Plan Submittal Requirements and Electronic Plan Review

Velina Valencia – Plan Review Coordinator

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 <u>building plans</u>, 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
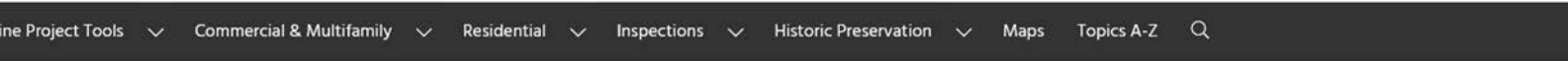
How to Get Started

➢ Visit the EPR Webpage:

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

      ➢ Announcements
      ➢ Submittal Guidelines
      ➢ How-to Documents

How to Documents

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

Online Application Example

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**
- <u>Drawings</u> – Upload plan sheets to be reviewed (each sheet must be a separate file)
- <u>Supporting Documents</u> – Upload all calculations, specs and supporting documents
- <u>Reference Drawings</u> – 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: 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 desciption
   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 – New Task Tab

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

1. Sorting is availabe 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)

ProjectDox – Tasks and Responsible Parties

ProjectDox Task List in Order

		Responsible Party
1.	ApplicantUpload_Confirmation	Applicant
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. *(ApplicantResubmit – if resubmit is rejected)...Applicant*

17. *(ResubmitReceived)...COP EPR Administrative Staff*

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. *(FinalFeePaymentCorrection –if outstanding fees or permitting requirements).....COP EPR Admin Staff*

24. *(VerifyFinalFeePayment)..COP EPR Administrative Staff*

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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Building Code Examiner
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SITE PLANNING REVIEW
(Setbacks & Lot Coverage)

Bernadine Ailing
Planner II
602-534-6592

PLANNING & DEVELOPMENT
PRESERVE
SHAPE
BUILD