The purpose of this document is to identify every task, role and responsibility for a project submitted through the EPR ProjectDox system.

### I. Accessing the Project Submittal

1. After logging onto the ProjectDox system find your project by clicking on the "Task (PD) button on the left side of the screen.

2. Click on the project name link to access the project home page.



### II. ProjectDox Task Types in Order

1. **Task**: ApplicantUpload Confirmation
   **Who**: Applicant
   **Responsibility**: This is the first task the applicant will see and complete after they have uploaded their plans. The applicant must click the "Upload Complete" button on the Eform to submit their project to the City.

For more information or for a copy of this publication in an alternate format, contact Planning and Development at 602 262-7811 voice or TTY use 7-1-1.

2. **Task**: PrelogReview
   **Who**: Varies
   - **Sign Inspector** (will do all EPR steps for their plan submittals)
   - **EPR Senior Engineering Technician** (will do all fire, civil and landscape plan submittals)
   - **Principal Engineering Technician** (will do all civil and landscape plan submittals)
   - **Building Code Examiner** (will do all commercial and residential plan submittals, including self-certification)
   - **Site Planner** (will do all site plan submittals including sign-offs on building and self-cert submittals)
   - **AFP Engineering Technician**

   **Responsibility:**
   a. Verifying the correct plans and supporting documents are uploaded in ProjectDox, including:
      - Ensuring plans and supporting documents are in the correct folder(s)
      - There is a 4"X4" clear space in the lower right corner of the cover sheet
      - Plans are legible. Zoom into an area to verify clarity
      - Ensures the applicant follows the EPR Submittal Guidelines for file naming
      - If rejecting the submittal, adds a comment in the "Comments" area to list the outstanding items needed to accept the prelog. **(1)** Clicks the "Add Comment" link to save comments.
      - **(2)** Completing the task button to approve or reject the submittal. An email will be sent to the applicant from ProjectDox after the task has been completed.
   b. Researching the project parent plan type and number in KIVA to ensure the project information matches the plan being submitted.
   c. Completing the reviewer portion of the P&D Online Application.  This is typically done after the pre-log review has been completed.

3.  **Task:** PrelogCorrectionRequest
    **Who:** Applicant
    **When:** If the Prelog person determines supplemental information is needed.
    **Responsibility:** The applicant must check the "I have uploaded corrected documents…" box before they can click the "Corrections Complete" button to resubmit the project.

    | | |
    |---|---|
    | **Task Instructions** | |

    VIEW INTAKE CHECKLIST (0)

    ☑ have uploaded the corrected documents and/or drawings as indicated below.

    COMMENTS LOG

    CATEGORY: EPR

    COMMENTS:

    ADD COMMENT

    KEYWORD FILTER:
    FILTER | CLEAR

    | Task | Category/Comments | Added By | Date |
    |---|---|---|---|
    | PreLogReview | EPR: Provide structural calculations, geotechnical report and water meter sizing form. | Steven Rodriguez | 10/3/2018 1:24:37 PM |

    Corrections Complete

4.  **Task:** PrelogReview (after re-submittal)
    **Who:** Varies (same as PrelogReview above)
    **Responsibility:**
    a.  Verifies outstanding items have been corrected.
    b.  Accepts the task and clicks the "Approve" button to accept the plan submittal.

5.  **Task:** CreatePR_KIVA
    **Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician
    **Responsibility:**
    a.  Verifies there is a copy of the reviewer application in the "Supporting Documents" folder and views the application to find the required fees and fee codes (if applicable).
    b.  Accepts the task and clicks on the Create button in the Eform.
    c.  Verifies the temporary KIVA plan number populates in the Eform.
    d.  Goes into KIVA and verifies the temporary KIVA plan number was created successfully. Goes through all KIVA screens to ensure all applicable fields are filled in and adds in the required plan review fees.
    e.  Goes back into ProjectDox, adds the plan review fee amount and any special comment(s) in the "Comments" area for the applicant. Clicks on the "Add Comment" link to save your comments.
    f.  Clicks the "Complete Task" button (the button will appear at the bottom of the page after the temporary plan review number was successfully created) to complete the prelog process. An Email is sent to applicant from ProjectDox.

COMMENTS LOG

| CATEGORY: | EPR ⌄ |
| COMMENTS: | The following plan review fee is due: LPRN T81939 – $1,560.00. Complete the "FeePayment" task in ProjectDox once payment has been made to start the plan review process. Thank you. |

ADD COMMENT ☐ PRIVATE

KEYWORD FILTER:

FILTER | CLEAR

| Task | Category/Comments | Added By | Date |
|------|-------------------|----------|------|
| PreLogReview | EPR: Provide structural calculations, geotechnical report and water meter sizing form. | Steven Rodriguez | 10/3/2018 1:24:37 PM |

Complete Task

**6. Task:** FeePayment
**Who:** Applicant
**Responsibility:** Makes payment online, over the phone or in-person. Accepts the "FeePayment" task and clicks on the "Complete Task" button after payment has been made to notify EPR staff to schedule review.

| Task | Category/Comments | Added By | Date |
|------|-------------------|----------|------|
| CreatePR_KIVA | EPR: The following plan review fee is due: LPRN T81939 – $1,560.00. Complete the "FeePayment" task in ProjectDox once payment has been made to start the plan review process. Thank you. | Steven Rodriguez | 11/7/2018 10:43:38 AM |
| PreLogReview | EPR: Provide structural calculations, geotechnical report and water meter sizing form. | Steven Rodriguez | 10/3/2018 1:24:37 PM |

Complete Task

**7. Task:** VerifyFeePayment
**Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician
**Responsibility:** Verifies all required plan review fees have been paid in KIVA.
   a. If all fees have been paid, goes into ProjectDox and clicks on the "Fees Paid" button.
   b. If fees have **not** been paid, enters comment in the "Comments" area and clicks the "ADD COMMENTS" link to save. Clicks on the "Reject-Return to Applicant" button to return the task to the applicant. An email will be sent to the applicant from ProjectDox.

| Task | Category/Comments | Added By | Date |
|------|-------------------|----------|------|
| CreatePR_KIVA | EPR: The following plan review fee is due: LPRN T81939 – $1,560.00. Complete the "FeePayment" task in ProjectDox once payment has been made to start the plan review process. Thank you. | Steven Rodriguez | 11/7/2018 10:43:38 AM |
| PreLogReview | EPR: Provide structural calculations, geotechnical report and water meter sizing form. | Steven Rodriguez | 10/3/2018 1:24:37 PM |

Fees Paid          Reject - Return to Applicant

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8. **Task:** FeePaymentCorrection
    **Who:** Applicant
    **Responsibility:** See Step II.6

9. **Task:** VerifyFeePayment
    **Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician
    **Responsibility:** Same as Step II.7.

10. **Task:** ScheduleActivities
    **Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician
    **Responsibility:** Assigns all required plan review staff.
    a. Verifies assigned plan review staff on the reviewer's online application in ProjectDox.
    b. Goes into KIVA, enters the plan reviewer(s) initials and tickle date into the Clearance Checklist screen.
    c. Goes into ProjectDox and verifies all the necessary plan review activities have been selected with a check matching the KIVA plan review activities.
        o You do **NOT** have to do anything with the reviewer name here.
    d. Clicks the "Begin Review" button at the bottom of the page to complete the task.



**"Scroll down"**

11. **Task:** DepartmentReview
    **Who:** Plan Review Staff
    **Responsibility:** After completing the plan review process.
    a. Click on the drop down arrow and choose the appropriate decision.
    b. Check the "Plan Review and/or Assignment Complete" box.
    **Notes**:
        o Enter comment(s) in the "Comments" area of the Eform to communicate with the applicant or EPR Staff, if applicable.
        o To request additional plan review staff to be added to the project, view the "EPR - Department Review(s) Addition" document for an overview of this process.
    c. Click the "Complete Review" button at the bottom of the page to complete the task.
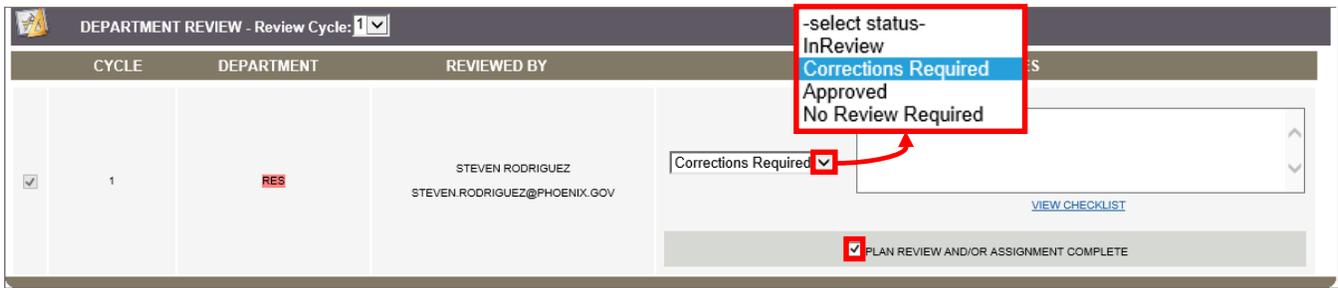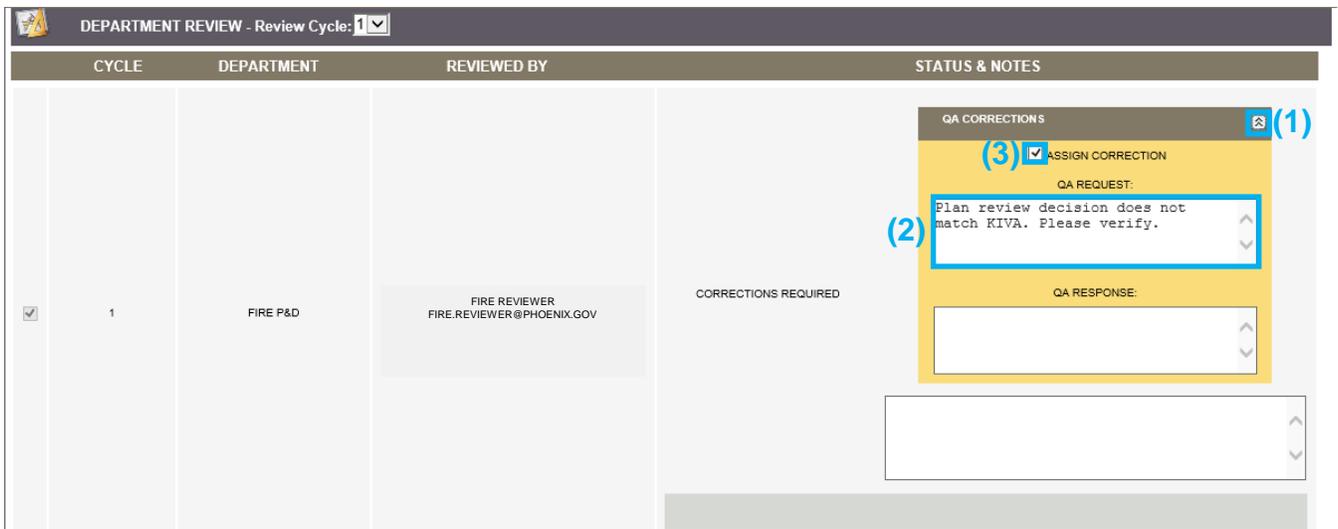
**"Scroll down"**



12. **Task:** ReviewQA

**Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician

**Responsibility:**

a. Make sure all reviewers have completed their review and sign-off in KIVA.

b. Make sure the plan review activities in KIVA match the decision made in ProjectDox.

c. Verify if additional plan review staff should be assigned to the project.

   o To request additional plan review staff to be added to the project, view the "EPR - Department Review(s) Addition" document for an overview of this process.

d. Make sure the task is ready to send it back to the applicant.

e. If you are not ready to send it back to the applicant. **(1)** Click the arrow next to QA Corrections on the department review you want to "send back" to the reviewer, **(2)** add any notes, **(3)** click the box next to "Assign Correction", **(4)** click 'Assign QA Corrections. You can choose to send the task back to the reviewer or open it up to the group.

f. Click the "QA Review Complete" button at the bottom of the page to complete the task.



**"Scroll down"**

**13. Task:** ReviewComplete

**Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician

**Responsibility:**

a. Verify if there are any outstanding items or fees dues.

b. Enters comments in KIVA and sends email to stop the SB 1598 (A.R.S. § 9-835(D-F)) notification clock.

c. Copy comments into ProjectDox Eform and click the "Corrections-Return to Applicant" button at the bottom of the page to complete the task. A back-up Email from ProjectDox will automatically be sent to the applicant.

| Task | Category/Comments | Added By | Date | |
|------|-------------------|----------|------|---|
| ReviewComplete | EPR: Corrections required. There is a 3rd review fee of $150.00 due at next submittal. Complete the ApplicantResubmit task once you have uploaded corrected plan sheets, documents and paid the 3rd review fee to start the plan review process. Thank you. | Steven Rodriguez | 11/7/2018 2:28:16 PM | Delete |

Corrections - Return to Applicant

**14. Task:** ApplicantResubmit

**Who:** Applicant

**Responsibility:** Upload corrected drawings, clicks the three task instruction boxes and clicks the "Complete Task" button at the bottom of the page to complete the task. (This button is only available after three check boxes are selected)

**Task Instructions**

☑ Effective December 31, 2012, State law A.R.S. Subsection 9-836 requires that no more than two substantive reviews are completed by a jurisdiction before the plans are either approved and a permit is ready to be issued, or the plans are denied and the review must start over. With these limitations on plan review, the Planning & Development Department can no longer put plans on hold or perform a third review to allow redesign after the first review. If any part of the construction plans are revised or redesigned after the first comprehensive plan review, the permit will be either denied and the applicant must resubmit, or the applicant may obtain a permit for the initial design and then submit revisions as a separate submittal. Please visit our website for more information: phoenix.gov/pdd/licensetimes.html.

☑ I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.

☑ I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. I am ready to complete my assigned task.

**"Scroll down"**

Complete Task

**15. Task:** ResubmitReceived

**Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician

**Responsibility:**

a. In the Drawings folder, click on the drop down arrow next to "Current Sort" and choose "Date (Newest First)". This will allow you to see all the new files uploaded.

b. Verify the new uploaded files have the **exact same file name** as the original files.

o Revised plan files should have V2 shown next to the file name.

o If the existing files do not show the V2 markup symbol, check to see if the file was uploaded with a different file name or a new sheet was added. All plan files should sort in order per the sheet index.

▪ Add additional plan review fees for the new sheets into KIVA if appropriate. Contact the applicant for payment over the phone or reject the resubmittal and add comments regarding the additional plan review fees.

**c.** If the resubmittal is accepted, manually re-tickle plan review staff who have approved the plans in KIVA on the first review to verify the plan files they approved have not been re-uploaded. Tickle all other plan review staff in KIVA as normal. Verify all required plan review activities are checked on the Eform. Click the "Begin Review" button to complete the task.

   o  If the resubmittal is **not** accepted, add a comment in the "Comments" area to list the outstanding items needed. Click on the "Return to Applicant…" button to complete the task.



**"Scroll down"**



16. **Task:** ApplicantResubmit
    **Who:** Applicant
    **Responsibility:** Check the last checkbox in the "Task Instructions" field, enters response if applicable and clicks on the "Complete task" button to compete the task.



**"Scroll down"**



17. **Task:** ResubmitReceived (see Step II.15)

18. **Task:** DepartmentReview (see Step II.11)

19. **Task:** ReviewQA (see Step II.12)

20. **Task:** ReviewComplete
    **Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician
    **Responsibility:**

a. Verify if there are any outstanding items or fees dues.

b. Enters comments in KIVA and sends email to stop the SB 1598 (A.R.S. § 9-835(D-F)) clock.

c. Copy comments into ProjectDox Eform and clicks the "Plan Review Approved" button at the bottom of the page to complete the task. A back-up Email from ProjectDox is automatically sent to the applicant.

**Note:** Site, Fire and Self-Cert Audit plans go straight to the "BatchStamp" task. Skip to Step II.25 to complete the "BatchStamp" process.

| Task | Category/Comments | Added By | Date | |
|---|---|---|---|---|
| ReviewComplete | EPR: Plans approved. The following permit fee is due: RSME T154359 - $576.75. NOTE: The permit fee does not include the cost for upgrading the water meter.  Contact the Water Services Counter at 602-262-6551 (Option 1, Option 1) for installation fee cost.  Complete the "FinalFeePayment" task | Steven Rodriguez | 11/7/2018 3:07:16 PM | Delete |
| CreatePR_KIVA | | Glen Burke | 7/19/2018 5:43:20 PM | |

<div align="right">**Plan Review Approved**</div>

21. **Task:** FinalFeePayment (see Step II.6)

22. **Task:** VerifyFinalFeePayment (see Step II.7)

23. **Task:** FinalFeePaymentCorrection (see Step II.6)

24. **Task:** VerifyFinalFeePayment (see Step II.7)

25. **Task:** BatchStamps
    **Who:** EPR Senior Engineering Technician, Sign Inspector or AFP Engineering Technician
    **Responsibility:** Verify files in the "DRAWINGS" folder match the sheet index file to ensure all files have been accounted for while selecting the sheets to batch stamp. Follows the "ProjectDox Batch Stamp Procedure" for batch stamping the plan set. After the files have been batch stamped, clicks the "I have Batch Stamped…" checkbox and clicks on the "Complete Task" button to finalize the process. An email will be sent to the applicant from ProjectDox to download the approved plan set.
    **Note:** Most of the time all plan sheets for civil, fire and site submittals will be stamped. For building plan submittals, we do not stamp the reference plans such as grading, landscape and site. Contact the Team Leader or Supervisor if you are unsure if the plan sheet should be stamped.

**Task Instructions**

☑ I have batched stamped all approved drawings and/or documents.

<div align="center">**"Scroll down"**</div>

<div align="right">**Complete Task**</div>

## ProjectDox Task List in Order

1.  ApplicantUpload_Confirmation

2.  PrelogReview

3.  *(PrelogCorrectionRequest – if Prelog is rejected)*

4.  *(PrelogReview)*

5.  CreatePR_KIVA

6.  FeePayment

7.  VerifyFeePayment

8.  *(FeePaymentCorrection – if fees still have not been paid)*

9.  *(VerifyFeePayment)*

10. ScheduleActivities

11. DepartmentReview

12. ReviewQA

13. ReviewComplete

14. ApplicantResubmit

15. ResubmitReceived

16. *(ApplicantResubmit – if resubmit is rejected)*

17. *(ResubmitReceived)*

18. DepartmentReview

19. ReviewQA

20. ReviewComplete

21. FinalFeePayment

22. VerifyFinalFeePayment

23. *(FinalFeePaymentCorrection – if fees still have not been paid or there is an open outstanding item)*

24. *(VerifyFinalFeePayment)*

25. BatchStamps