CITY OF GRESHAM

ePlan Review
Applicant User Guide
Submitting an Application

ePlan

Electronic Review

City of Gresham Contact Information

Urban Design & Planning
Development Planning
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INTRODUCTION

Electronic Plan Review (ePlan) is a multi-browser system that allows land use applicants to submit project documents and plans electronically, thus eliminating the need to produce multiple copies of documents and travel to City Hall for application submittal and payment. ePlan also enables City staff and designated review agencies to review Development Planning permit applications electronically as well as provides real-time project updates.

This guide provides the necessary information to upload project files as well as explains the prescreening process and fee payment instructions. For information pertaining to initiating an ePlan project, please reference the Preparing to Submit an Application guide.

PROJECT SUBMISSION

Once the Urban Design & Planning Project Information form found at www.GreshamOregon.gov/ePlan under the Planning tab has been submitted and accepted by the City, an applicant will receive notification from ePlan to upload project documents and drawings.

LOGIN TO EPLAN

To being the upload process, login to ePlan: www.eplan.GreshamOregon.gov/ePlan/. Once logged in, the ePlan home page will appear.

Any projects to which the user has access will display in the Active Projects List. Outstanding tasks that require action are displayed under Standard Workflow Task List, which is located below the Active Projects List. Projects are listed in order by application number.

Select the project by clicking on the appropriate link under Project Name. Please refer to the email notification from ePlan to confirm the project number.

PROJECT PAGE COMPONENTS

Once the applicant has clicked on the Project Name link, the main project page will appear. The following is an overview of project page components.

PROJECT INFO TAB

The Project Info tab will provide general project data. For instance:

- Description of the project
- Location of the project
- Planner contact information
- Project type

REPORTS TAB

The Reports tab will list all reports available for the applicant. For instance, the Routing Slip report will detail to whom the project was routed by workflow (or the type of review for the project - i.e. pre-application, Type II review, etc.). Please note that some projects may include multiple workflows.

FOLDER LIST

The list of project folders is located to the left of the Project Information and Reports tabs. Please note that once plan review is started, additional drawings or documents cannot be uploaded until all plan reviewers have completed their task in the workflow.

Folders within the folders list includes:

- Drawings: Drawings will be uploaded to the Drawings folder in single-page format with a landscape orientation

    o Design Review applications within a design district must utilize Vector PDF

    o Non-Design Review applications can be submitted in the standard PDF format if Vector PDF is not feasible

- Documents: Documents will be uploaded to the Documents folder

    o Microsoft Word as well as standard and/or searchable PDF files are accepted for calculations, reports, permit applications and other supporting documentation (non-drawing files)

    o Document files may be multi-page

- Hearing Body: For staff use only for the distribution of hearing materials to City hearing bodies

- Approved: Finalized approved documents for Type I and Type II review types that the applicant may download once notified by email

- Final: Finalized documents that do not require a decision and may be downloaded when the applicant has been notified by email

    o For example: Pre-application summaries, Optional Design Commission Consult summaries, etc.

- Decision: Finalized decision documents pertaining to Type III and Type IV review types that the applicant may download once notified by email

- EForm Attachments: Documents that any of the plan reviewers have attached for the applicant

UPLOADING DRAWINGS AND DOCUMENTS

The following will outline how to upload project drawings and documents. Please follow the Planning ePlan naming convention of documents and drawings found in the Preparing to Submit an Application guide.

- Click on the folder in which the applicant would like to upload project files

- Select the Upload Files button to upload project files

- Click the Browse for Files button and browse to the location of the files to be uploaded

- Select the files to be uploaded

    o Multiple files can be selected by using the Shift or Ctrl keys

- Click the Open button

- The selected files will be copied to the Upload Files window

- Click the Upload Files button

    o Depending on the file size and/or the number of files selected for upload, this may take some time

- Click on the Close button to close out the window

Once project files are uploaded to the correct folder(s), the folder list will be replaced by thumbnail images of each file contained in the folder. Under each thumbnail, the file name, author, date, and any relevant file icons will be displayed.

Continue to upload documents and drawings until all project files have been submitted. Once the upload is complete, send an email to ePlanReview@GreshamOregon.gov. The subject line should state: Upload Complete/Project (PZ##-26######). This email is only necessary during the initial upload. All other project notifications are automated.

PRESCREENING PROCESS

Once all drawings and documents are uploaded, the Permit Technician (Submissions Coordinator) will prescreen the project to determine if submittal requirements have been met and plan review can begin. Prescreening ensures that:

- Drawing pages have been uploaded individually

- All applicable checklists and applications are uploaded to the documents folder

The Permit Technician then calculates plan review fees based on the City's fee sheet or information received from the planner for the project.

The Permit Technician will email the applicant with any outstanding items as well as with plan review fees. The email will contain a link for fee payment.

PRESCREEN RESUBMITTAL

The applicant will receive an email from ePlan should it be determined that additional information is necessary to process the project. To upload the necessary submittal information, login to ePlan, open the project and upload the additional documentation by following the directions under the Uploading Drawings and Documents section.

Once complete, return to the Standard Workflow Task List and accept the CorrectionComplete task for the project. If desired, the applicant may submit a response to any prescreening comments found in the PRESCREEN COMMENTS box by utilizing the RESPONSE box.

Once completed, check the I HAVE ADDRESSED ALL OF THE PRESCREENING CHECKLIST ITEMS AND COMMENTS box and select the Corrections Complete button.

FEE PAYMENT

Plan review fees must be paid before plan review may begin. A Permit Tech will notify you by email with your fees and payment options.

Once project fees have been paid, the Permit Technician will start the workflow and the applicant will receive an email that prescreening has been approved and planning review has begun.