ePlanReview

City of Boise | Planning and Development Services

Electronic Plan Review
User's Guide
Planning Projects

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Getting Started

What is ePlanReview?

ePlanReview is the City of Boise's electronic plan review program.

Planning & Development Services customers can submit projects electronically. City departments and other agencies can review projects simultaneously, which helps reduce review time frames and lets customers skip a trip to City Hall.
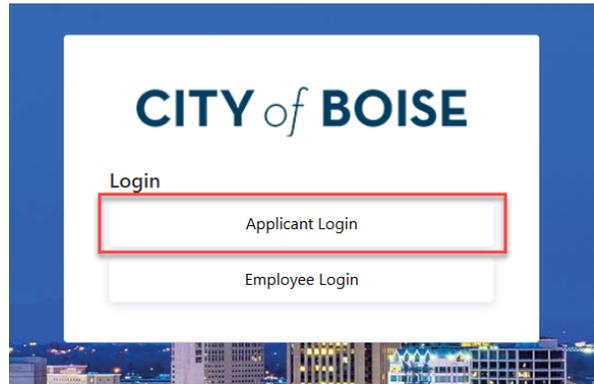
http://pds.cityofboise.org/ePlanReview

Figure 1

Setup Requirements

ePlanReview is a free service. It is a web-based program and little to no special software is needed. However, there are some requirements:

- **Activate your ePlanReview Account**
- Applicants need an ePlanReview account before they'll be able to upload drawings and documents for new permits. To create a new user account in ePlanReview, click on this link on "How to Log into ePlanReview using Boise Secure" and follow the instructions that begin on page 6 for first time users of ePlanReview.

> **Why are there two logins?**
> Permitting and Licensing and ePlanReview are two different websites and each requires a separate login. See the "What's the Difference" section for details.

- **Disable Pop-Up Blockers**
  ePlanReview displays plans in pop-up windows, so you'll need to disable your browser's pop-up blocker before using the system.

- **Compatible Browsers**
  The ePlanReview system works best with a Chromium browser such as Microsoft Edge or Google Chrome. For the best user-friendly navigation experience, we suggest using a computer to access the site. Using a phone or tablet may result in limited or obstructed navigation.

  Note: If you do not have "Administrator" rights to your computer, you may need to contact your IT staff for help with this step.

Submit Application

Submit Application

Submitting an application is the first step of electronic plan review. Our Permitting and Licensing website allows you to submit data and track previous applications.
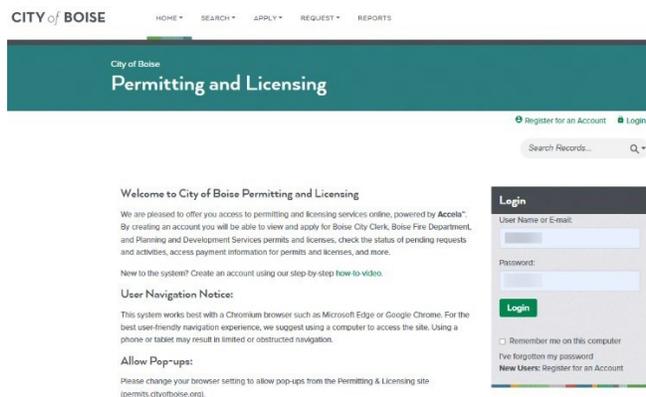
- **Permitting and Licensing Account**
  Applicants must have a free City of Boise Permitting and Licensing account. After registering, you can use the Apply menu to select your application, fill in the application fields, save the data and keep a record of all your applications.

  Need Help?
  Call (208) 608-7100 if you need help signing up.

- **Additional Forms**
  Applications are listed at
  pds.cityofboise.org. They are
  numbered and grouped
  together by discipline
  (Building, Planning, etc.).
  Each application has a
  checklist of required
  submittal items.

- **Are You the Applicant?**
  Are you the person responsible
  for uploading files and
  communicating with the City?
  Make sure you mark yourself as
  the project's "*Applicant*" on
  the application form, or you won't receive our emails and be given rights to
  upload files.

- **Submittal Standards**
  To pass our prescreen review, all drawings and documents must meet the
  requirements listed in the Electronic Plan Review Submittal Standards.
  Incomplete documents will not be accepted.
  More information is available at pds.cityofboise.org/ePlanReview.

- **Submit Online**

  Submitting your application online isn't just easier, it's also faster.
  Your data goes directly to our database, and a case is created
  as soon as you hit the "*Submit*" button. You don't have to wait for
  us to manually create the case and type in your information.
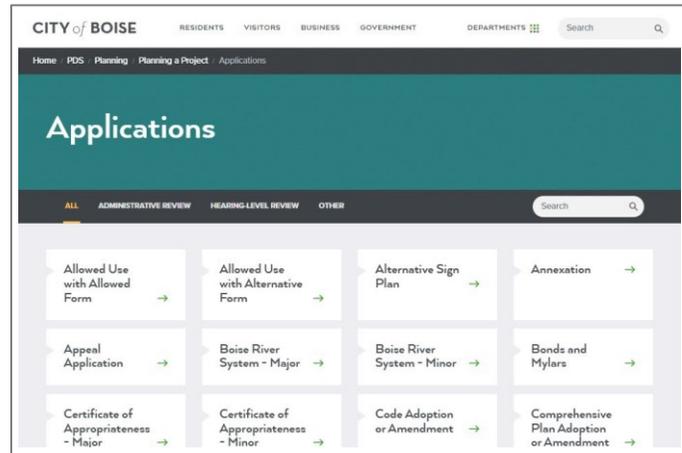
Viewing the Applicant Task List

After logging into ePlanReview, you'll begin by clicking the "**Continue**" button to be directed to your Project Dashboard. Your records will be displayed and any with current tasks will show an "**Open**" button to open the task.

Dashboard View:

Classic View:

When you click the "**View All Projects**" button on the Dashboard view shown above, you'll be directed to the classic view displayed below. The "**Tasks**" tab will show current tasks assigned to you to complete. The "**Projects**" tab will show all current and past project that you submitted.

Upload Files

After receiving the application, we'll send an email with the case number and a link to upload files. You'll have temporary rights to upload files. After submitting the files, your rights change to "read only."

If it's your first time using ePlanReview, you'll need to create a new user account so you can log in and set up your ePlanReview account. To create a new user account in ePlanReview, click on this link on "How to log into ePlanReview using Boise Secure". Instructions for first time users on ePlanReview begin on page 6.

Upload Files

The applicant's first step is to upload all required drawings and documents for their project. Follow the links within your invitation email to access the case and see your available tasks.

Please review and follow the Electronic Plan Review Submittal Standards.

Documents that do not meet standards will not be accepted and may be deleted in the system.

Click on the Applicant Upload Task.

Select **Upload Drawings** to begin your upload.

Plans and Drawings for Planning Applications

- File names must meet the requirements outlined in the **Submittal Standards** document
- Upload to correct folders (drawings in the "Drawings" folder and documents in the "Documents" folder)
- Drawings may be uploaded as individual sheets or grouped into a single file for similar subject (i.e. all elevation sheets uploaded in a single multi-page PDF).
- Orient each sheet correctly. Drawings must use "landscape" orientation.

A pop-up window will open allowing you to search your computer for files.
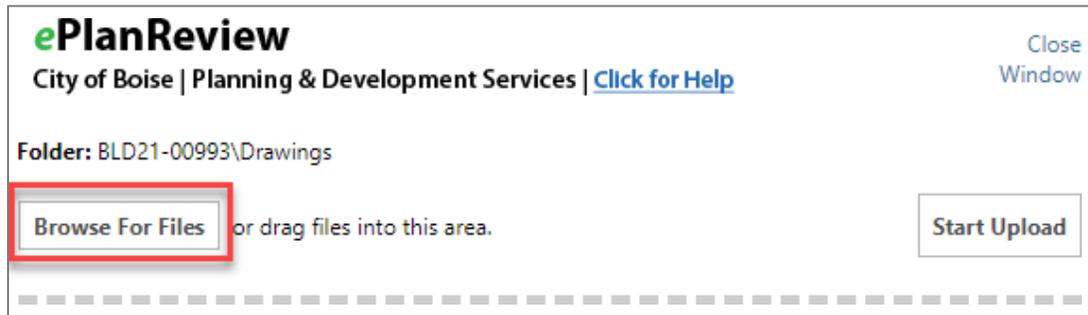
Select all appropriate files, then click "*Open*" to copy them over.
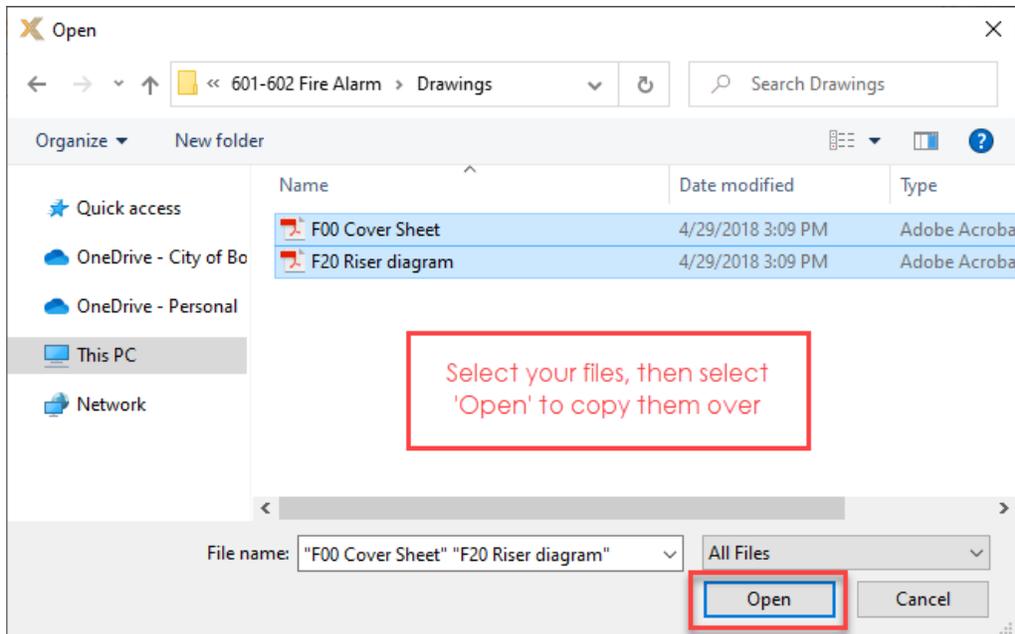
Select "*Upload Files*" to transfer the selected files into the ePlanReview program. Notice the messages that appear beneath each file being uploaded:

1. **Sheet Size** – plans do not meet the minimum sheet size for Building permits. Refer to the specific submittal checklist for your permit type for the size requirements. You will also find the minimum sheet size for Building permits listed in our "Electronic Plan Review Submittal Standards" guide.

2. **Multi-Page** – plan drawings must be uploaded as individual sheets (1 sheet per file).

3. **Sheet Rotated** – plans must be in the landscape/horizontal position or will be blocked from upload.

4. **Ready to start upload** – the file meets the size, orientation, and single page standards and is ready to upload

Once all the files have been uploaded, the upload window will close and display a confirmation message.

Select Upload Documents and repeat the upload steps until all required documents have been uploaded.

- **Documents**
  - ✓ Files must be .pdf format
  - ✓ Upload into the "*Documents*" folder

Submit Files

After uploading files, you need to formally submit them for review by completing the Applicant Upload Task.

At the bottom of the task window, check the box to confirm you have completed the upload.

Select "**Upload Complete – SUBMIT PLANS**" to send the files to City of Boise for review.

Important! You must complete the "*Applicant Upload Task*" to submit files. We cannot begin our review until you complete this task.

- **Note**: You won't be able to upload additional files after completing the task and will be required to wait until a new task is assigned to you before uploading additional files.

Applicant will now wait for notification from the City of Boise, either for corrections needed or that prescreen has passed and fees are now due

Prescreen Task

Prior to acceptance, we perform a cursory review of the application and plans to ensure they meet all submittal requirements.

- All files must meet the requirements specified in the **Electronic Plan Review Submittal Standards.** Electronic files that do not meet these requirements will not pass prescreen review.

If Corrections are required, the Applicant will receive an email notification to complete the "*Prescreen Corrections Task.*"

Accept the "*Prescreen Corrections Task*" to view comments.

The Applicant can view the checklist items and can also add a response comment to the reviewer. Clicking the Review Comments button will open the list of reviewer comments in a new window.

You can respond directly to checklist items during the prescreen review. Type your response in the box next to the item you wish to reply to. Close the window once you are finished with your reply.

Upload any corrected or new documents in the Versioned or New files sections.

The upload tool for Versioned files will display by default, for providing new versions of previously uploaded files. If you wish to upload new files that have not been previously submitted, be sure to click the New Files tab.

Select "**RESUBMIT PLANS**" once all corrections have been made and desired notes have been added. This action sends the task back to City of Boise for additional review.

This "*Correction Task*" can cycle through multiple times until the submittal is complete.

Applicant is notified via email that prescreen is approved, but fees are due prior to review (with a few exceptions). The official review begins once fees are paid in full.

Fees Due

Once the application is deemed complete, the applicant is notified via email that Prescreen is approved, but fees are due prior to review. ***The project review only begins once fees are paid in full.***

For commission/committee level applications, fees must be paid by 4:00 pm on the cut-off day in order to be scheduled on the next hearing agenda.

- **Payment Options**
  All fees can be paid online with a credit card or an electronic check transfer.

- **Online Payment**
  Fees can be paid at Permitting and Licensing. Anyone can pay individual permit fees, but logged-in users can select and pay for multiple fees at a time using the ePay tool on the Home page

  For help using the ePay tool, check out our How to Use ePay video.
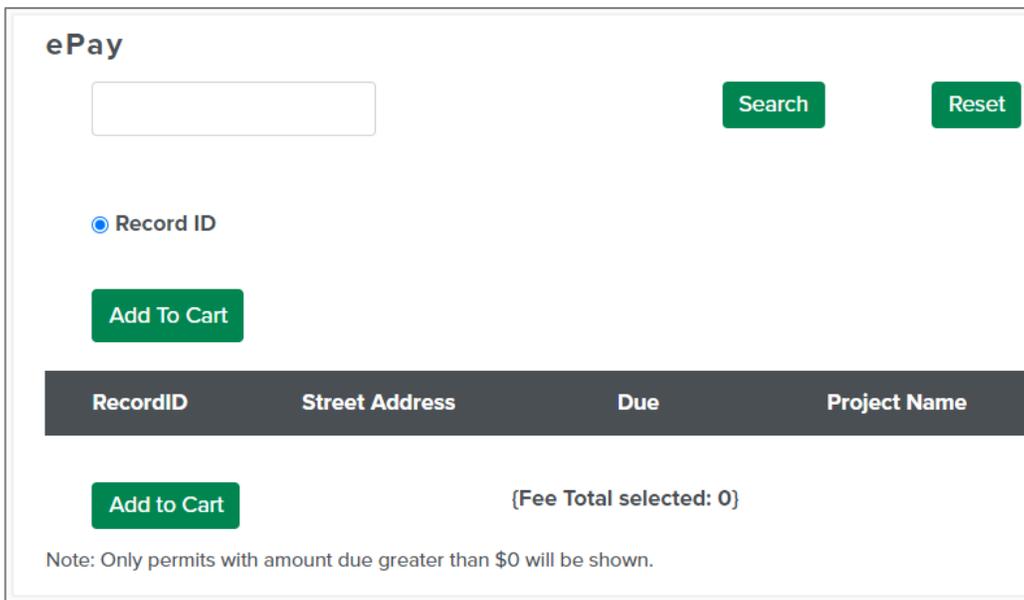
After fees have been paid, the project will be accepted for review.

Review

Review

After prescreen is approved and you have paid your intake fees, we can begin our review.

Planning & Development Services, other City departments and outside agencies will review the plans simultaneously.

Resubmittals

The applicant will receive an email notification if additional corrections are required during the review. Follow the link in the email to complete the "*Applicant Resubmit Task.*"

Note: You cannot upload any new documents until all departments have finished their reviews and you have received your "*Applicant Resubmit Task.*"

Applicants must complete the "*Applicant Resubmit Task*" to submit the corrected files. We cannot begin our review until you complete the task.

Select the "*Applicant Resubmit Task*" to accept the task.

Select "*Review Comments*" to see any changes requested by the planner or other reviewers.

Applicant can respond to reviewer comments directly if no resubmittal is required.

Enter any responses in the applicant response field. All responses should auto-save.

The Applicant can also export a list of change views for further review or distribution and import any responses using the Export to Excel and Import Excel Responses buttons.

STEP 1 of 4: Please respond to all correction items

Resolve Review Comments ❓

Unresolved Comments: 5
Info Only Comments: 0
Files with Markups: 2

Plan Review: | Review Comments | | Export to Excel | Import Excel Responses | Learn how

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

Close RESUBMIT PLANS

Upload the requested corrections.

Please review and follow the [Electronic Plans Submittal Standards](#).

Use the Versioned Files and New Files uploads to provide any new or updated documents and drawings.

STEP 2 of 4: Please upload files into the appropriate folders below.

Version Upload for: BLD21-00993 ❓

Select "Versioned Files" to upload files as new version updates for files previously submitted and received.
Select "New Files" to upload any additional new file into this project as requested.

Versioned Files   New Files

Are your updated files named exactly the **same*** as the prior versions? | Yes | No | Learn how

* *"name-v2.pdf" is not an "exact" file name match to "name.pdf"*

Uploaded files:

▸ 📁 Drawings (2 - 0 New)
▸ 📁 Documents (2 - 0 New)
  📁 Agency Comments 🚫

Once all change views have been addressed and files are uploaded, check both "Task Instruction" boxes, then select "**RESUBMIT PLANS**" to return the project to City of Boise for additional review.

This "*Applicant Resubmit Task*" can cycle through multiple times until the review is approved. Version numbers will appear to the right of the file name of versioned files.

Other departments and agencies can upload project comments to the "*Agency Comments*" folder.

The applicant can view the document by clicking on the file name.

Once the review is complete, the applicant will receive official notification from the City of Boise regarding the administrative decision or the scheduled hearing date.

Project Status

During an active review, the Applicant has a few options to check the project's status.

Option #1 – Select the "**Status**" tab for a quick overview of review progress, including review comments and current active review tasks.

Option #2 – Select the "**Reports**" tab to access helpful reports. The most common are:
- Plan Review – Department Review Status,
- Plan Review – Workflow Routing Slip Reviews, and
- Plan Review – Review Comments.

Plan Review – Workflow Routing Slip Reviews combines several different pieces of useful information. It will be near the bottom of your report list and is also available on the Status tab. We encourage you to check it out.

Option #3 – View progress on City of Boise Permitting and Licensing, https://permits.cityofboise.org.

Enter your permit number in the search bar and hit Search. When the project opens, use the Record Info menu to open the Processing Status page and review the list of completed and upcoming project tasks.

Viewing Change Views, Callouts, and Markups

The plan reviewer may make notations on the drawings and documents that you upload to your case. These are meant to be either informational or require action on your part.

- Markups or red lines are shown in red text and are meant to be informational only.
- Change Views and Callouts are shown in blue text and require action on your part.

There are several ways to view markups, change views, and callouts, which are each explained below:

1. **File View**

   When you're in either the Drawings or Documents folder, you can identify a file with a markup/change view/callout when an icon with a pencil and exclamation mark are present.

   To view the information from the file view, click on the icon to open the File Markups window. Next, check the box and then click the "**View**" button.
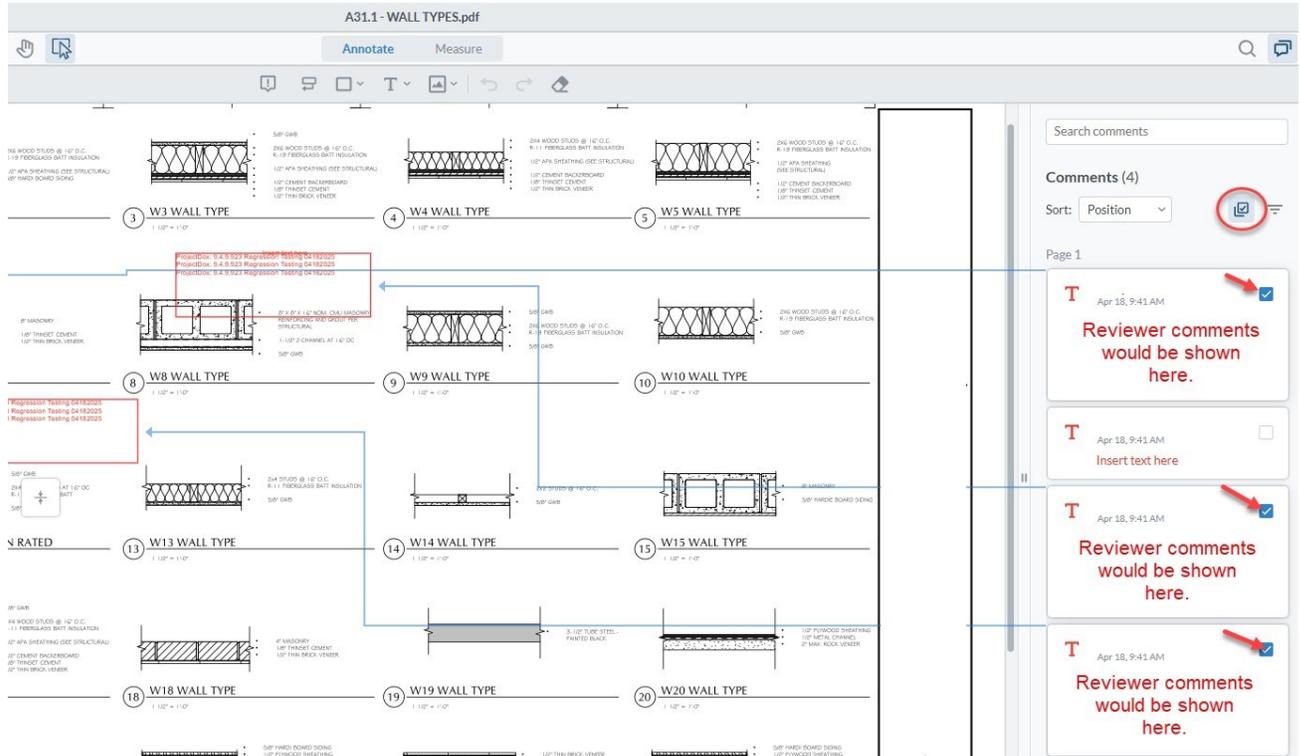
In the example below, the drawing has multiple markups shown. You can click the checkbox icon at the top of the Comments section to turn on the multi-select option, which then allows you to select each markup you want to view. A blue line will then extend from the comment to where the comment is located on the file
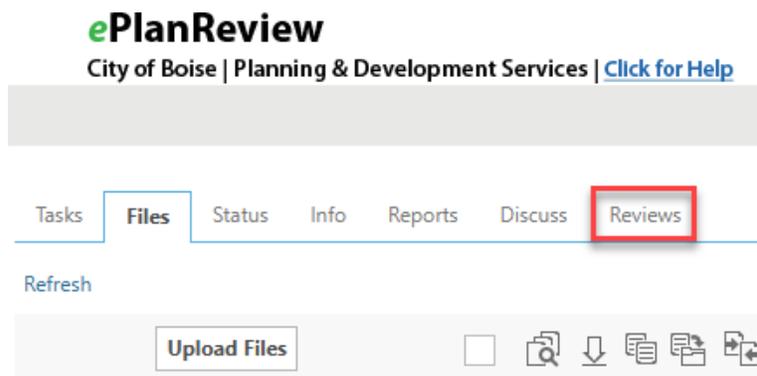

2. **Reviews Tab**

    Another option to view Change Views and Callouts is by going to the Reviews tab.

    NOTE: This option should not be used to view markups, as they don't appear on the Reviews tab.

   To open the Reviews tab, click on "**Reviews**" located near the upper left section of the ePlanReview screen.

    Once you open the Reviews tab, you'll see any Change Views or Callouts entered by the plan reviewer, which require action.

3. <u>**Plan Review – Review Comments report**</u>

The third way to view Review Comments is by pulling a report from ePlanReview.

NOTE: This option should not be used to view markups, as they don't appear on the Reviews tab.

To generate a report with all Review Comments, click on "**Reports**" located near the upper left section of the ePlanReview screen. Next you can simply scroll down to the "**Plan Review – Review Comments**" report or type "*Review Comments*" in the Report Name field to filter out the report. Then simply click on the hyperlink to open the report.
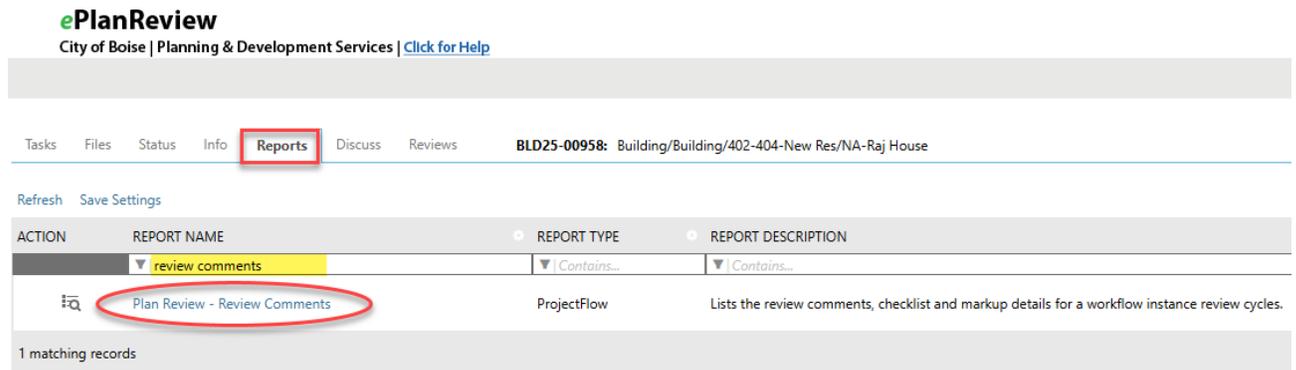
All of the Change Views and Callouts entered by the plan reviewers will be displayed. The report will also show you the status, whether they are unresolved, or resolve, etc. and includes not only the comment from the reviewer but any response you've entered to respond to the reviewer.

Project Approval

Download Plans

Once the permit fees have been paid in full and all associated permits have been issued the Applicant will receive an email notification with instruction on how to download the approved plans.

Download and Print Approved Plans: The architect/applicant must download the approved plans (*see instructions below*) and documents and provide a full-size copy of the approved plans and documents to the contractor. *An approved paper plan set, as well as the Inspection Card and signed Permit, must always be on the job site during construction.*

Download Approved Plans

The email notification includes a link to the specific project/case.

1. **Open Email**
   Open the email and click the link. Log in to ePlanReview, and under the Files tab open the "*Approved Drawings*" folder (Fig. 1).

2. **Select All Files**
   Click the check mark (Fig. 3) to select all files (Fig. 2), then click the "*Download checked files*" icon (Fig. 3).

3. **Download Zip File**
   The files are bundled as a zip file for convenience. Click the "*Download*" button and save the zip file to your computer.
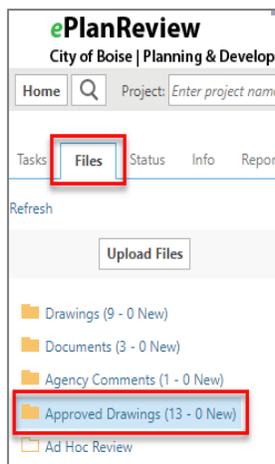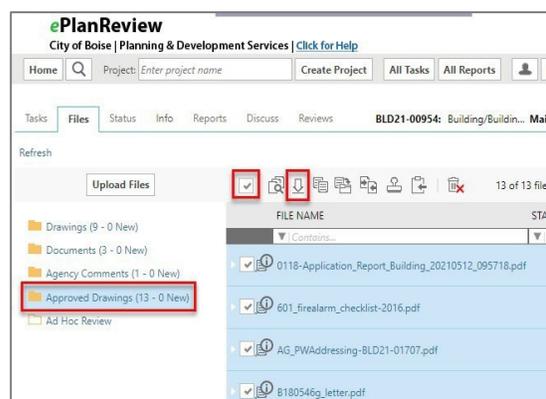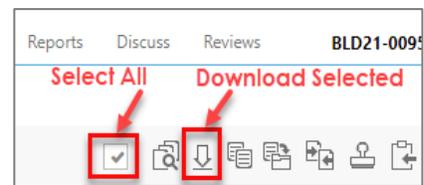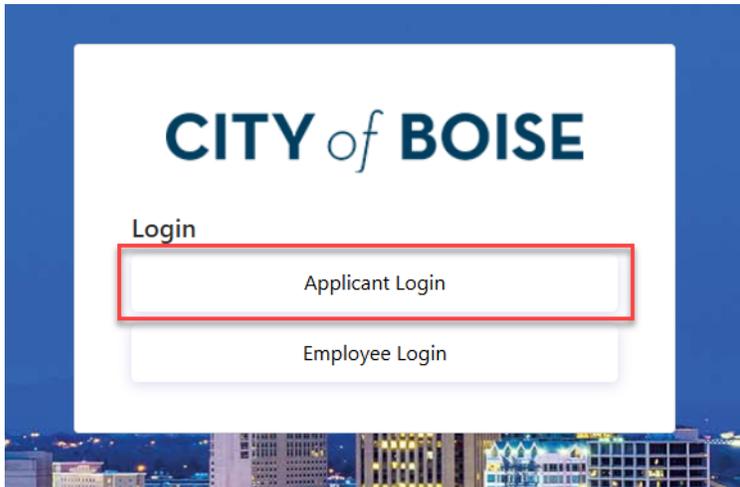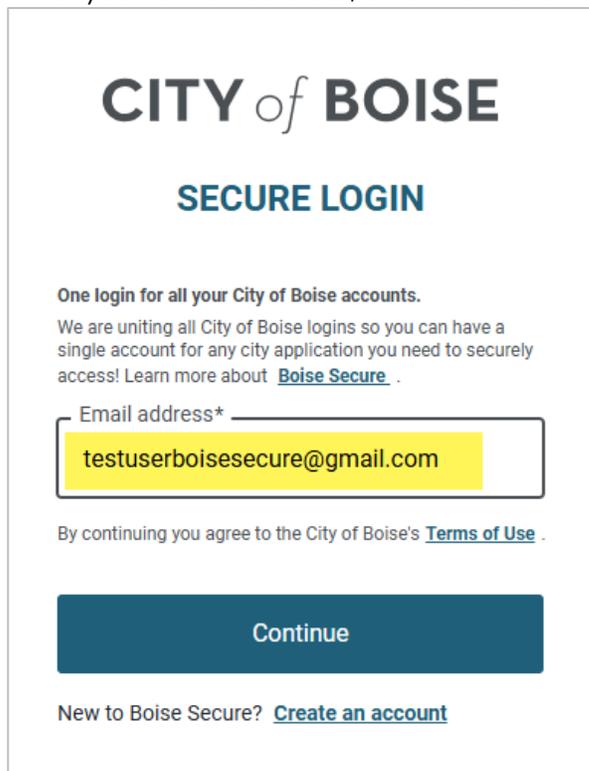

Figure 1

Figure 2

Figure 3

Changing your Password in ePlanReview

To reset your password in ePlanReview:

- [Click to go to ePlanReview](#).
- Click on "**Applicant Login**".

- Enter your email address, and then click **Continue**.

- Click on the "**Forgot password?**" link that appears below the Password field, and the.

- On the next screen, click "**Continue**".

- Enter the 6-digit verification code you received in email and then click "**Continue**".
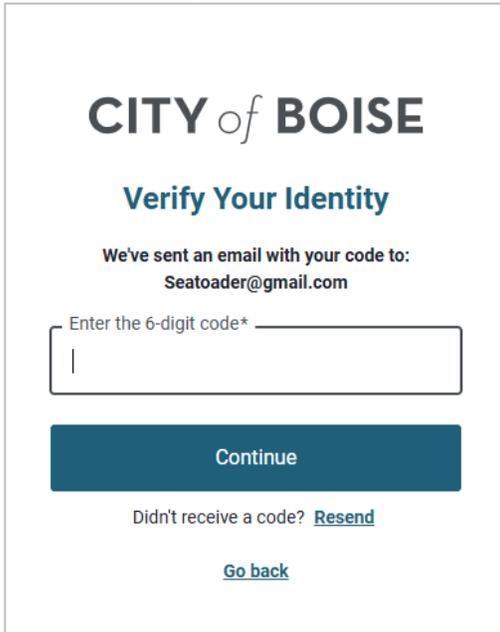
- Follow the prompts by entering and re-entering a new password, ensuring to follow the new password guidelines for your Boise Secure account.

New passwords must contain:
- At least 8 characters,
- At least 3 of the following:
  - Lower case letters (a-z)
  - Upper case letters (A-Z)
  - Numbers (0-9)
- Special characters (e.g. !@#$%^*)
- Cannot include these characters + , &
- Cannot contain your username.

Click on **Reset password** to continue.

- On the next screen, validate your account information including your phone number and whether your account is SMS enabled. Click **Save**.

- If prompted to verify your phone number, which will enable 2-factor authentication, you may click Continue to verify or you may skip this step initially but will get prompted in the future to complete this step.

Need Help?

Visit our website at pds.cityofboise.org/ePlanReview.