Residential Basement Finish/ Garage Conversion Plans

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See <u>Residential Plan Check Requirements</u> for all Residential handouts including handouts specific to Basement Finishes or Garage Conversions.

Since no outside agencies need to review this type of plan, it can be submitted for all Jurisdictions. See current <u>List of Electronic Plan Types</u> to see who can submit plans this way. The plan can be submitted and reviewed electronically, but the permit will need to be issued in person. It is not necessary to bring the approved plans at that time since we will already have an electronic copy.

All types of plans can be submitted as paper plans. Submitting electronically is an option in some cases and we are working on expanding to additional Jurisdictions and types of plans.

Getting Started:

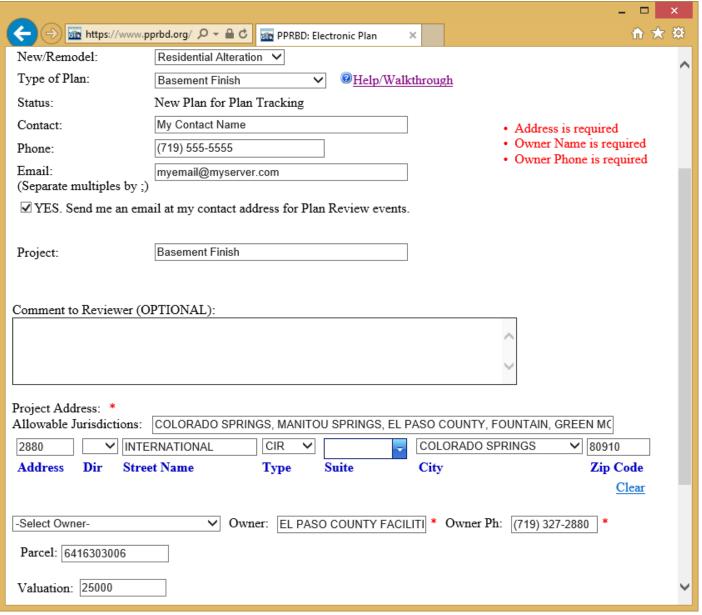
http://www.pprbd.org/plancheck/ElectronicPlanReview.pdf

To get started, see the above link. This explains setting up a free web account, getting logged on with your account, and uploading a plan. The Getting Started document explains the process of getting plans reviewed electronically, and isn't specific to this type. The same basic process is used for new homes and Basement Finishes. This document is a walk-through for how to submit this type of plan. Please refer to the Getting Started document for more general help not included in this document.

Creating a Plan:

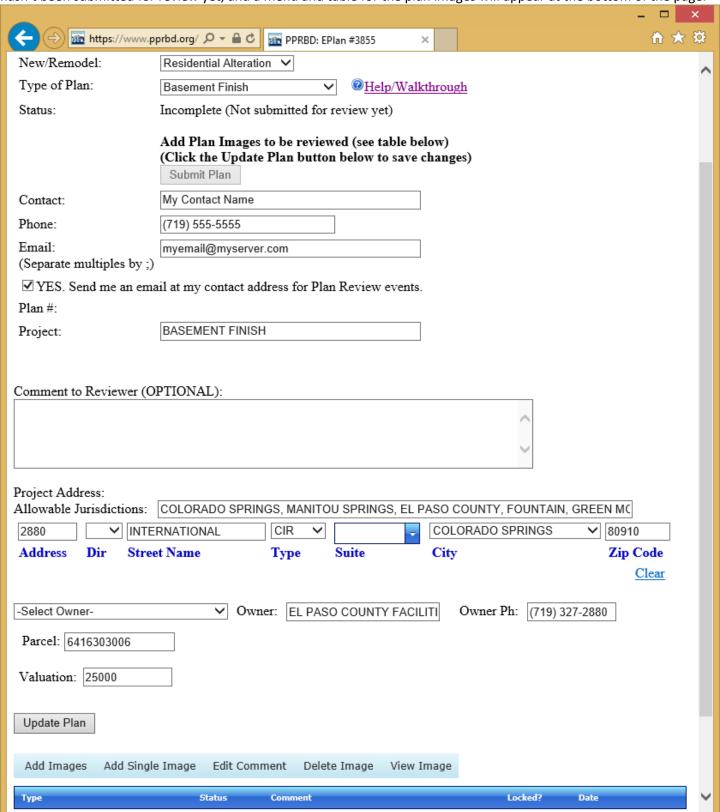
When logged on, the types of plans you are able to upload will be based on your account. If you view the <u>List of Electronic Plan Types</u> when logged on, it will highlight which types of plans you can upload.

- After logging on, go to Plans>Electronic Plans on the menu. This will show a list of all recently submitted plans and includes help links at the top of the page.
- Click the New Plan menu.
- Your contact information is pre-filled based on your user profile.
- For New/Remodel select Residential Alteration. This will filter the Type of Plan list.
- For Type of Plan, select "Basement Finish". (This walkthrough will be for a Basement Finish, but the process is similar for Garage Conversions.)
- Based on the type of plan selected, the page will show you the current list of allowable Jurisdictions. You will only be able to submit a plan within a listed Jurisdiction.
- Enter the Project Address. The street name will auto-complete based on our streets database. For a remodel you are only allowed to select an existing address. If the address you enter isn't recognized, you will need to contact the Building Department to verify it.
- Ower name, Owner Phone and Parcel will auto-fill based on the address, if we have matching information from the Assessor. You can over-write this with updated information.
- Enter a Valuation for the project, which is Total value of the work including (but not limited to) labor, materials and profit. Click Save button at bottom of page.



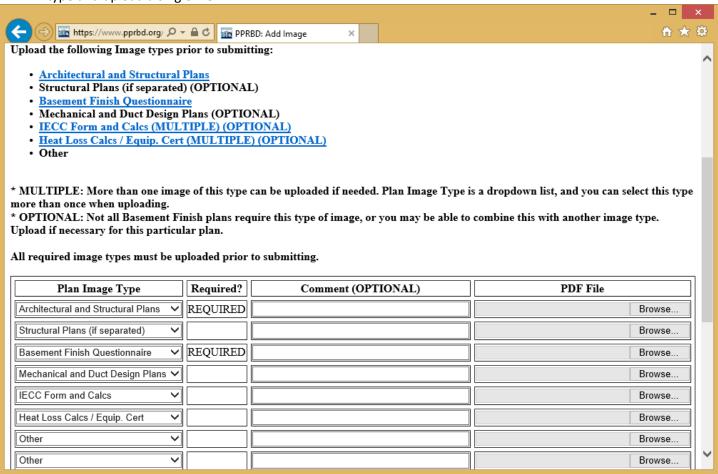
After Saving:

Once you've saved above, you will be assigned an Electronic Plan #, the status will show "Incomplete" which means it hasn't been submitted for review yet, and a menu and table for the plan images will appear at the bottom of the page.



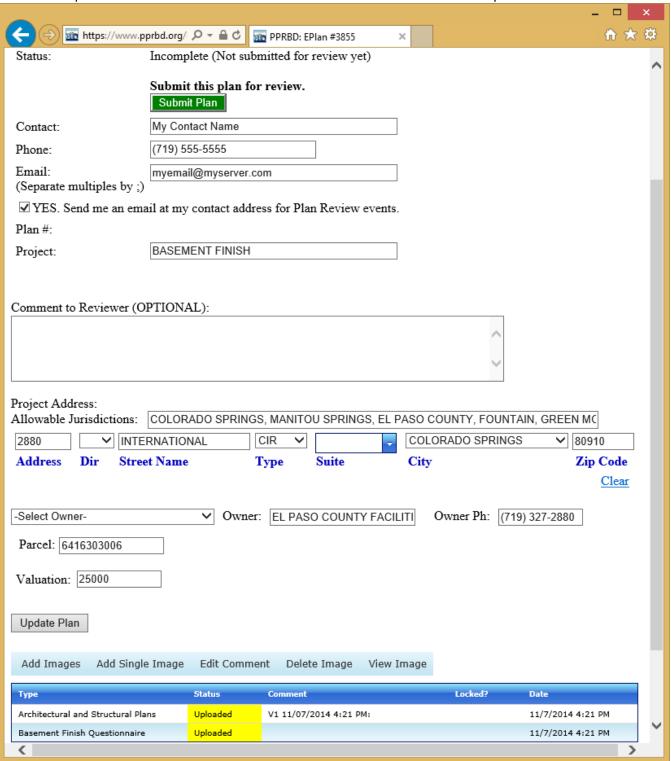
Adding Plan Images:

- Click the Add Images menu to select PDF files on your computer to upload to this Electronic Plan.
- You will be prompted for the types of documents you can upload, and provided links to additional information or downloadable forms when available.
- Multiple plan images can be uploaded at once using the table on this page:
 - Plan Image Type Use this column to specify the type of image being uploaded. By default, one item of
 every type not yet uploaded is selected. If uploading multiples images of the same type, you can change
 one of the dropdown selections to the type you want. If you return to this page after uploading some
 images, it will pre-select only those types still missing.
 - Required? Identifies whether this type of image is required to be uploaded prior to submitting the plan.
 - Comment (OPTIONAL) Allows you to enter a comment for this image. This is highly recommended
 when uploading multiple images of the same type (to distinguish them) or when using type "Other" so
 the reason for including that image with the plan will be clear.
 - o PDF File Click the Browse... button to select a PDF file from your computer to upload.
- When you've selected all the files you want to upload, scroll to the bottom of the page to click the Upload Files button.
- See the "Getting your plans in PDF Format" section in <u>About Electronic Plan Review</u> if your plans are not already in PDF format. All plan images must be in PDF format in order for us to review them.
- Locked PDF files cannot be marked up or combined into a final approved image, so we don't allow them to be submitted for any image type that requires approval. If you get a message about Locked PDFs see the "Locked PDFs" subsection in the "Getting your plans in PDF Format" section in About Electronic Plan Review.
- If you are on a slow connection or are getting errors when uploading the images all at once, you can try uploading them one at a time with the Add Single Image option. This page will allow you to select a single image type and upload a single file.



Submitting the Plan for Review:

No one will start reviewing the plan until you submit it. This allows you to upload some plan images now and return to the plan to upload additional images, if you don't have all the documents ready. When all required information has been entered, and all required images have been uploaded, a green Submit Plan button will appear. (If not all information is specified, the page will show a message about what is missing in this area instead.) Click the Submit Plan button to request the review to start. Fees are not collected on remodels until the permit is issued.

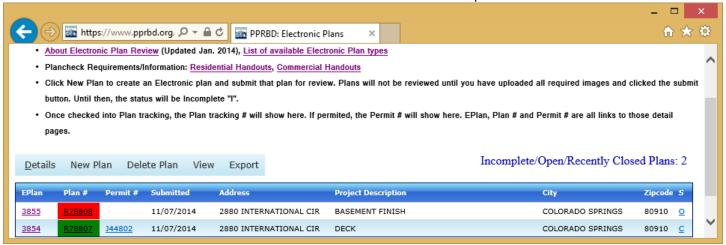


The submitted plan will be triaged and either assigned a plan tracking number and automatically routed for plan review or returned to you if there is a problem with the submission that prevents it being reviewed (an email will explain what is missing). The Plan tracking number can be used to lookup the review status of any plan, whether electronic or paper.

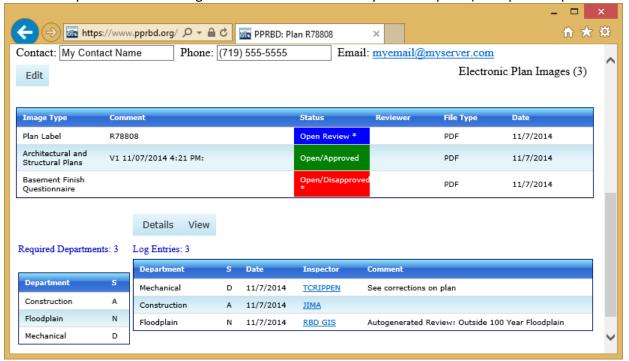
A Plan Label image is automatically added to all electronic plans when checked into plan tracking, and will include the Plan tracking #, Project address, description and provide space for Required departments approval stamps.

Following the progress of the Review:

- Status emails. Unless you specifically opt out, you will receive status emails using your contact information each time a required department signs off the plan and an additional email when each review cycle is complete.
- When logged on go to Plans>Electronic Plans on the menu to see the current status of all your recent plans. This will include links to the plan tracking record (if it has been checked in for review) and a link to the permit when that is issued. You can use the View menu to look back at older closed plans if desired.



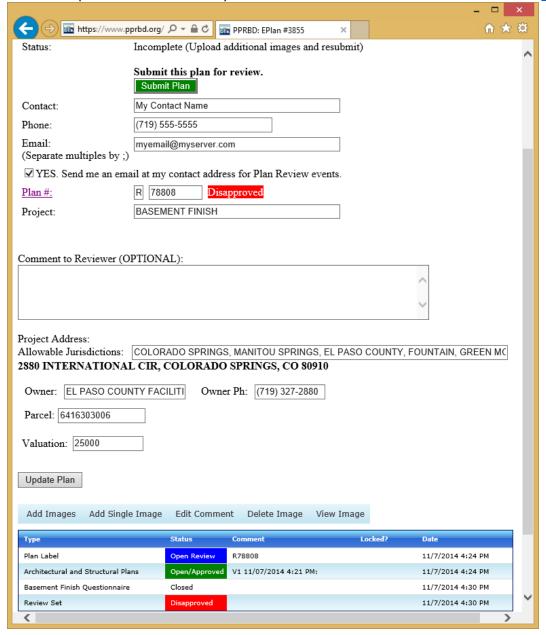
- Click the EPlan # link (or double-click the row) to return to the Electronic Plan details. This will show the current status of the electronic plan and the current status of each plan image in the table at the bottom of that page. If the plan reviewer uploads a document to your plan it will be visible here.
- As the plan reviewers sign off your plan, they will enter some comments into the review log and will markup the
 plan images. You will be able to see review log comments in real time, but the markup will only be visible once
 the current Review Cycle is complete (when all required departments have reviewed the document).
- Click the Plan # link to go to the plan tracking details. This will show the current status of all required departments (when all are A Approved or N N/A, the plan is approved. If any are D Disapproved, the plan is disapproved. / means the review is pending). It will also show the reviewer comments. You will only be able to upload corrected images after the current review cycle is complete (all required departments have reviewed).



Disapprovals/Resubmittals:

You will get notification emails as the plan is reviewed, including an email if the plan is disapproved that instructs you to return to the Electronic plan online for more information.

- When logged on, go to Plans>Electronic Plans on the menu. Click the EPlan # or double-click the row of the plan that has been disapproved.
- The plan will show a status of disapproved. Check the status of each of the plan images you submitted. If any individual plan images have been disapproved, they will be closed to additional review and you will need to upload a corrected version prior to resubmitting. Currently, a full corrected document needs to be uploaded on a resubmittal, not just a corrected page. Updated plan images are uploaded the same as the initial ones (see "Adding Plan Images" above). You are required to upload corrected versions of the disapproved plan images. You can optionally upload corrected versions of the approved images, which will trigger a re-review of those images. You can use the Delete menu to remove images from the plan.
- Check the markup and comments in the disapproved "Review Set" image that has been added to your plan, as
 well as the comments associated with the plan tracking record (you can click the "Plan #" link to jump to that
 page).
- Note that the status has been reset to Incomplete. When the plan is in this status, you can correct information
 and upload additional or corrected plan images. When ready, click the green Submit Plan button to resubmit
 the plan. See the "Review Cycle Status Codes" and "Resubmissions" sections in <u>About Electronic Plan Review</u>.



Approved Plan/Getting the Permit(s):

After all required departments have approved the plan (or entered N/A) it is approved for permit and we will generate the final combined/approved plan image. Approved plans are added to a queue for final review and generation of the plan image, and are usually handled within a few hours of the final approval (depending on the time of day). You can get your permit prior to the approved plan image being generated.

The final approved plan image will be associated with the plan tracking record, and later with the permit issued. Click the Plan # link from the Electronic Plans list to go to Plan Details. From there you can view the image using the Plan Image menu.

This type of permit cannot currently be issued online, so you will need to get this permit in person based on the approved plan. You will need to pay all applicable permit, plancheck and outside agency fees at this time.