

Electronic Permits and Plan Review

User's Guide

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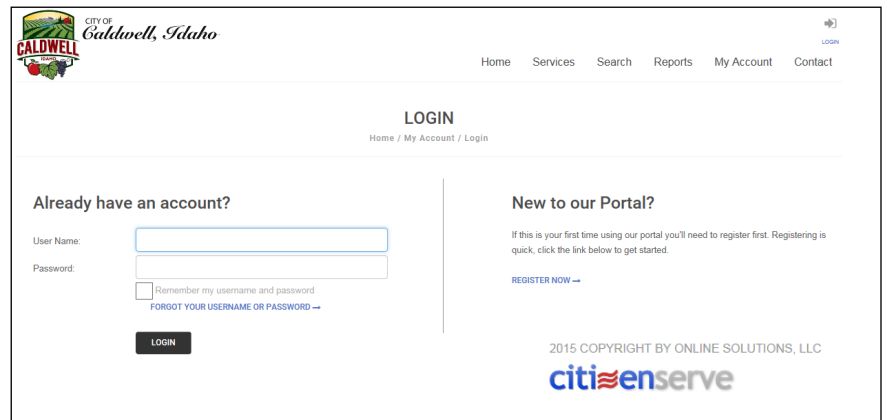
PROJECT APPROVAL



Getting Started

ePermits

With e Permits and e Plan Review, City of Caldwell Development Services customers can submit for permits online from their home or office. Submitting electronically will allow each department to review projects simultaneously, reducing turn around times, and for our customers, less trips to Development Services. With e Permits customers will also have the ability to submit for Business Permits, request information, and submit complaints for code violations.



The screenshot shows the login page for the City of Caldwell ePermits portal. At the top left is the City of Caldwell logo. The navigation menu includes Home, Services, Search, Reports, My Account, and Contact. The main heading is "LOGIN" with a breadcrumb trail "Home / My Account / Login". There are two columns: "Already have an account?" and "New to our Portal?". The "Already have an account?" section has fields for "User Name:" and "Password:", a checkbox for "Remember my username and password", and a "FORGOT YOUR USERNAME OR PASSWORD -->" link. A "LOGIN" button is at the bottom. The "New to our Portal?" section has a paragraph explaining that new users need to register and a "REGISTER NOW -->" link. At the bottom right, it says "2015 COPYRIGHT BY ONLINE SOLUTIONS, LLC" and the "citienserve" logo.

Submitting an Application

The first step to e Permits and e Plan Review is creating an account in our permit tracking system, Citizenserve. This will be the portal to all of your projects. From here you can apply for permits, upload documents, pay for permits, track and monitor your project, request, schedule, and monitor your inspections. To help insure that your application submittal gets approved, be sure to read the "Submittal Guidelines" prior to applying. Missing documents and inaccurate information will cause your submittal to be Declined or placed On Hold until all appropriate items are received. All received submittals will be placed as Pending in the application intake. Once the review fees have been paid, all approved applications will be routed to all departments for the review process to begin. **Remember, all the data you enter and submit goes directly into our database to create the permit. So please, fill in all non-required fields the best that you can. If you are unsure, leave blank.** This will create a much faster process for you.

CREATING YOUR ACCOUNT

- Provide full contact information, i.e., name, business name, address, phone, and email.
- Important: Make sure email address is correct.
- Contractor information must be correct, i.e., licenses, RCE# and expiration dates.

COMMERCIAL PERMIT APPLICATION

- Project Name - if project is a business, use business name.
- Make sure address is correct.
- Valuation - exclude electrical, mechanical and plumbing, only if this work is also being done. Valuation is based from a contract price.
- When applicable, provide all information on registered design professionals, i.e., architects and engineers.
- If your project is going to be a business, provide full legal business name.
- Important: Do not attempt to upload plans and documents from the Citizenserve permit portal. Any miscellaneous single page documents uploaded through this application must be a PDF. Plans and documents pertaining to construction projects must be uploaded through your project in Project Dox.
- If plans and documents need to be uploaded as part of your project, be sure click "yes" at the bottom of your application where it asks, "Will you be submitting plans with this project". This will create your project in Project Dox.

ePlanReview

ePlanReview is a free software and service with no special software requirements. Please see below what requirements you will need, to use this service.

- **Create an Account** - All applicants will need an account to use the software. Once you submit an application to Project Dox, you will receive an email with a temporary login and directions to set up your account. Be sure to change your password when setting up your official account.
- **Disable Pop-Up Blockers** - ePlanReview displays plans in pop up windows, so you will need to disable your browsers pop-up blocker before using the system.
- **Install Project Dox Components** (if using internet explorer) - At the ePlanReview log-in screen click the "Install ProjectDox Components" link at the bottom left of the screen. This will install the Active X components needed to run the software.



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Note: If you do not have Administrator rights to your computer, you may need to contact your IT staff.

- **Plans and Documents**

File names must meet the requirements outlined in the Electronic Submittal Standards Document.

Each plan sheet must be uploaded as a separate file.

Plans must use "Landscape" orientation.

Files must be .pdf format.

All drawings must reserve a space on the bottom right corner for City approval stamps.

Upload plans into the "Drawings" folder.

- **Documents**

Files must be .pdf format.

Upload into the "Documents" folder.

Leave an open space on the cover sheet only for City approval stamps.

Submitting Files

After uploading files, you need to submit them for review by completing the "Upload Confirmation" task. Tasks are located under the "Tasks" button. (Fig.)



- **Complete Task - Important!** You must complete the "Upload Confirmation" task to submit files. NOTE: You won't be able to upload additional files after completing the task.

Pre-Screen Review

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 Submittal Standards."** Electronic files that do not meet these requirements will not pass pre-screen review.
- You will receive an email with the results of your pre-screen review.

Fees are calculated in **ePermits**. Once your project passes the pre-screen review, you will be prompted with "fees due".

- **Applicable Fees** - Plan Review Fees must be paid to process your permit, once the pre-screen review has approved your submittal.
- **Payment Options** - All fees can be made by credit card or electronic check transfer.

Plan Review Process

Once you have passed the application Pre-Screen, your project will show "Fees Due". At this point you will need to pay the required "Plan Review Fees" only. Once received, your application will change status to "Under Review". You will be notified by email at each status change or new task required.

- * All relevant departments will review your plans simultaneously.
 - * If changes are required you will receive a "New Task".
 - * An email will be sent to you when the project is complete, and letting you know that the remaining fees are due.
 - * Once all fees have been received, you will receive an email that your project has been issued and plans are available for download.
- **Resubmittals** - Must use the same file name. "Applicant Resubmittal" task must be completed to begin our review.

Project Approval

- **Permit Required** - Your project has now been approved, though is not ready for construction until your permit has been issued. The applicant/owner/contractor shall secure the permit.
- **Plans** - Once the project is complete, the plans will be ready for download. A printed copy by the applicant shall be provided on-site, throughout the length of the project.

Help? permitinfo@cityofcaldwell.org