

Plan Submittal Requirements and Electronic Plan Review

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Plan Review Coordinator



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Pre-Submittal Requirements

- Obtain all necessary sign-offs on the back of the Self-Certification Permit Application to expedite the pre-log process
 - ✓ **EPR staff can obtain sign-offs and complete the Water and Sewer Service Info Request Form, allow 48 hours**
- **Ensure the most up-to-date applications and checklists are used**
- **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 inspection staff
 - Grading and/or storm water plan is approved
 - Right of way bonds are posted for offsite work

For paper submittals contact epr.support@phoenix.gov to schedule an appointment



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Pre-Submittal Requirements Continued

- 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

Requirements



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Example of Sign-Offs

| Building # | Building Area | Building Valuation | Construction Type | Occupancy Type |
|------------|---------------|--------------------|-------------------|----------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

Self-Certification Professional is to obtain P&D Clearances (below) prior to project submittal

Site Development Counter Clearance

Site Review:

Project Number: 05-3137
 Site Plan Approved: Yes No Not Required
 Zoning Approved: Yes No Not Required
 Site Inspection Required: Yes No interior insp. only.
 Other Requirements: _____ Yes No Not Required

Staff Initials: PK Date: 3/18/2015

Traffic Review:

Updated Tenant Parking: Approved Not Required
 Other Requirements: _____ Yes No Not Required

Staff Initials: PK Date: 3/18/2015

Civil Permitting and Water Services Counter Clearance

Bonds Posted: Yes No Not Required
 Civil Permits Purchased: Yes No Not Required
 Other Requirements: All Civil permits complete Yes No Not Required
 Address Approved: Yes No Correct Address: _____
 AFP Project: Yes No

Staff Initials: _____ Date: _____

APPROVED ADDRESSES
CITY OF PHOENIX
DEVELOPMENT SERVICES
PROJECT ENGINEERING

BY JCH DATE 3/18/15



Date: 03/20/15
 Requestor Name: Mike Stanley Phone: 602-523-4906
 Company: Gensler Fax: 602-523-4949
 KIVA Project No: _____ Q.S.: _____
 Address: 29822 N. Cave Creek Rd., Phoenix, AZ 85331 APN: APN 211-88-382

***Name and identification is required for map attachments*
MAPS CANNOT BE EMAILED**

Staff Use Only:
 Requestor Name*: _____
 I.D / D.L.*: _____ State*: _____
 Staff Name: NA Date: _____

The information provided on this form and the attachment is based on record drawings submitted by others including other city departments. Users of this information are cautioned that independent verification of actual conditions may be necessary.

Attachment:

Existing Water Service

Tap Investigation Required: No Yes Date: 3/20/15 Tote
 Tap Size: 1" Meter Size: 1" Comment: UNK
 Tap Size: _____ Meter Size: _____ Comment: _____
 Tap Size: _____ Meter Size: _____ Comment: _____
 Note: _____

Existing Sewer Service

Tap Size: 6" Comment: _____
 Tap Size: _____ Comment: _____
 Note: _____

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



How to Get Started



Visit the EPR Webpage:

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

- Announcements
- Submittal Guidelines
- How to Documents



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How to Documents

City of Phoenix

RUNOFF ELECTION

Search...

PHX At Your Service | PHX Pay Online | Map It | Find Public Records | PHXTV | Translate

City of Phoenix > Planning and Development > Online Services & Information > Electronic Plan Review

Home Project Tools | Commercial & Multifamily | Residential | Inspections | Historic Preservation | Maps | Topics A-Z

view (EPR) can
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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:

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

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...

Click

Getting Started

How to Get Started

P&D Online Permits Search Permit Inspections Electronic Plan Review Online Payments Log On

OFFICIAL WEB SITE OF THE City of Phoenix P&D Online - Electronic Plan Review

City of Phoenix Planning & Development Department Electronic Plan Review System

Choose What You Want To Do

- Start new plan review application
- Return to a saved plan review application
- After completing application link to ProjectDox to upload drawings
- Make payment for a plan review or permit

1 Plan Review Application and Fee Payments

Choose The Appropriate Link

- Return to established project to finish uploading drawings
- Submit EPR project to city for processing
- Viewer markups
- Upload corrections
- Download approved plans

2 ProjectDox Electronic Plan Review System

Two Login Accounts

1. P&D Online Creation/Login
2. ProjectDox Login (password will be sent once first application is submitted)

Online Application

- **Create PDD Online User Account**
 - <https://apps-secure.phoenix.gov/PDD/EPR>
- **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

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

OFFICIAL WEB SITE OF THE
City of Phoenix

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?
Civil

What type of Civil Plan are you submitting?
Commercial

What type of Commercial Plan are you submitting?
G&D

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

Next

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

ProjectDox - Upload

- ProjectDox will send an invite with your temporary password
- Prior to uploading, name files using the information in the **EPR Submittal Guidelines**
 - **File 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*)

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



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ProjectDox – Upload Continued

- **Provide 4” X 4” blank 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.
- [VIDEOS – NEXT SLIDE](#)



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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



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... |

ProjectDox – Tasks and Responsible Parties

ProjectDox Task List in Order

| | <u>Responsible Party</u> |
|---|-------------------------------------|
| 1. ApplicantUpload_Confirmation | Applicant |
| 2. PrelogReview..... | City of Phoenix (COP) Pre-log Staff |
| 3. <i>(PrelogCorrectionRequest – if Prelog is rejected)</i> | <i>Applicant</i> |
| 4. <i>(PrelogReview)</i> | <i>COP Pre-log Staff</i> |
| 5. CreatePR_KIVA..... | COP EPR Administrative Staff |
| 6. FeePayment..... | Applicant |
| 7. VerifyFeePayment..... | COP EPR Administrative Staff |
| 8. <i>(FeePaymentCorrection – if fees still have not been paid)</i> | <i>Applicant</i> |
| 9. <i>(VerifyFeePayment)</i> | <i>COP EPR Administrative Staff</i> |
| 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 |

Pre-Log Review

- **Civil/Landscape pre-log review completed by:**
 - Velina Valencia (602) 534-0849
 - Shawn Lauridsen (602) 534-2731
- **Building pre-log review completed by:**
 - Glen Burke (602) 534-6598
 - Stevan Varnell (602) 534-8705
- **Verifies:**
 - Files are named correctly and uploaded into the appropriate folder
 - 4" X 4" blank area is available in the lower right corner of cover sheet only
 - If application sign-offs are needed



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.
- **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:**

- Through PDD Online:

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

- Via email:

- ✓ payments.submittals@phoenix.gov

- ✓ epr.support@phoenix.gov

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

- By phone: 602-534-5933 or 602-534-5934

- In-Person at Payment and Submittals



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ProjectDox – Department Review

- **Applicant must complete the “FeePayment” task before the plan review can begin.**
- Plan review staff will perform a thorough review of plans and documents
- **Commonly Missed Items:**
 - Plans missing registrant seal and 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 visit the Civil Permitting/Water Services Counter to complete the transaction.**
- 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**



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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

**For paper submittals contact epr.support@phoenix.gov to make an appointment



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Key Points to Remember

- **Separate Login ID and Password required for PDD On-line Application and for ProjectDox**
- **Tasks must be completed after every step**
 - **Upload**
 - **Fee payment**
 - **Resubmittal**
- **Revised/corrected plans must have EXACT SAME file name as the original so it “versions”**
- **For EPR “How to Documents” visit:**
 - <https://www.phoenix.gov/pdd/onlineservices/electronic-plan-review>



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Questions?
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