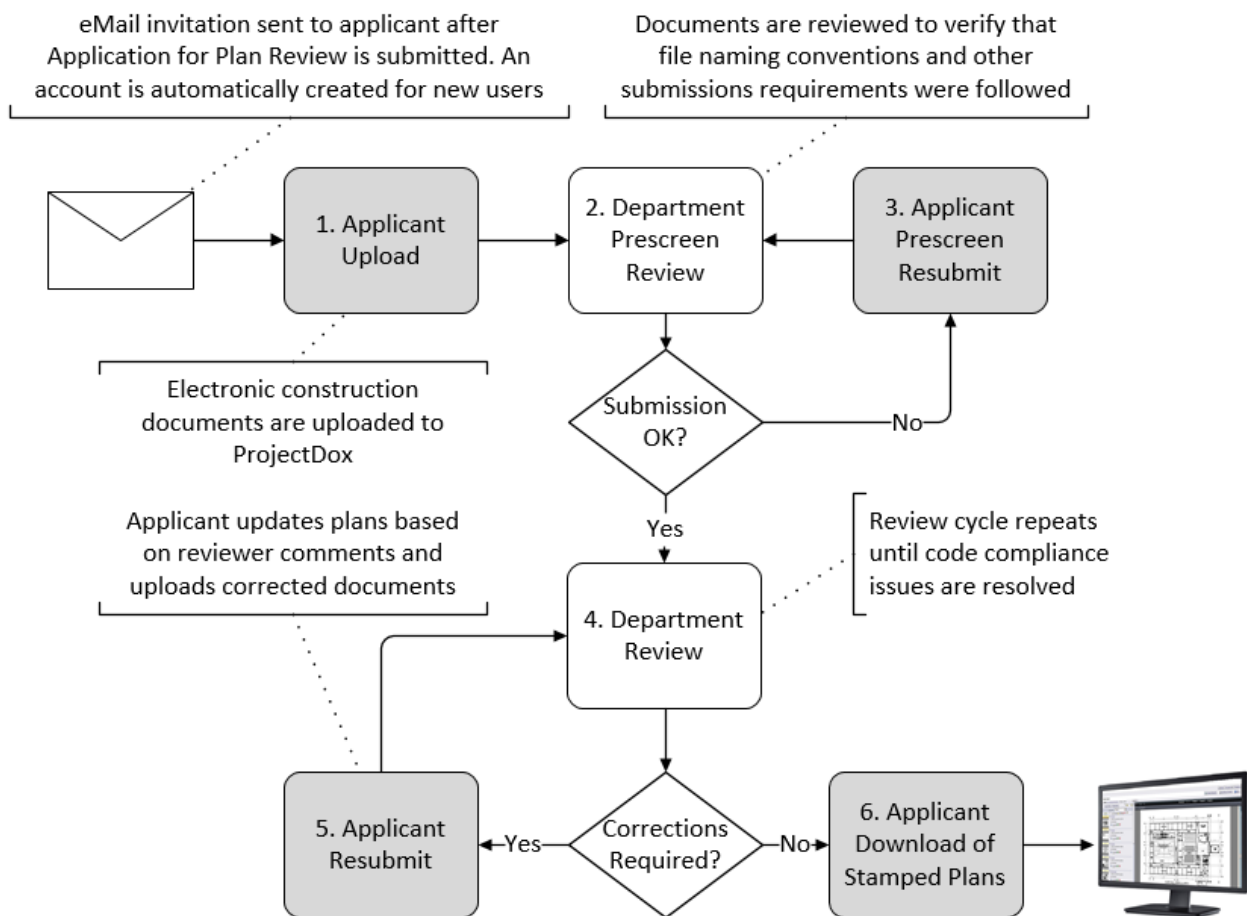


ePlans Overview

ePlans replaces the paper-based plan review process with tools that enable electronic collaboration between applicants and the plan reviewers. Plan review application information is used to create a project in ePlans. ePlans sends the applicant an email invitation when a new project is created. **There is no need to set up an account ahead of time.** If the applicant is new to ePlans then an account will automatically be created for them, and a temporary password will be included in the email invitation.

The ePlans electronic plan review process is managed by “workflow”, a behind-the-scenes process that electronically moves a project from participant to participant by assigning pre-defined tasks and sending email notifications. Each workflow step must be completed before the next step can begin. The diagram below illustrates the workflow at a high level.

ePlans Workflow



The process starts when an Application for Plan Review is submitted to the department. Application information, such as project description, applicant name, and email address are used to create an ePlans project. **If the applicant is new to the system, ePlans automatically creates an account for them** and includes login information in the email invitation to participate in the plan review project. More information about the Plan Review application process can be found on the department’s [ePlans page](#).

The major ePlans workflow steps, as illustrated in the diagram above, are:

- 1) The applicant follows instructions in the email invitation and logs into the ePlans system where they upload electronic construction documents. Refer to the User Guide section on Submission Guidelines for more information. **A separate New Account email will be sent with a temporary password for users that are new to the system.**
- 2) The uploaded documents are checked by department staff for adherence to naming conventions, sheet size, orientation, and required documents, as described in the Submission Guidelines section of the User Guide.
- 3) If submission issues were found, the applicant will be notified and asked to submit any missing documents or re-submit documents not adhering to the Submission Guidelines.
- 4) Complete submissions are made available to department plan review staff. Plans are reviewed for code compliance. Issues, if found, are identified via electronic mark-up.
- 5) If compliance issues were found, the applicant is notified via email that corrections are required. Reviewer mark-ups can be viewed as a layer appearing on the electronic plans. The applicant updates drawings and/or documents based on reviewer feedback and re-submits the relevant files to ePlans for review.
- 6) When plan review is complete, the applicant is notified that they can download an approved, stamped set of construction documents.

Note: The stamped set of plans is a PDF copy of the original construction documents. The original construction documents are not altered or embellished in any way.

Each activity in the workflow is referred to as a “step”. As one workflow step completes, the next step begins. Each step is automatically assigned to an individual or a group, depending on the step. Applicant steps are assigned to the individual that was identified as the project contact on the original application for plan review. Once a step has been assigned it becomes a “task” and an email notification is sent to the individual or group assigned to that task.

Task assignments can be found on the ePlans home page.

Refer to task-specific instructions in other sections of the User Guide for information about accepting and completing tasks that have been assigned to you.