



Plan Submittal Requirements and Electronic Plan Review

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EPR Systems

WEB Portal

- **Plan Review Application**
- **Online Fee Payment**
- **Scheduling Inspection**

ProjectDox

- **Upload Plans/Docs**
- **Markups/Resubmit**
- **Download Approved Plans**
- **Email Engine (Task Completion)**

Permitting System

- **Permits**
- **Holds/Flags/Conditions**

Pre-Submittal Requirements

Prior to submitting building plans, ensure the following items are complete (if applicable):

- Final site plan and zoning are approved
- Salvage permit is closed out with inspections staff
- Grading and/or storm water plan is approved
- Right of way bonds are posted for off-site work

Pre-Log Requirements

- Use the most current application, Self-Cert forms and checklists
- EPR staff can obtain sign-offs and complete the Water and Sewer Service Info Request Form – *allow 48 hours*
 - Self-Cert Application must have both pages uploaded even if sign-offs are not completed
 - If any plumbing is being revised or installed, a Water Sewer Info Request Form must be uploaded but can be left blank for EPR Team to complete

How to Get Started

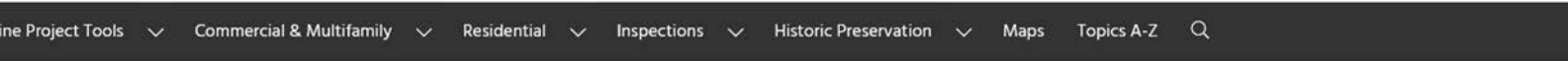
- Visit the EPR Webpage:

www.phoenix.gov/pdd/onlineservices/electronic-plan-review

- Announcements
- Submittal Guidelines
- How-to Documents



How to Documents



Electronic Plan Review (EPR) can be used for Development and Construction. Click back for more information.



ProjectDox is a web-based tool that allows you to upload and review documents online.

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Electronic Plan Review



What's New?

The Electronic Plan Review (EPR) program ProjectDox was recently updated.

New ProjectDox features include:

- New Home Page
- New Navigation Buttons
- New Grid View Configuration
- New Uploader
- New Viewer Updates

View the following document to see what's new in ProjectDox 9.1:

Submittal Guidelines:

How To Links

Getting Started

- [Plan submittal guidelines](#)
- [Internet Explorer 9 and Less Setup](#)
- [Internet Explorer 10/11 Setup](#)
- [Electronic Plan Review workflow at a glance](#)
- [Electronic Plan Review permit types](#)
- [How to create user IDs](#)

Submitting a Project

- [How to submit an application](#)
- [How to upload drawings/documentation](#)
- [How to View Tasks](#)
- [How to invite a user](#)

Making a Payment

- [How to make fee payment](#)
- [How to complete the fee payment task in ProjectDox](#)

If you have questions, feel free to contact us at 602-534-5934.



Once you have reviewed the Plan Submittal Guidelines and you are ready to begin Click EPR

Online Application

Complete Online Submittal Application

- If you do not get the Self-Certification option when completing the on-line application



Contact EPR Triage Team at 602-534-5933
or epr.support@phoenix.gov



PLANNING & DEVELOPMENT
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SHAPE
BUILD**

Online Application Example

P&D Online Permits Search Permit Inspections Electronic Plan Review Online Payments Welcome! steven.rodriguez@phoenix.gov **My Profile** My EPR Log Off



P&D Online - Electronic Plan Review - Plan Type Picker

Guidelines >> **Plan Type** >> Checklists >> Project Address >> Apply >> Confirm >> Submit

What type of plan are you submitting?

What type of Civil Plan are you submitting?

What type of Commercial Plan are you submitting?

Would you like to submit as a Self-Certified Plan Review Application?

Next

To verify you have entered your Self-Cert information, click 'My Profile'

ProjectDox - Upload

- Prior to uploading, name files using the information in the **EPR Submittal Guidelines**
- Files names must have:
 - 3 digit number sheet number and abbreviated sheet name
 - Match the plan Index
 - Not exceed 30 characters including spaces
- Resubmittals: Sheets must be named exactly as the original sheet (corrected sheets will Version once uploaded~V2 [.pdf v2](#))


Example: **Index:**

Sheet Index	
CS	Cover Sheet
A1.0	Site Plan
E1.0	Electrical Floor Plan
E2.0	Electrical One Line Diagram
S1.0	Structural Details

ProjectDox File Name: 001 CS Covr Sht
 002 A1.0 SitePln
 003 E1.0 Elec Flr Pln
 004 E2.0 Line Dgrm
 005 S1.0 Struc Dtl

ProjectDox – Upload cont'd

- **Provide 4" X 4" blanks area** in lower right corner of cover sheet
- **Upload into appropriate folder**
- Drawings – Upload plan sheets to be reviewed (each sheet must be a separate file)
- Supporting Documents – Upload all calculations, specs and supporting documents
- Reference Drawings – Upload plans for reference (i.e. City approved site plan or grading plan)

If files are uploaded incorrectly, you have access to delete them only at the initial upload using the delete  button

Complete the “ApplicantUpload_Confirmation” task to submit project

(Hint: **Expand the E-form** to select Upload Complete: )

- An Automatic email notification will be sent out if the task is not completed within 24 hours

ProjectDox – New Project Search Engine



Note: The Search icon next to the Home button is **not** user friendly. **Do Not Use the magnifying glass icon.** There is no longer an overall search engine.

1. Under the Project Tab, Click All Projects
2. Use the filters under the corresponding Column Title
 - a. Project – Query by plan review number
 - b. Description – Query by customer’s project description
 - c. Status – Query by Status (Pre-log Reject, Create PR – Kiva, Plan Review, etc)
 - d. Create Date – Query by date of last **Task** creation

ProjectDox 

Home  All Tasks Create Project All Reports Profile Logout ?

Tasks (PD) **Projects**

Recent Projects Refresh Save Settings Reset Settings Recent Projects **All Projects** Archived Projects

Show 13 records

PROJECT a	DESCRIPTION b	OWNER	STATUS c	CREATE DATE d
Contains...	Contains...	Contains...	Contains...	On...

2 →

1

ProjectDox – New Task Tab

Note: There are no filter or search options in the TASK Tab

1. Sorting is available in ascending and descending by clicking the title of the column
2. The Applicant is the responsible party for all Tasks listed under the Tasks Tab (they are not under review by the City of Phoenix)



Home All Tasks Create Project All Reports

Tasks (PD) Projects

Project Name	Task	Attached To	Status	Priority	Due date	Created On	Updated On	Update
Valencia - Civil - 08312018144813	PreLogCorrectionRequest	APPLICANT	Pending			3/28/2019 3:40:14 PM	3/28/2019 3:40:14 PM	
Valencia - Fire - 01252019102927	CreatePR KIVA	PRE-LOG AFP	Pending			1/25/2019 10:32:34 AM	1/25/2019 10:32:34 AM	
Rodriguez - Civil - 08212018144624	CreatePR KIVA	PAYMENT and SUBMITTALS	Pending			11/15/2018 2:21:39 PM	11/15/2018 2:22:10 PM	steve



ProjectDox – Tasks and Responsible Parties

ProjectDox Task List in Order

Responsible Party

- 1. ApplicantUpload_ConfirmationApplicant
- 2. PrelogReview.....City of Phoenix (COP) Pre-log Staff
- 3. *(PrelogCorrectionRequest – if Prelog is rejected)*.....Applicant
- 4. *(PrelogReview)*.....COP Pre-log Staff
- 5. CreatePR_KIVA.....COP EPR Administrative Staff
- 6. FeePayment.....Applicant
- 7. VerifyFeePayment.....COP EPR Administrative Staff
- 8. *(FeePaymentCorrection – if fees still have not been paid)*.....Applicant
- 9. *(VerifyFeePayment)*.....COP EPR Administrative Staff
- 10. ScheduleActivities.....COP EPR Administrative Staff
- 11. DepartmentReview.....Plan Review Staff



ProjectDox – Tasks and Responsible Parties cont'd

12. ReviewQA.....	COP EPR Administrative Staff
13. ReviewComplete.....	COP EPR Administrative Staff
14. ApplicantResubmit.....	Applicant
15. ResubmitReceived.....	COP EPR Administrative Staff
16. <i>(ApplicantResubmit – if resubmit is rejected)</i>	<i>Applicant</i>
17. <i>(ResubmitReceived)</i>	<i>COP EPR Administrative Staff</i>
18. DepartmentReview.....	Plan Review Staff
19. ReviewQA.....	COP EPR Administrative Staff
20. ReviewComplete.....	COP EPR Administrative Staff
21. FinalFeePayment.....	Applicant
22. VerifyFinalFeePayment.....	COP EPR Administrative Staff
23. <i>(FinalFeePaymentCorrection –if outstanding fees or permitting requirements)</i>	<i>COP EPR Admin Staff</i>
24. <i>(VerifyFinalFeePayment)</i>	<i>COP EPR Administrative Staff</i>
25. BatchStamps).....	COP EPR Administrative Staff

ProjectDox - Audits

- **Automatic Audits** – When the submittal is greater than 50 plan sheets, a paper copy must be provided within 5 days of the self-certified submittal
*****due to the pandemic, you only need to provide a paper set if requested by the audit reviewer*****
- **Random Audits** – The self-certified professional will be notified if a paper copy is required
 - The permit will not be issued until the paper audit copy is received

ProjectDox – Fee Payment

Payment can be made:

➤ **PDD Online (fastest route):**

✓ <https://apps-secure.phoenix.gov/PDD/Payments>

➤ **Email:**

✓ payments.submittals@phoenix.gov

✓ epr.support@phoenix.gov

Email should include: Plan review number, contact information, and best time to call

➤ **Phone:** 602-534-5933 or 602-534-5934



ProjectDox – Department Review

Applicant must complete the “FeePayment” after payment

Plan review staff performs a thorough review of plans and documents

Commonly Missed Items:

- Plans missing registrant seal and/or Self-Certification stamp
 - ✓ **EVERY** sheet must contain both a registrant seal and Self-Certification stamp
- **Cover Sheet** must include **owner/contractor notice** and must have the **signed statement: “I hereby certify** that these drawings are prepared by me, under my supervision, or reviewed by me and to the best of my professional knowledge conform to the Phoenix Building Construction Code”
- Missing documents from the **Self-Certification Program Submittal Checklist**

Within 5 business days of payment, the customer will be notified of any missing items or if permit is ready for purchase

- Additional fees may be assessed for each additional hour it takes to complete the intake review

ProjectDox – Final Fee Payment and Approved Plans

- **Payment Options:** online, phone, email, or in-person.
 - **Note: If a new water/sewer service or right of way bond is required, the applicant will need to contact the Civil Permitting/Water Services Counter to complete the transaction (602) 262-6551 or cws.permits@phoenix.gov**
- The “**FinalFeePayment**” task must be completed once all permit fees have been paid to initiate the batch stamping process. **Allow up to 24 hours to view the Approved plan set.**
- ProjectDox will send an email notifying the applicant when approved plans are available for download.
 - **Plans must be download and printed for jobsite**



EPR ProjectDox – Plan Revisions

- Complete **new on-line submittal application**
 - Select Revision to Approved plan under plan type
 - In the “Scope of the Project” state “Revision to (add original plan number & type)” and explain the nature of the revision.
- Upload all applicable revised checklist, plans, and supporting documents
- Complete “ApplicantUpload_Confirmation” task in ProjectDox to initiate the prelog process.
- After payment is made and FeePayment task is completed, city staff performs a limited cursory screening of plans and documents
- Allow to 3-5 business days to process

Key Points to Remember

- PDD On-line Application and ProjectDox are two different systems
 - Though fees are paid in PDD Online App, the FeePayment task must be completed in ProjectDox
- Tasks must be completed after every step
Project is not reviewable until complete
 - Upload
 - Fee payment
 - Resubmittal
- Revised and corrected plans must have EXACT SAME file name as the original so it “versions” and plans are comparable
- For EPR “How to Documents” visit:
 - <https://www.phoenix.gov/pdd/onlineservices/electronic-plan-review>

Questions?
EPR Triage Team
Email: epr.support@phoenix.gov
Phone: 602-534-5933

**PROJECTDOX SUPPORT
and CIVIL INTAKE**

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BUILDING INTAKE

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602-534-6598

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Building Code Examiner
602-534-8705

**SITE PLANNING REVIEW
(Setbacks & Lot Coverage)**

Bernadine Ailing
Planner II
602-534-6592



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