

ePlans – Applicant Tasks

The Overview section gave a brief introduction to the ePlans workflow, a behind-the-scenes process that electronically manages participant activities and email notifications. Each activity in a workflow is referred to as a “step”. As one step completes, the ePlans workflow moves the project to the next step and automatically creates a task and assigns it to the appropriate participant. Participants include the applicant, plan reviewers and permit coordinators. The applicant is the individual that was identified as the Project Contact on the original application for plan review. When a task is created an email notification is sent to the assignee.

The ePlans portal page displays your tasks in the “Tasks” column. You can return to your ePlans portal page at any time by clicking the “ePlans” link at the top left of any ePlans page.

The screenshot shows the ePlans portal interface. At the top left is the ePLANS logo. Below it is a navigation bar with 'Profile' and 'ProjectDox Dashboard'. The date 'February 3, 2022' is displayed on the right. A central header reads 'ePlans Portal Home Page'. Below this is a 'My Projects' section containing a table with columns: PROJECT, DESCRIPTION, LOCATION, STATUS, and TASKS (1). The table has one row with project ID 'BL-R2202-0001', description 'Test 2/2/22', location 'BLD Region 2', and status 'Upload Pending'. In the 'TASKS (1)' column, there is an 'Open' button and the text 'Applicant Upload Task'. A red arrow points from the ePLANS logo to a text box that says 'Click here to return to this page'. Another red box highlights the 'ePlans Portal Home Page' header. A third red box highlights the 'Open' button and 'Applicant Upload Task' in the task column.

Please refer to the Task column every time you log into ePlans to see if there are tasks waiting for you. Your oldest tasks will appear at the top of the projects list and will have a button labelled “Open”.

Each row in the projects table includes the state-assigned project number and the project description that was provided on the plan review application. The “Status” column will indicate where your project is in the review process.

Begin your assigned tasks by clicking the “Open” button in the Task column. This will open an “eform” that will guide your task activities. All eforms will include step-by-step instructions as well as “Watch Video” links that will demonstrate the activities that you need to complete.

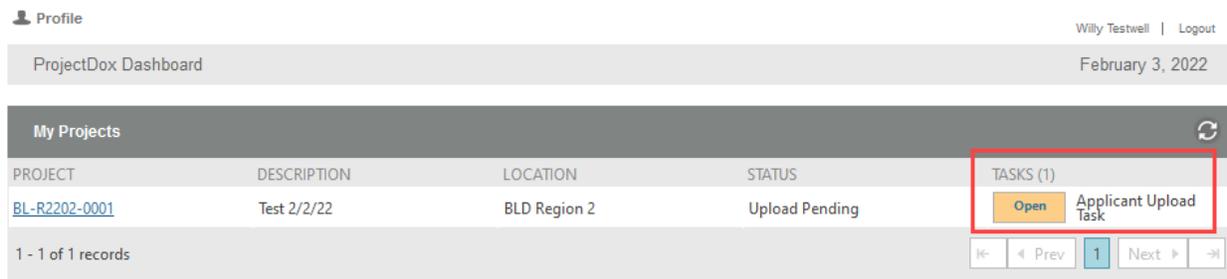
This section of the guide will provide you, the applicant, with information you need to complete tasks that will be assigned to you during the ePlans workflow. Refer to the workflow diagram in the Overview section to see a visual representation of where each step occurs in the process. Workflow facilitates the collaboration between the applicant and the department ensuring that review steps are completed in order.

Applicant Upload

The first step in the ePlans workflow is the Applicant Upload. In this step the applicant will upload drawings and documents that will be reviewed by the department.

When the Applicant Upload task is created, a task notification is emailed to the applicant. The email will contain basic instructions and a link to the ePlans portal login page. If you are a new user, please review the Getting Started section before proceeding.

After logging in to ePlans, locate your project and find the “Applicant Upload” task in the “Tasks” column.



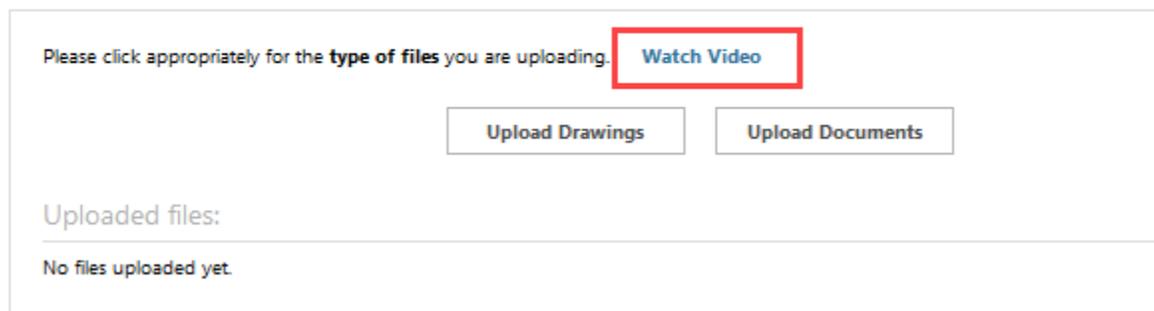
Click the “Open” button in the Task column to begin working on your task. An “eform” will open to guide your task activities. All eforms include step-by-step instructions as well as “Watch Video” links that will demonstrate the activities that you need to complete.

The “Watch Video” links are important and helpful tools that will help you complete tasks correctly and completely. Please refer to these video links when you have questions about how to complete an activity.

The Applicant Upload eform includes a “Watch Video” link that demonstrates how to upload drawings and documents.

STEP 1 of 3: Select and upload your drawing and supporting document files into this project, as required

File Upload for: BL-R2202-0001



Once you have uploaded all the drawings and documents for your project it is important that you “Submit” the Applicant Upload eform to indicate that you have completed your task. If you fail to submit the eform the project workflow will not proceed, and the department will not know to start reviewing your submission.

To complete your task, check the box indicating that you have uploaded all required drawings and documents and click the “Submit” button.

STEP 2 of 3: Check all to confirm you have completed this task and are now ready to submit

Confirmation ?

Selection is required.

I have uploaded all required drawings and/or documents.

STEP 3 of 3: Click the “Submit” button below to complete your task

After completing this task, you will see your project in the list with no task identified in the Tasks column. This indicates that your project has moved forward in the workflow and has been assigned to a department resource.

My Projects				
PROJECT	DESCRIPTION	LOCATION	STATUS	TASKS (0)
BL-R2202-0001	Test 2/2/22	BLD Region 2	Upload Pending	

You can return to your ePlans portal page to watch for status changes or new tasks. You will be notified when new tasks are assigned to you, so you do not have to monitor the ePlans portal page.

Plan Review Queue

Plan review projects go into an internal queue after the Applicant Upload step is completed and the department completes the Prescreen Review step to verify that uploaded construction documents meet submission guidelines. The next available plan reviewer will take a project from the queue on a first in, first out basis. Depending on the number of projects in the plan review queue, it may take a few days to a few weeks before a plan reviewer begins reviewing a project. You will receive a Prescreen Approved Notification email letting you know that your project is in the queue. If your project did not meet submission guidelines you will receive an email notifying you that prescreen corrections are required before your project can proceed to the plan review queue.

Applicant Prescreen Resubmit

After the applicant completes the Applicant Upload step the department performs a cursory review of submitted documents to see if they conform to the department’s submission guidelines. Please refer to the Submission Guidelines section of the User Guide for details. If issues were found by the department the applicant will be assigned a Prescreen Corrections task. The purpose of this task is for the applicant to make corrections based on prescreen

comments and then upload corrected or missing documents. If the submission passes the prescreen step, then the project will move into the plan review queue.

As an applicant, you will be notified via email if you were assigned a Prescreen Correction task. After logging in to ePlans, open the Prescreen Corrections tasks to proceed.

My Projects				
PROJECT	DESCRIPTION	LOCATION	STATUS	TASKS (1)
BL-R2202-0001	Test 2/2/22	BLD Region 2	Prescreen Corrections	<input type="button" value="Open"/> Prescreen Corrections Task

The Prescreen Corrections eform includes a step where you will review and respond to feedback from the department. Please review the “Watch Video” for “Review Comments – Responding to Comments” for a demonstration.

STEP 1 of 4: Respond to any comments, as needed

Resolve Review Comments ?

Unresolved Comments: 1
Info Only Comments: 1
 Files with Markups: 0

Plan Review:

Review and respond online. *Review and respond in Excel, then upload your responses.*

Before making corrections and resubmitting documents, consider the comments made by the department’s prescreen reviewer and make the necessary corrections or provide the missing information. Issues will commonly be related to missing documents, multi-page drawing files, drawing orientation, or failure to follow file naming conventions. The Submission Guidelines section of the ePlans User Guide may clarify Prescreen reviewer feedback.

Make sure to respond to any “Unresolved” comments.

			Add Comment / Ask Question	Add Comment	Please enter your responses ?
Ref.# 1	Permit Coordinator	2/3/22 6:55 PM			I renamed and re-uploaded the files
Unresolved	Drawing file names must include a discipline identifier and a sheet number.				
Checklist Item					
Ref.# 2	Permit Coordinator				No response required.
Info Only	Please review and respond to checklist co				
Comment					

Provide a response here to any "Unresolved" items

The eform includes a step for uploading new or revised drawings and documents. This process is like the original file upload step you followed for the Applicant Upload task.

After you have finished responding to comments and uploading corrected or missing files, you must complete your task by submitting your eform. This will send the project back to the department for review. To complete this task, you must first check the checkbox on the eform that indicates that you have addressed the prescreen comments.

STEP 3 of 4: Check all to confirm you have completed this task and are now ready to submit

Confirmation 

*I have reviewed and addressed, including responses where appropriate, all Review Comments Items accessed by clicking on the "Review Comments" button above. **Required*

STEP 4 of 4: Click the "Submit" button below to complete your task

This will complete your assigned Prescreen Corrections Task and advance the workflow to the Prescreen Review step, which will be completed by the department. If no further submission issues are identified, you will receive a notification email letting you know that your project has moved to the plan review queue.

After completing this task, you will see your project in the list with no task identified in the Tasks column. This indicates that your project has moved forward in the workflow and has been assigned to a department resource.

My Projects 				
PROJECT	DESCRIPTION	LOCATION	STATUS	TASKS (0)
BL-R2202-0001	Test 2/2/22	BLD Region 2	Prescreen Corrections	