Welcome to the City of Santa Clara

User Guide

MY UTILITIES ACCOUNT

Start New Utility Services 1

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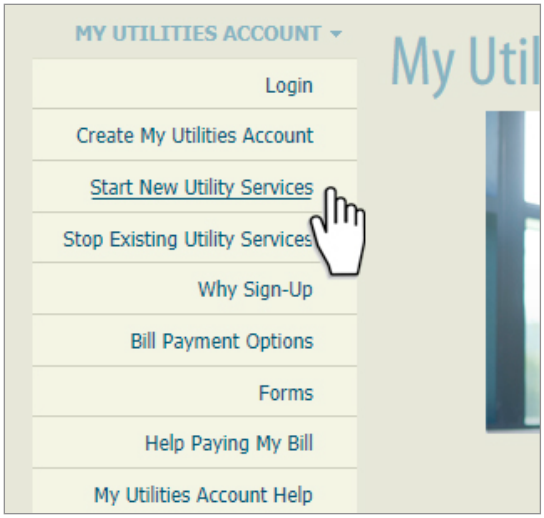
WELCOME TO THE CITY OF SANTA CLARA ◆

We've made it easy for you start a new utility services. If you are moving into Santa Clara and wish to start a new utility service, go to **Start New Utility Services** to sign up.



NOTE: If you currently live in Santa Clara and are moving into another location within Santa Clara, go to Move Within Santa Clara.

LOGIN > Service Orders > "Create Order" button > Choose: Move Within Santa Clara.

1. Click on the link in the left side navigation bar, **Start New Utility Services.**
2. In the first paragraph, click on **Start New Utility Services** link to begin the process.
3. A pop-up window will appear to let you know that you are being directed to an External Site Link. Click on Go to External Site.

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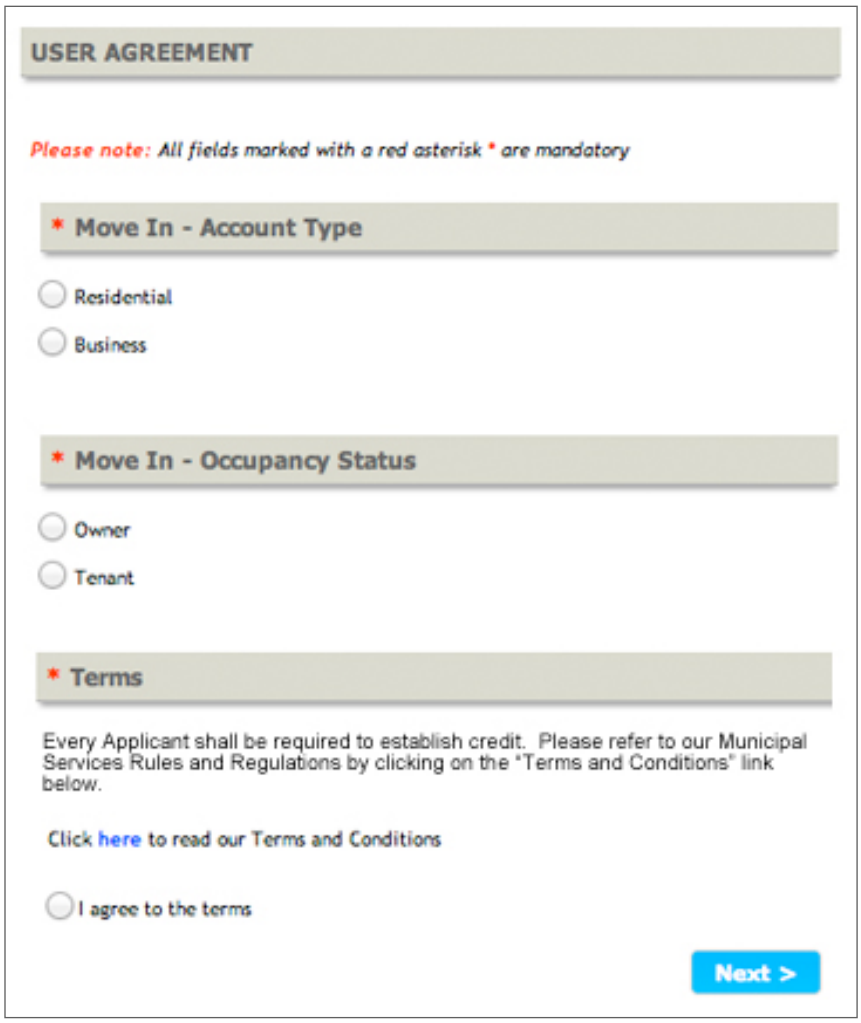
START NEW UTILITY SERVICES, continued

STEP ONE: Complete User Agreement

1. Move In - Account Type: Choose Residential or Business

2. Move In - Occupancy Status: Choose Owner or Tenant

3. Terms: Click "here" to read the Municipal Services Rules and Regulations. Check the box "I agree to the terms" and then click on the "Next >" button.



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START NEW UTILITY SERVICES, continued

STEP TWO: Complete First Page in Move In Registration form.

1. Customer Name: Complete First Name, Last Name fields (Middle Initial is optional).

2. Contact Information: Enter your Home Phone number and Email Address.

3. Where Are You Moving To: Enter Street Name, Street No., City, State, Zip Code, and Move in date.

4. Click on the **Next >** button to go to Step Three.

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MOVE IN REGISTRATION FORM

Please Note: Move in requests received after 4:00 p.m. will be processed on the next business day.

Customer Name

First Name: *
Last Name: *
Middle Initial:

Contact Information

Home Phone: * - * - *
Business Phone: - -
Email Address: *
Re-enter Email Address: *

Where Are You Moving To?

Street Name: * Please select a street
Street No: *
Apt/Unit:
Mod:
City: *
State/Province: *
Zip/Postal code: *
Move in date: *

Next >

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STEP THREE: Complete Second Page in Move In Registration form.

1. Mailing Address: Check "Same as service address" box if your mailing address is the same as your service address. Otherwise, complete the following fields: Street Name, Street No., City, State, Zip code.

2. Identification 1: Enter your SSN. If you don't have an SSN, complete the Drivers License and DL State fields.

3. Comments: Add any necessary instructions or additional comments.

4. Click on the **Next >** button to go to Step Four.

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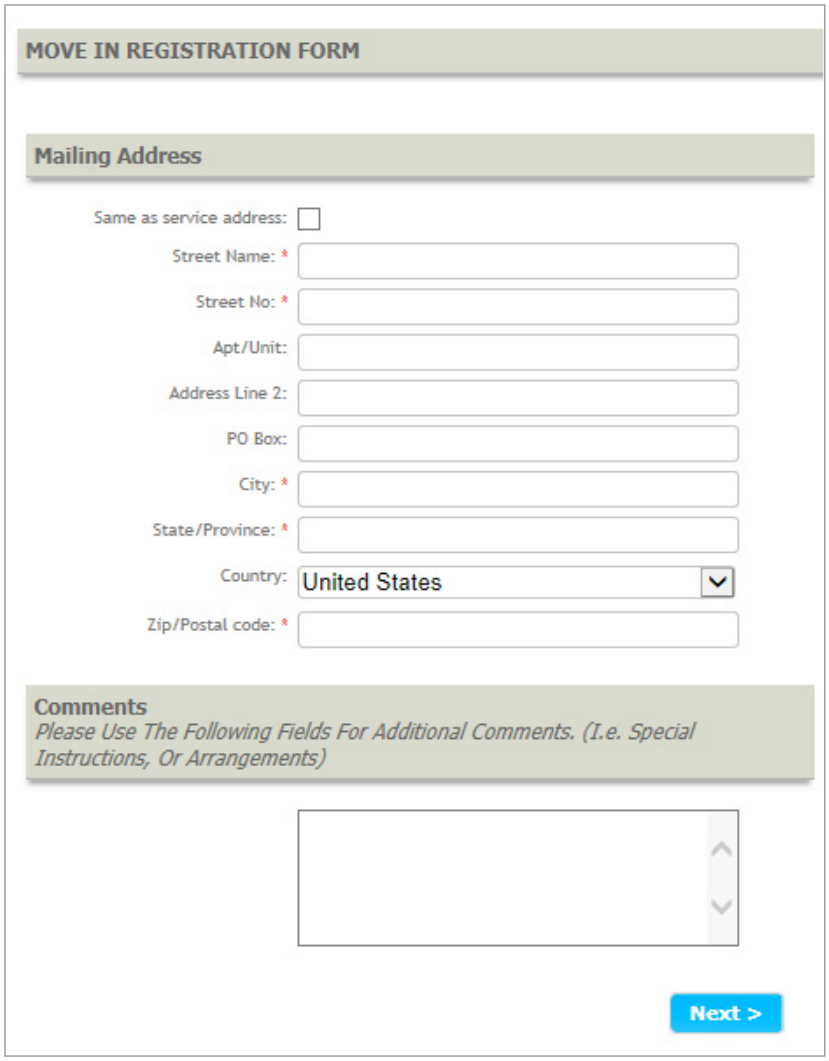

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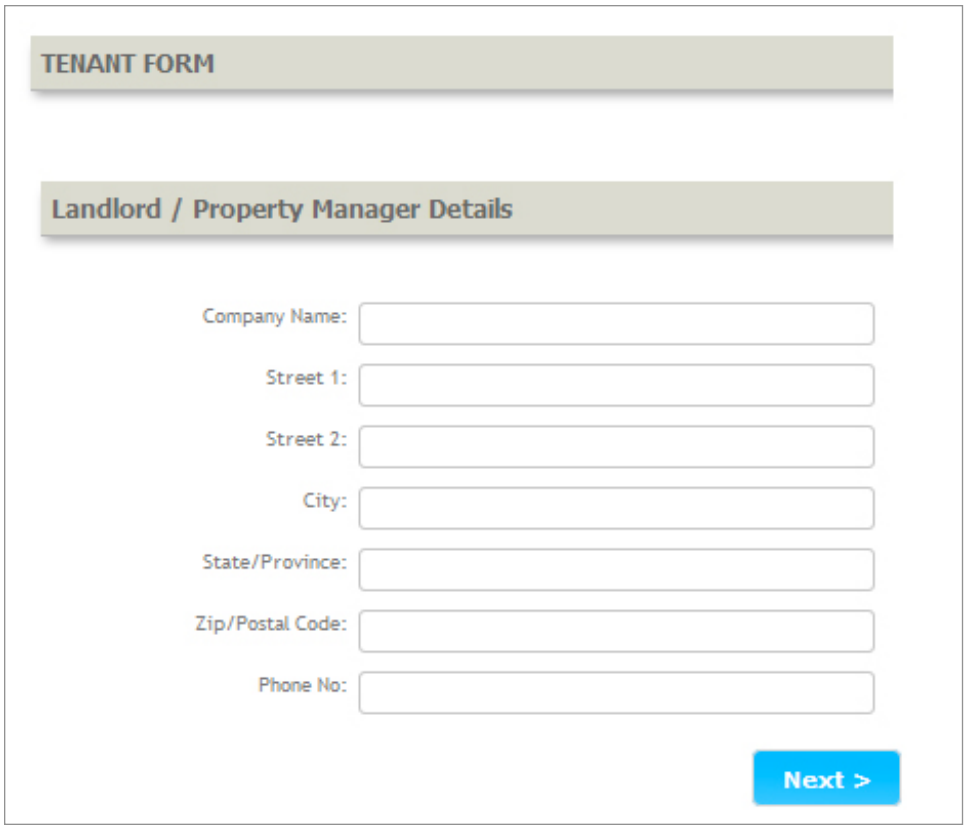
STEP FOUR: If you are a tenant and not the owner, you will be brought to the Tenant Form to complete.

1. Fill in the fields of the Landlord / Property Manager Detail form: Company Name, Street address, City, State, Zip Code, and Phone No.

2. Click on the **Next >** button to go to Step Five.



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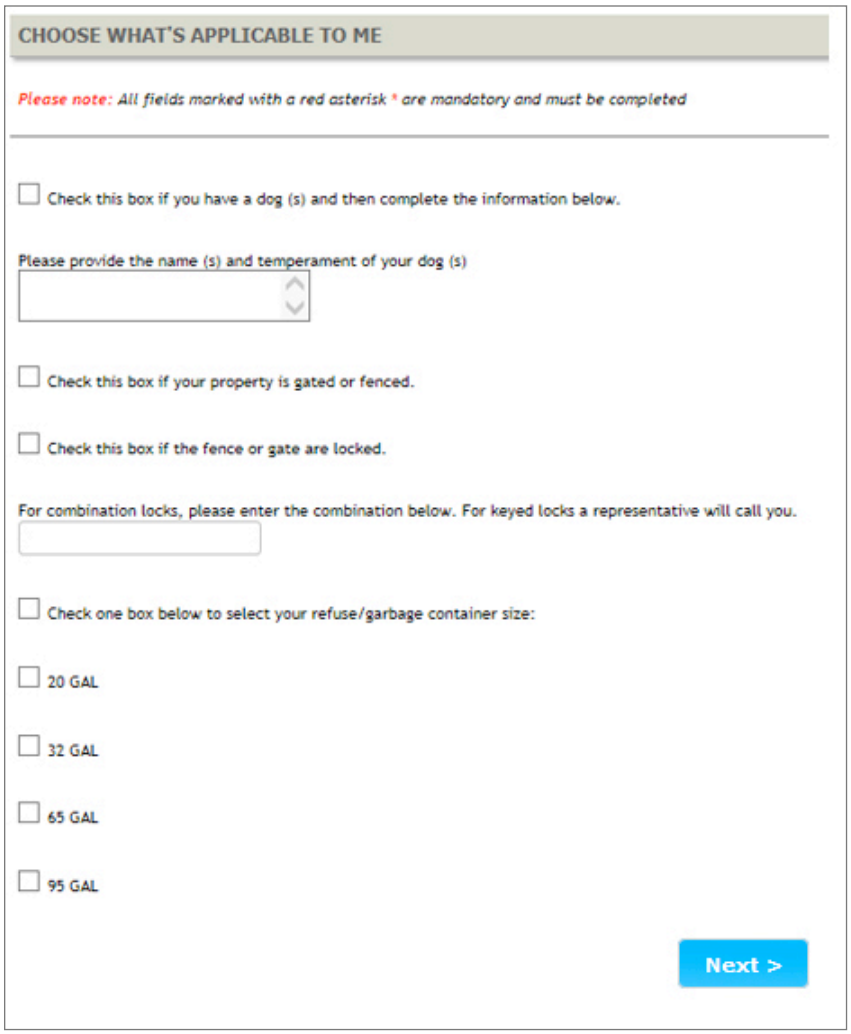
STEP FIVE: Complete the Choose What's Applicable To Me form.

1. If you have a dog, check the box and provide any additional information in the comments box.

2. Check the gate-related boxes if applicable. Check the garbage container size you'd like.

3. Click on the **Next >** button to go to Step Six.



CHOOSE WHAT'S APPLICABLE TO ME

*Please note: All fields marked with a red asterisk * are mandatory and must be completed*

☐ Check this box if you have a dog (s) and then complete the information below.

Please provide the name (s) and temperament of your dog (s)

☐ Check this box if your property is gated or fenced.

☐ Check this box if the fence or gate are locked.

For combination locks, please enter the combination below. For keyed locks a representative will call you.

☐ Check one box below to select your refuse/garbage container size:

☐ 20 GAL

☐ 32 GAL

☐ 65 GAL

☐ 95 GAL

Next >

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STEP SIX: Review **Registration Summary** page. If you should need to edit any of the fields, click on the "EDIT" button. Otherwise, click on the "SUBMIT" button to complete the process.

Once you click the "SUBMIT" button, you will be taken to a Confirmation page with all of your transaction details. You will also receive an email confirming your New Utility Services activation.

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WHY CREATE AN ONLINE ACCOUNT ◆

Signing up for an online account is free, simple and will save you time. Once you have signed up, you will be able to pay your bill online, check the status of your account day or night, sign-up for paperless billing, view you bill, usage history, and more.

HOW TO CREATE AN ONLINE ACCOUNT ◆

1. Go to **My Utilities Account Home Page**.

2. Click on the link in the left side navigation bar, **Create My Utilities Account**.

3. A new window will open with the **Registration Form**.

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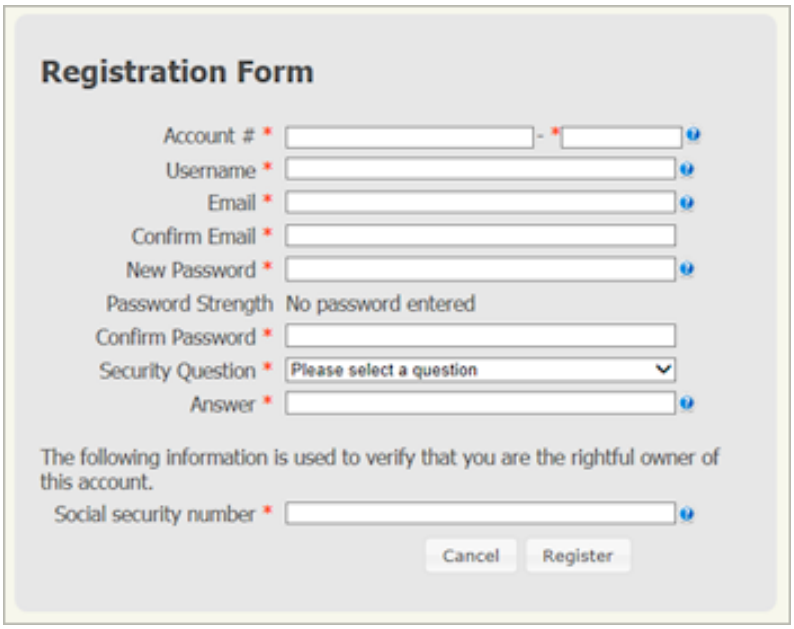
HOW TO CREATE AN ONLINE ACCOUNT, continued

4. Complete the Registration form



Account #: When entering your account number, include the zeros at the front of your account number. Ex. 00012345 06

Username: This can be a name of your own choosing or your email address.

Email: Please enter a valid email address that has not been used before on My Utilities Account.

Password: Your password requires a minimum of **seven letters and one number**.

Security Question Answer: An authentication measure used to protect your account. Your answer does not have to necessarily reflect the question.

Social Security Number: Enter the last four numbers of your Social Security Number or Tax ID that we have on file.

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HOW TO CREATE AN ONLINE ACCOUNT, continued

5. Once you have completed all of the fields, click on the **Register** button. You will then be taken to a webpage with the message:

> "You have successfully registered for a new online account. You must now activate your account via the email confirmation that was sent to you. Please read that email and follow its instructions.

6. Check your email inbox for the email from us. Click on the link in the body of the email to activate your account.

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NAVIGATING MY UTILITIES ACCOUNT ◆

We've tried to make it as simple as possible for you to find your way around My Utilities Account. Below are the main areas of navigation.

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NAVIGATING MY UTILITIES ACCOUNT, continued

In the header at the top of the page are several navigational features. They're located all together making it easier for you to set your preferences.

Header Navigation

1 Control Font Size

- **A** Increase font size to make text larger
- **A** Text will be normal size
- **A** Decrease font size to make text smaller

2 Home, Default

You can set which page you want as your default home page in Settings (#3)

3 Your Settings

- Select your default home (landing) page
- View your service details
- If you are signed up for automatic bill payment or bank payment, your information will appear here. If you need to update your credit card information, please call us at **408-615-2300**.
- Notification Contact Methods: how do you want us to contact you.
- Add a new Account User for another person to have the ability to view account information. However, they will be unable to view or modify any other Account Users.

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NAVIGATING MY UTILITIES ACCOUNT, continued

Header Navigation

4 Help / More Info — If you have any questions, access our Help FAQ and other useful documents. Bill inserts and Mission City Scenes are also included here.

5 Logout — To logout of My Utilities Account, click on the **X**.

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FINDING YOUR USER SETTINGS ◆

Header Navigation >

To access your User Settings, go to the Header Navigation (top right corner) and click on the "gears" icon.

ONLINE ACCOUNT ◆

In the Online Account section, you can update your email address, change your security question, change your password, or deactivate your online account.

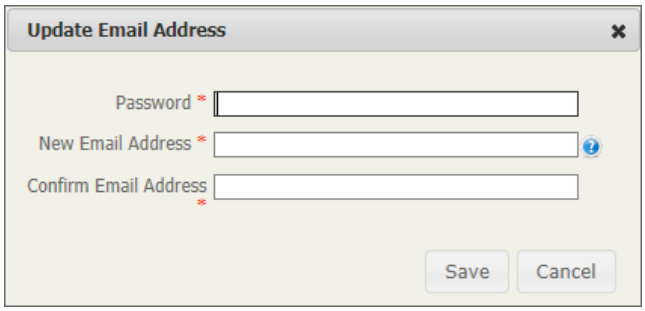
Update Email Address

1. Click on the **Update** link.

2. Enter your current password, then enter your new email address.

3. Confirm your email address by re-entering your updated email address in the third field, **Confirm Email Address.**

4. Click on the **"Save"** button to save your changes.



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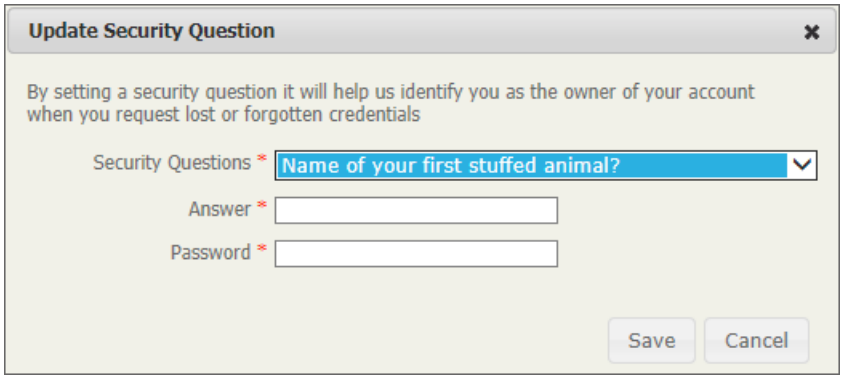
ONLINE ACCOUNT, continued

Update Your Security Question

1. Click the **Edit** link.
2. Pick a new question for the list.
3. Supply your answer.
4. Type in your password.
5. Click "**Save**".



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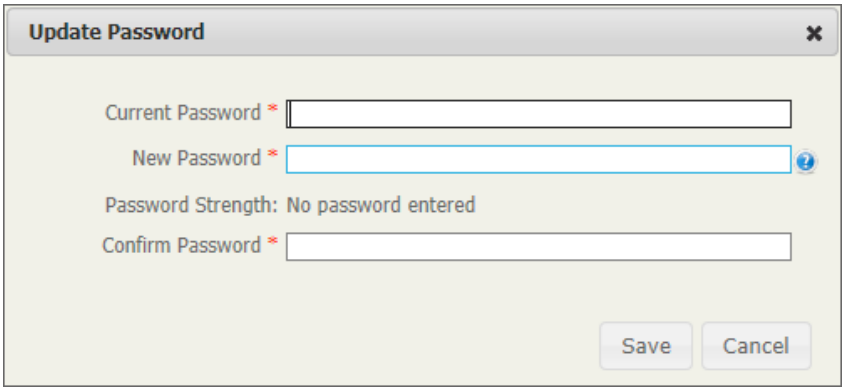
Update Your Password

1. Click the "**Update**" link.
2. Enter your current password.
3. Re-enter your password to confirm you have entered the correct new password.
4. Click "**Save**".



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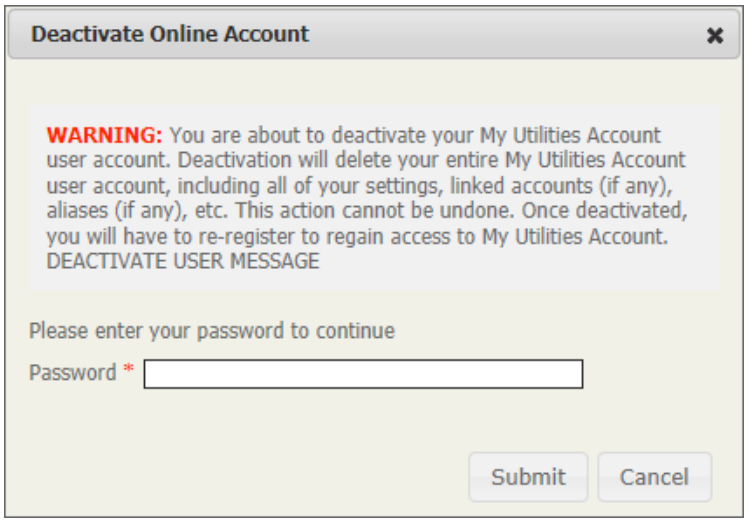
Deactivate Your Online Account

To deactivate your online account, enter your password and click "**Submit**". This action cannot be undone.



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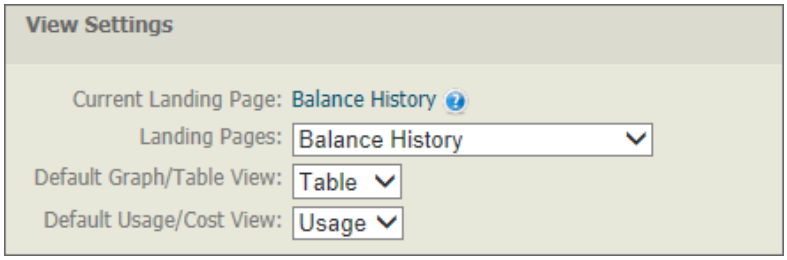
VIEW SETTINGS ◆

In the View Settings section, you can choose which page you want as your default landing page. Choose the page from the drop-down list and click the "**Update**" button in the top right corner of the View Settings section.

You can also choose table or graph as the display preference, for billing history, balance history, and meter reading. You can also choose to view by usage or cost.



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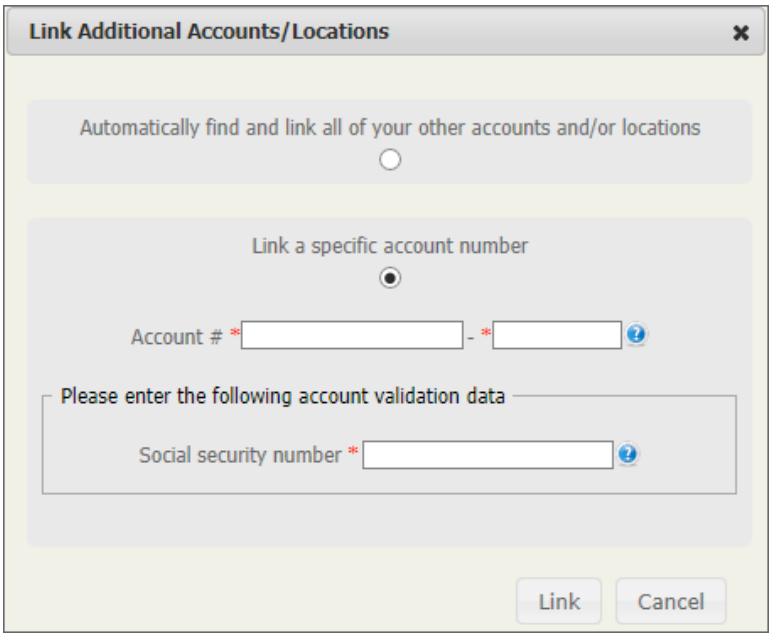
ACCOUNT INFORMATION ◆

In the Account Information section, click on the "**Link Account / Location**" button in the top right corner of this section to link your account with another account (or multiple accounts).

For a specific account number, you will need to enter the account number and the last four digits of the Social Security Number that we have on file. Once you've entered your information, click "**Link**" at the bottom of the dialog box.



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SERVICE DETAILS ◆

In the Service Details section, you will find a list of your services and the amount due for each of them.

Service Details

Utility	Bill Code	Due Date	Amount
Water	1EXCIS	09-09-2014	$ 1.19
Drainage	2ACUCM	09-09-2014	$ 4.62
Garbage	3HSHZW	09-09-2014	$12.60
Sewer	DFLAT	09-09-2014	$10.48
Electricty	D1	09-09-2014	$34.92

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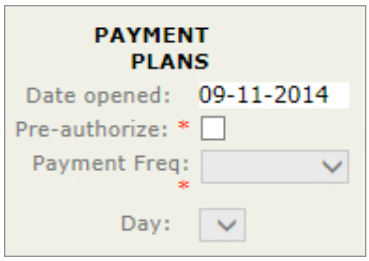
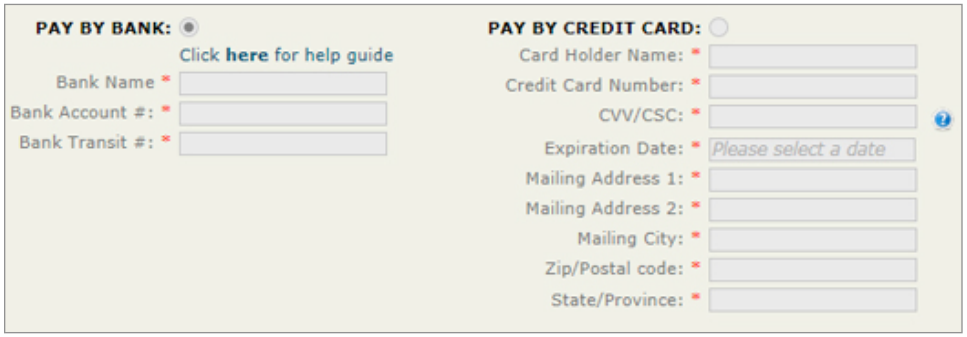
BILLING INFORMATION ◆

In the Billing Information section under the Payment Plan Options tab, you can sign up for automatic bill payment through your bank or a credit card.



To begin the sign-up process, check the Pre-authorize box. Once you have received the message, "You are qualified for the Pre-authorized Payment Plan," you can then sign up for the plan of your choice.



Once you have made your payment plan choice and have filled in all of the required fields, check the "**I agree**" checkbox under "You Must Acknowledge the Terms and Conditions". Then click "**Save**" to save your billing information preferences.

Deposits Tab

If you have a deposit with us, you will find that information under this tab.

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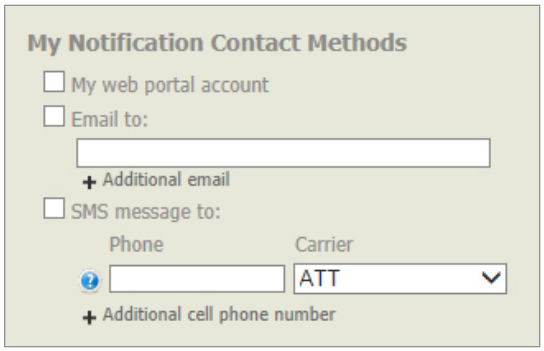
NOTIFICATION SETTINGS ◆

In the Notification Settings section, you can enter your preferred method of contact.



1. My web portal account (My Utilities Account)
2. Email and an additional email address
3. Text message and an additional cell phone number

After you've entered your preferences, click "**Save**" in the top right corner of this section.

When you have notifications, they will appear at the top of the page under the navigation bar.

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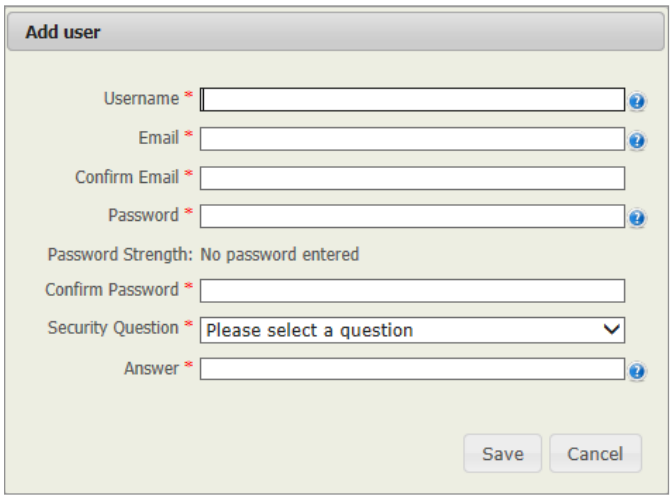
ACCOUNT USERS ◆

In the Account Users section, you can add an Account User (Alias). This person will be able to view and export reports, but will be unable to view of modify any other Account Users.

Adding a New Account User

To add an Account User, click "**Add User**" in lower left corner of this section. Complete the Add User form and click "**Save**".



Username: This can be a name of your own choosing or your email address.

Email: Please enter a valid email address that has not been used before on My Utilities Account. Re-enter the email address in the Confirm Email field.

Password: Your password requires a minimum of **seven letters and one number**. Re-enter your password in the Confirm Password field.

Security Question Answer: An authentication measure used to protect your account. Select your question from the drop-down menu. Enter your answer in the Answer field. Your answer does not have to reflect the question.

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NOTIFICATIONS ◆

If you have chosen to be notified of any alerts (User Settings > Notification Settings), they will appear at the top of your webpage under the Main Navigation bar. Click on the down arrow on the right of the Notifications bar to see all of your notifications.

Red Notifications: These are generated by the City of Santa Clara to announce emergencies.

Orange Notifications: These are generated by My Utilities Account when customer-defined thresholds have been exceeded.

Green Notifications: These are generated by the City of Santa Clara regarding general information.

Deleting Notifications

Click on the X at the right end of the notifications bar to remove them from the Notifications bar. This action moves them to Notification History.

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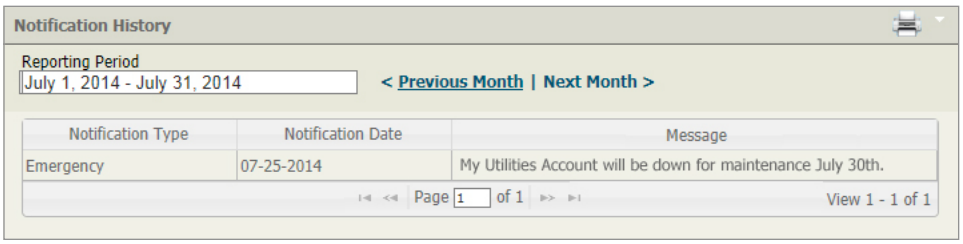
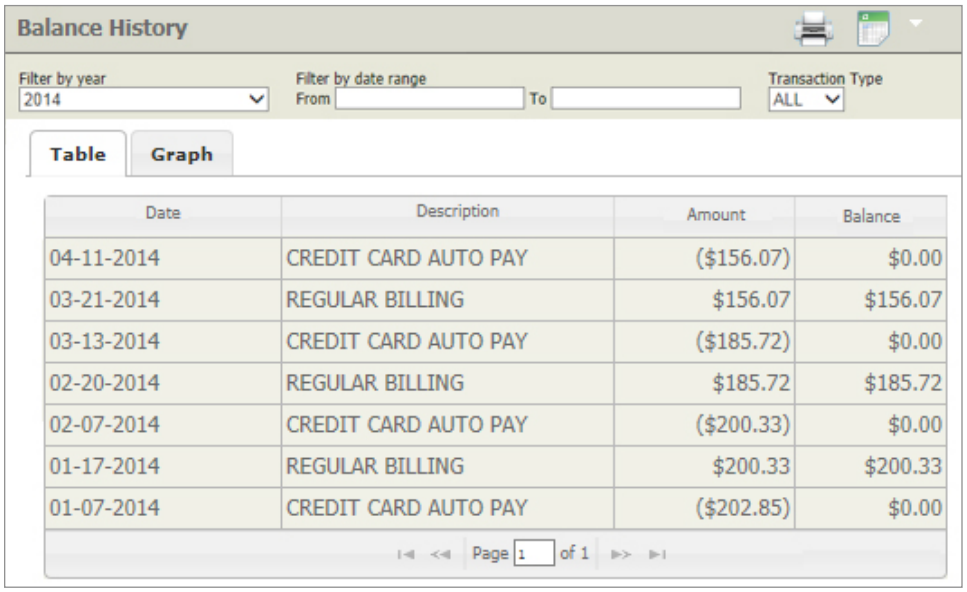
NOTIFICATION HISTORY ◆

If you have chosen to be notified of any alerts (User Settings > Notification Settings), they will be displayed here.



BALANCE HISTORY ◆

Your Balance History displays your past billing amount and payments made. You can filter this information by year or date range. You can also print out the results or export the data to Excel (in CSV format).



Date	Description	Amount	Balance
04-11-2014	CREDIT CARD AUTO PAY	($156.07)	$0.00
03-21-2014	REGULAR BILLING	$156.07	$156.07
03-13-2014	CREDIT CARD AUTO PAY	($185.72)	$0.00
02-20-2014	REGULAR BILLING	$185.72	$185.72
02-07-2014	CREDIT CARD AUTO PAY	($200.33)	$0.00
01-17-2014	REGULAR BILLING	$200.33	$200.33
01-07-2014	CREDIT CARD AUTO PAY	($202.85)	$0.00

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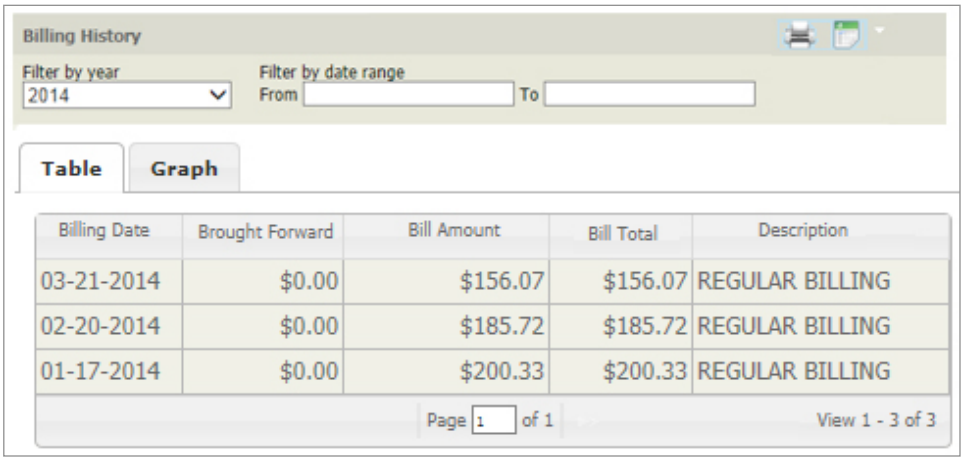
BILLING HISTORY ◆

In Billing History, you will find your billing totals and billing dates. You can view this in table or graph format and filter by year or date range. You can also print or export the data to Excel (in CSV format).



Billing Date	Brought Forward	Bill Amount	Bill Total	Description
03-21-2014	$0.00	$156.07	$156.07	REGULAR BILLING
02-20-2014	$0.00	$185.72	$185.72	REGULAR BILLING
01-17-2014	$0.00	$200.33	$200.33	REGULAR BILLING

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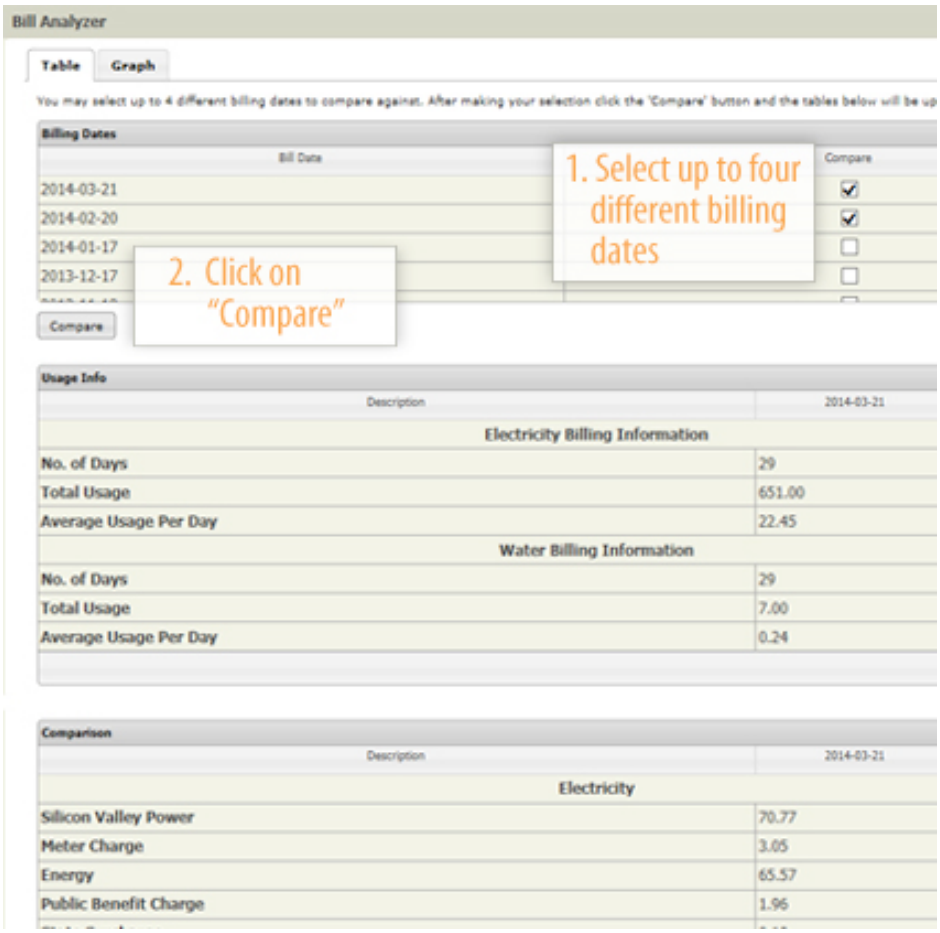
BILL ANALYZER ◆

You can compare up to four different billing dates in the Bill Analyzer. The results can be viewed as a table or graph.

Check up to four different billing dates in the compare column. Click "**Compare**". Click on the **Printer icon** in the top right corner to print the comparison.



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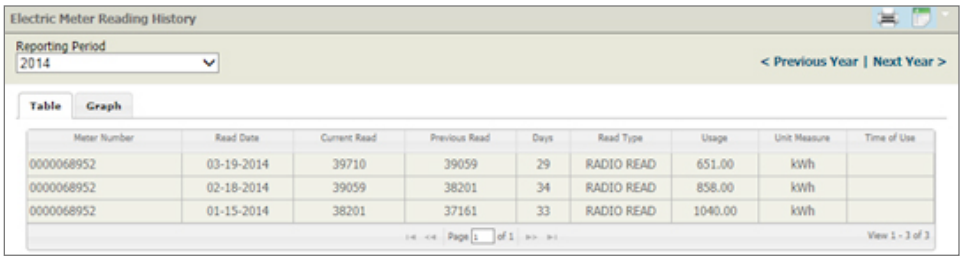
ELECTRIC METER READING HISTORY ◆

Choose the reporting period from the drop-down menu. Your electric meter reading history will appear below. View in table or graph format by clicking the table or graph tab. Print the results or export the data to Excel by clicking on the icons in the top right hand corner..


Electric Meter Reading History

Reporting Period 2014

< Previous Year | Next Year >

Table Graph

Meter Number	Read Date	Current Read	Previous Read	Days	Read Type	Usage	Unit Measure	Time of Use
0000068952	03-19-2014	39710	39059	29	RADIO READ	651.00	kWh	
0000068952	02-18-2014	39059	38201	34	RADIO READ	858.00	kWh	
0000068952	01-15-2014	38201	37161	33	RADIO READ	1040.00	kWh	

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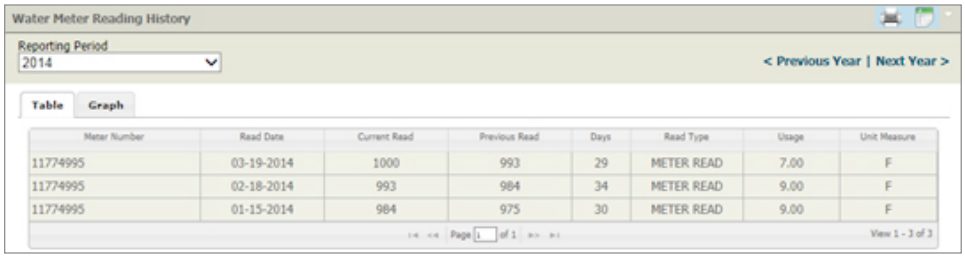
WATER METER READING HISTORY ◆

Choose the reporting period from the drop-down menu. Your water meter reading history will appear below. View in table or graph format by clicking table or graph tabs. Print the results or export the data to Excel by clicking on the icons in the top right hand corner..


Water Meter Reading History

Reporting Period 2014

< Previous Year | Next Year >

Table Graph

Meter Number	Read Date	Current Read	Previous Read	Days	Read Type	Usage	Unit Measure
11774995	03-19-2014	1000	993	29	METER READ	7.00	F
11774995	02-18-2014	993	984	34	METER READ	9.00	F
11774995	01-15-2014	984	975	30	METER READ	9.00	F

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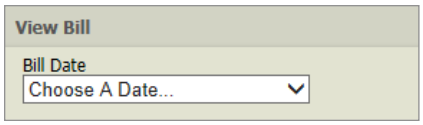
VIEW BILL ◆

To view a bill, choose the date from the **Bill Date** drop-down menu. The bill you select will appear as a PDF in a new window. You can view up to eighteen months of bills. If you would like a copy of an older bill, please contact us at **408-615-2300**.



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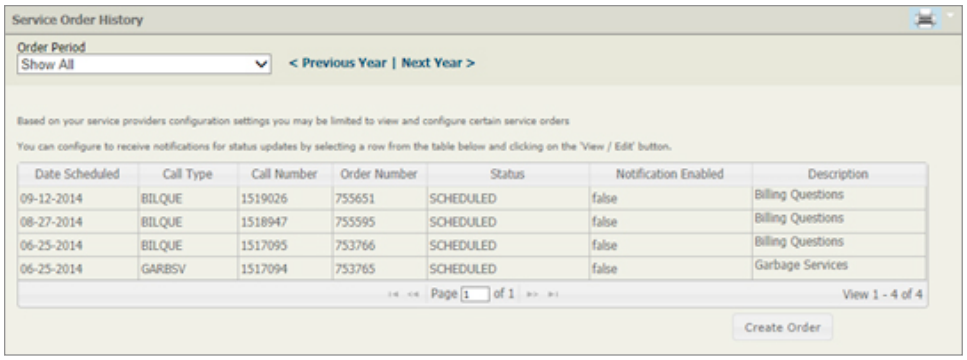
SERVICE ORDER HISTORY ◆

To view past service orders, choose from the **Order Period** drop-down menu.



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CREATE SERVICE ORDER ◆

To contact us, go to the Service Orders page and click on the "Create Order" button. You will then be taken to the **Create Service Order** form.

Select the appropriate subject from the **Order Type** drop-down menu:

- Automatic Payment Update
- Billing Inquiries
- Garbage Cart Changes
- Green Power Inquiries
- Other Inquiries
- Stop Service
- Start Service

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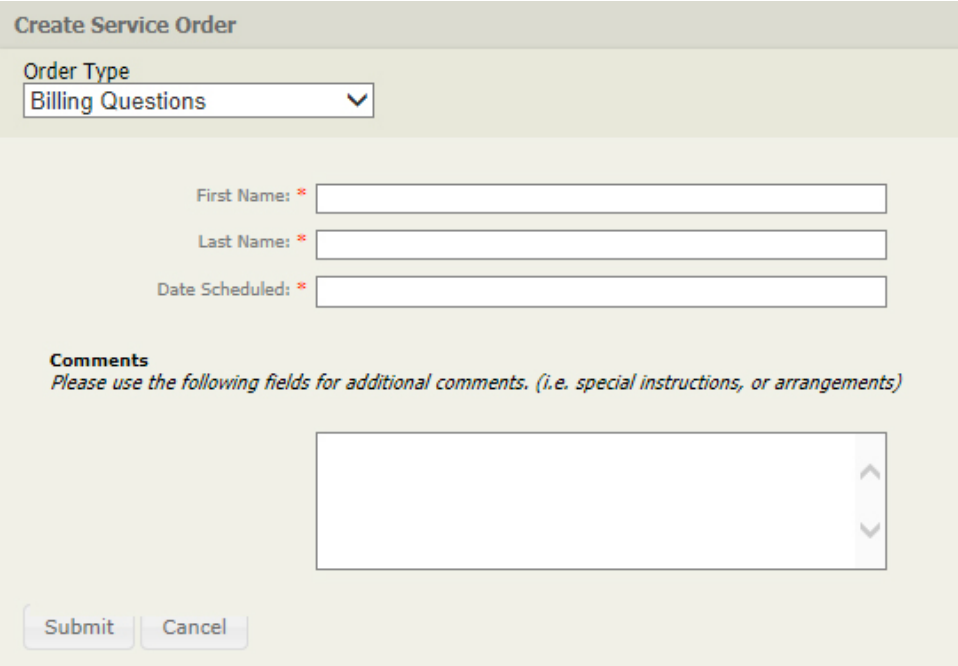
CREATE SERVICE ORDER, continued

Your first and last names are auto-populated in the First Name and Last Name fields.

In the Date Scheduled field, enter today's date unless your request ties into a particular date.

Enter the details of your inquiry in the Comments field and click on the "Submit" button to send. A dialogue box will open with the message: "Your service order was created successfully." Click on the "OK" button to close.

You'll be taken back to your **Service Order History** page and you'll see your service order listed.



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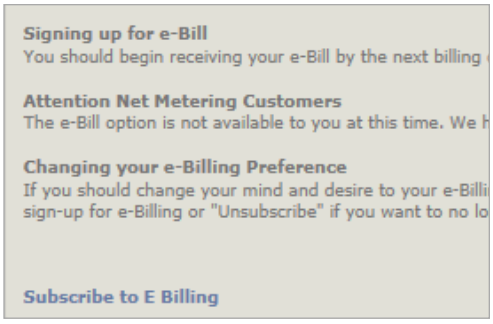
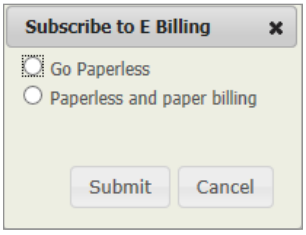
SUBSCRIBE ◆

If you are not subscribed to e-Billing, click on the link at the bottom of the page: "Subscribe to e-Billing".



A new dialog box will open up.



Click on "Go Paperless" or "Paperless and paper billing" and then click on the "Submit" button.

A new dialogue box will open with the message: "You have successfully subscribed to e-Billing. You will receive a confirmation email shortly."

Click "OK" to close the box.

UNSUBSCRIBE ◆

On the e-Billing page, you'll see the link at the bottom of the page, "Unsubscribe from e-Billing". Use this link if you decide to unsubscribe.

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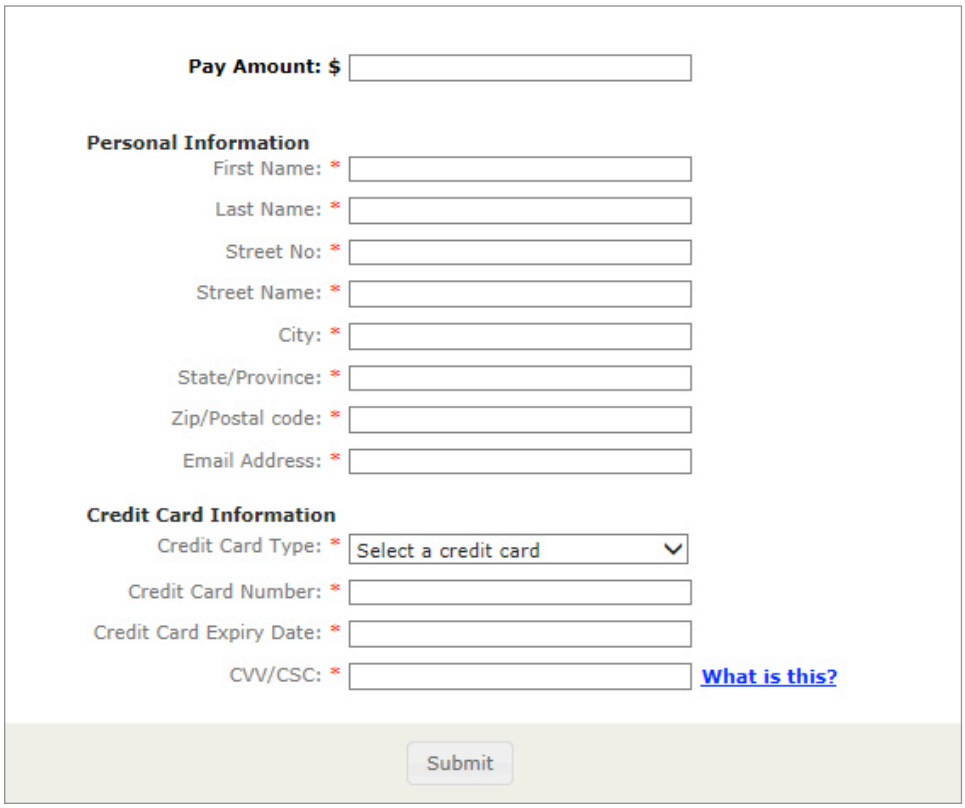
STEP 1

Enter the payment information required in all fields of the Pay My Bill form. Click the "Submit" button. Please note that your credit card information is not stored and must be entered every time you make a payment.



STEP 2

Once you have clicked the "Submit" button, you will be taken to a "payment received" page with the transaction details for your records. When you click on the "Done" button, you will be returned to the main Pay My Bill webpage.

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THE LIBRARY ◆

Help information is stored in the Library. From "How to Read Your Bill" to this User Guide, we supply helpful information to make your experience with us as easy as possible.

Also stored in the Library are "Mission City Scenes" and monthly bill inserts. Even if you are on paperless billing, you still have access to all the information customers receive when they are signed up for the "paper only" option.