City of Richmond
ePlan User Guide
May 2024
Version 2

Richmond

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1. Introduction

The City of Richmond has implemented ePlan, an online system for the review of Servicing Agreement (SA) documents.

The ePlan system improves customer service levels by providing the following benefits:

1. Reducing review times;
2. Improving tracking, reporting and accountability; and
3. Reducing resource use.

ePlan Review Process Overview

1. The ePlan review process is initiated when the Property Owner or their authorized agent ("The Applicant") submits an SA application at the Zoning Counter. The Applicant will receive an SA number and will be requested to pay the SA application fee.

2. An ePlan account will be setup for the Project Contact listed on the SA application and a task will be assigned. They will be requested to enter their Civil Engineering Consultant's (the "Engineering Consultant") contact details into ePlan.

3. Subsequently, ePlan will send an email to the Engineering Consultant, requesting drawings and documents be submitted through ePlan.

4. The Engineering Consultant will upload drawings and documents to ePlan.

5. The Development Applications Coordinator ("Dev Apps Coordinator") pre-screens the submission to ensure completeness and compliance with City submission standards. The Project Contact and Engineering Consultant will be notified if corrections are required; otherwise, the files will be distributed to relevant City departments for concurrent review and comment.

6. City staff will review and comment on submission documents digitally through the ePlan system. Review typically requires one month to complete, but review times may vary depending on complexity. ePlan allows both the Project Contact and the Engineering Consultant to check the status of the review at any time (Refer to Section 11 of this Guide).

7. The Project Contact and the Engineering Consultant are notified through email once the review is complete. Comments can be viewed and downloaded through ePlan.

8. The Engineering Consultant will respond to all comments through ePlan and upload revised drawings and documents.

9. Steps 6–8 are repeated until all City comments are addressed and drawings are ready for approval.

10. Once all statutory-right-of-way registration and other requirements have been met, the drawings will be stamped for approval.

11. An email will be sent to notify the Project Contact and Engineering Consultant that the approved drawings may be downloaded. **Note:** Prior to construction, a Preconstruction Meeting is required with City Inspections. City Inspections will set up the meeting once all requirements have been met. The Dev Apps Coordinator will notify the Project Contact and Engineering Consultant of the requirements.

12. The Engineering Consultant is required to send hard copies of signed and sealed approved drawings to the Dev Apps Coordinator for distribution to field staff. The number of drawings required will be confirmed at the time of approval.

This User Guide provides the Project Contacts and Engineering Consultants with directions to navigate the SA review process using ePlan system.

In addition to this User Guide, please refer to the instructions provided within the Help Manual embedded within the ePlan system and visit the City of Richmond's website at richmond.ca/business-development/e-plan/servicing-agreements.htm. Please also refer to the Terms and Conditions of Use in Appendix A.

2. Submission Standards

This section outlines standard requirements for creating, naming, formatting and submitting SA documents through ePlan. Maintaining standards minimizes SA review times and ensures that the City obtains consistent, functional record documents.

Submission Document Requirements

ePlan allows Engineering Consultants to submit drawings and supporting documents for the City's review.

Drawing Files

1. Drawing files depict infrastructure to be constructed through the SA in accordance with requirements of Rezoning, Development Permit and/or Subdivision.

2. Drawing files include title sheets, key plans, survey plans, and all other plan types required to depict the infrastructure being constructed.

3. Drawings must be prepared in accordance with the City's Engineering Drafting Standards, with the exception of one amendment according to Item #4 below. The City's Engineering Drafting Standards is available for purchase by contacting Engineering's Records Technician.

4. The bottom left corner of all drawings shall be left blank and be reserved for the City Approval stamp. BC One Call instructions originally occupying this space shall be incorporated as a standard drawing note. Required margins will position the blank space 0.5" from the bottom and left edges of the document.
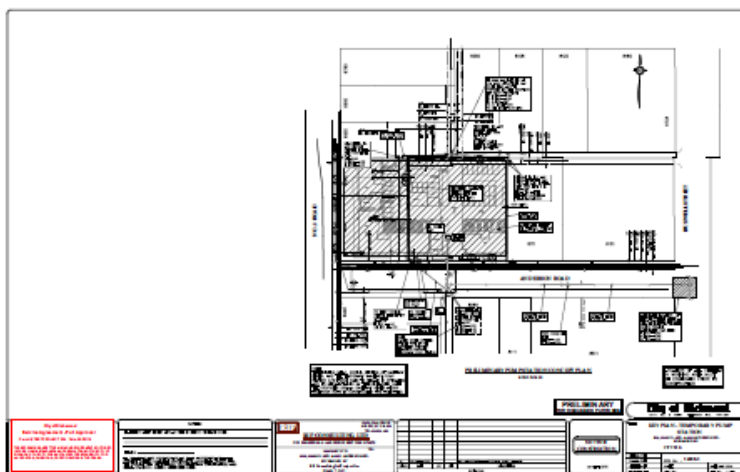
5. Drawings shall be submitted as single-page, separate files, and in vector PDF format.

6. Drawings shall be uploaded into the permit's "Drawings" folder within ePlan. Detailed file upload instructions are provided in Section 6 of this document.

7. All drawing files must be digitally sealed using EGBC approved software. For more information, please refer to EGBC guidelines found at egbc.ca/.

8. All drawing files prepared by Registered Landscape Architects must be digitally sealed according to BCSLA digital seal policy.

Supporting Documents

1. Supporting documents provide information to support the permit drawings. Such documents may include, but not be limited to letters, e-mails, geotechnical reports, arborist assessments, calculations or checklists.

2. Each submission must be accompanied by

   a. A sealed copy of the completed Servicing Agreement Design Drawing Checklist, available for download at richmond.ca/__shared/assets/eplan-sa-checklist44641.pdf.

   b. A TCA/OBI form.

3. Supporting documents shall be submitted in a searchable PDF format.

4. Supporting documents shall be uploaded into the permit's "Documents" folder within ePlan. Detailed file upload instructions are provided in Section 6 of this document.

5. All engineering reports must be digitally sealed using EGBC's approved software. For more information, please refer to EGBC's guidelines found at egbc.ca/.

Submission of As-Constructed Drawings

Hard copies of as-constructed drawings shall be submitted to the City's Inspection department for review. Once drawings have been finalized, electronically sealed copies shall be uploaded to the "As-Constructed" folder within ePlan for record purposes.

Drawing Numbers

Drawing numbers shall consist of the following components:

1. **City Permit Number:** The permit number, typically shown in the form "SA24-123456", includes the year of the permit application (24) and a unique permit identification number (123456) assigned by the City for each specific permit. This number will be shown in the ePlan system and in emails you receive regarding your permit. Drawing numbers shall begin with the permit number in reverse order (123456-24).

2. **Drawing Type Identification:** A 2-digit identification number that indicates drawing type (survey, sanitary, traffic etc.). Please refer to Table 1 for identification numbers assigned for each drawing type.

Note that title or cover sheets are not assigned a drawing number.

File Names

Drawings

ePlan drawing file names should include the following:

1. **Drawing Number:** Drawing number, assigned per the above section.

2. **Drawing Type Abbreviation:** Abbreviation of the drawing type, as defined in Table 1.

3. **Sheet Number:** A 2-digit number indicating a specific drawing number for any one drawing type. Each discipline's first drawing begins with 01 and increases linearly up to the total number of drawings of that type (e.g. 01, 02 and 03 for Roadworks drawings with 3 sheets).

Table 1 provides an example of drawing numbers and file names for a medium-sized Project, SA24-123456.

Table 1: Drawing Number and File Name Convention

Drawing Type	Drawing Type ID	Drawing Type Abbreviation	Drawing No.	Sheet No.	File Name
Title Sheet	N/A	TITLE	N/A	N/A	123456-24_TITLE
Survey Plan	03	SURVEY	123456-24-03	01	123456-24-03_SURVEY_01
Key Plan	04	KEYPLAN	123456-24-04	01	123456-24-04_KEYPLAN_01
Roads Works	05	ROAD	123456-24-05	01 02 03	123456-24-05_ROAD_01 123456-24-05_ROAD_02 123456-24-05_ROAD_03
Water Works	06	WATER	123456-24-06	01	123456-24-06_WATER_01
Storm Works	07	STORM	123456-24-07	01	123456-24-07_STORM_01
Sanitary Works	08	SAN	123456-24-08	01 02	123456-24-08_SAN_01 123456-24-08_SAN_02
Street Lighting	09	LIGHTING	123456-24-09	01 02	123456-24-09_LIGHTING_01 123456-24-09_LIGHTING_02
Landscape	10	LAND	123456-24-10	01 02 03	123456-24-10_LAND_01 123456-24-10_LAND_02 123456-24-10_LAND_03
Environmental	11	ENVIRO	123456-24-11	01	123456-24-11_ENVIRO_01
Dike	12	DIKE	123456-24-12	01	123456-24-12_DIKE_01
Electrical Vehicle Charging	13	EVC	123456-24-13		NA*
Traffic Signals	14	SIGNAL	123456-24-14	01	123456-24-14_SIGNAL-01
Pavement Signs & Markings	15	TRAFFIC	123456-24-15	01 02 03	123456-24-15_TRAFFIC_01 123456-24-15_TRAFFIC_02 123456-24-15_TRAFFIC_03
District Energy Utility	16	DEU	123456-24-16		NA*

*This example project provides no Electrical Vehicle Charging or District Energy Infrastructure so no drawing is generated for these assets.

Supporting Documents

No specific naming convention is required by the City for supporting documents; however file names should be indicative of the document content and are limited to a maximum of 20 characters.

Re-Submitted Files

Re-submitted files should use **EXACTLY** the same file name as the original submission. No additional letters or numbers to identify a subsequent version should be added. ePlan will automatically tag the re-submitted file as a new version when it is uploaded with the same file name.

City Markup Standards

The City's review comments are marked onto drawings and documents in the form of "changemarks."

To help Engineering Consultants quickly identify where review comments originate from, each City department's markups and changemarks are assigned a standard name and colour, as defined in Table 2. Markups by City staff will be named as the Markup Group, followed by the Reviewer's initials. For example, comments made by Bob Jones in Engineering will be titled ENG-BJ.

Table 2: Markup Naming and Colour Standards

City Department / Group	Markup Group	Markup Colour
Approval – Development	ADEV	Purple
Approval – Engineering	AENG	Purple
Approval – Parks	APARK	Purple
Approval – Transportation	ATR	Purple
Planners	PLAN	Turquoise
Development	DEV	Red
District Energy Utility	DEU	Brown
Engineering	ENG	Green
Environmental Sustainability	ENV	Yellow
Environmentally Sensitive Area	ESA	Coral
Fire Prevention	FIRE	Dark Green
Park Planning	PARK	Pink
Street Lighting	SL	Orange
Transportation	TR	Blue
Traffic Operations	TO	Blue
Traffic Signals	TS	Blue

Note that Applicants are not permitted to add drawing mark-ups.

The Engineering Consultant is required to respond to all changemarks. Refer to Section 8 on how to respond to City review comments.

3. Login to ePlan

Project Contact Invitation

Upon submission of a SA application, a new project will be created in the City's permitting system, ePlan. The Project Contact will receive an email from ePlan requesting the Project Contact to log into ePlan and enter the Engineering Consultant's contact information.

The Project Contact can follow the link to access and log in to ePlan. Only the Engineering Consultant is able to submit documents through ePlan. However, the Project Contact may access the submission status of the application through ePlan (Refer to Section 11).

Engineering Consultant Invitation

Upon receiving the Engineering Consultant's information, ePlan will send an email to the Engineering Consultant. Similarly, the Engineering Consultant is required to follow the link provided to access and log in to ePlan. The Engineering Consultant will be the one uploading required drawings and documents.

New Users

Computer Setup

ePlan is best compatible with the following internet browser Microsoft Edge; however, Chrome may used as well.

New Account Setup

As a new user, you will receive an invitation email providing you with a login ID (your email address) and a verification code. Follow the link provided and enter the login information.

NEW ACCOUNT REQUEST

Welcome to Online Submission!

Before gaining access, you must confirm your account.

TIP: Set New Password Now
Your verification code will expire quickly. If it has expired, you can click on Login and request another to be sent by email.

Your login: **ncheah@mailinator.com**
Verification code: **A566E3** *good until 4/26/2024 3:47:12 PM*

To set a new password, please click on "Login" below.

Login   To confirm account and set your password

Please do not reply to this email.

You will be prompted by the system to change your password. Upon logging in for the first time, you will be required to enter your personal information. Mandatory fields are marked with asterisks. Once all mandatory fields have been completed, click the Save button in the middle of the screen, and you may begin to use ePlan.

Existing Users

If you are a returning user, login to ePlan Review using your existing e-mail address and password. If you have forgotten your password, click on the "Forgot Password" button and the information will be emailed to you. This will work only if you have logged in once.

4. Navigating ePlan

1. **Navigation Bar:** Allows you to navigate to different sections of the site, including the Help button and access to your profile information. There is also a Home button that allows you to return to City Permits Page or Task Page at any time.

2. **Task Page:** A list of all active tasks pending your action. Completed tasks are automatically removed from this list. This is one way to access tasks and permit projects.

    IMPORTANT: Review Section 5 before accepting a task.

3. **City Permits Page** A list of recent permits you have accessed. Click "All Permits" to show all permits assigned to you. Permits are listed in order by Permit number, but can be sorted by clicking on any header field name. This is another way to access tasks and permit projects.

4. **List Toggles:** On the task list, these three toggles allow you to filter and sort the list based on "All tasks", "Overdue tasks", and "Priority tasks". On the City permits list, these three toggles allow you to filter and sort based on "All tasks", "Recent tasks", and "Archived tasks". Recent tasks filter show permits that have been recently opened. This is different for every user.

5. **Filter columns:** These columns can be used to search for permits. You can filter each column by typing in any part of the relevant information, or in full, and click "Enter"

    a. **Action:** You can click on the icons to show each of the following: "Project Tasks", "Project Status", "Project Reports", "Project – view/edit", and "Project Files".

    b. **City permit numbers:** You may search based on parts of, or the entirety of, the City permit number provided to you.

    c. **Location:** You may search based on parts of, or the entirety of, the project address.
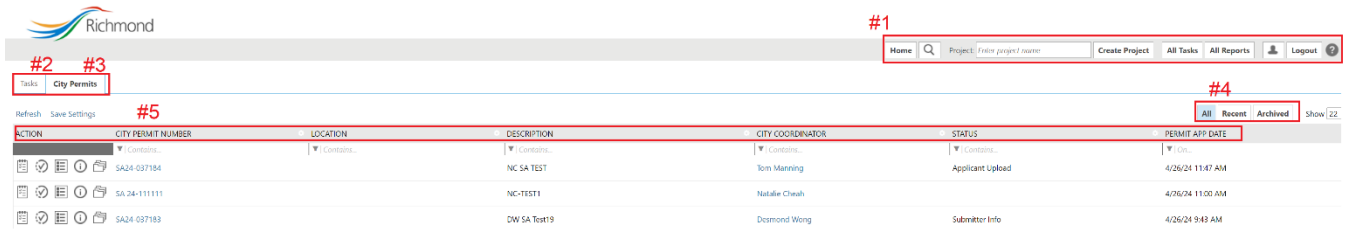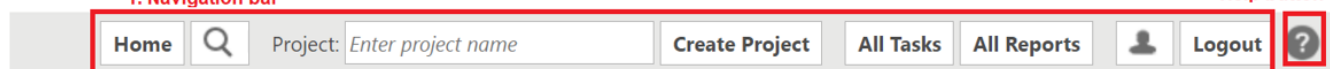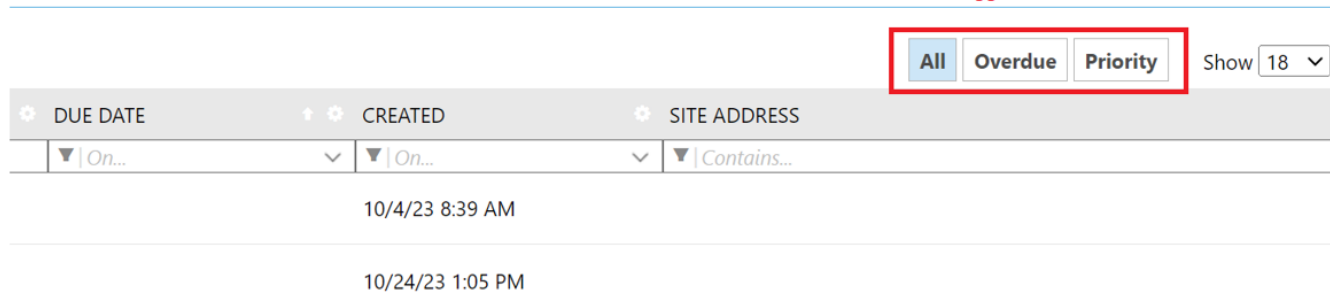
2. Task list

3. City Permits List

Tasks	City Permits	

Refresh   Save Settings

ACTION	TASK	CITY PERMIT NUMBER
▼ Contains...	▼ Contains...	
Complete	Submitter Info Update	SA19-879200
Accept	Submitter Info Update	SA21-930741

5. Accessing, Accepting and Completing Tasks

Task for Project Contact

The Project Contact is required to complete the **Submitter Info Task** to input the Engineering Consultant's information: First name, Last name, and Email address. Select "Invite User" when complete and then select "Complete" to complete the task. This step is required order to grant the Engineering Consultant access to the SA.

SUBMITTER INFO UPDATE

Resources   Task Information   Workflow Report

City Bylaws

- Bylaw No. 8751: Subdivision and Development Bylaw
- Bylaw No. 7222: Residential Lot (Vehicular) Access Regulation
- Bylaw No. 8057: Tree Protection
- Bylaw No. 8441: Watercourse Protection and Crossing Bylaw

Other Helpful Links

- Engineering Design Specifications
- MMCD Supplementary Specs and Detailed Drawings
- Survey Requirements

Task Instructions

Add contact information provided to Applicant-Civil Consultant group.

Invite/Remove Project User ❔

Invite to Group:	Applicant-Civil Consultant ▾
First Name:	
Last Name:	
Email:	
	Invite User

Remove from Group:	Applicant-Civil Consultant ▾
Name:	▾
	Remove User

Complete   **Save for Later**   Close

Task for Engineering Consultant

Once the Project Contact has completed the **Submitter Info Task**, ePlan will notify the Engineering Consultant. The Engineering Consultant is required to complete the following tasks throughout the ePlan review process:

1. **Applicant Upload Task:** Engineering Consultant to upload all necessary permit drawings and documents into ePlan for the City's review.

2. **Prescreen Corrections Task:** This task may or may not be required, depending on whether the original submission meets the City's basic submission requirements. If revisions are required, the Engineering Consultant will be assigned a task to make necessary corrections.

3. **Applicant Resubmit Task:** Engineering Consultant to review and address the City's review comments, and resubmit drawings and documents as required to satisfy review comments. This task may be repeated several times throughout the review process until the drawings are ready for approval.
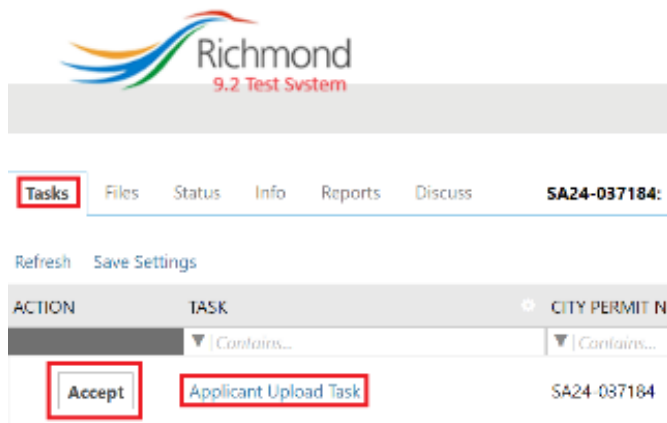
At each stage, the Engineering Consultant will receive an email notification that the task has been initiated and assigned to them. The Project Contact will also receive email notifications when these tasks are initiated, but no action from the Project Contact is required.

More details of how to navigate through each task are provided in Sections 6, 7 and 8.

Accessing, Accepting Tasks, and Completing Tasks

Tasks are accessed through ePlan. Begin by logging into ePlan through the link provided in your notification email.

Tasks can be accessed from two locations:

1. Within the SA Permit Page;
2. Within the City Permits Page.

Staff recommend accessing tasks through the SA Permit Page as it is easier to respond to them from this location.

Accessing Task Location 1: SA Permit Page – Workflow Portals

You can access active tasks pertaining to specific permits through the SA Permit Page, accessible by clicking on a specific permit number under the Permit List on the City Permits Page.

While on the SA Permit Page, you can find your active tasks for the permit under the tab "Tasks". To accept a task, click on the button in the "Action" column or "Task" column. A Task dialogue box will open, providing instructions for completing the task.

Accessing Tasks Location 2: City Permits Page – Task List

All active tasks pending your action are shown in the Task List at the bottom of the City Permits Page. Similarly, click on the button in the "Action" column or "Task" column to accept a task. A Task dialogue box will open, providing instructions for completing the task.

Note that the information and instructions presented differ for each task. The information shown at the top differs depending on which task has been selected.

A sample of the dialogue box:

Resources: Shows a list of bylaws available for reference along with other links that may be helpful in describing City design standards.

Task Information: Shows information relating to the project, the user, and the task due date.

Workflow report: Shows details relating to drawing routing between City departments and Engineering Consultant.

Completing Tasks

Once the task, such as uploading documents for the **Applicant Upload Task**, has been completed, open the Task dialogue box and click on the "Submit" button.

6. Applicant Upload Task

The City requires that all permit files be uploaded by the Engineering Consultant. Once the SA application is initiated and the Project Contact has completed the **Submitter Info Task**, the Engineering Consultant will receive a task to upload all necessary files to ePlan.

Uploading Files

File uploads can be accessed via Tasks.

The **Task Instruction** section includes a three-step drawing and document upload process.

Select the "Upload Drawings" or "Upload Documents" button to drag and drop files or browse for the files.

1. Ensure that all drawings and documents have been uploaded, according to the servicing requirements. Drawings and documents are to be uploaded into the appropriate folder.

Task Instructions
Please follow the steps below:

STEP 1 of 3: Select and upload your drawing and supporting document files into this project, as required

File Upload for: SA24-037170 ❓

Please click appropriately for the **type of files** you are uploading.

| Upload Drawings | Upload Documents |

Uploaded files:

No files uploaded yet.

2. Confirm, via checkbox, that all files have been uploaded.

STEP 2 of 3: Check all to confirm you have completed this task and are now ready to submit

Confirmation ❓

☐ *I have uploaded all required drawings and/or documents. *Required

3. Click "Submit" to complete drawing/document upload, or click "Complete Later" to save your progress and return to this page. The dialogue box can be re-open the same way at any time until you complete the task. Clicking "Submit" completes the task.

STEP 3 of 3: Click the "Submit" button below to complete your task

| Submit | Complete Later |

IMPORTANT: Do not click "Complete" until the task has been fully completed and is ready to be submitted to the City.

Files that are uploaded to the Drawings folder will go through an automated, basic screening to ensure that they are digitally sealed, they have the right orientation and are named properly, etc.

Files will also be colour-coded. Uploaded files must have the exact same title and cannot be the same drawing as a previously uploaded file. Files that do not comply will be removed and will not be uploaded.

Orange files indicate new uploads.

Blue files indicate that they are new versions of previously uploaded files.

Red files indicate that the file has been uploaded previously. Duplicates will be deleted.

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9.2 Test System

Close Window

Folder: SA24-037184\Drawings

| Browse For Files | or drag files into this area. | Start Upload |

033306-23-05_ROAD_02.pdf	0B/880.99KB ✗
033306-23-06_WATER_01.pdf	0B/857.48KB ✗
033306-23-07_STORM_01.pdf	0B/843.53KB ✗
033306-23-08_SAN_01.pdf	0B/829.14KB ✗
033306-23-09_LIGHTING_01.pdf	0B/929.76KB ✗
033306-23-11_ENVIRO_01.pdf	0B/879.11KB ✗
033306-23-11_ENVIRO_02.pdf	0B/635.86KB ✗

0 of 9 uploaded   Hide Details

0B/7.36MB

Orange files are **new uploads**
Blue files are new **version uploads**
Red files appear to be same as previously uploaded (**will likely be discarded**)

✓ Ready to start upload
⚠ Remove, fix, re-select to start upload.

To upload files, first select the relevant Permit Number under the Active City Permit List on the City Permits Page.

Refresh   Save Settings

ACTION	TASK	⚙	CITY PERMIT NUMBER	⚙
	▼ | *Contains...*		▼ | *Contains...*	
Complete	Submitter Info Update		SA19-879200	
Complete	Submitter Info Update		SA21-930741	

This will direct you to the Permit Page where files can be uploaded. Uploading files is quick and easy—simply follow the steps below:

1. To upload drawings, go to the "Files" tab and click "Drawings". With "Drawings" highlighted in blue, as shown below, click "Upload Files". Alternatively, to upload supporting documents, click the "Documents" folder, so that "Documents" is highlighted. Please do not upload supporting documents into the "Drawings" folder, or vice-versa.

Richmond

| Home | 🔍 | Project: *En* |

| Tasks | **Files** | Status | Info | Reports | Discuss | **SA21-930741:** *z* |

Refresh

Upload Files

📁 Drawings
📁 Documents (1 - 0 New)
📁 Approved
📁 As-Built Drawings

FILE NAME
▼ \| *Contains...*

2. Upon clicking "Upload files", a new window will popup. You may choose to click "Browse for files" to select your files, or drag files into the area below.

3. Once you have inserted all desired files, click "Start upload". If there are no errors found, the window will close by itself, bringing you back to the main ePlan page of the SA project.

   IMPORTANT: You cannot delete files or modify file names after clicking "Upload Files". Please ensure your file selection is correct before clicking upload. If you need to delete files, please send an email to the Dev Apps Coordinator requesting files to be deleted on your behalf.

4. Upon successful file upload, they will appear in the list to the right of the file tree. The "Status" column will indicate new files that have been uploaded and will also indicate new versions.

   You may click on the "File info/History" icon to the left of the file name to view a preview of the drawing as well as information such as who the drawing was uploaded by, upload date, and file size.
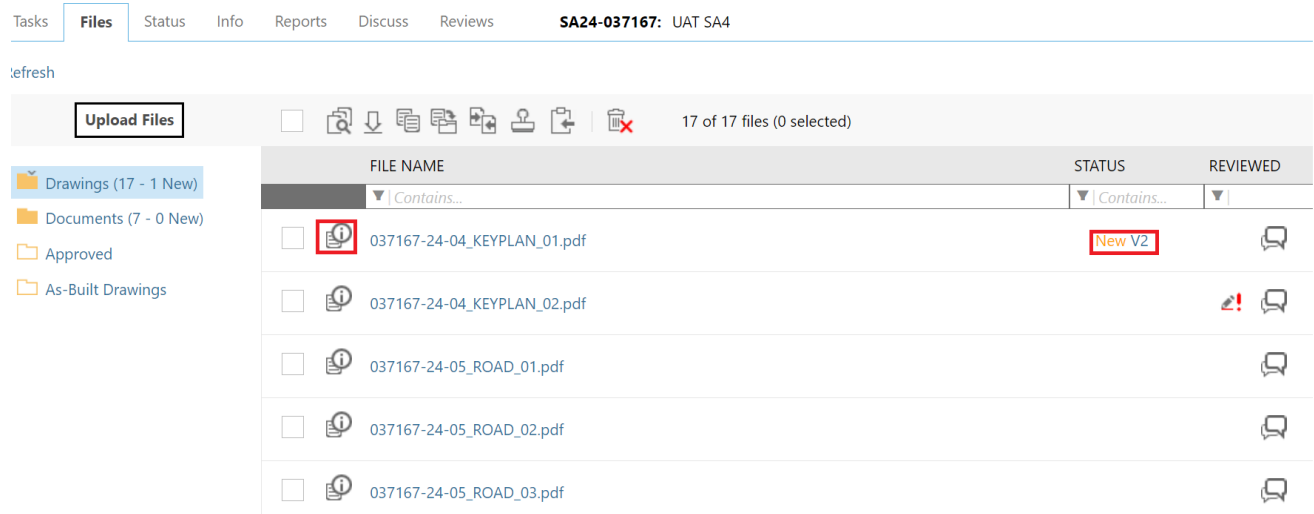
Modifying Files

While the **Applicant Upload Task** is still open and has not been marked as complete, the Engineering Consultant can re-upload and replace files of the **same filename**, following the same upload process described above. If the system detects that a new version of an existing file is uploaded, the uploaded file will replace the existing as a new version.

Deleting Files

Once files have been uploaded to the system, the Engineering Consultant **CANNOT** delete the files at any point. If a file is uploaded in error, or is uploaded with an incorrect filename, the Engineering Consultant must notify the appropriate Dev Apps Coordinator to request that it be deleted.

7. Prescreen Correction Task

Once you have completed the task, the Dev Apps Coordinator will receive a submission notification. The Dev Apps Coordinator will pre-screen the submission within 48 working hours of receiving it.

In addition to confirming the files meet the Submission Standards, the Dev Apps Coordinator checks to ensure submission complies with the requirements of Rezoning, Development Permit and/or Subdivision.

If requirements have been met, the submission will be distributed for departmental review. However, if there are missing or erroneous items in the submittal, you will receive a "Pre-screening Rejection" email, directing you to make the necessary corrections on ePlan.

Follow the steps below to amend your submission:

1. Login to ePlan and open the **Prescreen Correction Task** for your permit. (Refer to Section 5 for instructions on accepting and opening tasks.)
2. A **Prescreen Correction Task** dialogue box will open. Prescreening comments may be provided through the comments section.

Task Instructions

Please make any necessary corrections as described and then complete this task by clicking on the Return to City of Richmond button below.

Resolve Review Comments ❓

Unresolved Comments: 0
Info Only Comments: 0
Files with Markups: 0

Plan Review | Review Comments | | Export to Excel | | Import Excel Responses |
Review and respond online. | Review and respond in Excel , then upload your responses.

Prescreen Review ❓

Add Comment

DISCUSSION COMMENT

0 - 0 of 0 records

3. Select "Review comments" button to view detailed comments.

4. Correct files as required and upload them again to the Permit folder, following upload instructions outlined in Section 6. Please ensure the same file name as the original submission is used.

5. If the **Prescreen Corrections Task** dialogue box has been closed, re-open it. Add any relevant comments by clicking the "Add Comment" button to confirm that the Prescreening comments have been addressed (see example below).

Prescreen Review ❓

Comment: * Drawings have been resolved to include the correct title blocks and have been uploaded as a new version.   Save   Cancel

6. Click "Save".

7. Confirm that documents/drawings have been corrected as per comments.

8. Click on "Return to City of Richmond" to complete the task.

9. A dialogue box will open prompting you to confirm the task has been completed. Click "OK" to close all dialogue boxes.

Once you have identified the task as complete, the City will be notified that the corrections have been completed. The Prescreening process will now continue. If the submission now meets all standard requirements, it will be directed to department staff for review. If corrections are still required, an additional Prescreening Rejection email will be sent to the Engineering Consultant.

8. Applicant Resubmit Task

Once the permit submission has passed prescreening, it will be circulated to relevant City departments for concurrent staff review. Staff will use ePlan to mark-up and add comments to each plan and document.

When City staff has completed the review, the Engineering Consultant will receive an **Applicant Resubmit Task** notification through email requesting document resubmission, if corrections are required.

The following steps are required in completing the **Applicant Resubmit Task**:

1. Review Reviewer Comments, Changemarks, and Correction Items
2. Respond to Changemarks and Correction Items
3. Revise and re-upload permit files based on City review comments
4. Complete and close the **Applicant Resubmit Task**

Step 1: Review Changemarks and Correction Items

Accept the **Applicant Resubmit Task** and open the **Applicant Resubmit Task** dialogue box. (Refer to Section 5 on accepting and opening tasks).

These items can be viewed through the following methods:

1. In the dialogue box for the task, select the "Review Comments" button to view a report of current and past Changemarks, Correction Items and Reviewer Comments.

2. Click on the "Open Markups" button next to the drawing, indicated with an icon resembling a red pen. This is found under the SA Permits page, under files where the list of uploaded drawings are shown.

All Changemarks will be listed on the right-hand pane. Click on a specific markup to zoom into that area of the drawing. Note that different City departments will create separate markups for the same submission file.
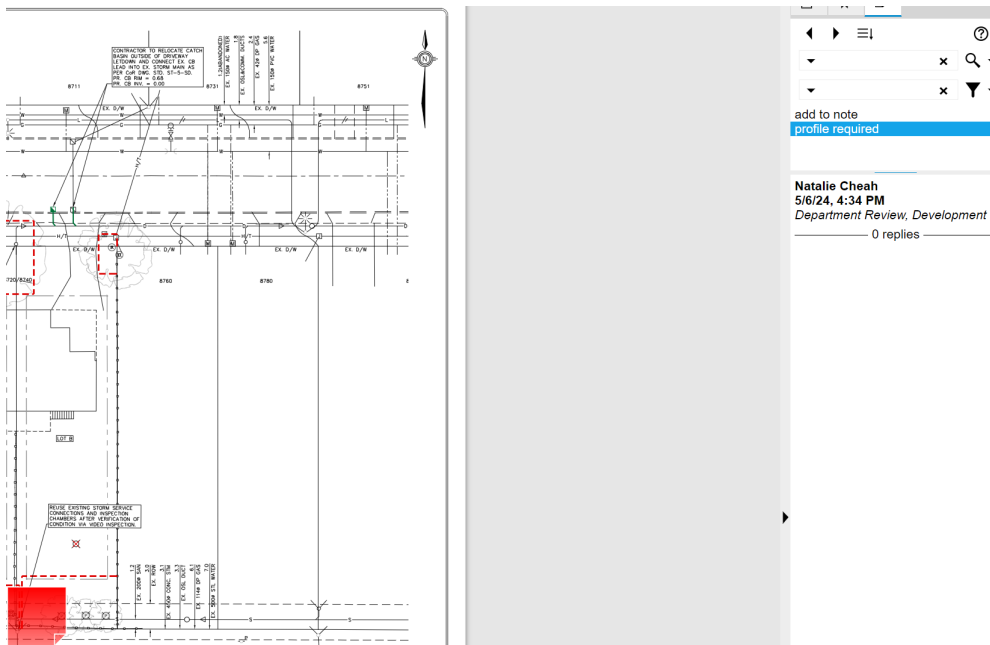
Clicking the icon will open a dialogue box containing a list of all markups applicable to that specific drawing or document. Check "View" for one or more of the markups, and click the "View" button to open.
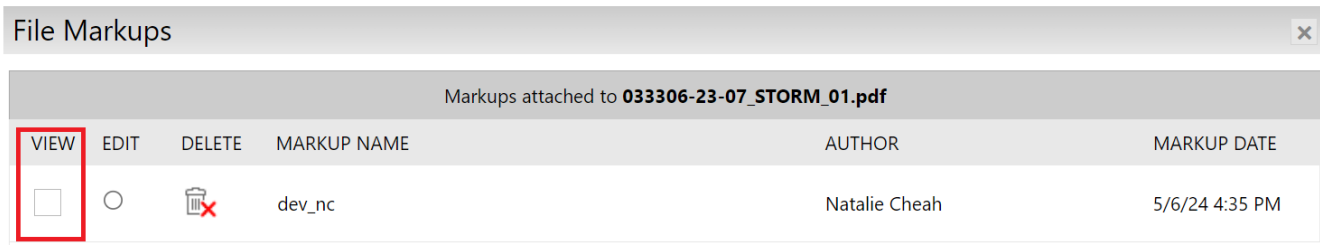
Each Markup will contain one department or reviewer's comments. You can overlay various reviewers' comments by selecting more than one checkbox at a time.

3. Click on the Reports button to select the report showing "Plan Review – Review Comments". This brings up a report that shows comments from all cycles, including responses from Staff Reviewers and Engineering Consultants.

Tasks	Files	Status	Info	**Reports**	Discuss	Reviews	**SA19-879200:** 10320 Lassan

Refresh   Save Settings

ACTION	REPORT NAME	REPORT TYPE
	▼ | *Contains...*	▼ | *Contains...*
🔍	Current Project - All Emails Sent	Project
🔍	Current Project - All Group Users	Project
🔍	Current Project - All Logged Events	Project
🔍	Current Project - All Uploaded Files with Sheet Sizes	Project
🔍	Current Project - Combined Discussions	Project
🔍	Current Project - Discussion Comments with All Participants	Project
🔍	Current Project - Unpublished Files	Project
🔍	Current Project - User Activity History by Date	Project
🔍	Plan Review - Department Review Status	ProjectFlow
🔍	Plan Review - Discussion Board Plan Review	ProjectFlow
🔍	Plan Review - Review Comments	ProjectFlow
🔍	Plan Review - Review Details	ProjectFlow
🔍	Plan Review - Workflow Routing Slip	ProjectFlow

You may export the report by clicking on the disk icon at the top of the report. The report can be exported to any of the following formats: XML, CSV, DPF, MHTML, Excel, TIFF, or Word.

Step 2: Respond to Changemarks and Correction Items

Once the requested change has been made, respond to each Changemark item within the Review Comments Report dialogue box by entering notes where it says "Please enter your response". Responses will be automatically saved. Click "Close Window" when done.

Step 3: Revise and Re-upload Permit Files

The Engineering Consultant shall revise all documents as required to adequately address the City's comments, and upload the revised files through ePlan. Refer to Section 6 for help on uploading files.

If a drawing requires no changes then it should not be re-submitted until the final approval stage when the drawing will be marked "For City Approval".

IMPORTANT: Be diligent when re-submitting drawings. If a review comment requires a change that impacts multiple drawings, but the change was only identified on one sheet, it is the Engineering Consultant's responsibility to ensure that every drawing is amended and re-submitted accordingly.

Step 5: Complete and Close Task

Read and fill out the checkboxes in the "Confirmation" section of the Task, then click "Resubmit Complete" to return the submission to the City for subsequent review.

Confirmation ❓

☐ *I have reviewed and addressed, including responses where appropriate, all Correction Items accessed by clicking on the "Correction Items" button above. *Required

☐ *I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above. *Required

☑ *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. *Required

Resubmit Complete   Close eForm

9. Approval

When the drawing review is approved by all reviewers, both the Project Contact and Engineering Consultant will be notified through email.

After an approval has been issued the drawings will be electronically stamped by the City. You will then receive an email indicating that your permit is ready and instructions that you may download and print your files. At which, the Dev Apps Coordinator will provide more information on the next steps.

10. Topics

The Topics feature allows parties involved in a SA to leave notes and comments for each other.

Topics can be used to document discussion and response between Project Contact, Engineering Consultant, Dev Apps Coordinator, and Staff Reviewers.

Using Topics, you can do the following:

1. Add a new Topic
2. Respond to an existing Topic by adding a new comment

Adding a New Topic

Access the Topics function by clicking the "Discuss" button within the SA Permit Page and then select "Add Topic".
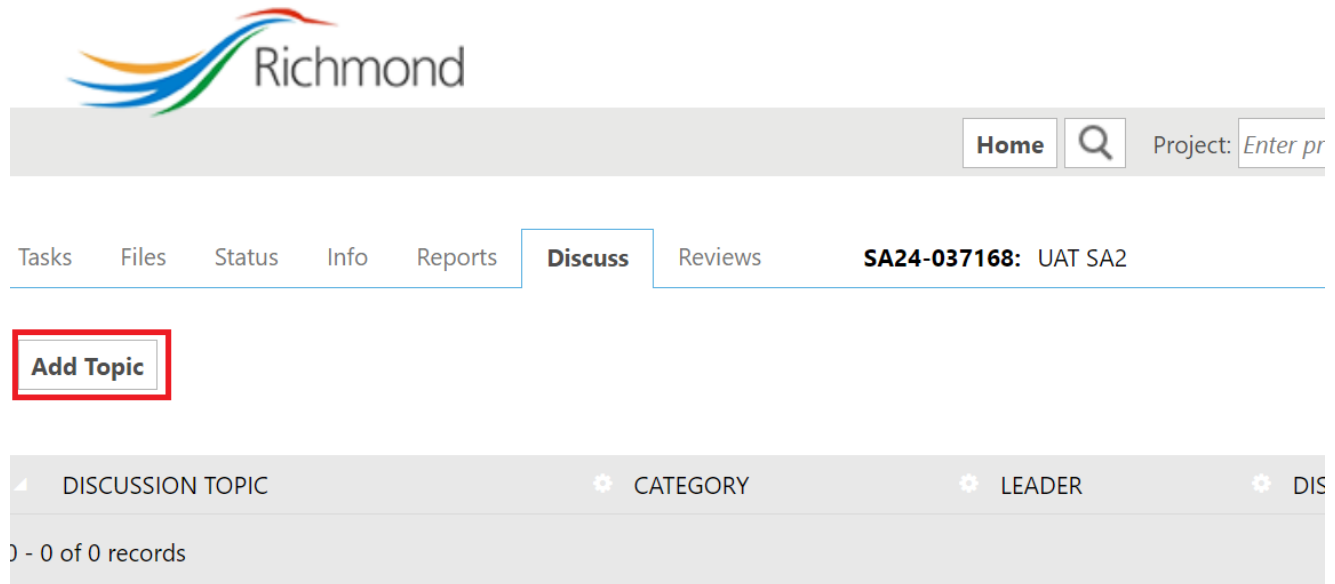
The page will reload to show a comment box, where you can input the intent of the topic, provide a subject title, and leave your comments. Begin by selecting the purpose of your topics through the "Category" drop-down menu.
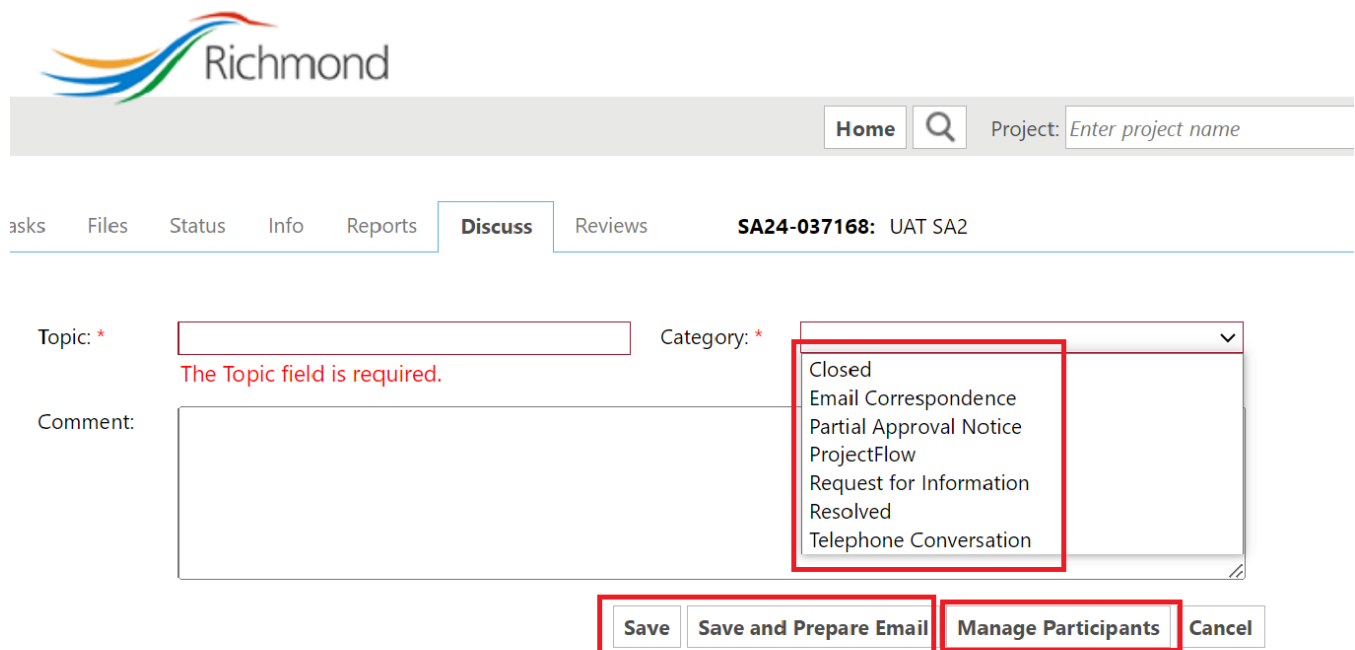
Once you have entered the subject title and content of the Topic, you may click "Manage Participants" to choose your specified recipients. Subsequently, click either "Save" or "Save & Prepare Email".

Email type: Topic/Note Notification

Subject: * Sanitary connection location

Body: *

As discussed, please have the sanitary connection to be shown in the rear.

Users/Groups that will be emailed (includes groups that contain users and have permissions): *

	Name
☐	👤 Non Group Members
☐	👥 Applicant-Civil Consultant
☐	👥 Approval-Development
☐	👥 Approval-Engineering
☐	👥 Approval-Parks
☐	👥 Approval-Transportation
☐	👥 Development

	Name	Company	Email
☑	Natalie Cheah	City of Richmond	

Clicking "Save" will save the topic on ePlan. Clicking "Save & Prepare Email" will allow you to send an email notification to specified recipients with the content of your Topic. If you click "Save & Prepare Email", the dialogue box will update to show potential recipients. For each person you wish to email, expand the group they belong to by clicking the "+" icon. A list of personnel within that group will appear. Check off the person or people you wish to email, then click "Send".

The dialogue box will update to confirm that the email has been sent. Click "Close Window" to exit.

Respond to an Existing Topic

If another party sends you an email through ePlan, you will receive a notification email with information on the originator, the permit of discussion, the Topic subject and the comments. Respond to the comment by clicking "Open Project".

ePlan will open, directing you to log in and access the topic. In the Topic dialogue box, enter into the comment section and click "Save and Prepare email" to respond to the Topic. Follow the same steps described in "Adding a New Topic".

When a Topic is sufficiently addressed, and no more correspondence is required, you may mark the topic as "Close" within the Topic page.

When you click "Close Topic", the system will send a confirmation notification. By clicking "Ok", you acknowledge that once a topic is marked as "Closed", additional comments cannot be added to the topic.

You may return to the fully topics list by clicking "Discuss" tab.

11. Checking Application Status

ePlan allows all parties to access a permit application's status at all times. Follow the steps below to review the status of your application:

1. Log in to ePlan

2. Access the SA Permit Page for your permit of interest by clicking on the permit number on the City Permits Page

3. Click on the "Reports" tab in the SA Permit Page

| Tasks | Files | Status | Info | **Reports** | Discuss | Reviews | S |

Refresh   Save Settings

ACTION	REPORT NAME
	▼	*Contains…*
🔍	Current Project - All Emails Sent
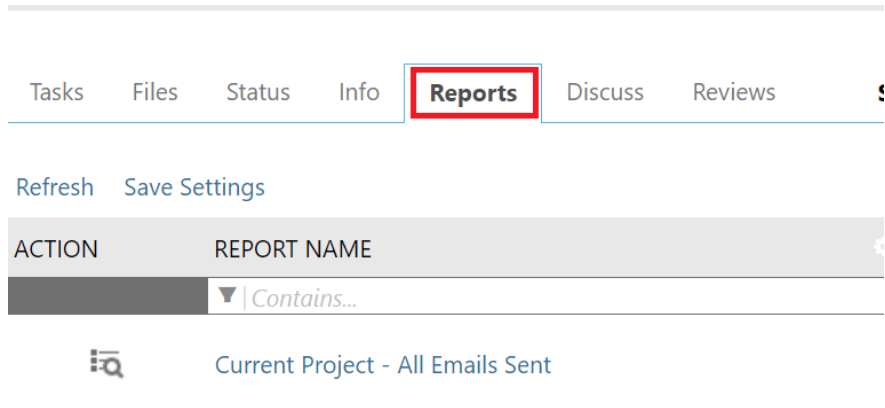
4. Click on the icon next to the report titled "ProjectFlow – Workflow Routing Slip"

🔍	Plan Review - Review Comments	ProjectFlow
🔍	Plan Review - Review Details	ProjectFlow
🔍	Plan Review - Workflow Routing Slip	ProjectFlow

5. A dialogue box for the Workflow Routing Slip will open. Within the "Workflow Instance" dropdown, select the appropriate review cycle, then click "View Report". If there is only one workflow, this step will be skipped.

Workflow: SA24-037184 - Servicing Agreement - 4/26/2024 11:47:12 AM ⌄

| ◁ | ‹ | 1 | of 1 | › | ▷| | ↻ | ⊕ | 100% ⌄ | 💾 ⌄ | | Find | Next |
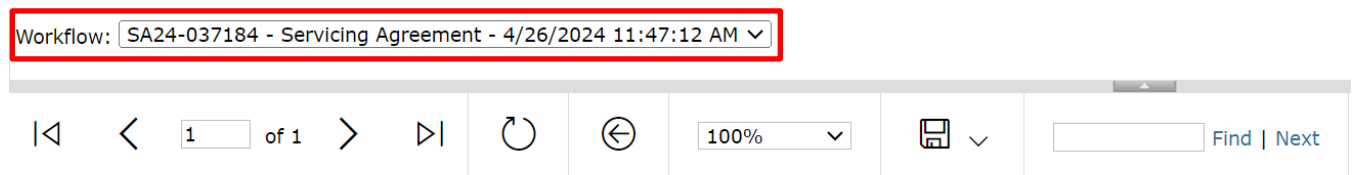
Plan Review - Workflow Routing Slip

6. A Workflow Routing report will generate, providing you with the status of all tasks that have been initiated to date.

Plan Review - Workflow Routing Slip

Report Generated: **05/02/2024 04:29 PM**

Review Type: **Servicing Agreement**
Number of Files: **9**
Project Name: **SA24-037184**
Workflow: **SA24-037184 - Servicing Agreement - 4/26/2024 11:47:12 AM**
Total Review Comments:
Total Review Cycle: **1**

Days Calculated as: **Business Days**
Time Elapsed: **4 days 4.5 hrs**
Time with Jurisdiction: **4 days 4 hrs**
Time with Applicant: **0 days 1 hr**
Completed Submission (Prescreen): **0 days 3.5 hrs**
Completed Plan Review: **Not Completed**

TASK	TASK STATUS	REVIEW STATUS	CYCLE	ASSIGNED	ACCEPTED	COMPLETED	GROUP
Submitter Info Update	Completed		0	04/26/2024 11:47 AM	04/26/2024 01:48 PM	04/26/2024 02:32 PM	Project Contact
Applicant Upload Task	Completed		0	04/26/2024 02:32 PM	04/26/2024 02:34 PM	04/26/2024 03:28 PM	Applicant-Civil Consultant
Prescreen Review Task	Completed		0	04/26/2024 03:28 PM	04/26/2024 03:31 PM	04/26/2024 03:31 PM	Development Applications Coordinator
Assign Reviewers Task - Staff Review	Completed		0	04/26/2024 03:31 PM	04/26/2024 03:32 PM	04/26/2024 03:37 PM	Development Applications Coordinator
Engineering Sanitation Recycling Department Review cycle #1	Pending		1	04/26/2024 03:37 PM			Engineering Sanitation Recycling
Street Lighting Department Review cycle #1	Completed	Approved	1	04/26/2024 03:37 PM	04/29/2024 10:05 AM	04/29/2024 10:07 AM	Street Lighting
Approval-Transportation Department Review cycle #1	Pending		1	04/26/2024 03:37 PM			Approval-Transportation

This report provides information on the tasks initiated, dates assigned, accepted and completed, and the responsible group. If the task is accepted but not complete, you can check the duration the task has been in process. Please allow staff a minimum of ten working days to complete tasks before contacting the department for a detailed update.

Thank you for taking time to review this Applicant Guide. Should you have any questions on how to complete your task, please contact your assigned Dev Apps Coordinator.

Appendix A – City of Richmond ePlan System

Terms and Conditions of Use

Your access to and use of the City of Richmond ("City") ePlan website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By logging in, you accept, without limitation or qualification, these Terms and Conditions of Use. Throughout these Terms and Conditions, the words "you" and "your" mean you and the employees, consultants, contractors, and any other parties who access the Site using your password.

Modification of the Agreement

The City maintains the right to modify these Terms and Conditions of Use and may do so by posting such modifications on its Site. Any modification is effective immediately upon publishing unless otherwise stated. Your continued use of the Site following any modification signifies your acceptance of such modification.

Conduct

You agree to access and use the Site only for lawful purposes. You are solely responsible for the knowledge of and adherence to any and all laws, statutes, rules and regulations pertaining to your use of the Site. By accessing the Site, you agree that you will not:

- Use the Site to commit a criminal offense or to encourage others to conduct that which would constitute a criminal offense or give rise to a civil liability;

- Post or transmit any unlawful, threatening, libelous, harassing, defamatory, vulgar, obscene, pornographic, profane, or otherwise objectionable content;

- Use the Site to impersonate other parties or entities;

- Use the Site to upload any content that contains a software virus, "Trojan Horse" or any other computer code, files, or programs that may alter, damage, or interrupt the functionality of the Site or the hardware or software of any other person who accesses the Site;

- Upload, post, email, or otherwise transmit any materials that you do not have a right to transmit under any law or under a contractual relationship;

- Disrupt the normal flow of communication in any way;

- Claim a relationship with or speak for any business, association, or other organization for which you are not authorized to speak for or claim such a relationship;

- Post or transmit any unsolicited advertising, promotional materials, or other forms of solicitation; or,

- Post any material that infringes or violates the intellectual property rights of another.

Termination of Use

The City may, in its sole discretion, with or without cause, terminate or suspend your access and use of this Site without notice and for any reason, including but not limited to:

- Your violation of these Terms and Conditions of Use;

- Your failure to pay any fee due in connection with the project;

- Your failure to pay any fee due in connection with your use of this Site; or

- Other conduct by you which the City, in its sole discretion, believes is unlawful or harmful to others.

In the event of termination, you are no longer authorized to access the Site, and the City will use whatever means possible to enforce such termination.

Content

The City has the right to monitor the content that you provide, but is not obligated to do so. The City reserves the right to delete, move, or edit any material that the City considers unacceptable or inappropriate, whether for legal or other reasons. You agree to abide by all copyright laws and notices.

Timeliness

The City has the right to expire, close or terminate any account that has not been used, or had no activity occur on the account within a term, at the discretion of the City without notice to the account holder. It is the responsibility of the account holder to monitor and review their account for denied projects, projects with corrections, and plan approvals. Plan review requirement responses must be made using the system in a reasonable timely manner.

Indemnity

You agree to defend, indemnify, and hold harmless the City and its employees ("Indemnified Parties") from any and all liabilities and costs incurred by Indemnified Parties in connection with any claim arising from your use of the Site, including but not limited to, any breach by you of these Terms and Conditions of Use, including reasonable attorneys' fees and costs. You agree to cooperate as fully as may be reasonably possible in the defense of any such claim. The City reserves the right to assume, at its own expense, the exclusive defense and control of any matter otherwise subject to indemnification by you. You in turn shall not settle any matter without the written consent of the City.

Disclaimer of Warranty

You expressly understand and agree that your use of the Site, or any material available through this Site, is at your own risk. Neither the City nor its employees warrant that the Site will be uninterrupted, problem-free, free of omissions, misstatements, or errors; nor do they make any warranty as to the results that may be obtained from the use of the Site. The content and function of the Site are provided to you "as is," without warranties of any kind, either express or implied, including, but not limited to, warranties of title, merchantability, fitness for a particular purpose or use.

Limitation of Liability

In no event will the City or its employees be liable for any incidental, indirect, special, punitive, exemplary, or consequential damages, arising out of your use of or inability to use the Site, including without limitation, loss of revenue or anticipated profits, loss of goodwill, loss of business, loss of data, failure to meet deadlines, computer failure or malfunction, or any and all other damages.

Site Maintenance

The City has the right to perform periodic maintenance on the Site, which maintenance may cause service interruption, without prior notification to you.

Modification of the Agreement

The City maintains the right to modify these Terms and Conditions of Use and may do so by posting such modifications on this page or Site. Any modification is effective immediately upon publishing unless otherwise stated. Your continued use of the Site following any modification signifies your acceptance of such modification.