# **Solar Plans**

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See Residential Plan Check Requirements or Commercial Plan Check Requirements for Solar handouts.

For Solar projects within selected Jurisdictions, you have the option to do everything related to the plan and permit online. You can submit PDF copies of the application and plan images online at <a href="www.pprbd.org">www.pprbd.org</a> and the plan will be reviewed electronically. If you need to make corrections prior to permit, those can also be submitted online. Once approved, you can get the permit online. See current <a href="List of Electronic Plan Types">List of Electronic Plan Types</a> to see which Jurisdictions are currently accepting this type of plan electronically, and who can submit plans this way. If the project location is outside these Jurisdictions, a paper copy will need to be submitted.

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

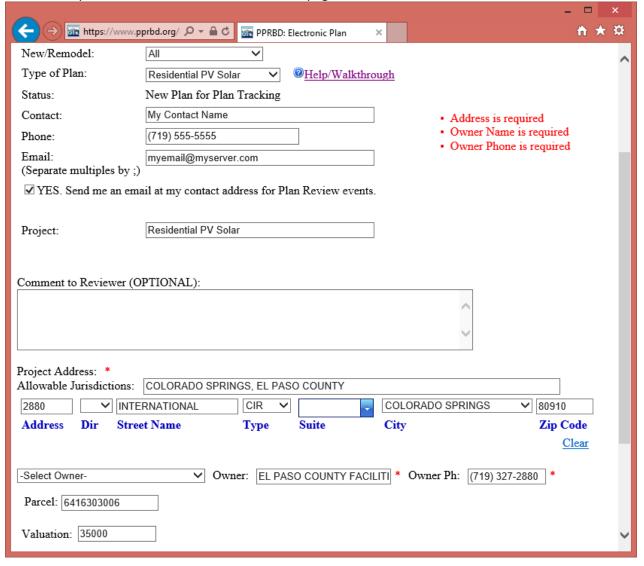
To get started, see the above link. This explains setting up a free web account, getting logged on with your account, and uploading a plan. The Getting Started document explains the process of getting plans reviewed electronically, and isn't specific to this type. The same basic process is used for new 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.

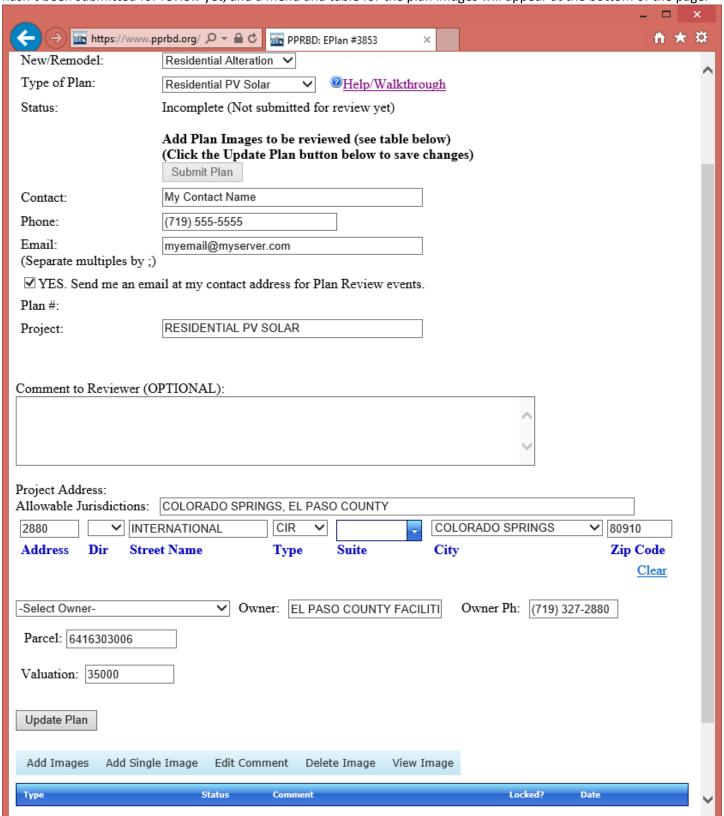
- After logging on, go to Plans>Electronic Plans on the menu. This will show a list of all recently submitted plans and includes help links at the top of the page.
- Click the New Plan menu.
- Your contact information is pre-filled based on your user profile.
- For New/Remodel select Residential Alteration for Residential Solar or Commercial Alteration for Commercial Solar. This will filter the Type of Plan list. If you only have a Solar license you may want to select All to see all the different Solar projects that can be submitted.
- For Type of Plan, select the type of Solar work you are doing if it is available. (If your type of project is not listed in the dropdown, you will need to submit your plan on paper.) For this walkthrough, we'll select "Residential PV Solar", but the process is similar for the other types of Solar projects.
- 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.



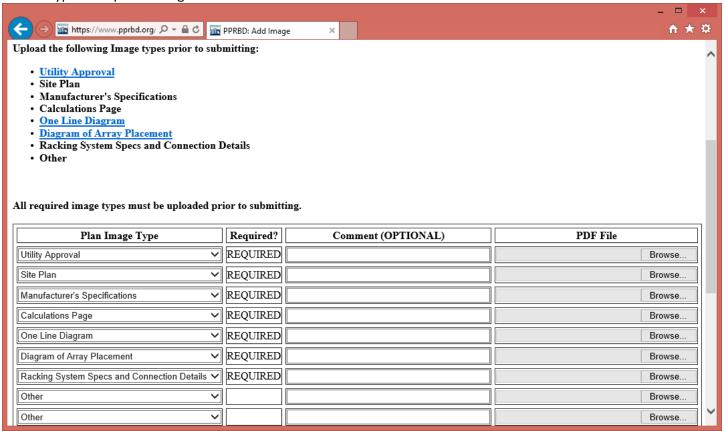
# **After Saving:**

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.



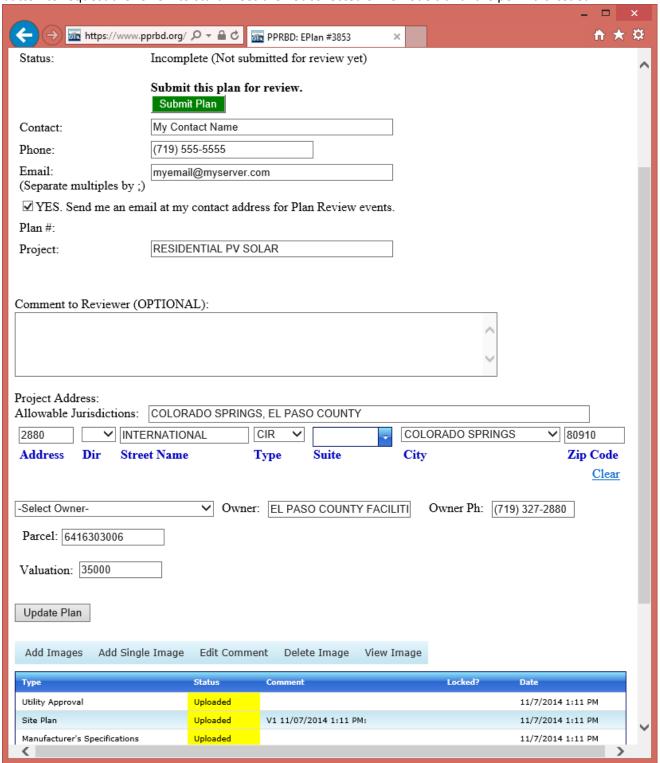
# **Adding Plan Images:**

- 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.
  - 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 <a href="About Electronic Plan Review">About Electronic Plan Review</a>.
- 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.

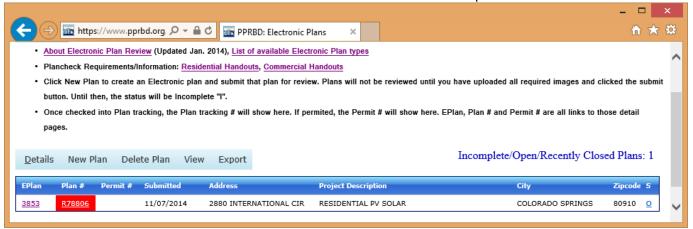


The submitted plan will be triaged and either assigned a plan tracking number and automatically routed for plan review or returned to you if there is a problem with the submission that prevents it being reviewed (an email will explain what is missing). The Plan tracking number can be used to lookup the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

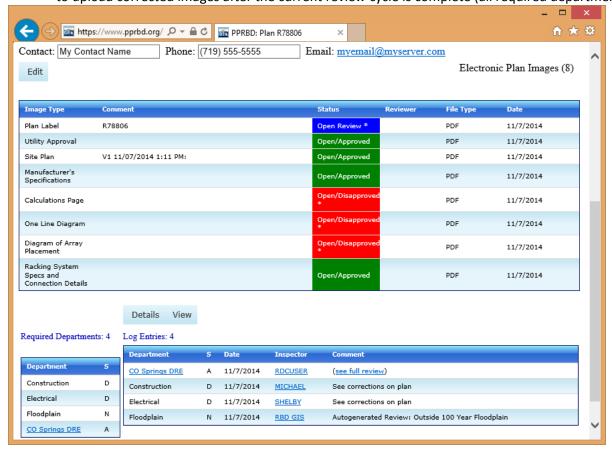
A Plan Label image is automatically added to all electronic plans when checked into plan tracking, and will include the Plan tracking #, Project address, description and provide space for Required departments approval stamps.

# 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.



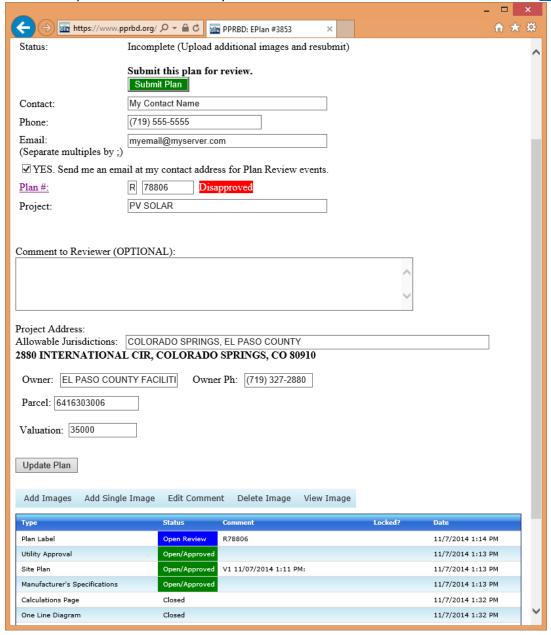
- Click the EPlan # link (or double-click the row) to return to the Electronic Plan details. This will show the current status of the electronic plan and the current status of each plan image in the table at the bottom of that page. If the plan reviewer uploads a document to your plan it will be visible 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>.



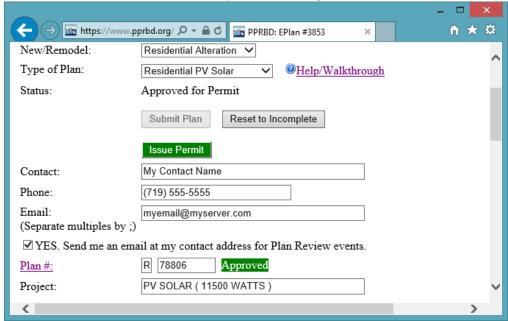
# Approved Plan/Getting the Permit(s):

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).

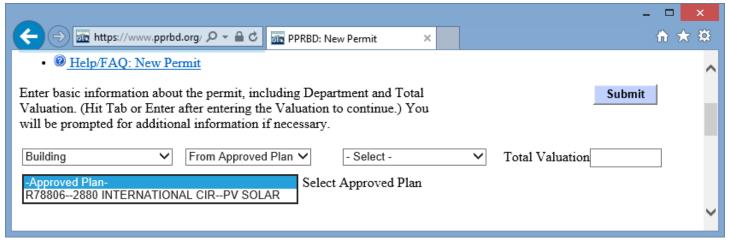
The final approved plan image will be associated with the plan tracking record, and later with the permit issued. Click the Plan # link from the Electronic Plans list to go to Plan Details. From there you can view the image using the Plan Image menu. Once the final plan image is generated, the plan will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

Solar plans that were approved electronically can be issued online or in person. Solar plans that were approved on paper can only be issued in person, because we will need to review and scan the approved paper plan at that time. The permit can be issued either from the Electronic Plan details page (see below) or from the New Permit page (see next screen capture).

When logged on, from the menu go to Plans>Electronic Plans to return to the list of plans. Click the EPlan # or double-click the row to return to the plan. Click the green Issue Permit button.

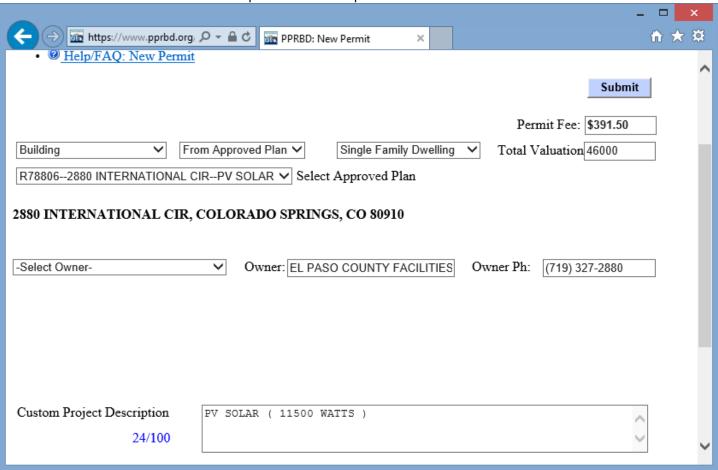


Alternately you can go straight to New Permit on the Permits menu. If you select Building and "From Approved Plan" (this may be pre-selected for you if you only have a solar license) you will have a list of approved projects to choose from in the dropdown list. This page won't allow you to add the same approved project to your permit checkout queue more than once.



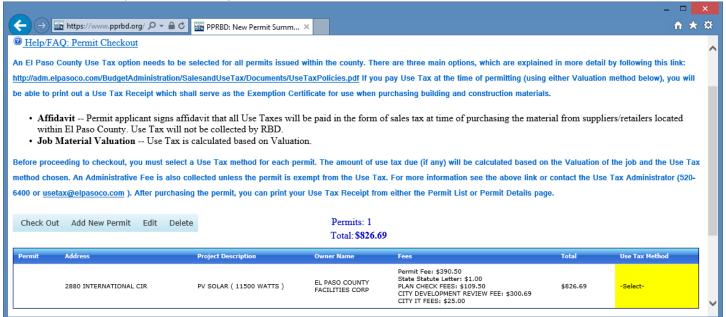
#### **New Permit form:**

Either of the above methods will take you to the same place, where you confirm the approved plan details to get the permit. The address, valuation and project description are all pre-filled in. You can update the owner name and phone number at this point if necessary, but everything else is part of the approved details of the plan and can't be modified. Click the Submit button to add this to the permit checkout queue.



# **Checkout/Paying for the Permits:**

- You need to select a Use Tax option for every permit issued. This is explained in the text on the page. You can select the option either using the dropdown in the Use Tax Method column, or by applying the same option to all permits in queue with the button at the bottom of the page.
- You can add as many different permits to queue before checking out as you want. A Convenience fee applies to online and over the phone transactions, but is charged per transaction, not per permit.
- Click the Check Out menu when ready to pay for the permits. (You can also use the Delete menu to remove items from queue, if not ready.)



Help: Paying for permits in Checkout queue:

http://www.pprbd.org/PublicAccess/Help FAQ.aspx?Usertype=C#Permits CheckoutPay

Help: Payment Accounts:

http://www.pprbd.org/PublicAccess/Help FAQ.aspx?Usertype=C#PaymentAccounts

#### **After Checkout:**

After checkout you will see a confirmation page showing that the permit (or permits) were successfully created, along with the new permit #. You can click that Permit # link to go directly to your permit. You will also get a confirmation email. See the help link on Permit Details for information on how to print a legal copy or receipt from there.



The Help link on your home page after logging on has information specific to your type of web account. This includes information on requesting inspections, viewing receipts and other web related questions.