number button if needed