

# ePlanReview

City of Boise | Planning and Development Services

Electronic Plan Review

## User's Guide

*Building Projects*



Getting Started



Submit Application



Upload Files



Plan Review



Project Approval



Planning & Development Services

PDSOnline | ePlanReview • <http://pds.cityofboise.org>

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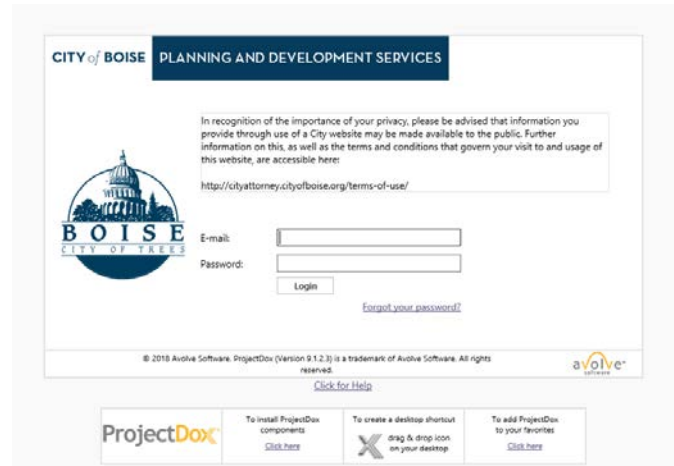
# Getting Started

## 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>



## Setup Requirements

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

- **Activate your ePlanReview Account**  
Applicants need an ePlanReview account. After submitting the application in PDS Online, you'll receive an email with a temporary password and directions for setting up an ePlanReview account. To keep your information secure, be sure to change your password after logging in for the first time.

### Why are there two logins?

PDS Online 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.

- **Install ProjectDox Components (if using Internet Explorer)**

We use ProjectDox software to review plans. At the ePlanReview login screen (Fig. 1), click the "Install ProjectDox Components" link at the bottom left of the screen. This installs the ActiveX components needed to run the program.

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



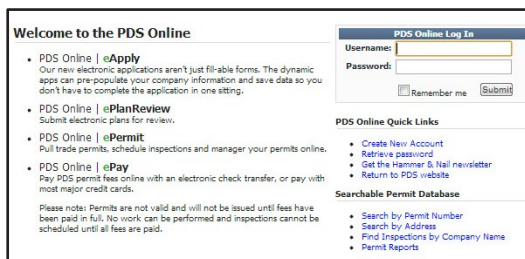
- **Other Browsers**

Version 9.1 of ePlanReview can now be used in a variety of browsers. Full functions are available and have been tested by the City of Boise in Internet Explorer 11, Microsoft Edge, and Google Chrome. Other browsers may work as well, but have not been internally tested. If you are using an alternate browser and experiencing difficulties, please try switching to one of the tested browsers listed above.

# Submit Application

## Submit Application (eApply)

**eApply:** Submitting an application is the first step of electronic plan review. The eApply section of our PDS Online website makes it easy to submit data and track previous applications. Applications are listed at [pds.cityofboise.org](https://pds.cityofboise.org). Simply select the desired application to get started.



- **PDS Online Account**

Applicants must have a free PDS Online account. After registering, you can type within the application fields, save the data and keep a record of all your applications.

### Need Help?

Call the permit desk at (208) 608-7070 if you need help signing up.

- **Additional Forms**

Applications are listed at [pds.cityofboise.org](https://pds.cityofboise.org). They are numbered and grouped together by discipline. Each application has a check-list of required submittal items.

- **Are You the Primary Contact?**

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

- **Submittal Standards**

To pass prescreen review, all plans 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](https://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. We don't have to manually create the case and type in your information.

<b>500 - COMMERCIAL CONSTRUCTION</b>
<b>502 - New Commercial and Commercial Additions</b>
502 - New Commercial Application (eApply)
502 - New Commercial: Application Preview (pdf)
502 - New Commercial: Submittal Requirements
304 - Registered Design Professional in Charge
502a - New Commercial: Process Flowchart
502b - New Commercial: User Guide

## 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 also get a temporary password so you can log in and set up your ePlanReview account.

# 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.

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.**

The screenshot shows the ePlanReview interface for case BLD39-00609. The left sidebar shows a tree view with 'Drawings' and 'Attachments' folders. The 'Drawings' folder is selected and highlighted with a red circle. Below the folder name, it says 'No files currently exist in Drawings.' and provides instructions for uploading files. A red circle highlights the 'Upload Files' button. The main content area shows a 'Task List' table with one record and a 'Workflow Instances' table with one record.

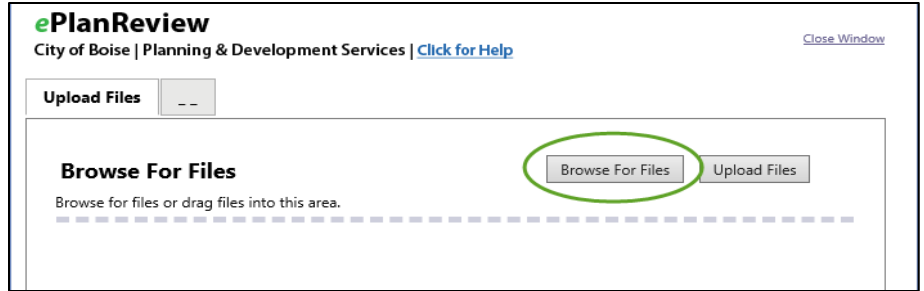
OPTIONS	TASK	CASE #	INST...	GROUP	ASSL...	STATUS	PRIO...	DUE...	CREA...	ADD...	CASE ...	CONT...
	Applicant Hollow Task	BLD39- 00609	BLD39- 00609 - Building Residential Template - 10/18/2018 8:22:16 AM	Applicant	FirstGroup	Pending	Medium	10/23/2018 8:22:20 AM	10/18/2018 8:22:21 AM	150 N Capitol Blvd, Boise, ID 83702	Test Residential Building Permit	Tyson Florence

NAME	COORDINATOR (GROUP)	STATE	VERSION	STARTED	COMPLETED
BLD39-00609 - Building Residential Template - 10/18/2018 8:22:16 AM	Review Coordinator	Active	Non-Integrated with 9:1 changes (Version 2)	10/18/2018 8:22:16 AM	

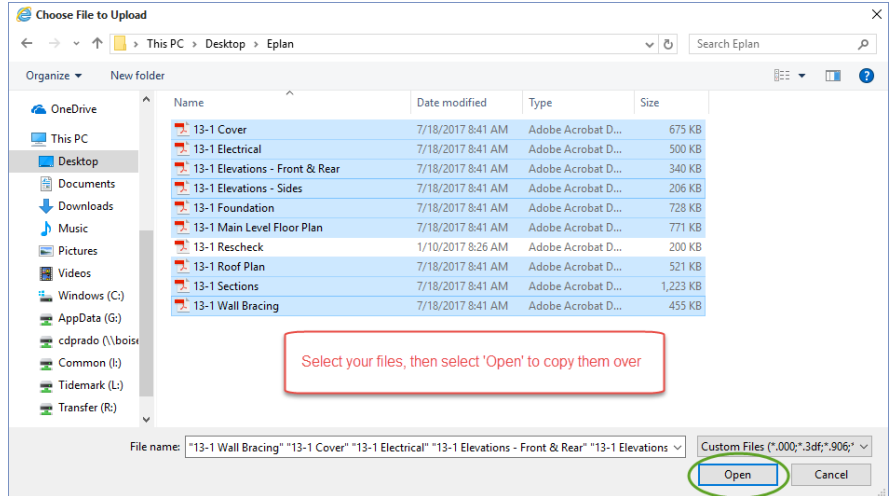
Select the **Drawings** folder to begin your upload.

- **Plans and Drawings**
  - ✓ File names must meet the requirements outlined in the [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

A pop-up window will open allowing you to search your computer for files.



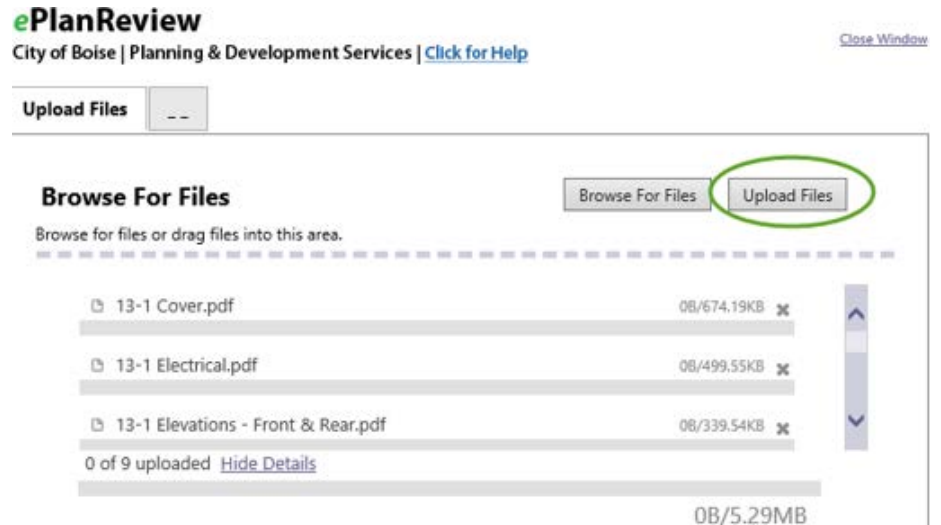
Select all appropriate files, then click "Open" to copy them over.



Select "Upload Files" to transfer the selected files into the ePlanReview program.



Once all the files have been uploaded, close the upload window.



**ePlanReview**  
City of Boise | Planning & Development Services | [Click for Help](#) [Close Window](#)

**Upload Files** [---]

**Browse For Files** Browse For Files **Upload Files**

Browse for files or drag files into this area.

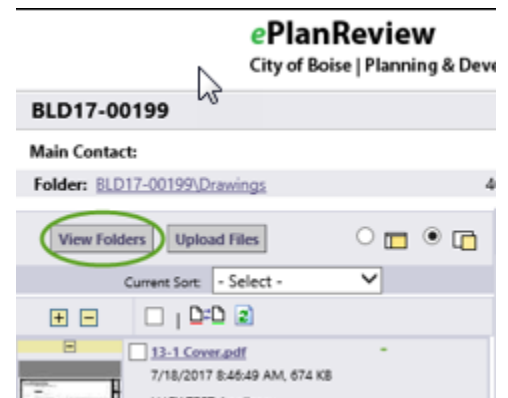
13-1 Cover.pdf	08/674.19KB	x
13-1 Electrical.pdf	08/499.55KB	x
13-1 Elevations - Front & Rear.pdf	08/339.54KB	x

0 of 9 uploaded [Hide Details](#)

0B/5.29MB

Select "View Folders" to access the Document Folder. Repeat the upload steps until all required documents have been uploaded.

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



**ePlanReview**  
City of Boise | Planning & Dev

**BLD17-00199**

Main Contact:

Folder: BLD17-00199\Drawings 4

**View Folders** Upload Files

Current Sort: - Select -

13-1.Cover.pdf	7/18/2017 8:46:49 AM, 674 KB
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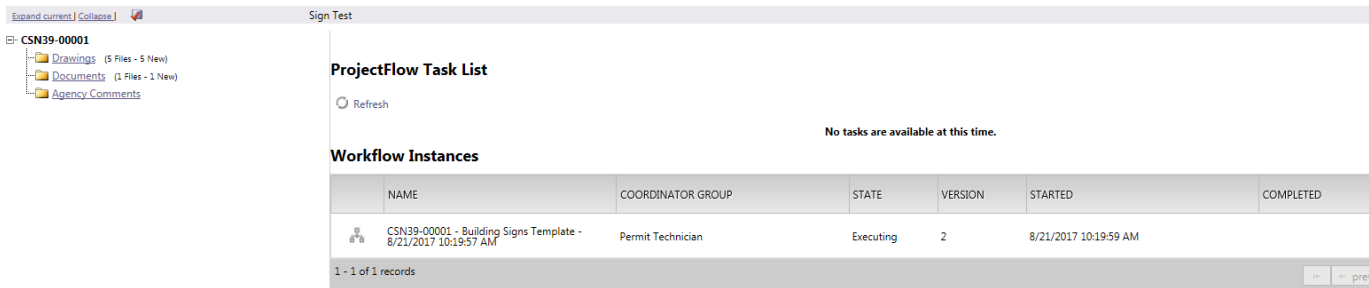




Upload Complete - SUBMIT PLANS Close

- **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.

Once you confirm that your account says “no tasks are available at this time,” you can log out.



Expand current | Collapse | Sign Test

CSN39-00001

- Drawings (5 Files - 5 New)
- Documents (1 Files - 1 New)
- Agency Comments

**ProjectFlow Task List**

No tasks are available at this time.

**Workflow Instances**

	NAME	COORDINATOR GROUP	STATE	VERSION	STARTED	COMPLETED
	CSN39-00001 - Building Signs Template - 8/21/2017 10:19:57 AM	Permit Technician	Executing	2	8/21/2017 10:19:59 AM	

1 - 1 of 1 records

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

## Prescreen 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 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.” Follow the links within your email to access the case.

Accept the “Prescreen Corrections Task” to view comments. Select the affirmative response to open the task window.

The Applicant can view the checklist items (Residential Only) and/or a response comment to the reviewer as needed.

Follow the upload instructions detailed on page 6 to upload any corrected or additional files, or upload directly from your task.

Select the check box, then "RESUBMIT PLANS" once all corrections have been made and the files uploaded. This will put you back in the que for another prescreen review.

**PRESCREEN REVIEW**

ProjectFlow BUILDING avolve SOFTWARE

**Task Instructions**  
Please verify applicant submission is complete. If this is a hillside project and the hillside prescreen reviewer has rejected the application, it will be returned to the applicant even if it is accepted here.

View/Edit Prescreen Checklist Items (2)

**Applicant Comments**  
<add additional comments here>

**Reviewer Comments**  
Please upload an attachment detail

Reviewer Comments Last updated: 8/30/2017 12:18:33 PM  
I have uploaded the corrected documents and/or drawings as indicated above.

RESUBMIT PLANS Close

- **Note:** You won't be able to upload additional files after completing the task.
- **Note:** This "Correction Task" can cycle through multiple times until the submittal is complete

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# Fees Due

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Fees are calculated after the project passes prescreen review. All fees must be paid before we can begin reviewing plans.

Follow either of the ePay links in the email notification to pay the application fee online. Once paid, your project will be routed for review

- **Applicable Fees**  
Building Plan Review fees must be paid prior to the start of review. Final permit fees are due prior to obtaining the approved plans.
- **Payment Options**  
All fees can be paid online with a credit card or an electronic check transfer.
- **ePay:** [pds.cityofboise.org/epay](https://pds.cityofboise.org/epay)

# Plan Review

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## Plan Review

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After your 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.

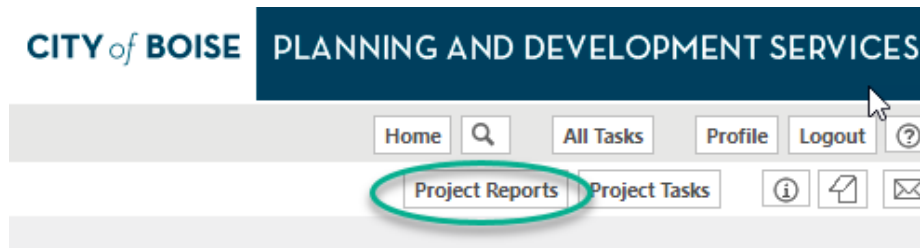
Plan reviewers will mark changes, corrections or red lines on the plans electronically.



# Project Status

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

**Option #1** – Select Project Reports to access helpful reports. Below are the three most helpful.



- **ProjectFlow – Changemarks** – Creates a PDF document listing all changemarks. This can be send out to your drafters or engineers, or used as a guide for publishing the full-size file.
- **ProjectFlow – Department Review Status** – Displays the status of all reviews
- **ProjectFlow – Workflow Routing Slip Reviews** – Displays the sequential route of all tasks, including passed or corrections required review status

**Option #2** – View progress with the PDS Online searchable database. Simply input your permit number to get started. Here is the link:

<http://pdsonline.cityofboise.org/pdsonline/Permits.aspx?id=0>

After you enter your permit number and hit Search, select your permit number from the list to access more features.

Enter a case number (all or part of a case number) and press the search button.

▶ [How to search by permit number](#)

Search Permits by Permit Number

Permit Number:

Number of permits found: 1

Permit Number	Status	Address	Name	Project Name
<a href="#">BLD16-04266</a>	Issued	150 N CAPITOL BLVD	EXCELSIOR CONSTRUCTION CO	PDS 2nd floor remodel

With the permit open, select Activities to see the progress.

**Permit Information**

Permit Number BLD16-04266  
 Status **Issued**  
 Name EXCELSIOR CONSTRUCTION CO  
 Site Address 150 N CAPITOL BLVD  
 Project Name PDS 2nd floor remodel  
 Customer Number  
 ePlanReview Yes  
 Description (CITY HALL)(PDS 2ND FOOR)Plan modification for parallel approach at lactation room sink, replace over head door with sliding door between confrence room and break room, revised layout for breakroom kitchen space. see notes on plans for approvals. \*\*ajs\*\*4/5/17Remodel of 3,367 SF in existing PDS department on 2nd floor of City Hall in 3 areas, Building 1. ALT #1 removed from scope of project as noted on drawings. Scope of work to include a new break

**Contact Information**

See [Activities](#) list for contact information

Permit Details | Project Related Cases | **Activities** | Conditions | Parcel | Fees | Valuation | Documents | Permit Summary Report

Show Inspection Activities Only

Description	Received	Requested	Completed	AM/PM	Disposition	Assigned To
Print Statement			5/9/2017		DONE	
Issue & PRINT to be Invoiced			5/9/2017		DONE	
Ron Hill picked up permit						

# Resubmittals

If the plans do not pass review, we'll ask for corrections.

As the Applicant, you will receive an email notification once the first review has been completed. If corrections are required, you will receive a notice to complete the "Applicant Resubmit Task."

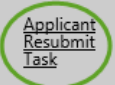
**Note:** You cannot upload any new documents until all departments have finished their reviews and you have received your "Applicant Resubmit Task."

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

Select "Applicant Resubmit Task" to view the correction items.

**ProjectFlow Task List**

[Refresh](#)

TASK	CASE #	INSTANCE	GROUP	ASSIGNMEN	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIPTIO	CONTACT
 Applicant Resubmit Task	BLD17-00204	BLD17-00204 - Building Residential Template - 7/25/2017 10:50:24 AM	Applicant	FirstInGr...	Pending	⚠ Medi...	8/1/2017 3:58:07 PM	7/25/2017 3:58:07 PM	402-1232131232	Christina Prado

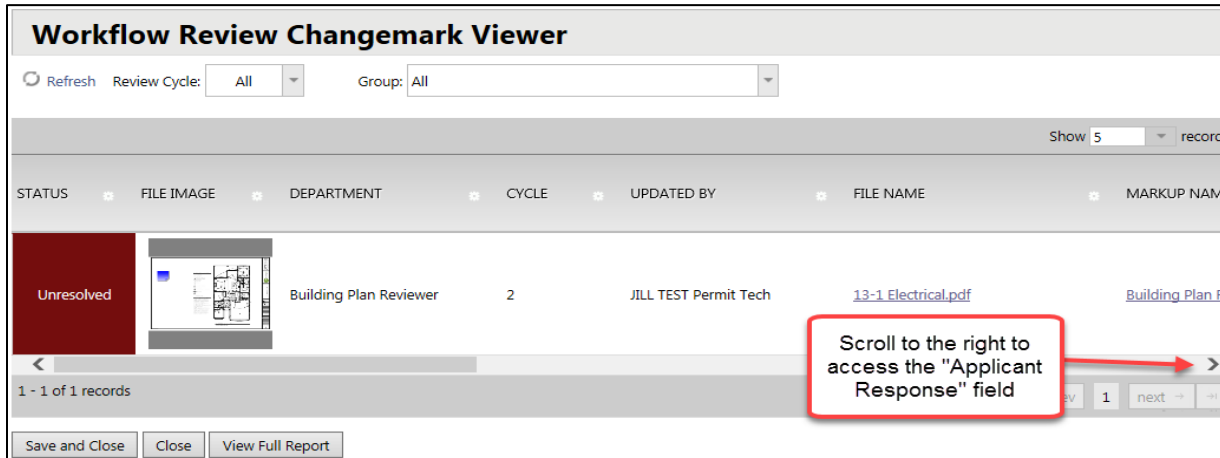
1 - 1 of 1 records

← ← prev 1 next → →

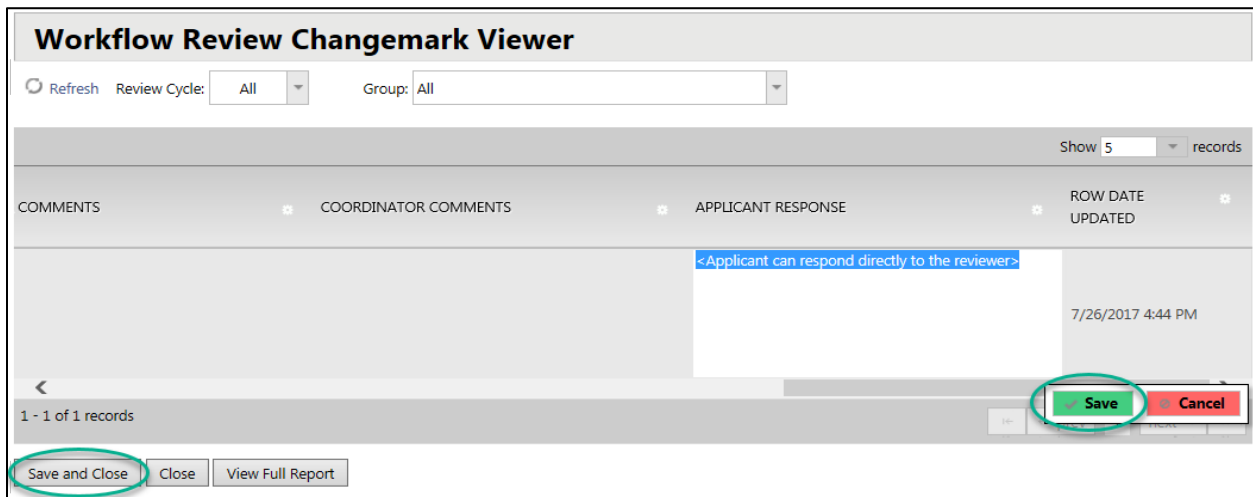
Select "View Changemark Items" to get a list of corrections required.

The screenshot shows a web interface for 'APPLICANT RESUBMIT'. At the top left is a logo with a plus sign and an upward arrow. At the top right are logos for 'ProjectFlow BUILDING' and 'avolve software'. Below the logos is a horizontal line. Underneath, the text 'Task Instructions' is followed by a mouse cursor icon and the instruction: 'After you have successfully uploaded all required plans and documents, please click the 'RESUBMIT PLANS' button.' At the bottom, there are two buttons: 'View Changemark Items (1)' and 'View/Edit Checklist Items (0)'. The 'View Changemark Items (1)' button is circled in green.

Applicant can now respond to reviewer comments directly if desired.



Scroll to the right to access the "Applicant Respond" field. Click on the grey field below the filter icon to add a response comment. When done, select the green "Save," then "Save" on the left and "Close" to complete.




The Applicant can also print a list of changemarks for further review and/or open the files directly by selecting the file or the view full report button.



### Workflow Review Changemark Viewer

Refresh Review Cycle: All Group: All

Show 5 records

STATUS	FILE IMAGE	DEPARTMENT	CYCLE	UPDATED BY	FILE NAME	MARKUP NAME
Unresolved		Building Plan Reviewer	2	JILL TEST Permit Tech	<a href="#">13-1 Electrical.pdf</a>	<a href="#">Building Plan Rev</a>

1 - 1 of 1 records


Save and Close Close **View Full Report**

Full report view:

ePlanReview  
City of Boise: Planning & Development Services

### Changemarks Report

**Project Name:** BLD17-00199  
**Workflow Started:** 07/19/2017 4:34 PM  
**Report Generated:** 07/26/2017 04:57 PM

Cycle	Complete?	Status	Department	Snapshot	File	Markup Name	Changemark Subject	Changemark Details
2	False	Unresolved	Building Plan Reviewer		13-1 Electrical.pdf	Building Plan Review	Changemark #01	Please update stairway lighting

Once all changemarks 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.

**Note:** This "Applicant Resubmit Task" can cycle through multiple times until the review is approved.



### APPLICANT RESUBMIT



**Task Instructions**

After you have successfully uploaded all required plans and documents, please click the 'RESUBMIT PLANS' button.

View Changemark Items (0) View/Edit Checklist Items (0)

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
Building Plan Reviewer	Christina Prado cdprado@cityofboise.org	Corrections Required	<input type="text"/>	<input type="text"/>

**Task Instructions**

- I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above.
- I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review.

**RESUBMIT PLANS** Close

**Permit Required:** Once the review is approved, the Applicant will receive an email notification with instructions on how to get the permit issued.

# 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 and documents and provide a full-size copy of the approved plans and documents to the contractor. *An approved paper plan set must be on the job site at all times during construction.*

Click on the Approved Drawings Folder

### ePlanReview

City of Boise | Planning & Development Services

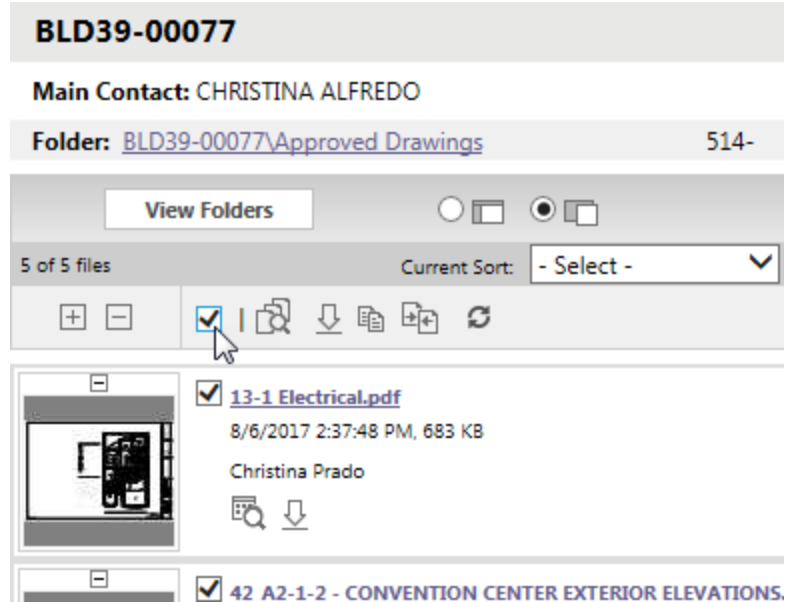
**BLD39-00077**

**Main Contact:** CHRISTINA ALFREDO

[Expand current](#) | [Collapse](#) |

- BLD39-00077
  - [Drawings](#) (4 Files - 0 New)
  - [Documents](#) (1 Files - 0 New)
  - [Agency Comments](#)
  - [Approved Drawings](#) (5 Files - 0 New)

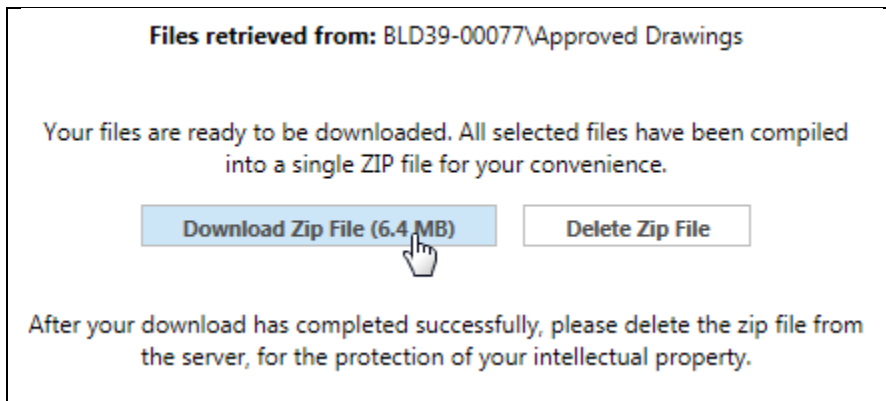
Select the Check Box icon in the top row to select all files. You can also select them individually if you prefer.



Select the Download icon to compress files into a zip folder, select the affirmative when prompted.



Select Download Zip File to transfer files to your PC



## Need Help?

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Visit our website at [pds.cityofboise.org/ePlanReview](https://pds.cityofboise.org/ePlanReview).