



Prince George's County

Department of Permitting, Inspections and Enforcement

9400 Peppercorn Place, Largo, Maryland 20774 (301) 636–2050 • FAX: (301) 883–3851 dpie.mypgc.us



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# ePlan Quick Tips



Version 9.2



### 1. Overview

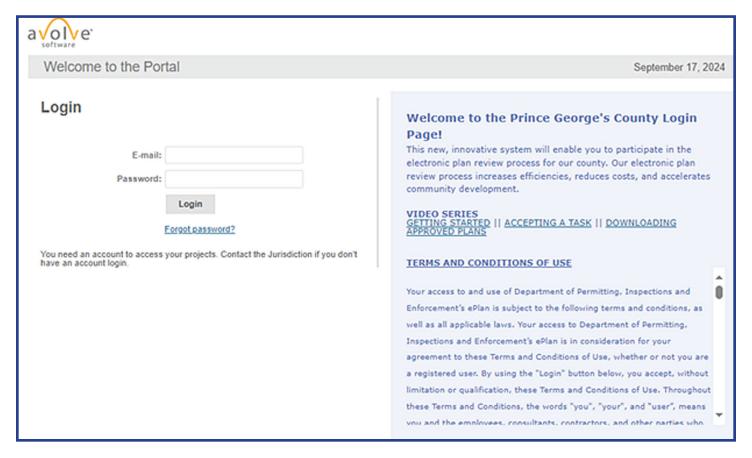
ePlan (ProjectDox software) is an online system DPIE uses for processing digital plan submissions and can be accessed anywhere! After an applicant submits a permit application, DPIE staff will process the application and, then, ProjectDox access details will be emailed to the applicant. In addition, a task will be assigned to the applicant to complete. This applicant user guide will cover how to sign in, how to accept the assigned applicant task, how to upload drawings and documents, how to submit the applicant task, how to look up the current status of the project, and how to download the approved drawings and documents.

# 2. How to Log-in

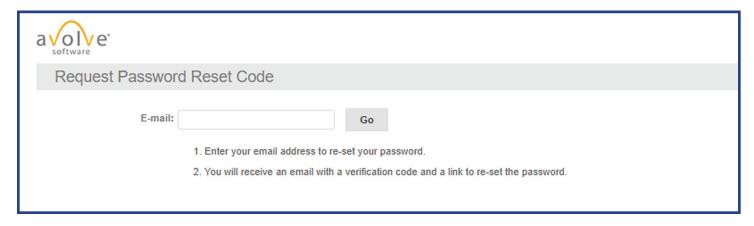
First-time and returning users of ProjectDox will receive a Project Invitation email from **eplan\_noreply@co.pg.md.us**. This email will contain the following:

- The permit application number
- The ePlan Applicant's Username and Temporary Password.
   Note: A Temporary Password is only provided if you are a first-time user. Returning users will use their prior password.
- Project Access link to ProjectDox

- New users CAN use the "Forgot your password?" feature.
- Returning users can use the "Forgot your password?" feature. Enter your user email address and a temporary passcode will be emailed.
- On the Login page there are also Helpful Videos with visual and audio instructions on how to log-in.



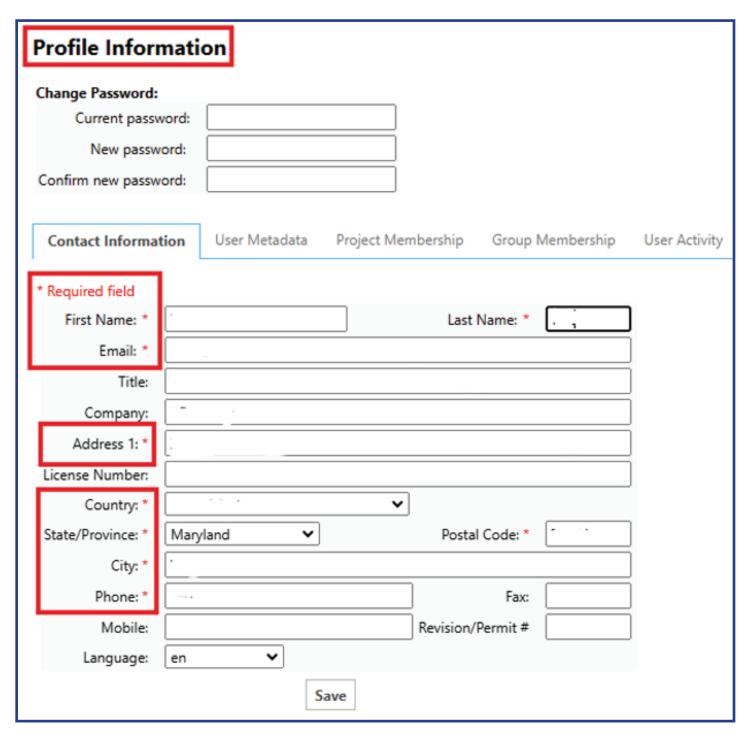
Selecting the "Forgot your password?" icon will redirect you to follow the directions on the "Request Password Reset Code" page.



### Setting up your Profile

All fields marked with an asterisk (\*) are required to be filled out by the applicant:

- The ePlan Applicant's Username and Temporary Password.
   Be sure to create a permanent password you can remember!
- Create a security question and security answer that you can recall.
- Do not forget to SAVE THE PROFILE before continuing.

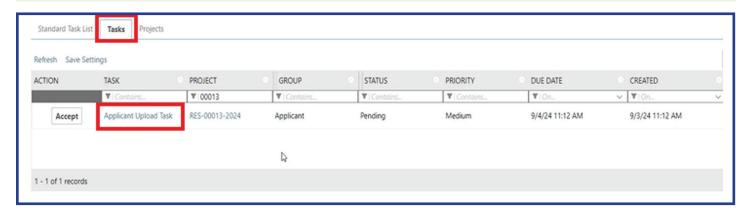


# 3. How to Accept your Task

Your first assignment will be the **Applicant Upload Task**. To begin, you will start by accepting the task by either selecting the "Accept" button or by clicking the "Applicant Upload Task" hyperlink. The task can be seen on the home page under the "Task" column. After you select and accept your task, the eForm (task) will open in a separate window.

**Note:** Don't know what you are required to upload? For the minimum requirements for Residential and Commercial plan review, visit our website using the links below.

Residential Building or • Commercial Building



Similarly, you can select the application number from the PROJECT column on the home page which will then direct you to the application page. The application page, or Project View, provides additional features which are discussed further down the guide.



After selecting and accepting the Applicant Upload Task, the eForm will open in a \*separate window\* where you will be able to upload your drawings and documents and then "Submit" when ready.

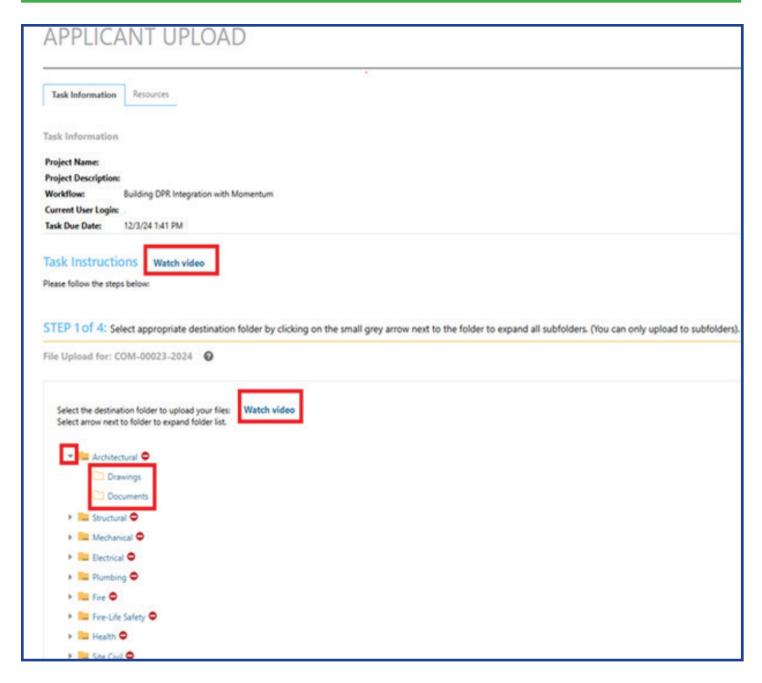
# 4. Standards for Drawings and Documents

- Individual Drawing Sheets: Upload each sheet individually. Multi-page DRAWING files are NOT acceptable. However, ZIP files are allowed.
- Drawing File Types: Drawings shall be PDF file types ONLY.
- Document File Types: Documents can be PDF, JPEG, TIF, TIFF, PPS, PNG, IMG, BMP, TXT, VSD, RFT.
- File Naming Standards for Drawings: Drawing files should be named after the drawing sheet number.
  - For example, **Architectural** sheet number **A**101 should have the file name "A101.pdf". **Structural** sheet number **S**-102 should be titled "S-102.pdf".
- **Resubmittals:** If revisions to the drawings are required, resubmit using the same file name as the original file to the original folder.
  - For example, if file "A101.pdf" in the architectural folder needed to be amended, then the revised drawing should be uploaded with the same name, "A101.pdf", and placed in the architectural folder.
- Graphic Scale: Provide scale on plans, minimum  $\frac{1}{4}$ " = 1'.
- **ZIP Files:** Files can be consolidated into a ZIP file to reduce upload time. When the ZIP file is uploaded, ePlan will unzip the file and place each individual file into the folder. However, as previously stated, drawing files MUST be a single-sheet PDF.

# 5. How to Upload Drawings and Documents

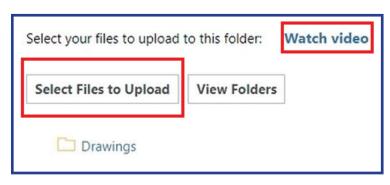
To upload drawings and/or documents for review, select the appropriate destination folder by clicking on the small gray arrow next to the folder to expand the subfolders for that discipline. (You can only upload to the subfolders which is indicated by the red "No Entry" icon next to the main folder.) Then, select the drawings and documents to upload to the applicable folder. Repeat the same step until all required files are uploaded.

There are also detailed instructions available by selecting "Watch video."



After selecting the appropriate Drawings or Documents subfolder, click the "Select Files to Upload" button which will open your file manager to select and upload.

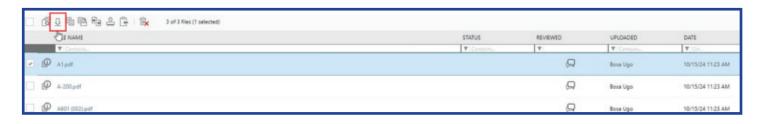
Select "Watch Video" for more detail instructions on how to upload files.



# 6. How to Download Drawings and Documents

Before you can download Drawings or Documents from ProjectDox, you must first be given permission to do so, which is granted when the applicant has been given a task to upload files, or when the permit has been issued.

To download drawings or documents, you must access the folder that the desired files are in, select the files you wish to download by selecting the checkbox associated with the file, then select the Download Icon ( ). Multiple files may be compressed and downloaded as a ZIP file.

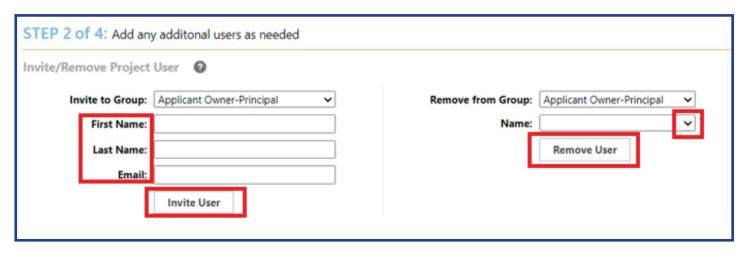


# 7. How to Add/Remove Users

When a task is assigned to the applicant, the applicant can add users to their project that will have "view-only rights" — which allows them access to view information about the case and receive email updates. However, the added users cannot upload/download files or complete tasks. The applicant can also remove any users they have added.

To invite a new user, complete the applicable fields for \*first name\*, \*last name\*, and \*email\* address and select the \*invite user\* option.

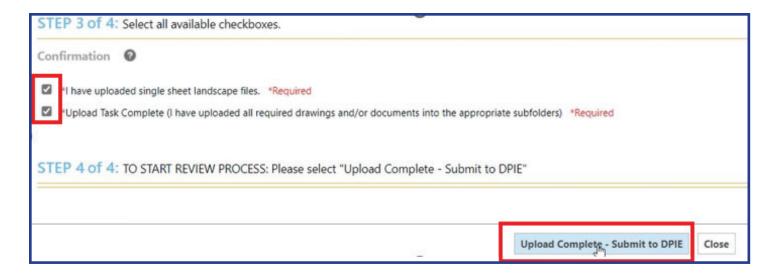
To remove a user, select the drop-down option on the \*name\* field to identify the user to be removed and select the \*remove user\* option.



# 8. How to Complete Your Applicant Task

Completing your task will mean the submission of your case for review and confirm that all required drawings and documents have been uploaded to the appropriate folders. Also, if applicable, ensure that you have addressed and responded to any reviewer comment(s).

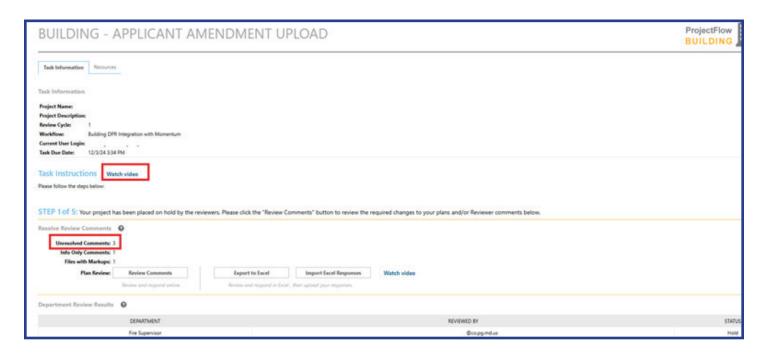
First, select **All** of the checkboxes at the bottom of the eForm and then select "Upload Complete — Submit to DPIE". Please note that if you select the "close" option on the eForm, the applicant task will NOT advance your project to start the DPIE review process.



### 9. Review Comments

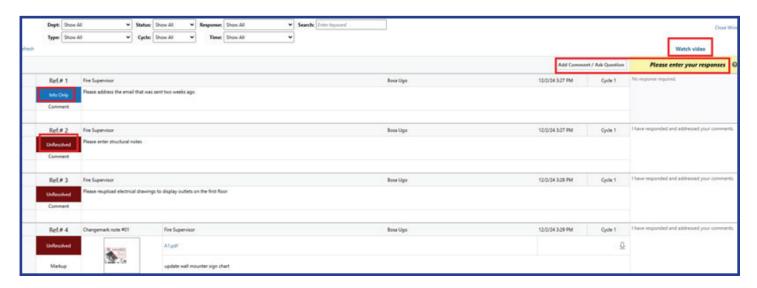
After the Applicant Upload Task is completed, the case should be distributed for review within 1–2 business days if the drawings meet the Minimum Requirements for Plan Review.

If the reviewers have comments that need to be addressed, they will place their review on "Hold," and an **Applicant Amendment Upload Task** will be assigned to the applicant. The applicant will receive an email notification. The reviewer's comments will be available on the eForm by selecting the "Review Comments" button. Their comments can also be seen on the Department Review Status Report as shown in the slides further down the guide.

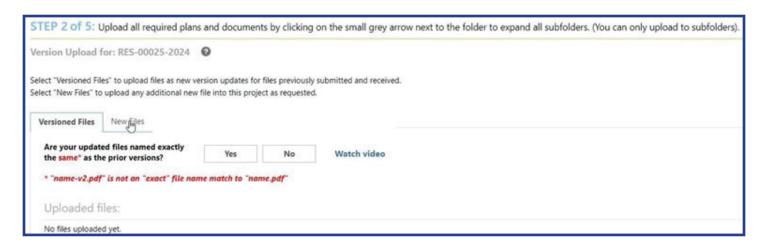


After selecting the "Review Comments" option, the \*Comments View\* window will open and allow the applicant access to all the reviewers' comments. The review comments will be displayed as "Resolved," "Unresolved," or "Info Only." The review comments will also display the name of the reviewer that entered the comment and the date and time the comment was entered.

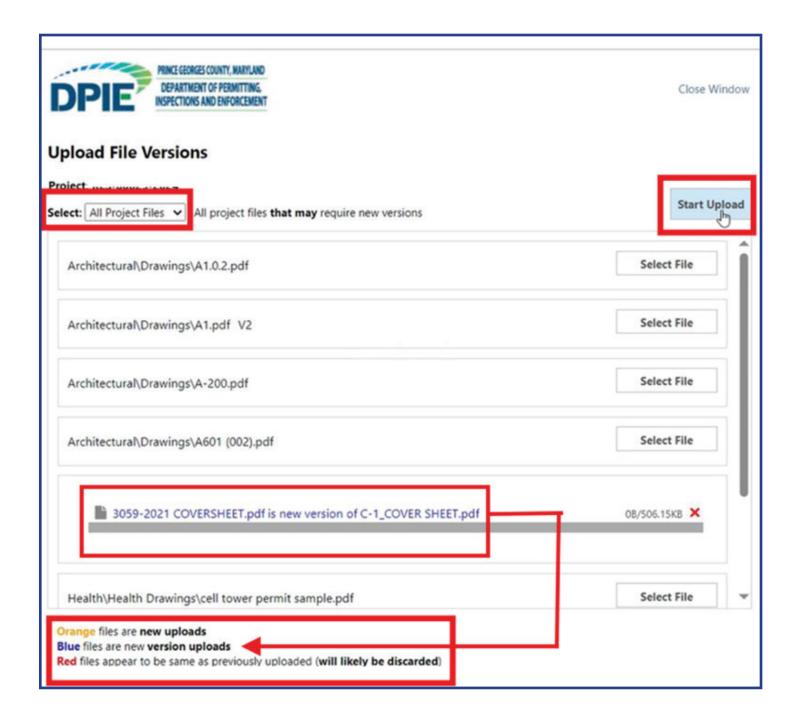
After addressing each review comment, the applicant is required to "enter a response" to acknowledge that the reviewer's unresolved comment has been addressed. Additionally, there is an option for the applicant to enter comments and/or ask a question, if applicable. There is also an instructional video for this page that goes into further detail about the various functions.



Revised drawings shall be uploaded using the same naming convention and in the same folder. ePlan offers the option to update the file name and to upload new files.



You will have to select the file that you want to update. After you select all the files, select \*Start Upload\*. The system will indicate if a file is a **new upload**, a **new version**, or a **previously uploaded** document (see explanation below).



### 10. Check Status

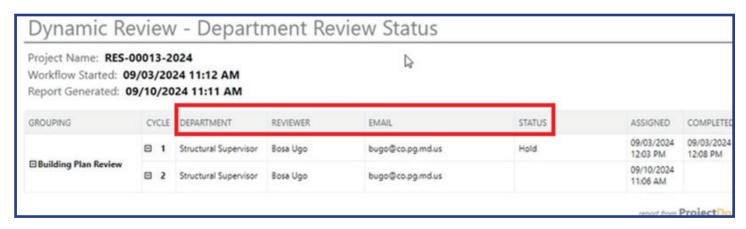
The Status tab in the Project View bar allows you to view the status of your online plan review. You may navigate between the different tabs to find additional information.



There are several reports that the applicant can view that provides a wide range of information about a specific case. Access the reports while in a case by selecting the **Reports** tab.



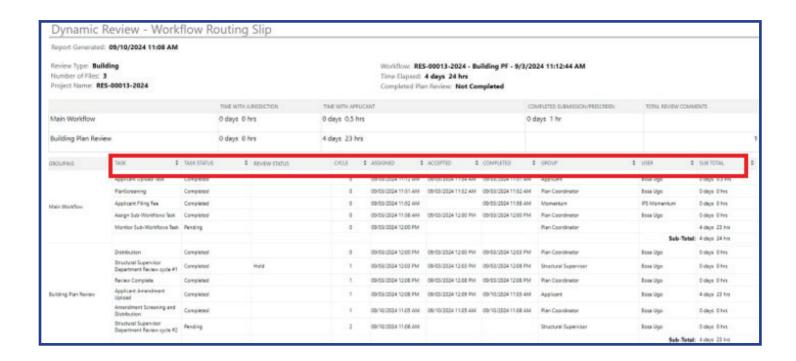
**Dynamic Review — Department Review Status:** Displays the status of each review (pending, approved, hold), the name of plan review discipline, the name of reviewer, and email contact information for the plan reviewer(s).



**Plan Review — Review Comments:** Displays the name of the reviewer, the review comments, the change mark filename and details the workflow instance review cycle, applicant discussion comments and reviewers' status to determine the review comments have been resolved or unresolved.



**Dynamic Review — Workflow Routing Slip:** Displays the task name, the task status, the plan review status, the plan review cycle, the date the task was assigned, accepted, and completed, the name of the user group, the username and the total task review time.



### 11. Permit Issuance

After the **permit** is issued, the applicant will be notified via email with instructions on how to download their permit, which is exclusively issued and available on the permitting site, **Momentum** (https://momentumhome.princegeorgescountymd.gov/).

The approved drawings will be made available for download from the **Approved Permit-Set folder in ProjectDox** after the permit has been issued.

# 12. Frequently Asked Questions

Question: Are ePlan and ProjectDox the same?

Answer: Yes, ePlan stands for electronic plan review; the provider we use for plan

review is ProjectDox.

Question: Why did I receive an Applicant Upload Task, and what do I have to upload?

Answer: All building permit applications require supporting drawings and/or

documents. For minimum requirements for your case type, visit our website.

• Residential Building

• Commercial Building

Question: Should drawing files be uploaded in sets or single sheets? Why?

Answer: A single sheet drawing file is defined as a file that contains one page.

Drawing files **MUST** be uploaded in single sheets for the following reasons: Multi-page drawing files have longer upload times.

Every time a multi-page drawing file is opened, it is transferred in total (full size) for view. On the other hand, if the applicant uploads single-sheet drawing files, viewing only requires opening the specific single page file with far less strain on network resources.

The Overlay Compare feature in ePlan will not function properly with multi-page drawing files. For example, if an examiner wants to overlay the mechanical drawing on top of the structural plan, it cannot be done within a multi-page file.

If a revised multi-page drawing file is uploaded, the system will version the file to distinguish it from the previous submission. Then, plan examiners must open both the old and new versions with Overlay Compare, find the markups that were created, and navigate between all the pages in both versions to see what has changed. Instead, if the applicant uploads single-sheet files, examiners can immediately see which files have been versioned without having to sort through a multi-page file.

Question: What format is accepted for drawing files?

Answer: All drawing files **MUST** be in PDF format.

Question: How do I get a log-in?

Answer: A ProjectDox login is automatically created after your permit application is

reviewed or if you are invited for viewing rights only.

### Question: I did not receive a password; what do I do?

Answer:

If you are listed as the ePlan Applicant on the Momentum application you will receive the password automatically after the permit application is reviewed and moved to ProjectDox. If you are a returning user, your previous password remains valid. If you don't remember the password, you can select "Forgot your password" link. Please check your spam folder for email notifications from "eplan noreply@co.pg.md.us." This email address should be marked as "not spam." If the email cannot be found, contact the Project Administrator at Home (powerappsportals.us).

### Question: How do I know I have a pending task?

Answer:

At the bottom of the Project Screen in ProjectDox, there is an Active Task List. All pending tasks will be displayed in that section. In addition, you will receive an email notification for all pending tasks.

### Question: How can I view the reviewers' comments?

Answer:

The reviewers' comments will be available on the "Review Tab" as well as the eForm by selecting the "Review Comments" option. The comments can also be seen on the **Dynamic Review — Department Review Status** report, review the section in this document for instructions.

### Question: I have completed my task, but it is not moving. What should I do?

Answer:

After your task is completed, your submission must be screened for completeness and then reviewed. If corrections are requested, you will receive an email notification. Otherwise, please wait patiently during the review process. Under the report tab you can review the "Workflow Routing Slip" report for pending items. Review section "10. Check Status" of this document for detailed instructions.

# Question: I have uploaded my drawings, but the task is still pending. What should I do?

Answer:

Uploading drawings does not complete the pending task. The pending applicant task must be accepted, you must upload the drawings in the applicable folder and, thereafter, select the "Upload Complete — Submit to DPIE" option to advance the task for review. Review section "8. How to Complete your Applicant Task" of this document for detailed instructions.

### Question: Are multiple log-in ID's permitted for a case/project?

Answer:

No, multiple log-in ID's are not permitted for a case/project because ePlan assigns each case to a single Applicant User Name. However, the applicant can add members for view-rights only to a project.

### Question: How long will the ePlan process take?

Answer: The duration of the online permitting process varies depending on the

number of reviewers that must examine your submission. Please be patient

as the County works as fast as possible.

#### Question: How do I delete a file?

Answer: Applicants do not have the ability to delete files. If an incorrect file was

uploaded, contact the Project Administrator at <u>Home</u>, and include the file name, folder location and the reason for your request. Note: Previously

reviewed files cannot be deleted.

# Question: How do I respond and upload the revised drawings to address comments and changemarks?

Answer: When revised drawings are necessary to address comments and/or

changemarks, the upload process is the same as the initial Applicant Upload step. However, the revised drawings must use the same file name and be uploaded to the same folder as the original document. The Review Comments section is where the applicant responds to comments or asks a question. See section "9. Review Comments" of this document for detailed

instructions.

### Question: Does ePlan accept ZIP files?

Answer: Yes, files can be consolidated into a ZIP file to reduce upload time. When

the ZIP file is uploaded, ePlan will unzip the file and place each individual file into the folder. However, as previously stated, drawing files  ${f MUST}$  be

single-sheet PDFs.

### Question: Who placed my case on hold?

Answer: The plan reviewer(s)' names and their comments are available on the

eForm by selecting the "Review Comments" option. Their comments can also be seen on the **Dynamic Review — Department Review Status** report

along with their name and e-mail address.

### Question: How do I download my approved documents?

Answer: After the **permit** is issued, the applicant will be notified via email with instructions on how to download the permit, which is exclusively issued and

available on the permitting site, Momentum.

The approved **drawings** will be made available for the ePlan applicant of record to download from the **Approved Permit-Set folder in ProjectDox** after the permit has been issued.

### Question: Why are all drawings not approved and/or stamped?

Answer:

Plan review staff will only stamp plan sheets relevant to the scope of work. Additionally, Electrical, Mechanical, Fire trade permits must apply for a separate permit application in <a href="Momentum Permits">Momentum Permits</a> | <a href="Prince George's County">Prince George's County</a>. Any plumbing work requires a <a href="WSSC permit https://www.wsscwater.com/work-with-us/permit-services">WSSC permit https://www.wsscwater.com/work-with-us/permit-services</a>.

### Questions: How do I make a payment?

Answer:

If your application originated in Momentum, you must log into Momentum and pay your fee from your dashboard, or you can use the <u>guest payment</u> <u>link — https://momentum.princegeorgescountymd.gov/guest-payments</u>.

If your application originated in ePermits, you must pay your fee at the <u>ePayments link — https://dpiestatus.princegeorgescountymd.gov/site/public/epayments/casestatus.aspx</u>.

**Note:** If you revised your case at any point, the fee will be under the **revision number**, and you must enter the case number with the correct revision number at the end to view the fees.

### For Example:

### **ePermit**

When entering your ePermit application number, you would type 22222-2022-00 for the original application and 22222-2022-**01** for the revision.

**Original** ePermit Application Number: 22222-2022-**00 Revision** ePermit Application Number: 22222-2022-**01** 

#### **Momentum**

When entering your Momentum application number, you would type 99999-2023-CE if applied for before July 15, 2024 or COM-99999-2024 if applied for on/after July 15, 2024 for the original application and 99999-2023-CE-R01 if applied for before July 15, 2024 or COM-99999-2024-R01 for the revision.

### **BEFORE July 15, 2024**

Original Momentum Application Number: 99999-2023-CE
Revision Momentum Application Number: 99999-2023-CE-R01

### ON or AFTER July 15, 2024

Original Momentum Application Number: COM-99999-2024
Revision Momentum Application Number: COM-99999-2024-R01

# 13. Contact Information and Helpful Tools

- You may use the link below for assistance with ProjectDox and Momentum: Home (powerappsportals.us).
- For assistance with General Permit/License related questions or inquiries, contact the Permit Office: 301–636–2050.
- You may use the link below to search for permits submitted before May 2023: <a href="https://dpiestatus.princegeorgescountymd.gov/Site/Public/Citizens/">https://dpiestatus.princegeorgescountymd.gov/Site/Public/Citizens/</a>
   CaseSearch.aspx.
- You may use the link below to search for permit applications submitted after May 2023:
  - https://lookseeproperty.princegeorgescountymd.gov/pg-home-page-30016.
- Alternatively, you may track the progress of a Momentum-submitted permit using the link below: <u>PG-County App Tracker</u>.
- When entering the permit number, please use the entire permit spelling convention, e.g., 99999-2023-CE or RES-99999-2024.





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