

City of Richmond **ePlan Applicant User Guide**

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Table of Contents

1. Introduction	2
ePlan Review Process Overview	2
2. Submission Standards	3
Submission Document Requirements	3
Drawing Numbers	4
File Names	5
City Markup Standards	6
3. Login to ePlan	7
Project Contact Invitation	7
Engineering Consultant Invitation	9
New Users	9
Existing Users	12
4. Navigating ePlan	12
City Permits Page	12
SA Permit Page	13
5. Accessing, Accepting and Completing Tasks	13
Workflow Tasks	13
Accessing and Accepting Tasks	14
Completing Tasks	18
6. Applicant Upload Task	19
Uploading Files	20
Modifying Files	24
Deleting Files	25
Complete Applicant Upload Task	25
7. Prescreen Correction Task	26
8. Applicant Resubmit Task	29
9. Approval	38
10. Topics & Notes	39
Adding a New Topic	39
Respond to an Existing Topic	42
11. Checking Application Status	44
Appendix A – City of Richmond ePlan System	48
Terms and Conditions of Use	48

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 Developer or their designated contact (the “Project Contact”) submits an SA application to the Zoning Counter at Richmond City Hall. The Project Contact will be provided with an SA number and be requested to pay an SA application fee and provide a contact email address. SA application forms are available online www.richmond.ca/__shared/assets/da46189.pdf.
2. ePlan will send the Project Contact an email requesting their Civil Engineering Consultant’s (the “Engineering Consultant”) contact details be sent to the City’s Development Applications Coordinator.
3. The Development Applications Coordinator will process the application and ePlan will send an email to the Engineering Consultant, requesting documents be submitted through ePlan.
4. The Engineering Consultant will upload drawings and documents to ePlan.
5. The Development Applications Coordinator pre-screens the submission to ensure completeness and compliance with City submission standards. Engineering Consultants 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 is 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 5–8 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 drawings may be downloaded and circulated for construction. **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 Development Applications Coordinator will notify the Project Contact and Engineering Consultant of the requirements.

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

This User Guide provides Applicants, including Developers and their 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 www.richmond.ca/plandev/overview.htm. Please also refer to the Terms and Conditions of Use in Appendix A.

2. Submission Standards

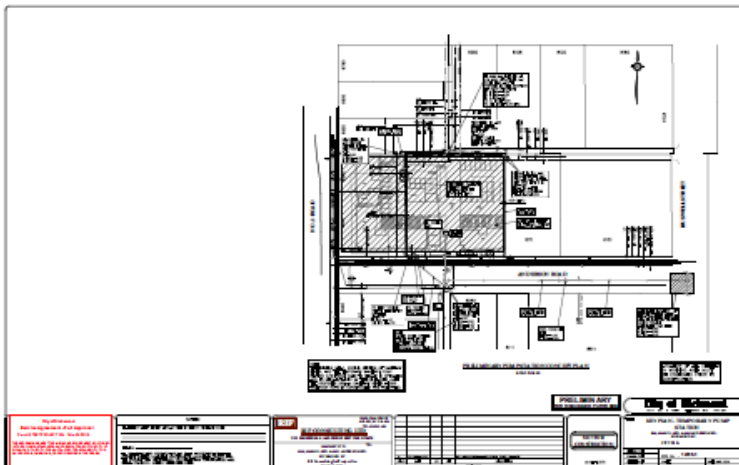
This section outlines standard requirements for creating, naming, formatting and submitting SA documents through ePlan. Maintaining standards minimizes SA review times and ensures that the City obtains consistent, functional record documents.

Submission Document Requirements

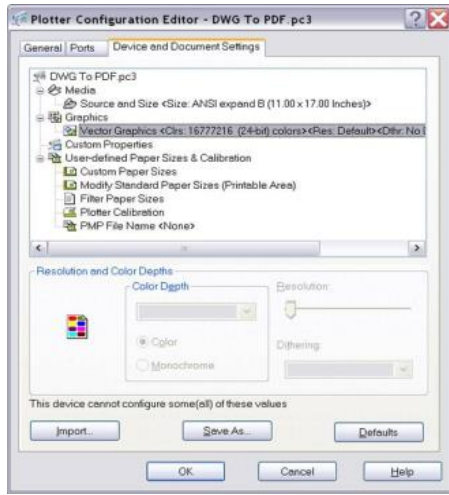
ePlan allows Applicants to submit drawings as well as supporting documents for the City's review.

Drawing Files

- Drawing files depict infrastructure to be constructed through the SA.
- Drawing files include title sheets, key plans, survey plans, and all other plan types required to depict the infrastructure being constructed.
- 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 at Richmond City Hall.
- 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.



- Drawings shall be submitted in vector PDF format. For drawing files created using AutoCAD software, it is recommended that drawings be converted to vector PDF format using the Autodesk Vector Graphic Converter “DWG to PDF.pc3 plotter driver.”



- Drawings shall be submitted as single-page, separate files.
- Drawings shall be uploaded into the permit’s “Drawings” folder within ePlan. Detailed file upload instructions are provided in Section 6 of this document.
- All drawing files must be digitally sealed using APEGBC approved software. For more information, please refer to APEGBC’s guidelines found at www.apeg.bc.ca. For Landscape Architecture drawings, please see **Submission of Landscape Architecture Drawings**.

Submission of Landscape Architecture Drawings

As digital seals are not available at this time, it is acceptable for Registered Landscape Architects to can a copy of their stamp without signature, add it digitally to drawings, then sign each sheet with an electronic signature in Adobe Acrobat.

Supporting Documents

- 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.
- Each submission must be accompanied by a sealed copy of the completed Servicing Agreement Design Drawing Checklist, available for download at www.richmond.ca/plandev/overview.htm.
- Supporting documents shall be submitted in a searchable PDF format.
- 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.
- All engineering reports must be digitally sealed using APEGBC’s approved software. For more information, please refer to APEGBC’s guidelines found at www.apeg.bc.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 “SA16-123456”, includes the year of the permit application (16) 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 (123456-16).
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, SA16-123456.

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	123456-16_TITLE
Survey Plan	03	SURVEY	123456-16-03	01	123456-16-03_SURVEY_01
Key Plan	04	KEYPLAN	123456-16-04	01	123456-16-04_KEYPLAN_01
Roads Works	05	ROAD	123456-16-05	01 02 03	123456-16-05_ROAD_01 123456-16-05_ROAD_02 123456-16-05_ROAD_03
Water Works	06	WATER	123456-16-06	01	123456-16-06_WATER_01
Storm Works	07	STORM	123456-16-07	01	123456-16-07_STORM_01
Sanitary Works	08	SAN	123456-16-08	01 02	123456-16-08_SAN_01 123456-16-08_SAN_02
Street Lighting	09	LIGHTING	123456-16-09	01 02	123456-16-09_LIGHTING_01 123456-16-09_LIGHTING_02
Landscape	10	LAND	123456-16-10	01 02 03	123456-16-10_LAND_01 123456-16-10_LAND_02 123456-16-10_LAND_03
Environmental	11	ENVIRO	123456-16-11	01	123456-16-11_ENVIRO_01

Drawing Type	Drawing Type ID	Drawing Type Abbreviation	Drawing No.	Sheet No.	File Name
Dike	12	DIKE	123456-16-12	01	123456-16-12_DIKE_01
Electrical Vehicle Charging	13	EVC	123456-16-13		NA*
Traffic Signals	14	SIGNAL	123456-16-14	01	123456-16-14_SIGNAL-01
Pavement Signs & Markings	15	TRAFFIC	123456-16-15	01 02 03	123456-16-15_TRAFFIC_01 123456-16-15_TRAFFIC_02 123456-16-15_TRAFFIC_03
District Energy Utility	16	DEU	123456-16-16		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 Applicants 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

City Department / Group	Markup Group	Markup Colour
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 the Project Contact completing a permit application at the City's Zoning Counter, a new project will be created in the City's permitting system. ePlan will automatically send an email to the Developer containing login and permit information. The email will request the developer forward the Engineering Consultant's contact information to the Development Applications Coordinator.

Servicing Agreement Project Contact Notification

Attention [UserFirstName]:

Your Servicing Agreement (SA) Application for [ProjectDescription] has been received and will be processed under reference number [ProjectName]. Please quote this number when making any inquiries with the City, either verbally or in writing.

The SA drawings and supporting documents will be reviewed via the City of Richmond's electronic plan review system. An ePlan Login has been created to allow you to electronically track the review process of your application. Please visit the [City of Richmond Website](#) to familiarize yourself with process and requirements for ePlan review. To access your new application, follow the instructions below:

1. Click the ePlan link below
2. Enter your User Login and Password (temp password sent in separate email if you are new user)
3. Click the City Permit Number link (if it is not listed, click the "All Permits" button)

The SA drawings and supporting documents are required to be uploaded by your Engineering Consultant. The City requires your Engineering Consultant's contact information so that an account can be created for them to electronically upload the SA drawings and supporting documents. Please forward the Engineering Consultant's contact information to the Developments Applications Coordinator listed below.

1. First Name
2. Last Name
3. Company
4. Email Address
5. Phone Number

The Development Application Coordinator will process this information, and within 48 hours your Engineering Consultant will receive an email prompting them to upload SA drawings and documents.

The SA is a requirement of a RZ, DP or SD application. The considerations of the RZ, DP or SD application, which specify SA requirements, must be finalized and signed by the Applicant before the City of Richmond will review the SA drawings and supporting documents.


User Login:	Your email address
Permit:	[ProjectName]
Description:	[ProjectDescription]
Task:	[Activity.Name]
Coordinator:	[OwnerUserName] ([OwnerEmail], [OwnerWorkPhone])

[Login to ePlan](#)

For any technical issues or questions related to this application, please contact the Coordinator listed above.

Please do not reply to this email.

A temporary password for login to the system will be sent through a separate email.



Password Reset

Hello ePlan User:

Your password has been reset by a system administrator.

Login:	ePlanUser@Gmail.com
Temporary password:	98ECK5H

[Login to ePlan](#)

The Developer can follow the link to access and log in to ePlan. Note that the Developer is not required to log in to ePlan as the Engineering Consultant is responsible for uploading all necessary documents.

Only the Engineering Consultant is able to submit documents through ePlan. However, the Developer may access the submission status of the application through ePlan (Refer to Section 11).

Engineering Consultant Invitation

Within 48 hours of the Developer providing the Engineering Consultant's contact information to the City, an email will be sent to the Engineering Consultant. The Engineering Consultant is required to follow the link provided to access and log in to ePlan.

Servicing Agreement Plan Review Upload Invitation

Attention [UserFirstName]:

Welcome to the City of Richmond electronic plan review system. This invitation has been sent to you in response to [ProjectName] - [ProjectDescription].

An ePlan project has been created to allow you to electronically upload your Servicing Agreement plans and supporting documents for review. Prior to preparing and submitting the Servicing Agreement plans and supporting documents, please visit the [City of Richmond ePlan Website](#) for requirements. To access your new application, follow the instructions below:

1. Click the Project Access Link below
2. Enter your User Login and Password (temp password sent in separate email if you are new user)
3. Click the City Permit Number link (if it is not listed, click the "All Permits" button)
4. Click on the "Plans" should this be "Drawings" or "Documents" folder
5. Click the "Upload Files" button and follow the instructions to upload your drawings or supporting documents
6. Accept the "ApplicantUpload" task and click the "Upload Complete - Notify Jurisdiction" button
7. Your plans and/or documents have now been submitted for plan review

The City of Richmond will accept the following file types.

Drawings: PDF
Supporting Documents: PDF

User Login:	Your email address
Permit:	[ProjectName]
Description:	[ProjectDescription]
Task:	[Activity.Name]
Coordinator:	[OwnerUserName] ([OwnerEmail], [OwnerWorkPhone])

Login to ePlan

For any technical issues or questions related to this application, please contact the Coordinator listed above.

Please do not reply to this email.

New Users

Computer Setup

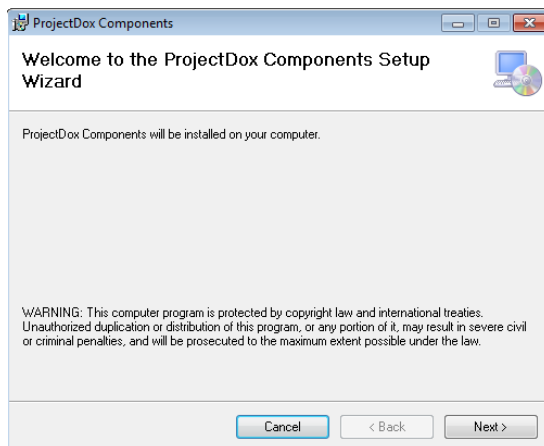
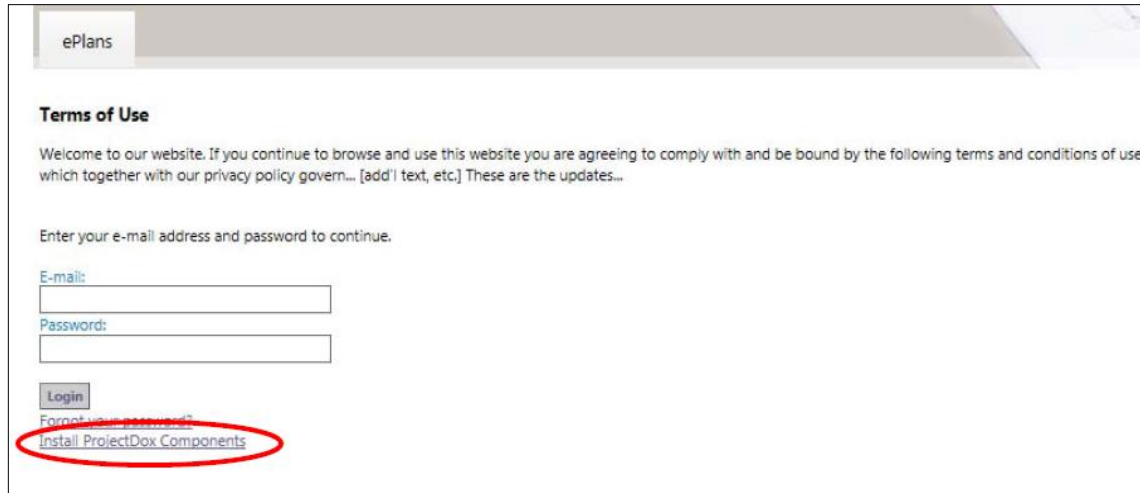
ePlan is compatible with the following internet browsers: Google Chrome, Internet Explorer, Firefox, and Safari.

Prior to logging onto ePlan, the following actions must be completed:

1. Disable your computer's "pop-up" blockers for the ePlan web address. Attempting to log in without disabling "pop-up" blockers may cause the web page to disappear once you hit the "Login" button. Some computers have more than one pop-up blocker installed (Internet Explorer, Google Task Bar, etc). Once pop-up is enabled on the ePlan site, you will be able to utilize the application.

2. If you are using Internet Explorer, you must install the necessary ActiveX Control components. Do this by clicking “Install ProjectDox Components” on the login page. This installation will need to be done once for each computer on which you access ePlan. This step is not required if you are using other internet browsers.

A ProjectDox Components Setup Wizard will pop up. Follow the prompts in the pop-up to install the necessary ePlan ActiveX controls.



Your computer is now set up and ready to use ePlan!

New Account Setup

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

Invitation

Hello ePlan Applicant:

You have been added to the ePlans database and as a new member to the project listed below.

Login:	ePlanApplicant@hotmail.com	Login Information
Temporary Password:	73FFD5B	
Project:	SA16-722066	
Group:	Applicant-Civil Consultant	
Project Owner:	City Coordinator	
Owner's Email:	CityCoordinator@richmond.ca	
Login to ePlans		Link to ePlan

You will be prompted by the system to change your password and enter your personal account 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.

Settings for **Test User** (TestUser@email.com)

Change Password:

Current password:	<input type="password"/>
New password:	<input type="password"/>
Confirm new password:	<input type="password"/>

Password Reset Question & Answer:

Security question:	<input type="text"/>
Security answer:	<input type="text"/>

Password must contain at least one digit, one upper case letter, one lower case letter, must not contain special characters and must be between 8 and 10 characters

Profile Information

Contact Information

User Metadata

Project Membership

Group Membership

*** Required field**

First Name: *	<input type="text" value="Test"/>	Last Name: *	<input type="text" value="User"/>
Email: *	<input type="text" value="TestUser@email.com"/>		
Title: *	<input type="text"/>		
Company: *	<input type="text"/>		
Address 1: *	<input type="text"/>		
Address 2:	<input type="text"/>		
City: *	<input type="text"/>		
State/Province: *	<input type="text" value="CO"/>	Postal Code: *	<input type="text"/>
Phone: *	<input type="text"/>	Fax:	<input type="text"/>
Mobile:	<input type="text"/>	Pager:	<input type="text"/>
Stamps:	<input type="text"/>		
Language: *	<input type="text" value="en"/>		

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 and added a security question and answer.

4. Navigating ePlan

City Permits Page

Once you have logged into ePlan, you will be taken to the City Permits page. This page provides access to all permits assigned to you and all outstanding tasks requiring your action.

This page contains the following sections:

1. **Navigation Bar:** Allows you to navigate to different sections of the site, including the Help manual and access to your profile information.
2. **Active City Permit List:** 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.
3. **ProjectFlow Task List:** A list of all active tasks pending your action. Completed tasks are automatically removed from this list. **IMPORTANT:** Review Section 5 before accepting a task.

Navigation Bar

Active City Permits

I recently entered project(s) out of 1 for Beata Ng (beata.ng@hotmail.com)

Recent Permits **All Permits** Press Enter To Search: Site Wide Tasks

City Permit Number	Options	Description	City Coordinator	Status	Permit App Date
SA16-722063		11111 2nd Ave - May 18 Test	Jeff Craddock	City Approved	5/18/2016 10:18:06 AM

Active City Permit List

All Permits

Page 1 of 1 (1 items)

ProjectFlow Task List

Refresh

TASK	CITY PERMIT NUMBER	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED	SITE ADDRESS
Applicant Upload Task	SA16-722066	SA16-722066 - Servicing Agreement Plan Review - 5/15/2016 8:47:22 AM	Applicant-Civil Consultant	First-Group	Pending	Medium	6/3/2016 9:39:28 AM	5/19/2016 9:39:28 AM	6911 No 3 Road

1 - 1 of 1 records

SA Permit Page

Every permit has its own page where you can review tasks and upload documents. Clicking on a specific permit number under the Active City Permit List on the City Permits Page will direct you to a specific SA Permit Page. This page contains the following sections:

1. **Navigation Bar:** Allows you to navigate to different sections of the site, including the Help manual, access to your profile information, and the City Permits Page.
2. **Permit Information and Reports:** A summary of the permit details, including contact information and status.
3. **Documents:** Allows user to upload or retrieve documents and drawings. Information on uploading files can be found in Section 6.

SA16-722063

Main Contact: Beata Ng

Expanded current | Collapse | 11111 2nd Ave - May 18 Test

Documents

- SA16-722063
 - Drawings (5 Files - 5 New)
 - Documents
 - Approved (5 Files - 5 New)

Navigation Bar

Back Forward City Permits Profile Reports Workflow Portals Info Logout

Permit Information and Reports

Permit Info	Reports
City Permit #	SA16-722063
Site Address or Location	11111 2nd Ave - May 18 Test
Site Image	No image exists
Consultant	Beata Ng
Consultant's Email	beata.ng@hotmail.com
Phone	0042704257
Consultant's Cell Phone	
Coordinator	Jeff Craddock
Coord Email	jcraddock@richmond.ca
Administrators	Tyson Florence, Eliana Dav
Drawing Status	City Approved
Start/End	Start: 5/18/2016 10:18:06 AM End: 11/18/2016 10:18:04 AM
Pass-Through	mov_wm_u_avl.htm_html_install.config.mp4
Versioning	Enabled for this project

You may return to the City Permits Page at any time using the “City Permits” button in the Navigation Bar.

5. Accessing, Accepting and Completing Tasks

Workflow Tasks

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.

- 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. Developers will also receive email notifications when these tasks are initiated, but no action from Developers is required.

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

Accessing and Accepting 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:



- Within the SA Permit Page;
- 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

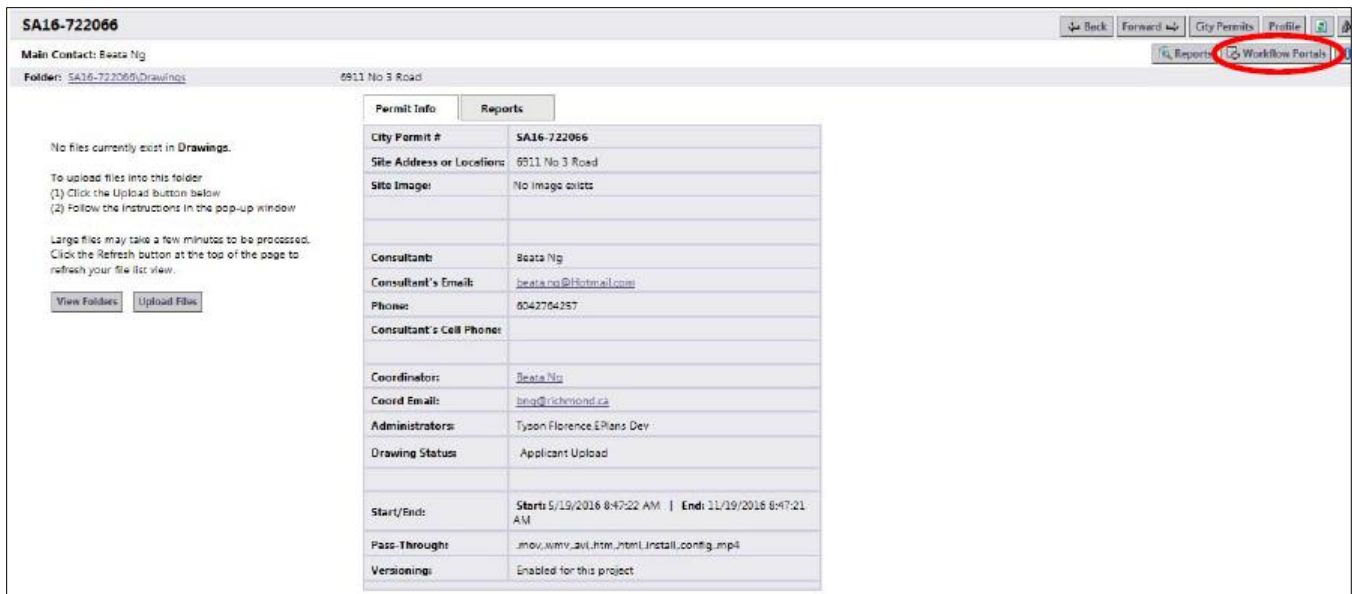
You can access active tasks pertaining to specific permits through the SA Permit Page, accessible by clicking on a specific permit number under the Permit List on the City Permits Page.

The screenshot shows the 'Active City Permits' page in the ePlan system. At the top, there are navigation buttons: Back, Forward, City Permits, Profile, and Logout. Below the navigation is a search bar and a 'Site-Wide Tasks' button. The main content is a table with the following columns: City Permit Number, Options, Description, City Coordinator, Status, and Permit App Date. The first row of the table is highlighted, and the permit number '1616-222024' is circled in red.

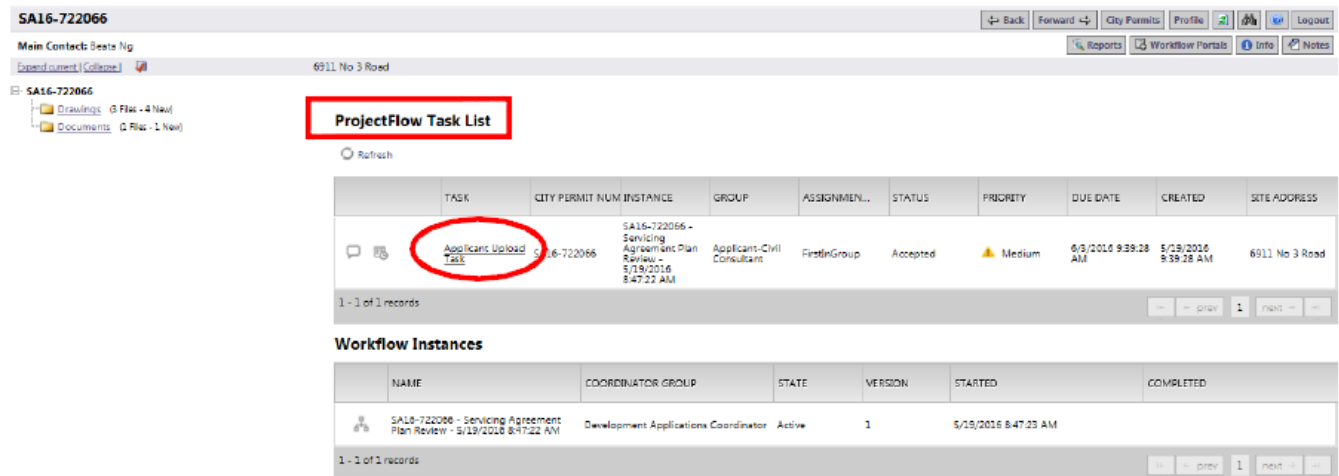
City Permit Number	Options	Description	City Coordinator	Status	Permit App Date
1616-222024	 	11111 2nd Ave - May 18 Test	Jeff Crawford	City Approved	5/18/2016 10:18:06 AM

Page 1 of 1 (1 items)

While on the SA Permit Page, access tasks by clicking on the “Workflow Portals” button.

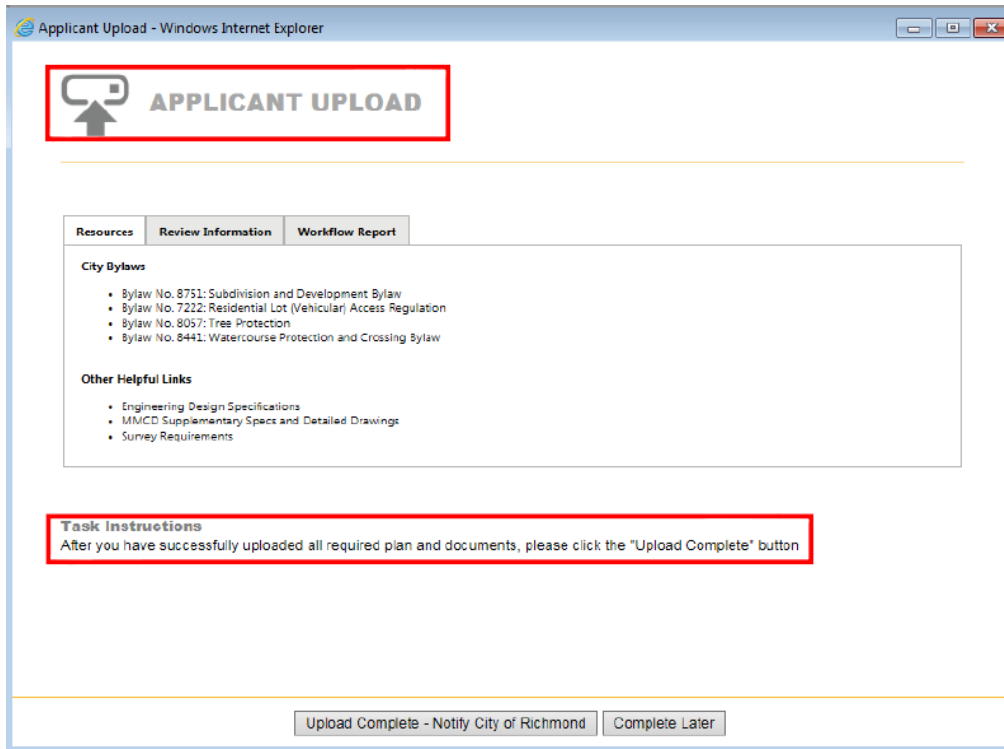


Your active tasks for the permit will appear under the “ProjectFlow Task List”. Click on the task you wish to accept.

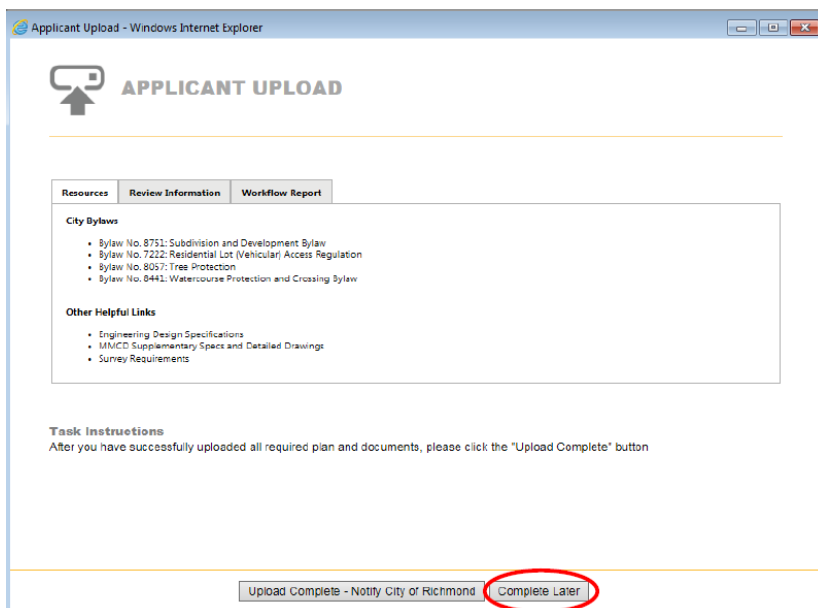


You will be prompted by the system to accept the task. Click “OK” to accept the task, and the Task Dialogue box will open. Note that you will only receive a prompt the first time you access a task; otherwise the Task Dialogue box will open directly.

A Task dialogue box will open, providing instructions for completing the task. A sample dialogue box for the Applicant Upload Task is shown below. Note that the information and instructions presented differ for each task.



After you have accepted a task, you can close the Task dialogue box by clicking the “Complete Later” button. The dialogue box can be re-open the same way at any time until you complete the task.



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

Accessing Tasks Location 2: City Permits Page – Task List

All active tasks pending your action are shown in the ProjectFlow Task List at the bottom of the City Permits Page. You can accept tasks by clicking on the Task name.

Active City Permits

2 recently entered project(s) out of 2 for Beata Ng (beata.ng@hotmail.com)

City Permit Number	Options	Description	City Coordinator	Status	Permit App Date
SA16-722066		6911 No 3 Road	Beata Ng	Applicant Upload	5/19/2016 8:47:22 AM
SA16-722065		11111 2nd Ave - May 18 Test	Jeff Craddock	City Approved	5/18/2016 10:16:06 AM

Page 1 of 1 (2 items)

ProjectFlow Task List

TASK	CITY PERMIT NUMBER	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED	SITE ADDRESS
Applicant Upload Task	SA16-722066	SA16-722066 - Servicing Agreement Plan Review - 5/19/2016 8:47:22 AM	Applicant-Civil Consultant	FirstGroup	Pending	Medium	6/3/2016 9:39:28 AM	5/19/2016 9:39:28 AM	6911 No 3 Road

1 - 1 of 1 records

You will be prompted by the system to accept the task. Click “OK” to accept the task, and the Task Dialogue Box will open, similar to if it were accessed through location 1.

Active City Permits

2 recently entered project(s) out of 2 for Beata Ng (beata.ng@hotmail.com)

City Permit Number	Options	Description	City Coordinator	Status	Permit App Date
SA16-722066		6911 No 3 Road	Beata Ng	Applicant Upload	5/19/2016 8:47:22 AM
SA16-722065		11111 2nd Ave - May 18 Test	Jeff Craddock	City Approved	5/18/2016 10:16:06 AM

Page 1 of 1 (2 items)

Message from webpage

Do you want to accept this task?

OK Cancel

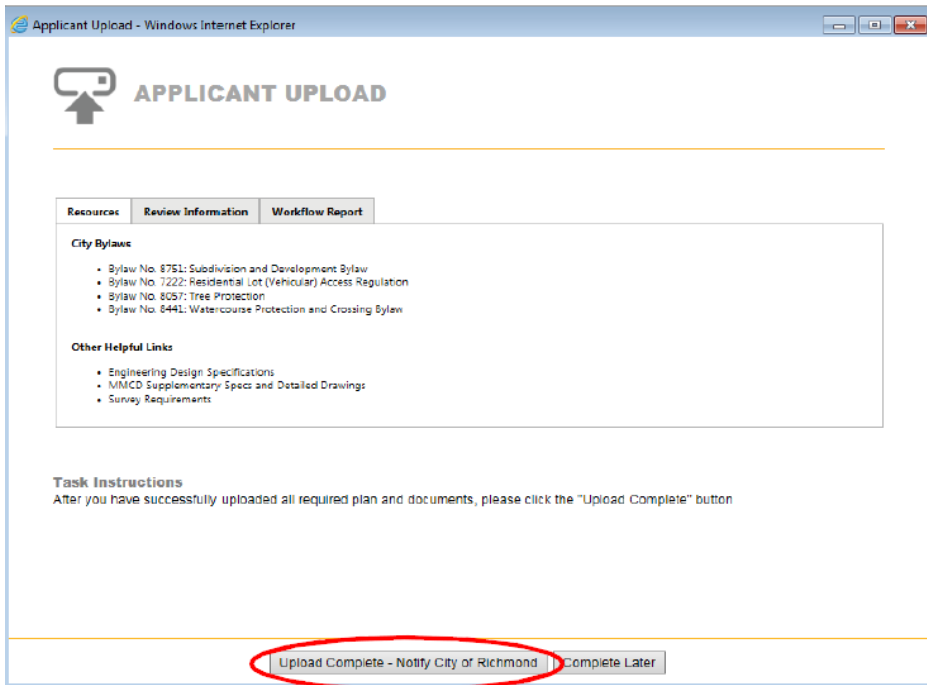
ProjectFlow Task List

TASK	CITY PERMIT NUMBER	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED	SITE ADDRESS
Applicant Upload Task	SA16-722066	SA16-722066 - Servicing Agreement Plan Review - 5/19/2016 8:47:22 AM	Applicant-Civil Consultant	FirstGroup	Pending	Medium	6/3/2016 9:39:28 AM	5/19/2016 9:39:28 AM	6911 No 3 Road

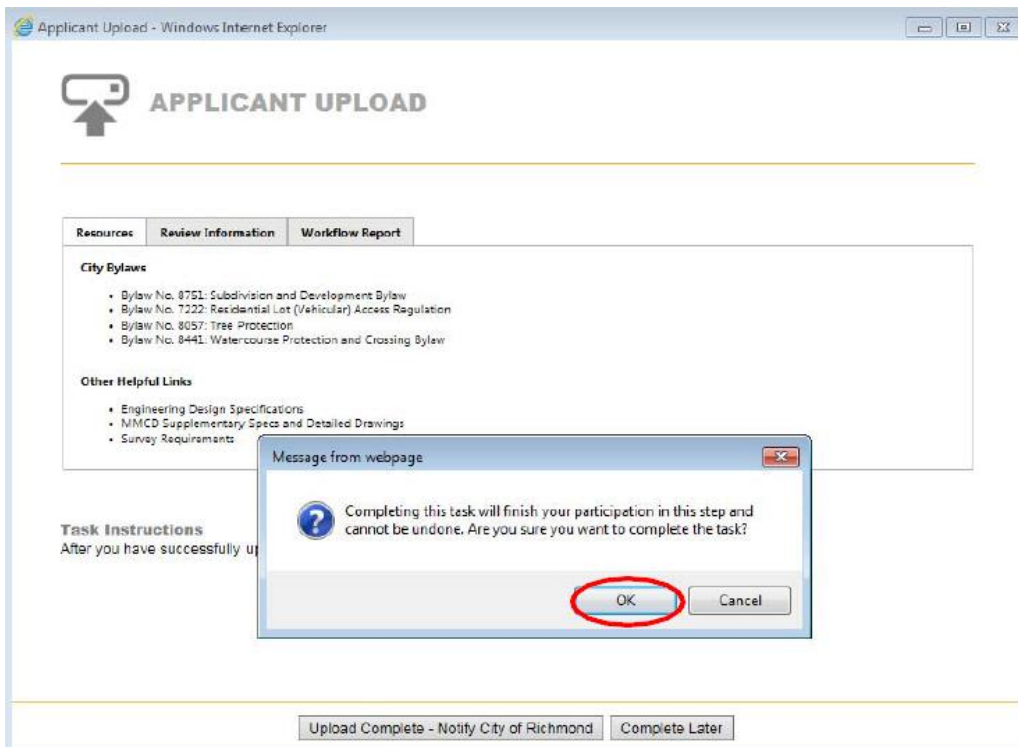
1 - 1 of 1 records

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 “Task Complete” button.



You will be prompted by a dialogue box to confirm completion of the task. Click “OK” to complete the process. The City’s Development Applications Coordinator will be notified.



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 Developer has provided the Engineering Consultant's contact details, the Engineering Consultant will receive a task, by email, to upload all necessary files to ePlan.

Servicing Agreement Drawing Review Upload Invitation

Attention [UserFirstName]:

Welcome to the City of Richmond electronic plan review system. This invitation has been sent to you in response to [ProjectName] - [ProjectDescription].

An ePlan project has been created to allow you to electronically upload your Servicing Agreement (SA) drawings and supporting documents for review. Prior to preparing and submitting the SA drawings and supporting documents, please review and follow the standards described in the [City of Richmond's ePlan Applicant User Guide](#). To access your new application, follow the instructions below:

1. Click the ePlan link below
2. Enter your User Login and Password (temp password sent in separate email if you are new user)
3. Click the City Permit Number link (if it is not listed, click the "All Permits" button)
4. Click on the "Drawings" or "Documents" folder
5. Click the "Upload Files" button and follow the instructions to upload your drawings or supporting documents
6. Accept the "ApplicantUpload" task and click the "Upload Complete - Notify Jurisdiction" button
7. Your drawings and/or documents have now been submitted for review

The City of Richmond will accept the following file types.

Drawings: PDF
Supporting Documents: PDF

User Login:	Your email address
Permit:	[ProjectName]
Description:	[ProjectDescription]
Task:	[Activity.Name]
Coordinator:	[OwnerUserName] ([OwnerEmail], [OwnerWorkPhone])
Login to ePlan	

For any technical issues or questions related to this application, please contact the Coordinator listed above.







Please do not reply to this email.

Uploading Files

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

Active City Permits Site-Wide Tasks |


3 project(s) out of 3 for Beata Ng (beata.ng@hotmail.com) Recent Permits All Permits Press Enter To Search:

City Permit Number	Options	Description	City Coordinator	Status	Permit App Date
SA16-722066	 	11111 2nd Ave - May 18 Test	Jeff Craddock	City Approved	5/18/2016 10:18:06 AM
SA16-722066	 	may 18th test 2	Jeff Craddock	City Prescreen	5/18/2016 12:38:07 PM
SA16-722066	 	6911 No 3 Road	Beata Ng	Applicant Upload	5/19/2016 8:47:22 AM

Page 1 of 1 (3 items)

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, click the “Drawings” folder and follow the steps below. Alternatively, to upload supporting documents, click the “Documents” folder. Please do not upload supporting documents into the “Drawings” folder, or vice-versa.





SA16-722066

Main Contact: Beata Ng

Expand/Close | Collapse | 6911 No 3 Road

SA16-722066

-  Drawings
-  Documents

Permit Info	Reports
City Permit #	SA16-722066
Site Address or Location	6911 No 3 Road
Site Image:	No image exists
Consultant:	Beata Ng
Consultant's Email:	beata.ng@hotmail.com
Phone:	0042704257
Consultant's Cell Phone:	
Coordinator:	Beata Ng
Coord Email:	bnng@richmond.ca
Administrators:	Tyson Florence EPlans Dev
Drawing Status:	Applicant Upload
Start/End:	Start: 5/19/2016 8:47:22 AM End: 11/19/2016 8:47:21 AM
Pass-Through:	.mov,.wmv,.avi,.htm,.html,.jpg,.gif,.png,.mp4
Versioning:	Enabled for this project

- Upon clicking on either folder, you will be presented with two buttons – “View Folders” and “Upload Files”. Click the “Upload Files” button.

SA16-722066

Main Contact: Beata Ng

Folder: SA16-722066/Drawings 0911 No 3 Road

No files currently exist in Drawings.

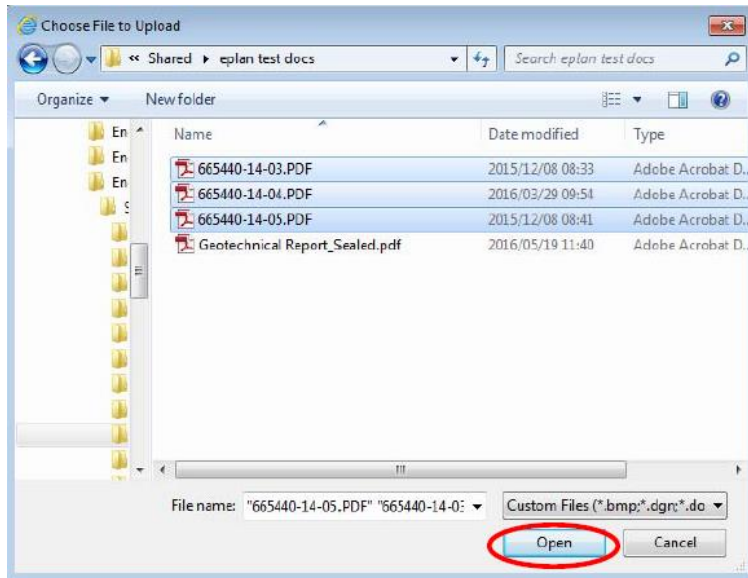
To upload files into this folder
 (1) Click the Upload button below
 (2) Follow the instructions in the pop-up window

Large files may take a few minutes to be processed.
 Click the Refresh button at the top of the page to refresh your file list view.

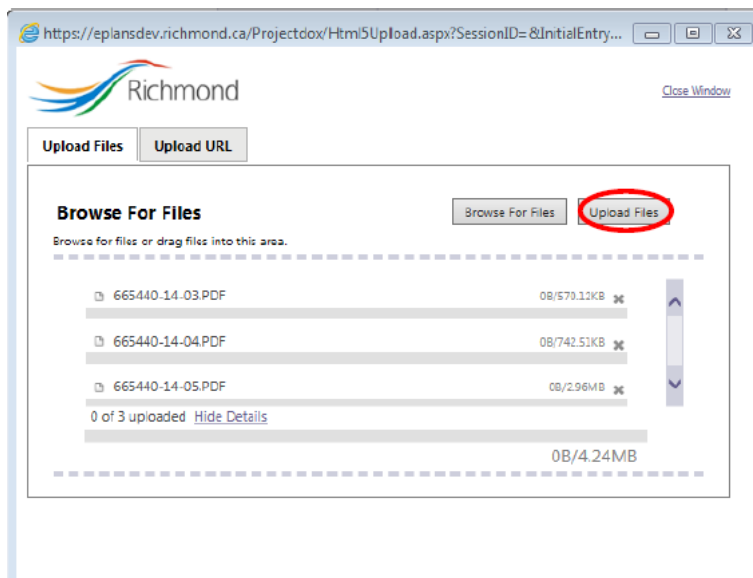
Permit Info	Reports
City Permit #	SA16-722066
Site Address or Location:	0911 No 3 Road
Site Image:	No Image exists
Consultants:	Beata Ng
Consultant's Email:	beata.ng@hotmail.com
Phones:	9042784257
Consultant's Cell Phones:	
Coordinators:	Beata Ng
Coord Email:	bing@richmond.ca
Administrators:	Tyson Florence EPlans Dev
Drawing Status:	Applicant Upload
Start/End:	Starts 5/19/2016 8:47:22 AM Ends 11/19/2016 8:47:21 AM
Pass-Through:	.mov,.wmv,.avi,.htm,.html,.install,.config,.mp4
Versionings:	Enabled for this project

- An Upload dialogue box will open. Click on the “Browse for Files” button.

4. A second dialogue will appear, allowing you to browse for files to upload from your computer. If you have Microsoft Silverlight installed, you can drag-and-drop single or multiple files into the window. If not, select individual or multiple files, then click “Open”. Multiple files can be selected using the “Shift” or “Ctrl” keys on your keyboard.

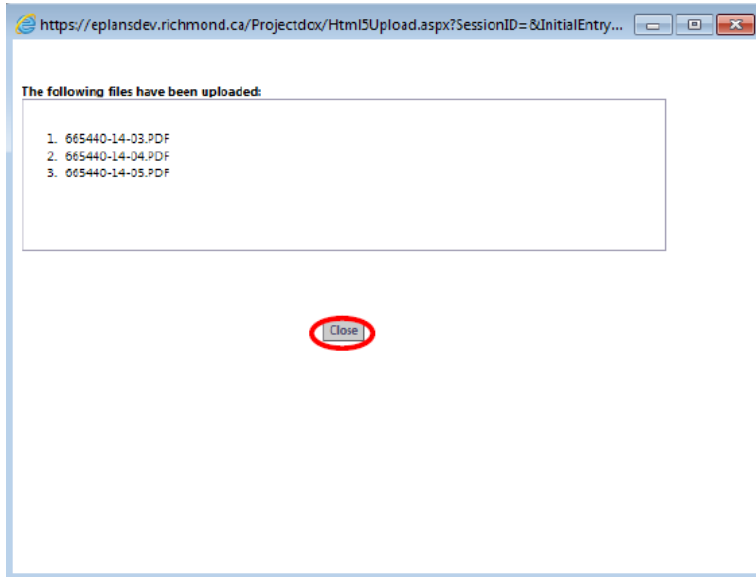


5. The files will be added to the upload dialogue box. When all files you wish to upload are listed, click the “Upload Files” button to upload your files to ePlan, or add more files by clicking “Browse for Files” again.



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 City’s Development Applications Coordinator requesting files to be deleted on your behalf.

- A dialogue box will open to confirm files that have been uploaded. Click “Close”.



- Once the files are uploaded to the folder, you should see thumbnail images of each file on the Permits Page. Icons are displayed next to each thumbnail showing the file name, author, upload date and file size.

Richmond

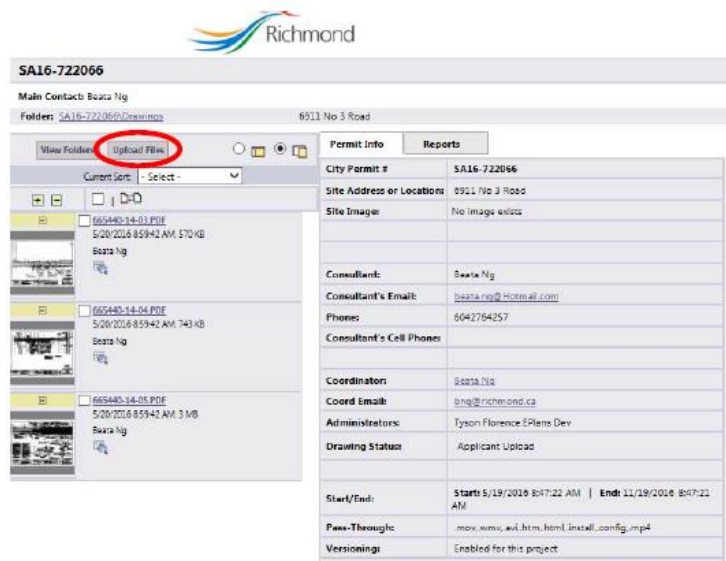
SA16-722066

Main Contact: Beata Ng

Folder: SA16-722066/Drawings 8911 No 3 Road

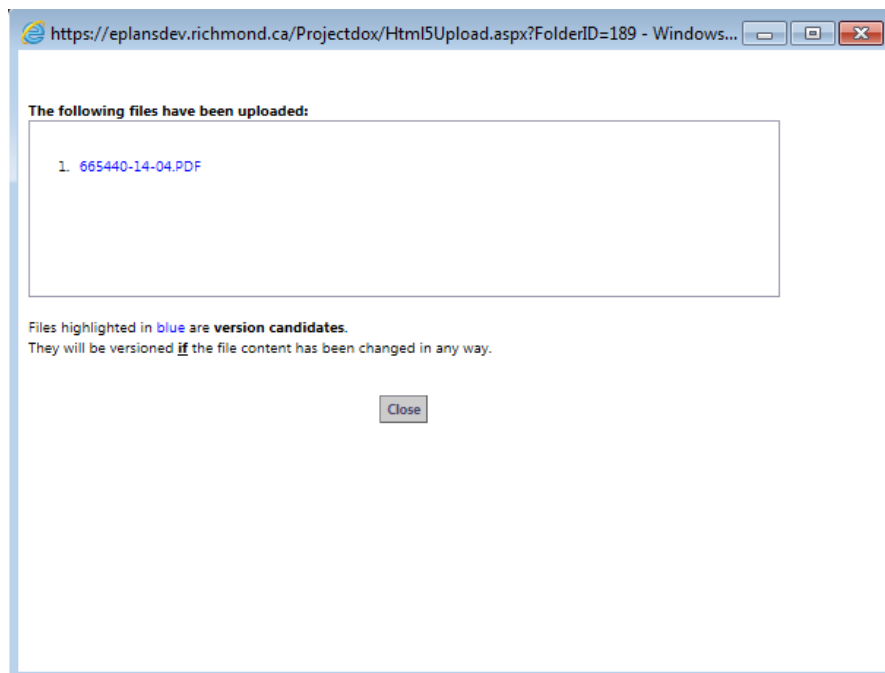
View Folders	Upload Files	Permit Info	Reports																																
<div style="border: 2px solid red; padding: 5px;"> <table border="1"> <tr> <td></td> <td>665440-14-03.PDF 5/20/2016 8:59:42 AM 570 KB Beata Ng</td> </tr> <tr> <td></td> <td>665440-14-04.PDF 5/20/2016 8:59:42 AM 743 KB Beata Ng</td> </tr> <tr> <td></td> <td>065440-14-05.PDF 5/20/2016 8:59:42 AM 3 MB Beata Ng</td> </tr> </table> </div>		665440-14-03.PDF 5/20/2016 8:59:42 AM 570 KB Beata Ng		665440-14-04.PDF 5/20/2016 8:59:42 AM 743 KB Beata Ng		065440-14-05.PDF 5/20/2016 8:59:42 AM 3 MB Beata Ng	<table border="1"> <tr> <td>City Permit #</td> <td>SA16-722066</td> </tr> <tr> <td>Site Address or Locations</td> <td>8911 No 3 Road</td> </tr> <tr> <td>Site Images</td> <td>No image exists</td> </tr> <tr> <td>Consultant:</td> <td>Beata Ng</td> </tr> <tr> <td>Consultant's Email:</td> <td>beata.ng@hotmail.com</td> </tr> <tr> <td>Phone:</td> <td>6042784257</td> </tr> <tr> <td>Consultant's Cell Phones:</td> <td></td> </tr> <tr> <td>Coordinator:</td> <td>Beata Ng</td> </tr> <tr> <td>Coord Email:</td> <td>bnq@richmond.ca</td> </tr> <tr> <td>Administrators:</td> <td>Tyson Florence ePlans Dev</td> </tr> <tr> <td>Drawing Status:</td> <td>Applicant Upload</td> </tr> <tr> <td>Start/End:</td> <td>Start: 5/19/2016 8:47:22 AM End: 11/19/2016 8:47:22 AM</td> </tr> <tr> <td>Pass-Throughs:</td> <td>mov, www, avi, htm, html, install, config, mp4</td> </tr> <tr> <td>Versioning:</td> <td>Enabled for this project</td> </tr> </table>	City Permit #	SA16-722066	Site Address or Locations	8911 No 3 Road	Site Images	No image exists	Consultant:	Beata Ng	Consultant's Email:	beata.ng@hotmail.com	Phone:	6042784257	Consultant's Cell Phones:		Coordinator:	Beata Ng	Coord Email:	bnq@richmond.ca	Administrators:	Tyson Florence ePlans Dev	Drawing Status:	Applicant Upload	Start/End:	Start: 5/19/2016 8:47:22 AM End: 11/19/2016 8:47:22 AM	Pass-Throughs:	mov, www, avi, htm, html, install, config, mp4	Versioning:	Enabled for this project
	665440-14-03.PDF 5/20/2016 8:59:42 AM 570 KB Beata Ng																																		
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Pass-Throughs:	mov, www, avi, htm, html, install, config, mp4																																		
Versioning:	Enabled for this project																																		

8. To upload more files, click the “Upload Files” button and repeat steps 3 to 6. You are able to continue to add files until you identify the Applicant Upload Task as complete within the Applicant Upload Task dialogue box.



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 following prompt will appear, confirming that the uploaded file will replace the existing as a new version.



Within the Documents pane, the version number will now be shown next to the drawing's thumbnail image.

SA16-722066

Main Contact: Beata Ng

Folder: SA16-722066\Drawings 6911 No 3 Road

View Folders Upload Files

Current Sort: Select

665440-14-03.PDF	5/20/2016 8:59:42 AM, 570 KB	Beata Ng
665440-14-03.PDF v2	5/20/2016 8:59:42 AM, 570 KB	Beata Ng
665440-14-05.PDF	5/20/2016 8:59:42 AM, 3 MB	Beata Ng

Permit Info	Reports
City Permit #	SA16-722066
Site Address or Location	6911 No 3 Road
Site Images	No image exists
Consultant	Beata Ng
Consultant's Email	beata.ng@hotmail.com
Phone	6042764257
Consultant's Cell Phone	
Coordinator	Beata Ng
Coord Email	bnc@richmond.ca
Administrators	Tyson Florence, EPlans Dev
Drawing Status	Applicant Pre-screen Corrections
Start/End	Start: 5/19/2016 8:47:22 AM End: 11/19/2016 8:47:21 AM
Pass-Through	.mov, wmv, avi, htm, html, install, config, mp4
Versioning	Enabled for this project

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 City's Coordinator to request that it be deleted.

Complete Applicant Upload Task

Once all drawings and documents are uploaded and ready to be submitted to the City for review, remember to click "Upload Complete" within the ePlan Task Dialogue Box (See Section 5 for instructions on completing tasks). Once you have identified the task as complete, a notification will be sent to the City's Development Applications Coordinator to initiate the Pre-screening process.

Applicant Upload - Windows Internet Explorer

APPLICANT UPLOAD

Resources Review Information Workflow Report

City Bylaws

- Bylaw No. 8751: Subdivision and Development Bylaw
- Bylaw No. 7232: Residential Lot (Vehicular) Access Regulation
- Bylaw No. 803: 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
After you have successfully uploaded all required plan and documents, please click the "Upload Complete" button

Upload Complete - Notify City of Richmond Complete Later

7. Prescreen Correction Task

Once you have uploaded documents, the City's Development Applications Coordinator will receive a submission notification. The Coordinator will pre-screen the submission within 48 working hours of receiving it.

Pre-screening is a cursory review to ensure that the uploaded files meet the submission requirements and standards. Examples of where submission requirements may not be met include unreadable drawings, incorrectly formatted PDFs, un-sealed files, missing drawings, missing documents or mis-named drawings.

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, as shown below, directing you to make the necessary corrections on ePlan.

Pre-Screen Correction Request Task Assignment

Attention [UserFirstName]:

Your drawing review submission for [ProjectName] - [ProjectDescription] has not met the minimum requirements for acceptance. You may review correction comments and requirements by accessing [City of Richmond ePlan](#).

When corrected drawings and or documents are ready for re-submittal, please login to [City of Richmond ePlan](#) and follow the instructions provided for re-submittal.

Please be advised when re-submitting drawings and or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested

Permit:	[ProjectName]
Description:	[ProjectDescription]
Task:	[Activity.Name]
Coordinator:	[OwnerUserName] ([OwnerEmail], [OwnerWorkPhone])

[Login to ePlan](#)

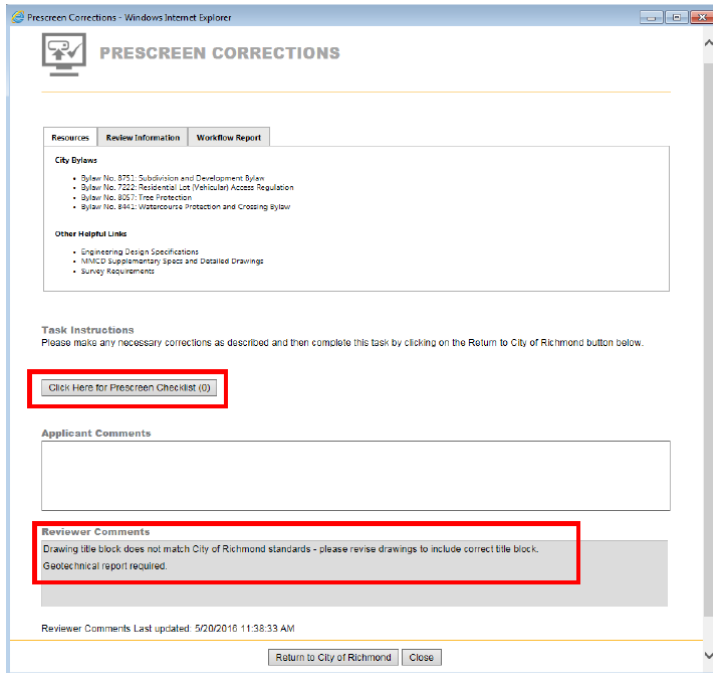
For any technical issues or questions related to this application, please contact the Coordinator listed above.

Please do not reply to this email.

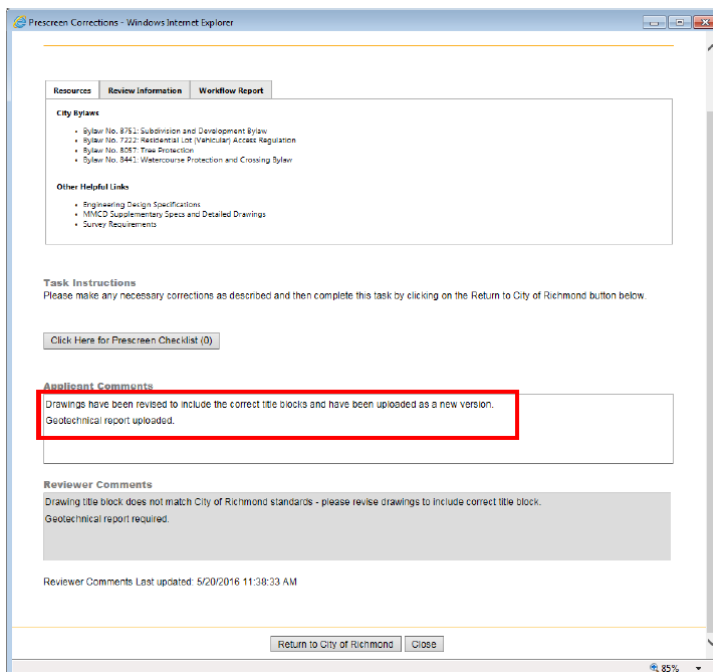
Follow the steps below to amend your submission:

1. Login to ePlan and open the Prescreen Correction Task for your permit. (Refer to Section 5 for instructions on accepting and opening tasks.)

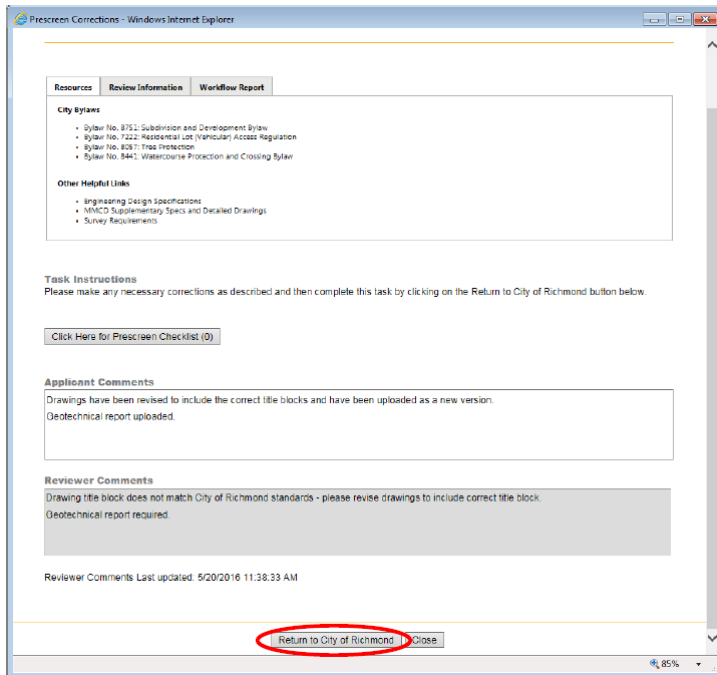
2. A Prescreen Correction Task dialogue box will open. Prescreening comments may be provided through the “Reviewer Comments” section or within a prescreen checklist (click on “Click Here for Prescreen Checklist”).



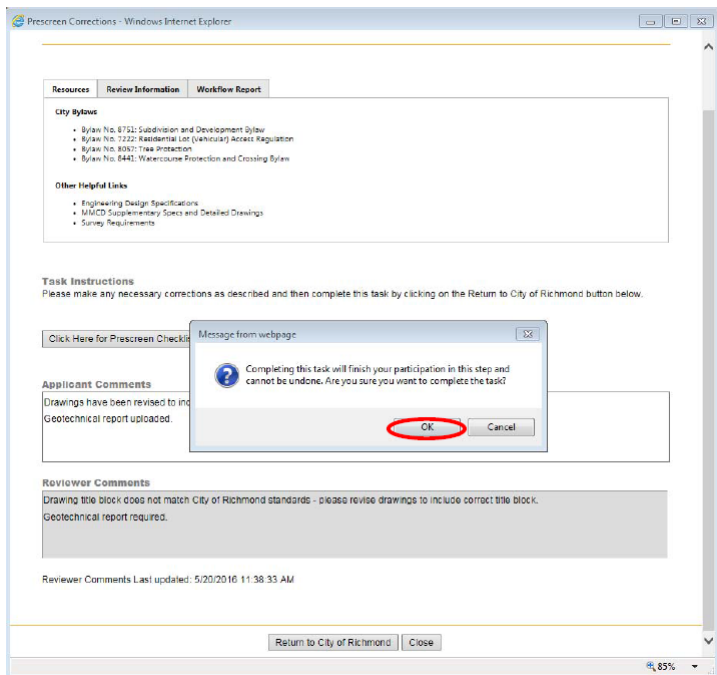
3. Review the Prescreening comments to identify what submission requirements were not met.
4. Correct files as required and upload them again to the Permit folder, following upload instructions outlined in Section 6. Please ensure the same file name as the original submission is used.
5. If the Prescreen Corrections Task dialogue box has been closed, re-open it. Add any relevant comments in the “Applicant Comments” box to confirm that the Prescreening comments have been addressed (see example below).



6. Click on “Return to City of Richmond” to complete the task.



7. 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 a “Applicant Re-submit Task” notification through email requesting document resubmission.

Review Correction Request Task Assignment

Attention [UserFirstName]:

Your drawing review submission for [ProjectName] - [ProjectDescription] has been reviewed, but has generated staff comments or requires corrections. You may review the comments and drawing markups by accessing [City of Richmond ePlan](#).

When drawings and / or documents have been corrected, please login to [City of Richmond ePlan](#) and resubmit as per the instructions in the [City of Richmond's ePlan Applicant User Guide](#).

Please be advised when re-submitting drawings and / or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested

Permit:	[ProjectName]
Description:	[ProjectDescription]
Task:	[Activity.Name]
Coordinator:	[OwnerUserName] ([OwnerEmail], [OwnerWorkPhone])

[Login to ePlan](#)

For any technical issues or questions related to this application, please contact the Coordinator listed above.

Please do not reply to this email.

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

1. Review Changemarks, Correction Items and Reviewer Comments
2. Respond to Changemarks and Correction Items
3. Revise and re-upload permit files based on City review comments
4. Respond to Reviewer Comments
5. 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).

The Applicant Resubmit Task dialogue box, shown below, will open. This dialogue box will contain the following information:

1. Access to the City’s Changemarks and Correction Items report
2. A summary of each City Department’s review status, together with the Reviewer’s contact and their Reviewer comments.
3. A checklist of task instruction.

Resources | **Review 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
Applicant Resubmit Task for the Staff Review Process

1 View Changemark Items (3) | View/Edit Checklist Items (0)

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
City Planners	Andy Bell abell@richmond.ca	Corrections Required	Please revise drawings according to markups.	

2

Task Instructions

3

I have completed all corrections per the changemarks and checklist items

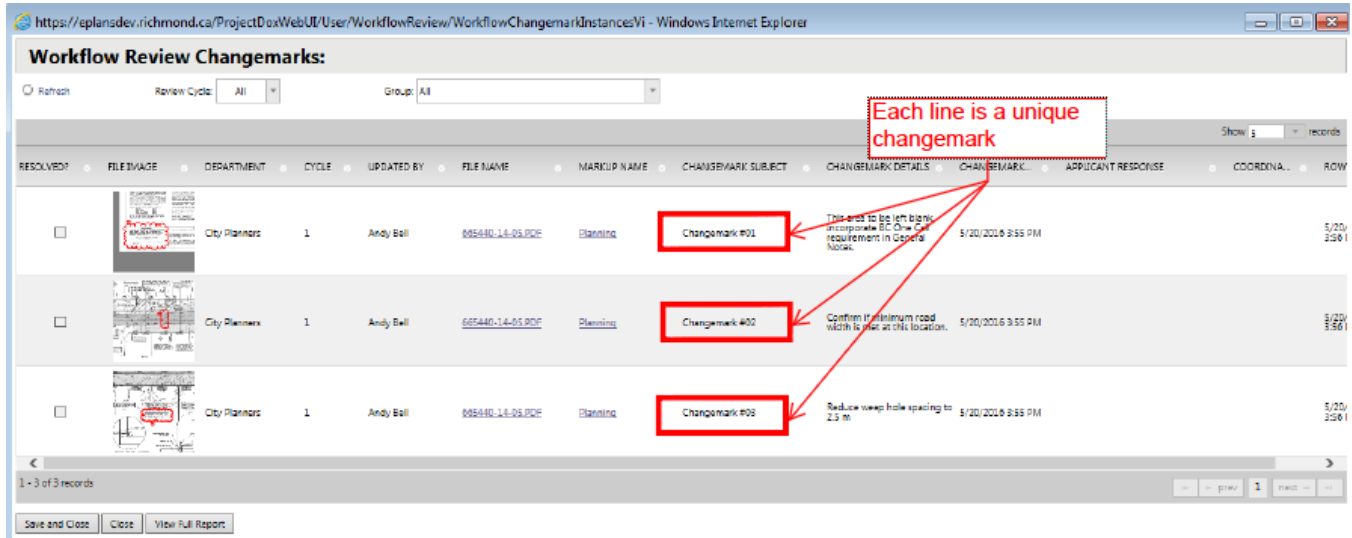
I have uploaded all corrected plans using the SAME file names

Resubmit Complete | Close eForm

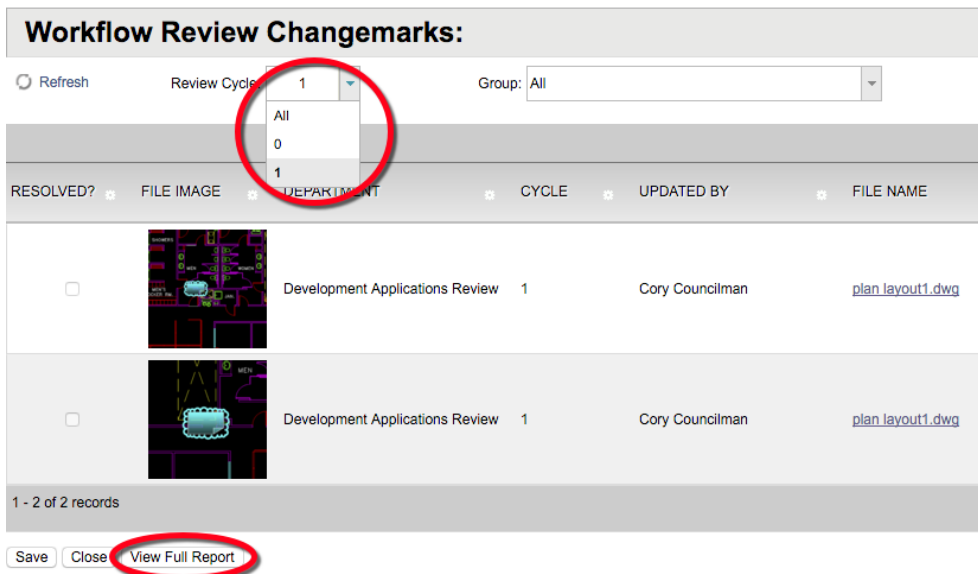
Changemarks and Correction Items Report

The City’s review comments are provided to Engineering Consultants in the form of Changemarks and Correction Items. While Correction Items are standardized comments regarding the submission, Changemarks are unique notes from the reviewer. Both items must be addressed by the Engineering Consultant.

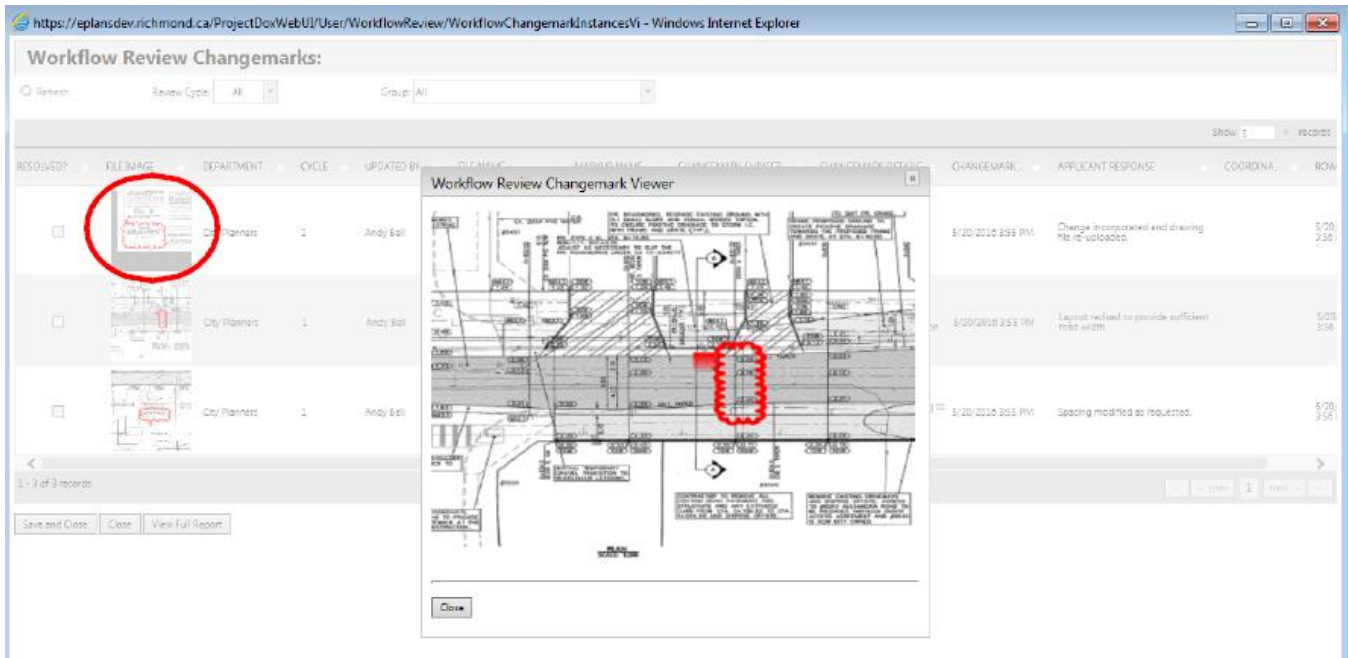
Access the Changemarks or Correction Items report by clicking on their respective buttons. Clicking on the Changemark button will open a Changemark Report dialogue box, as shown below.



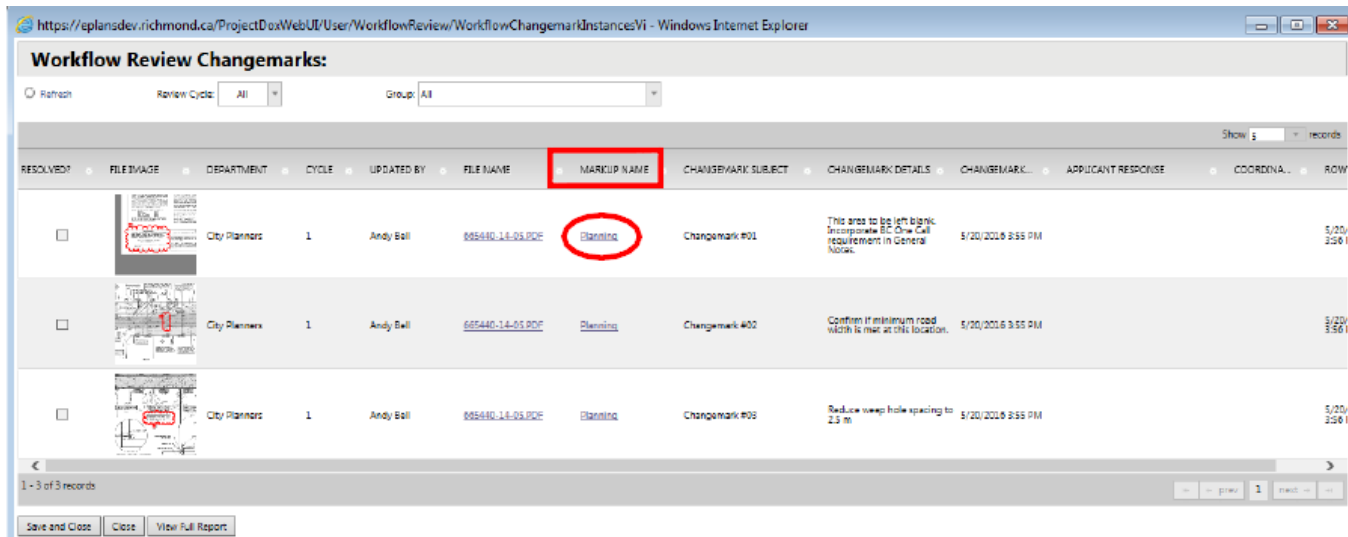
By default, you will see Changemarks for the current review cycle. However, Changemarks for previous review cycles can also be reviewed using the “Review Cycle” dropdown tab. You can also obtain an exportable report of all Changemarks relating to the permit by clicking the “View Full Report” button.



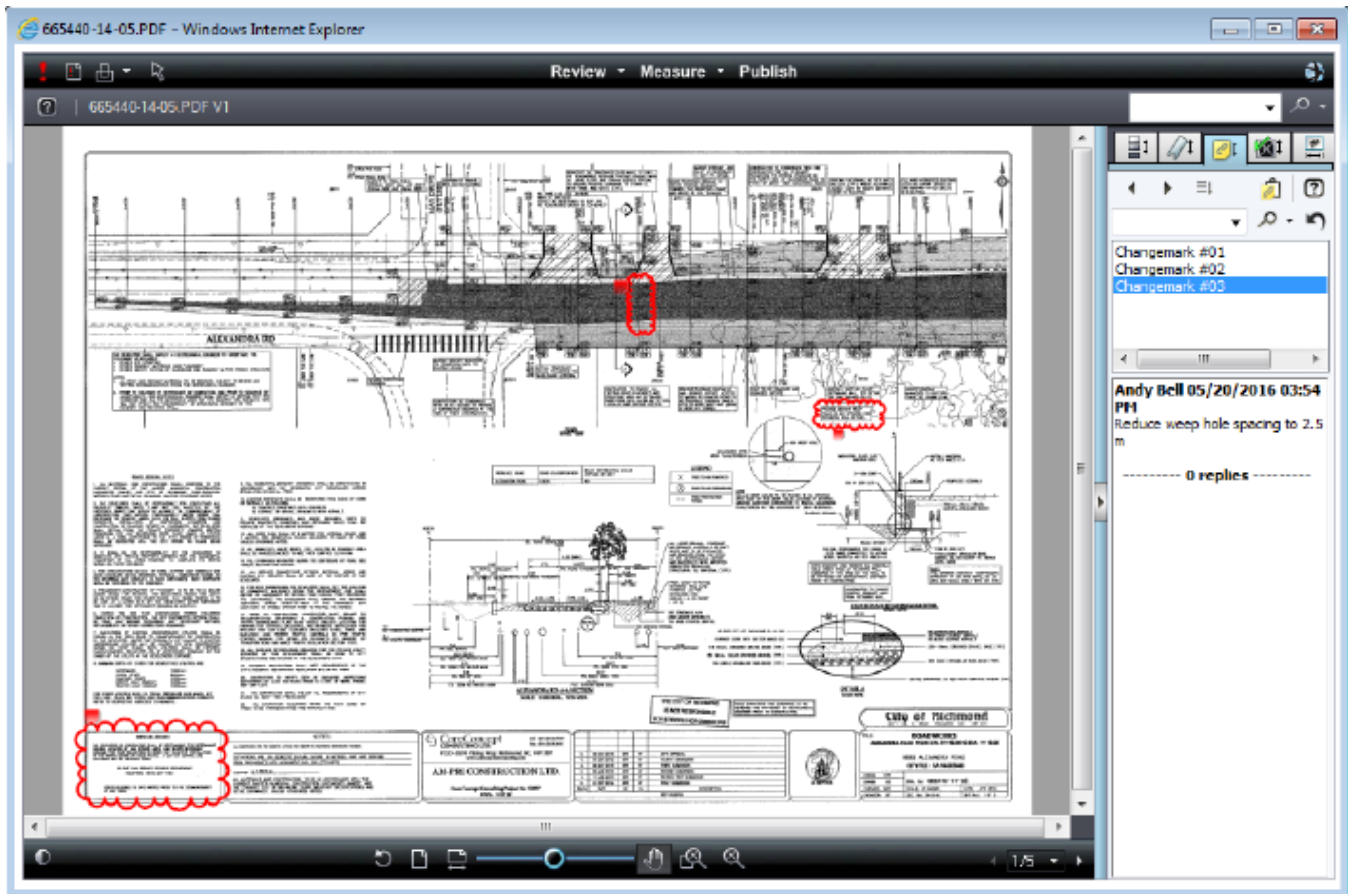
The Changemark Report contains information on the originating department of the review comments, the reviewer, the associated file and markup, and the comment left by the reviewer pertaining to that Changemark. You can zoom in to see the drawing markup by clicking on the thumbnail.



To access the full markup drawing will all Changemarks shown, click on the Markup Name, shown below. Note that clicking on the file name under "FILENAME" will open the original submission file without the City's comments.



The markup will open on a new dialogue box.



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.

Alternatively, you can also access all markups pertaining to a file in the Document pane within the SA Permit Page. Markups are indicated with an icon resembling a red pen.

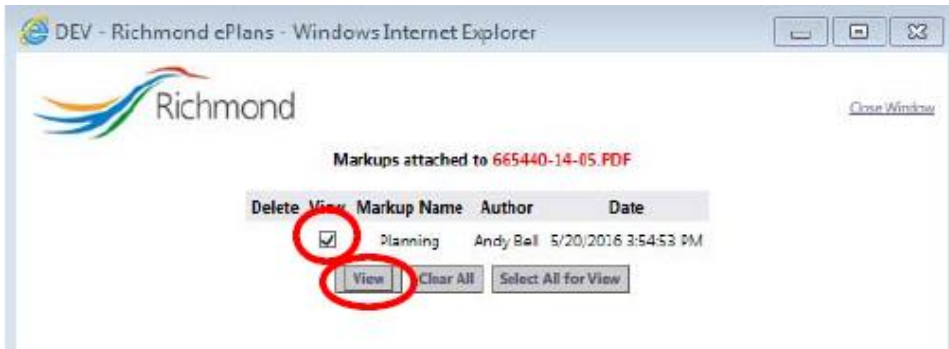
SA16-722066

Main Contact: Beata Ng

Folder: SA16-722066/Drawings 6911 No 3 Road

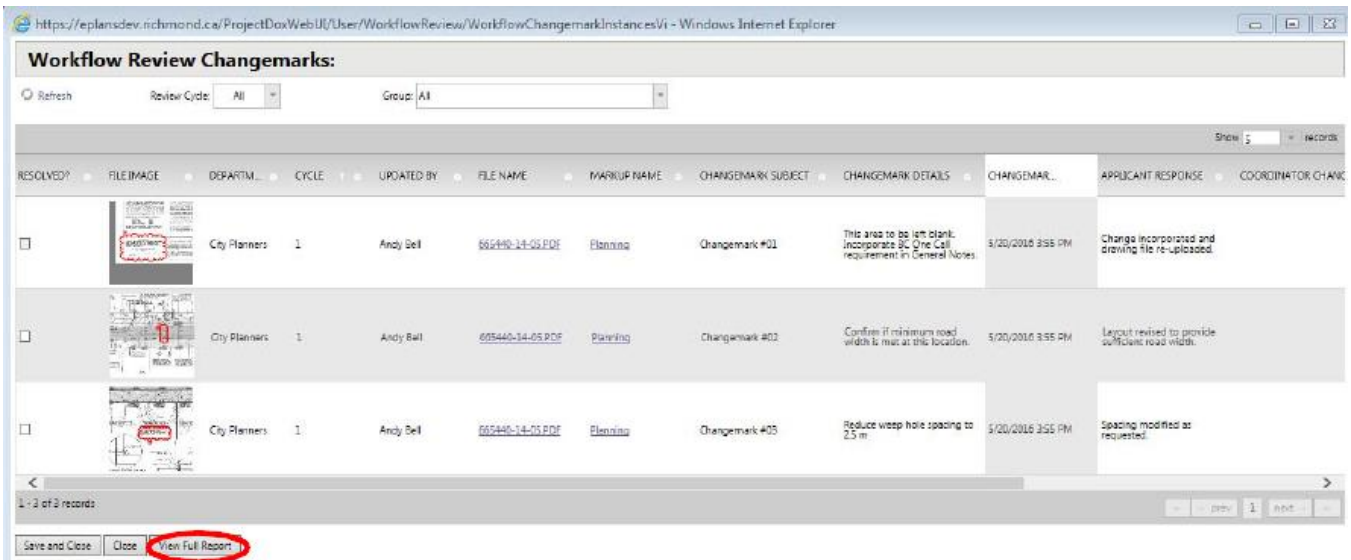
View Folders	Upload Files	Permit Info	Reports
Current Sort: - Select - 665440-14-83.PDF 5/20/2016 8:59:42 AM, 570 KB Beata Ng		City Permit # : SA16-722066 Site Address or Location : 6911 No 3 Road Site Image : No image exists	
665440-14-84.PDF V2 5/20/2016 11:00:30 AM, 747 KB Beata Ng		Consultant : Beata Ng Consultant's Email : beata.ng@hotmail.com Phone : 6042764257 Consultant's Cell Phone :	
665440-14-85.PDF 5/20/2016 8:59:42 AM, 3 MB Beata Ng		Coordinator : Beata Ng Coord Email : brng@richmond.ca Administrators : Tyson Florence, EPlans Dev Drawing Status : Applicant Resubmit	
		Start/End : Start: 5/19/2016 8:47:22 AM End: 11/19/2016 8:47:21 AM Pass-Through : .mov,.wmv,.avi,.htm,.html,.install,.config,.mp4 Versioning : Enabled for this project	

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.

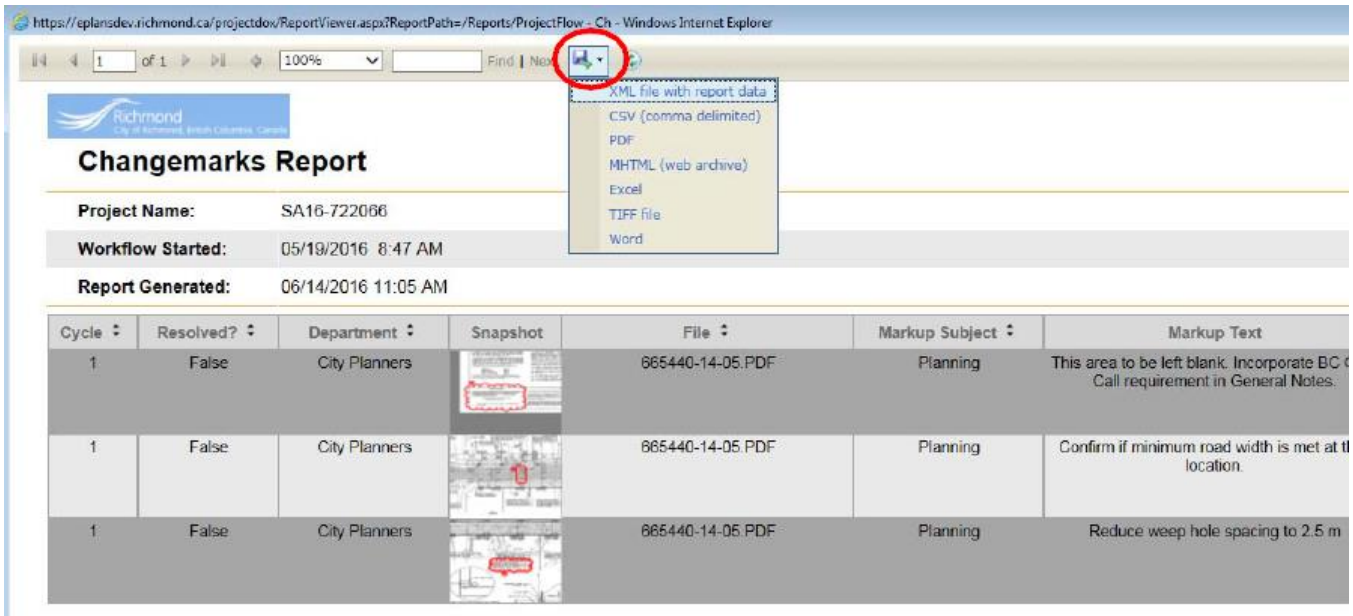


Each Markup will contain one department or reviewer’s comments. You can overlay various reviewers’ comments by selecting more than one checkbox at a time.

To review the full set of City comments, it is recommended that you download the full Changemark and Correction Items report. To do so, click “View Full Report” in the Changemark or Correction Items dialogue box.

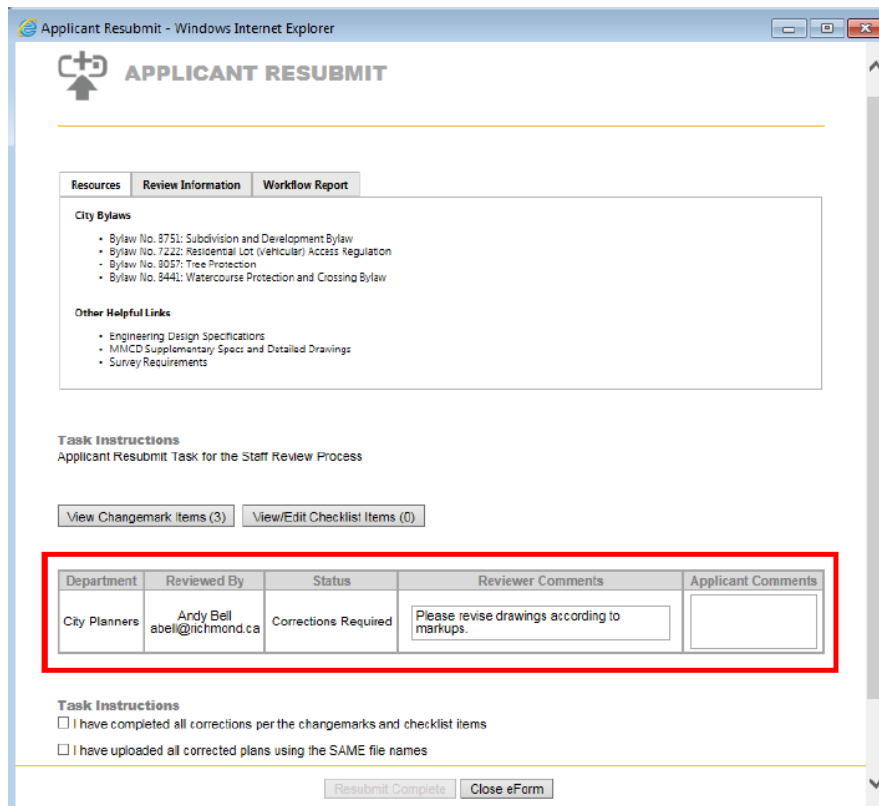


A new dialogue box will open with the full report. You may export the report by clicking on the disk icon at the top of the report. The report can be exported to any of the following formats: XML, CSV, PDF, MHTML, Excel, TIFF, or Word.



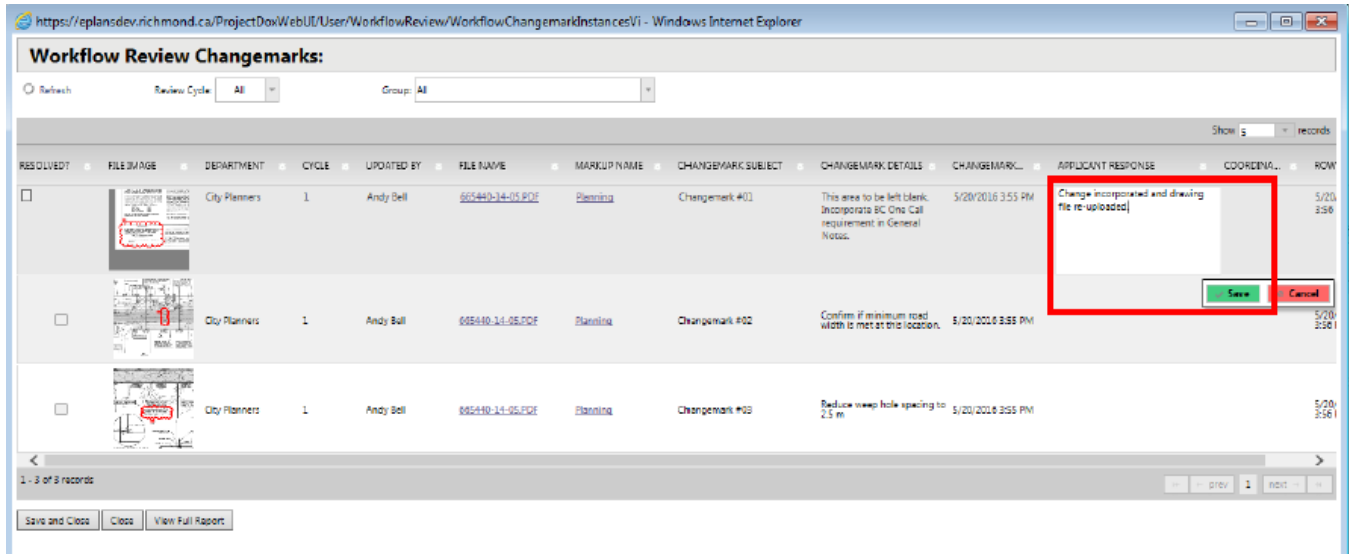
Reviewer Comments

General comments from reviewers regarding the submission are found in the Applicant Resubmit Task dialogue box.

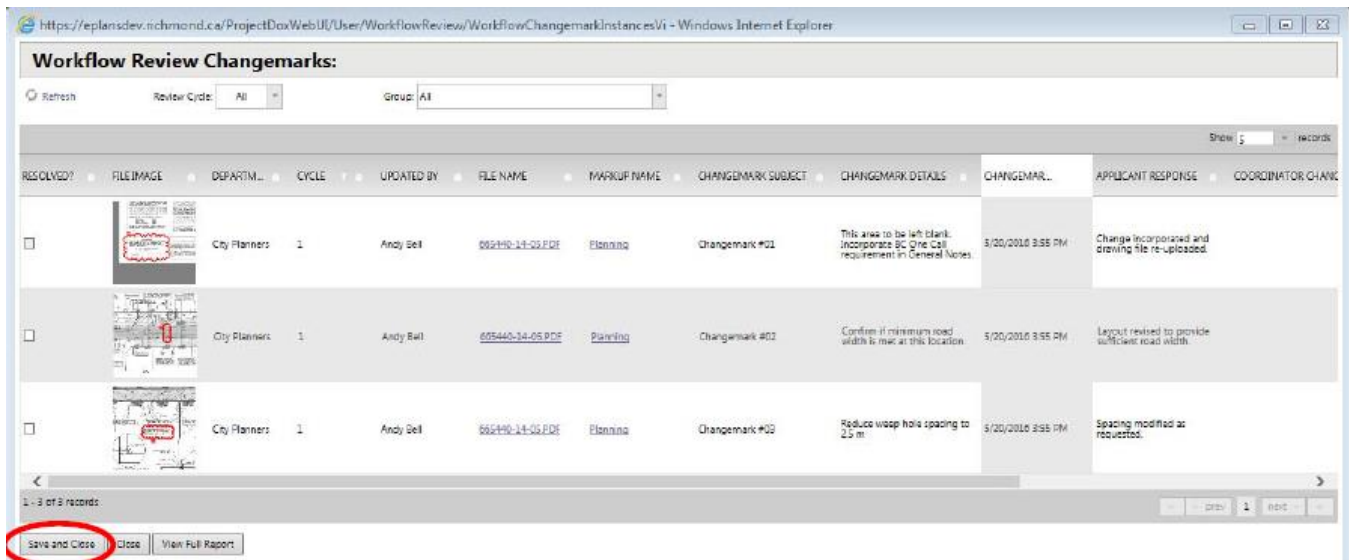


Step 2: Respond to Changemarks and Correction Items

Once the requested change has been made, respond to each Changemark item within the Changemark Report dialogue box by entering notes under “Applicant Response”. Double click under “Applicant Response” to open a text box and enter notes or comments. Click “Save” after your entry is complete.



Click “Save and Close” when you have entered responses to all Changemark comments.



Complete the same process for Correction Items.

Step 3: Revise and Re-upload Permit Files

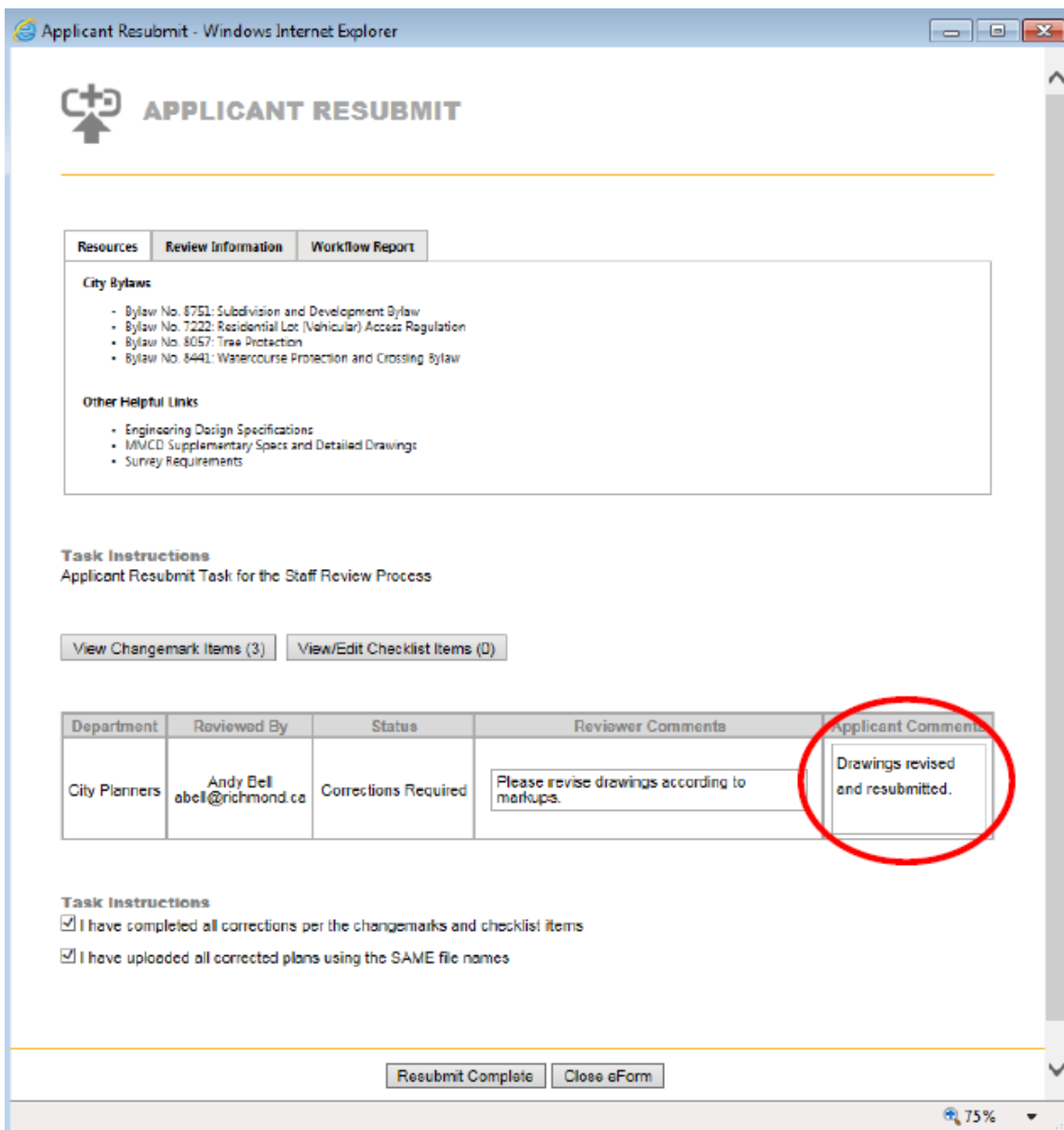
The Engineering Consultant shall revise all documents as required to adequately address the City’s comments, and upload the revised files through ePlan. Refer to Section 6 for help on uploading files.

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 4: Respond to Reviewer Comments

Once all Changemarks and Correction Items have been addressed and drawings are revised and re-uploaded through ePlan, re-open the Applicant Resubmit Task dialogue box. Confirm that all reviewer comments have been addressed and respond to general reviewer comments under “Applicant Comments.”



Step 5: Complete and Close Task

Confirm that all tasks have been completed by checking off each item under “Task Instructions”, then click “Resubmit Complete” to return the submission to the City for subsequent review.

Applicant Resubmit - Windows Internet Explorer

APPLICANT RESUBMIT

Resources | Review 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
Applicant Resubmit Task for the Staff Review Process

View Changemark Items (3) | View/Edit Checklist Items (0)

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
City Planners	Andy Bell abel@richmond.ca	Corrections Required	Please revise drawings according to markups.	Drawings revised and resubmitted.

Task Instructions

- I have completed all corrections per the changemarks and checklist items
- I have uploaded all corrected plans using the SAME file names

Resubmit Complete | Close eForm

75%

9. Approval

When the drawing review is approved by all reviewers, both the Applicant 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 e-mail indicating that your permit is ready and instructions that you may download and print your files.

The email will indicate the number of printed, sealed drawing sets to be sent to the City for field review purposes.

10. Topics & Notes

The Topics & Notes feature allows the parties involved in a Permit to leave notes and comments for each other.

Topics & Notes can be used for the following purposes:

- **Email Correspondence:** Parties involved in the permit can email each other through Topics and Notes. ePlan will automatically send the email to the recipient.
- **Partial Approval Notice:** Partial approval notices from the City will be sent via Topics and Notes.
- **Request for Information:** Either the City or the Applicant may request information or clarification through Topics and Notes.
- **Telephone Conversations:** For decisions made through telephone conversations, records of the conversation can be made in Topics and Notes. This information will become available to all parties involved in the permit, and will be kept on record through ePlan.

Using Topics & Notes, you can do the following:

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

Adding a New Topic

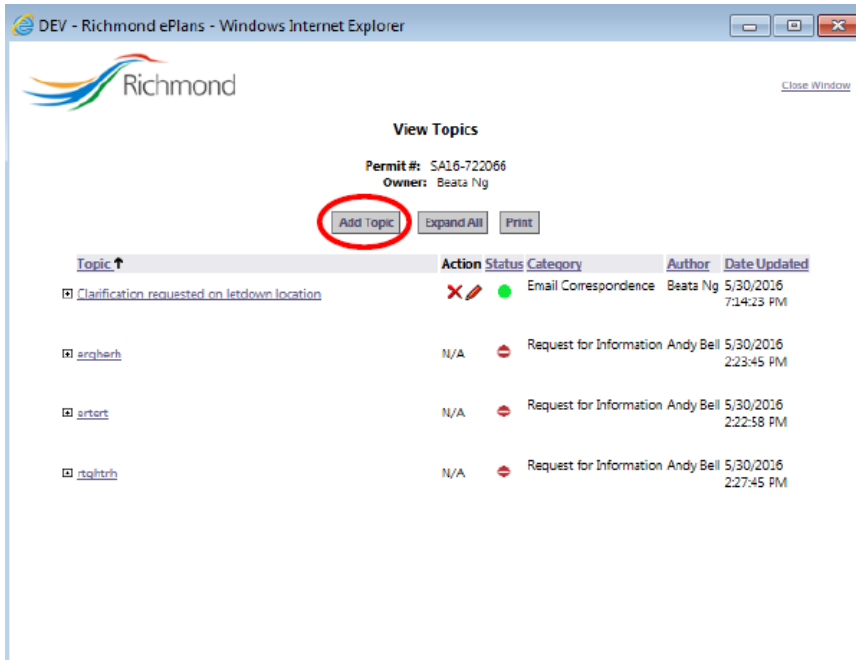
Access the Topics & Notes function by clicking the “Notes” button within the SA Permit Page.



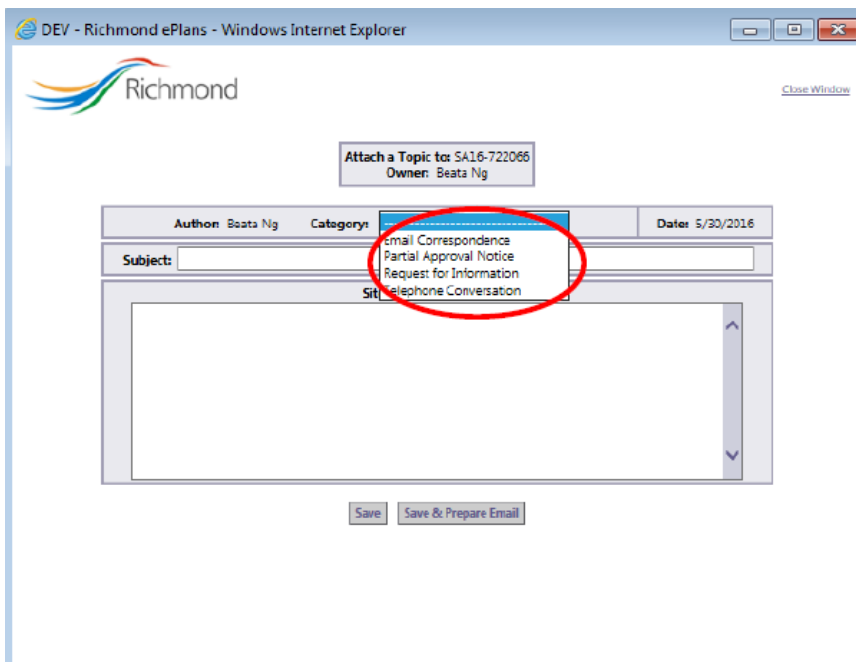
The screenshot shows the SA Permit Page for permit 5A16-722063. The page includes a navigation bar with buttons for Back, Forward, City Permits, Profile, and Logout. Below the navigation bar, there are buttons for Reports, Workflow Portals, Info, and Notes. The Notes button is circled in red. The main content area displays permit information and a list of documents.

Permit Info	Reports
City Permit #	5A16-722063
Site Address or Location	11111 2nd Ave - May 18 Test
Site Image	No image exists
Consultant	Besta Ng
Consultant's Email	bsata.ng@hotmail.com
Phone	6042764257
Consultant's Cell Phone	
Coordinators	Jeff Craddock
Coord Email	jcraddock@richmond.ca
Administrators	Tyxon Florence, Erlene Dew
Drawing Status	City Approved
Start/End	Start: 5/18/2016 10:18:06 AM End: 11/18/2016 10:18:04 AM
Pass-Through	.mov,.wmv,.avi,.html,.html,.install,.config,.mp4
Versioning	Enabled for this project

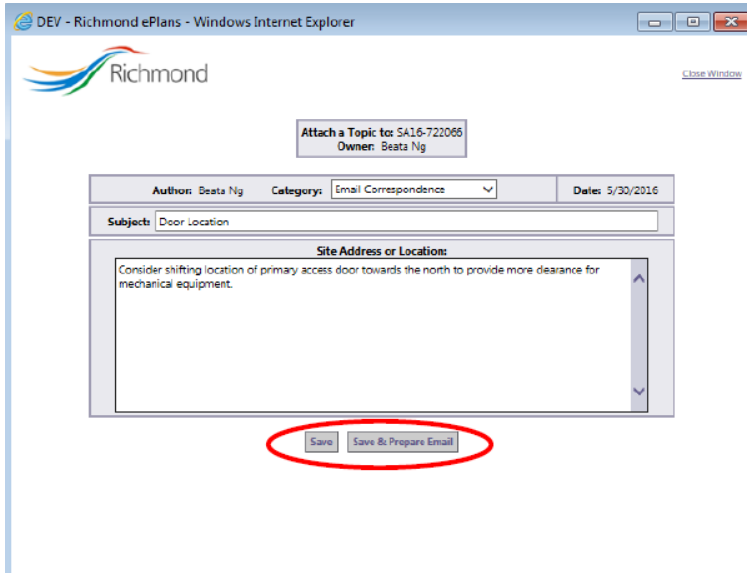
A Topics dialogue box will open. This dialogue box contains a report of all Topics that have been opened for the permit. To add a new topic, click “Add Topic”



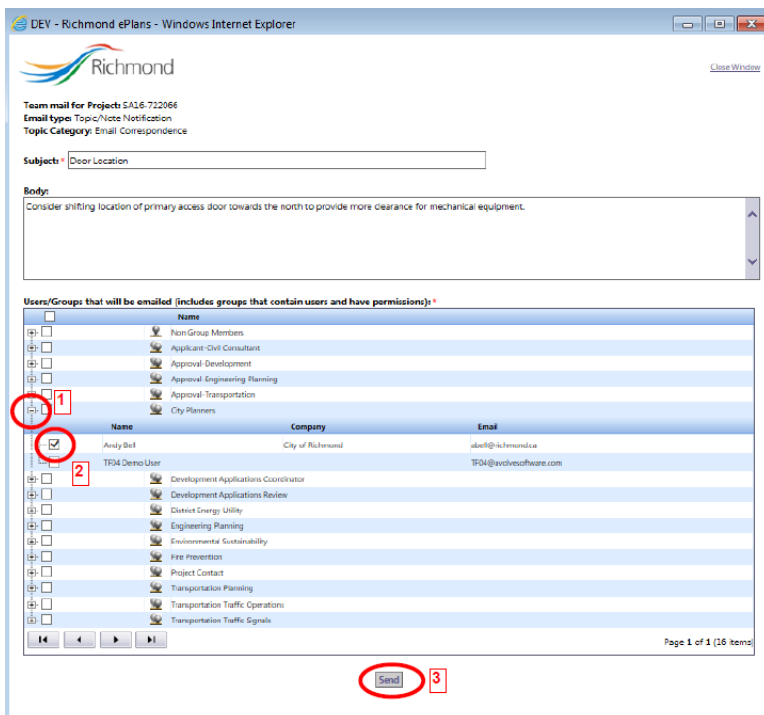
The dialogue box will reload to show a comment box, where you can input the intent of the topic, provide a subject title, and leave your comments. Begin by selecting the purpose of your topics through the “Category” drop-down menu.



Once you have entered the subject title and content of the Topic, click either “Save” or “Save & Prepare Email”.



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 project party sends you an email through ePlan, you will receive a notification email within information on the originator, the permit of discussion, the Topic subject and the comments left. Respond to the comment by clicking “Topic Access”.

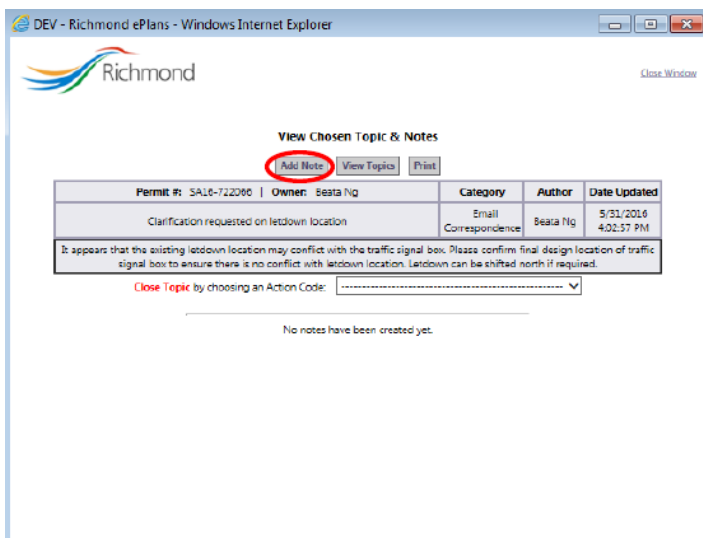
ProjectDox - Team Mail - Topic attached to project

Project:	SA16-722066	Information on originator and permit of interest
Author:	Beata Ng	
Subject:	Clarification requested on letdown location	
Category:	Email Correspondence	
	Project Access Topic Access Login to ProjectDox	Topic content

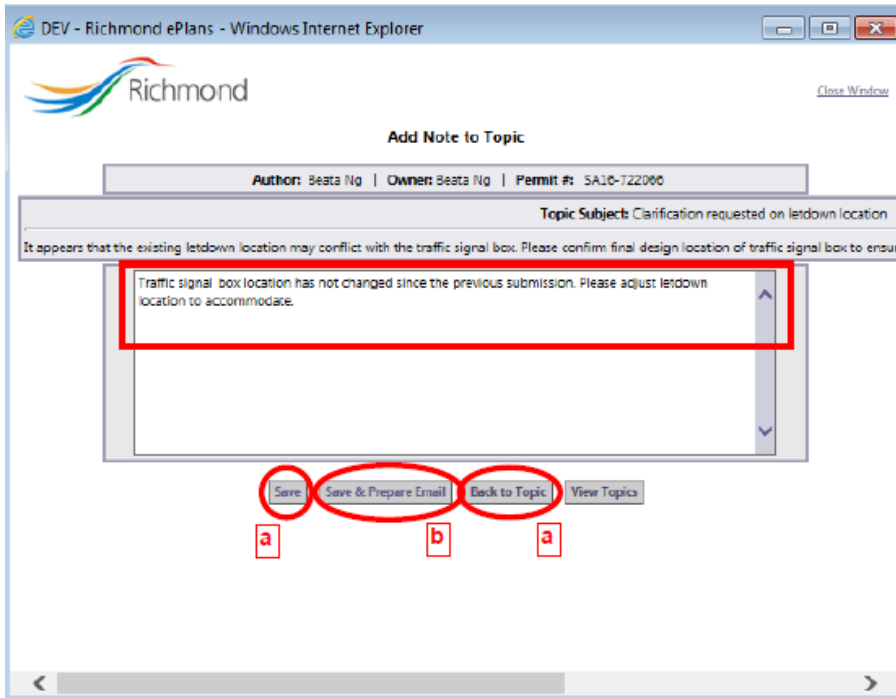
It appears that the existing letdown location may conflict with the traffic signal box. Please confirm final design location of traffic signal box to ensure there is no conflict with letdown location. Letdown can be shifted north if required.

If you do not have access to the specified folder, please contact the [Project Administrator](#).

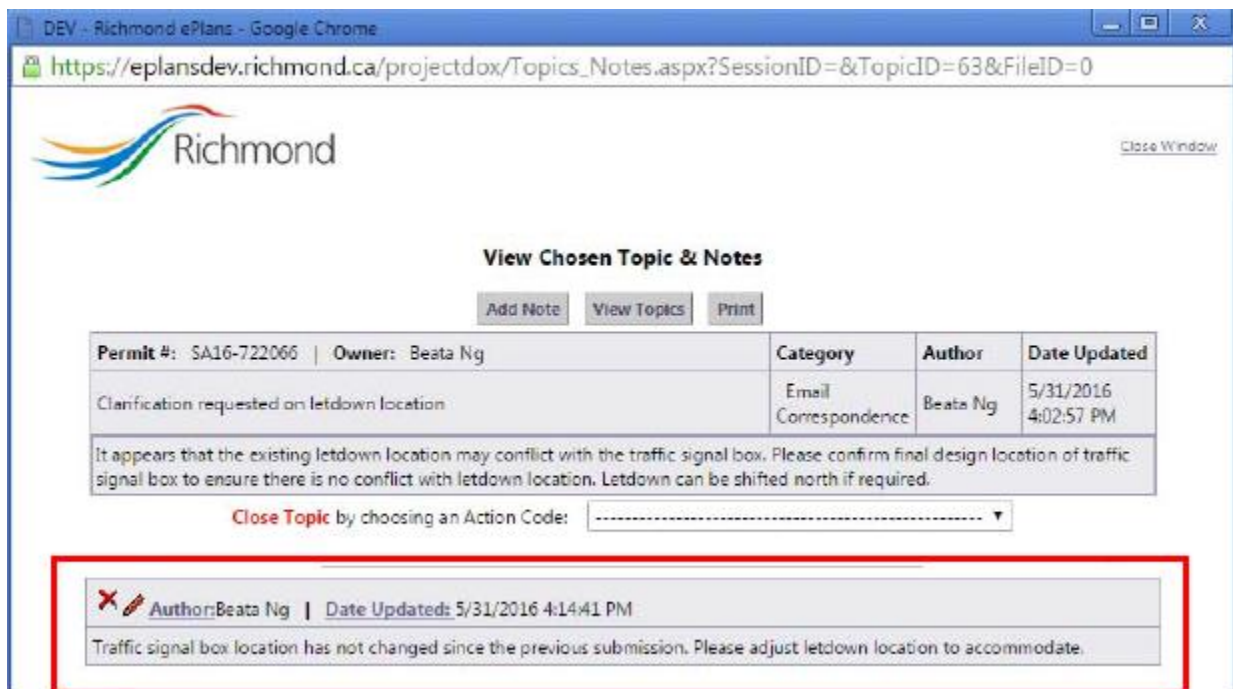
ePlan will open, directing you to log in and access the comment. The Topic & Notes dialogue box with the relevant topic will automatically open. Click “Add Note” to respond to the Topic.



Enter your response into the comment box provided. Once your response is complete, click “Save” or “Save & Prepare Email”.

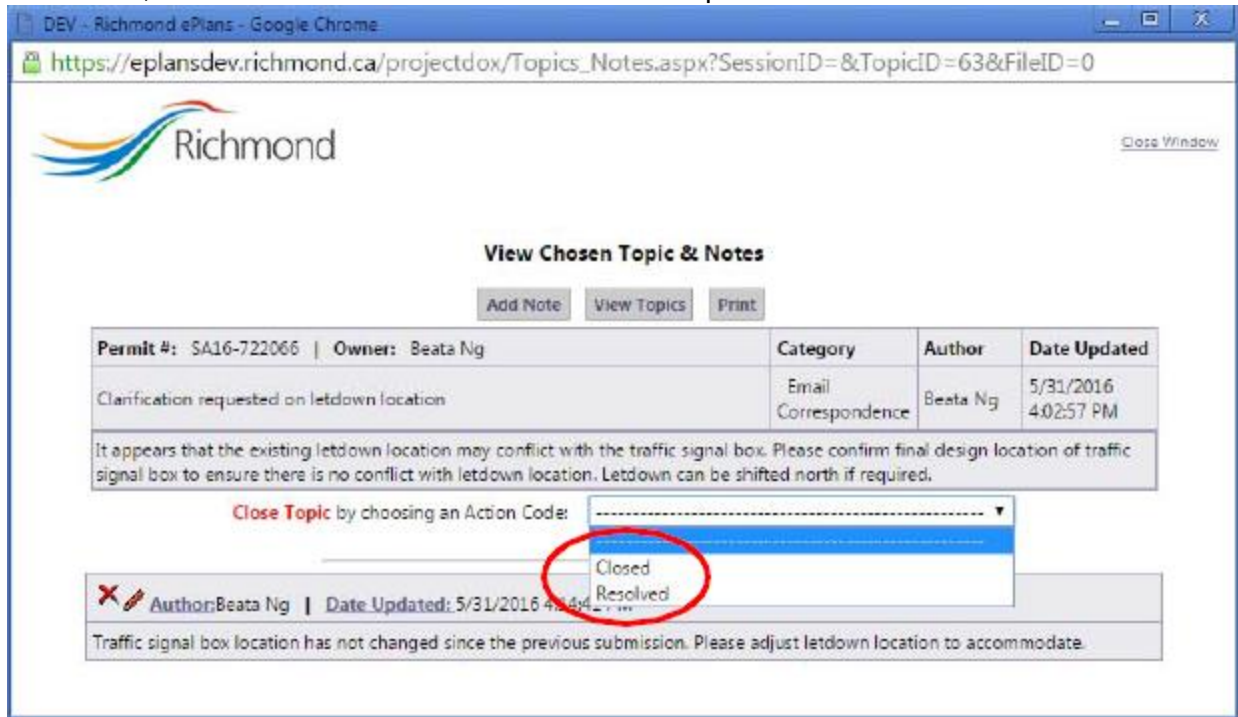


- a Click “Save” to save your Note. Return to the Topic page by clicking “Back to Topic”. You will now see your Note listed under the topic.



- b Click “Save & Prepare Email” to save your note and send notification to select individuals or teams. 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” or Resolved” within the Topic page. Once a topic is marked as “Closed” or “Resolved”, additional notes cannot be added to the topic.

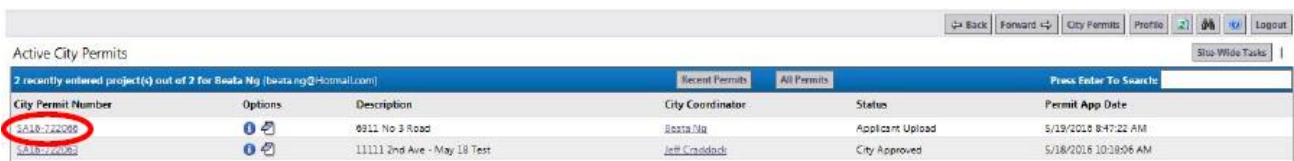


You may return to the fully topics list by clicking “View Topics”.

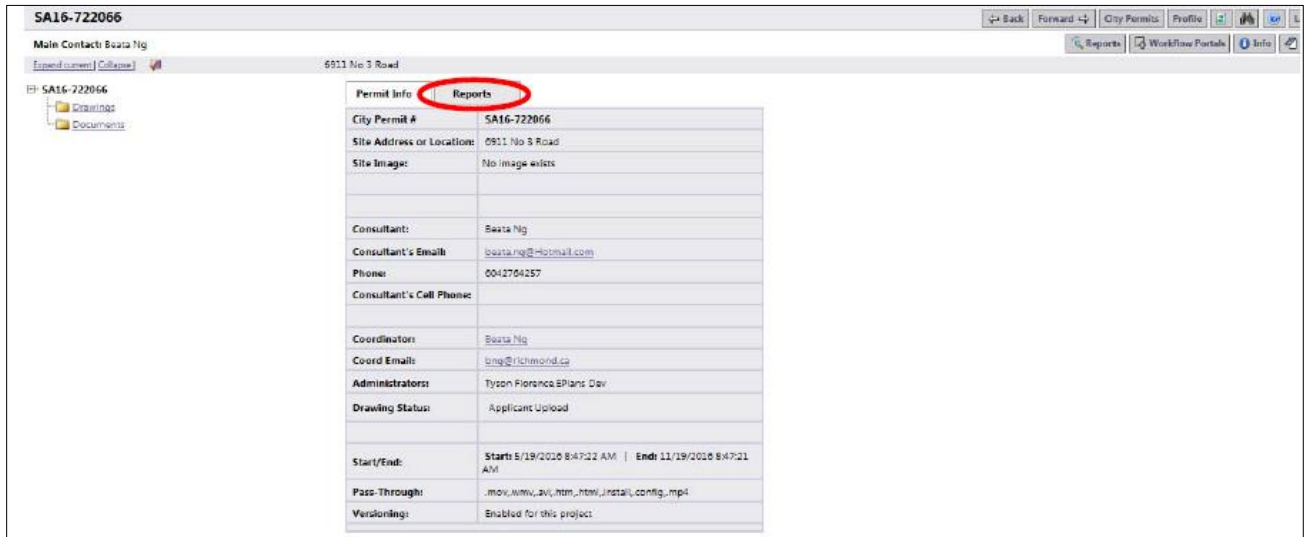
11. Checking Application Status

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:

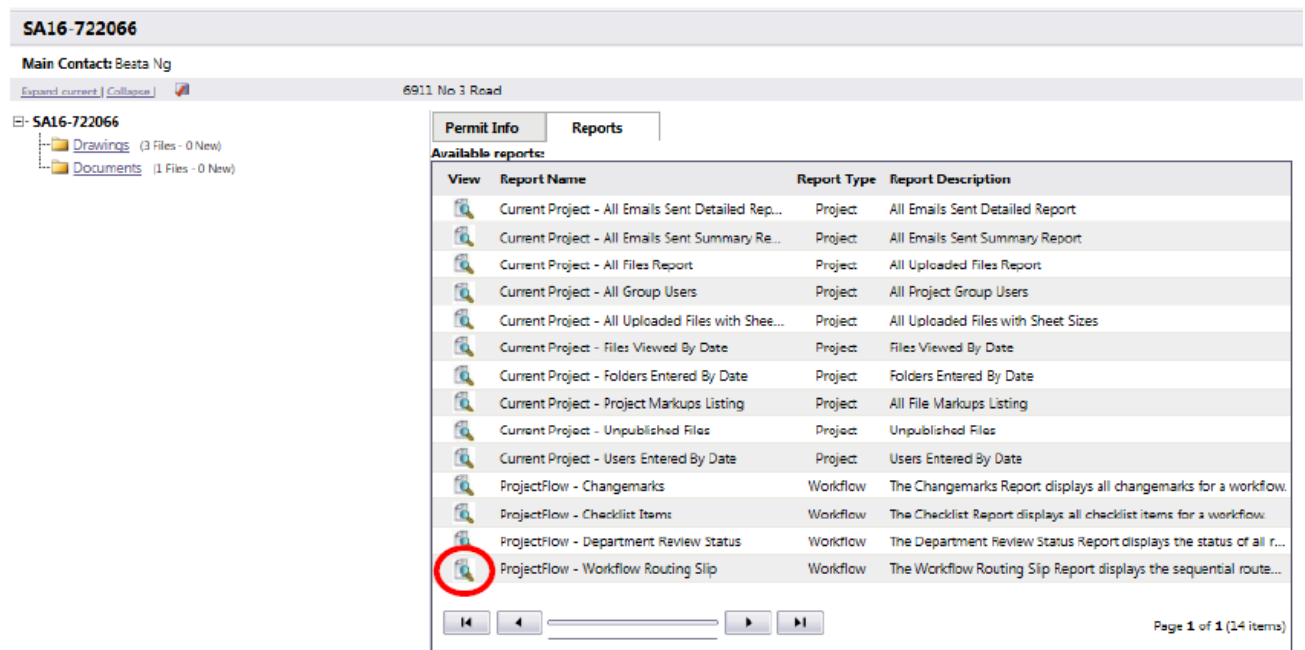
1. Log in to ePlan
2. Access the SA Permit Page for your permit of interest by clicking on the permit number on the City Permits Page



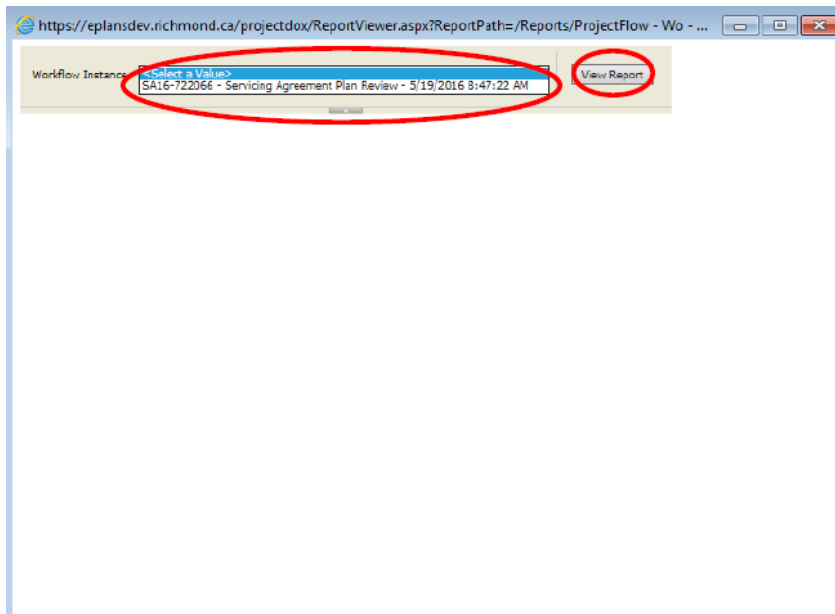
3. Click on the “Reports” tab in the SA Permit Page



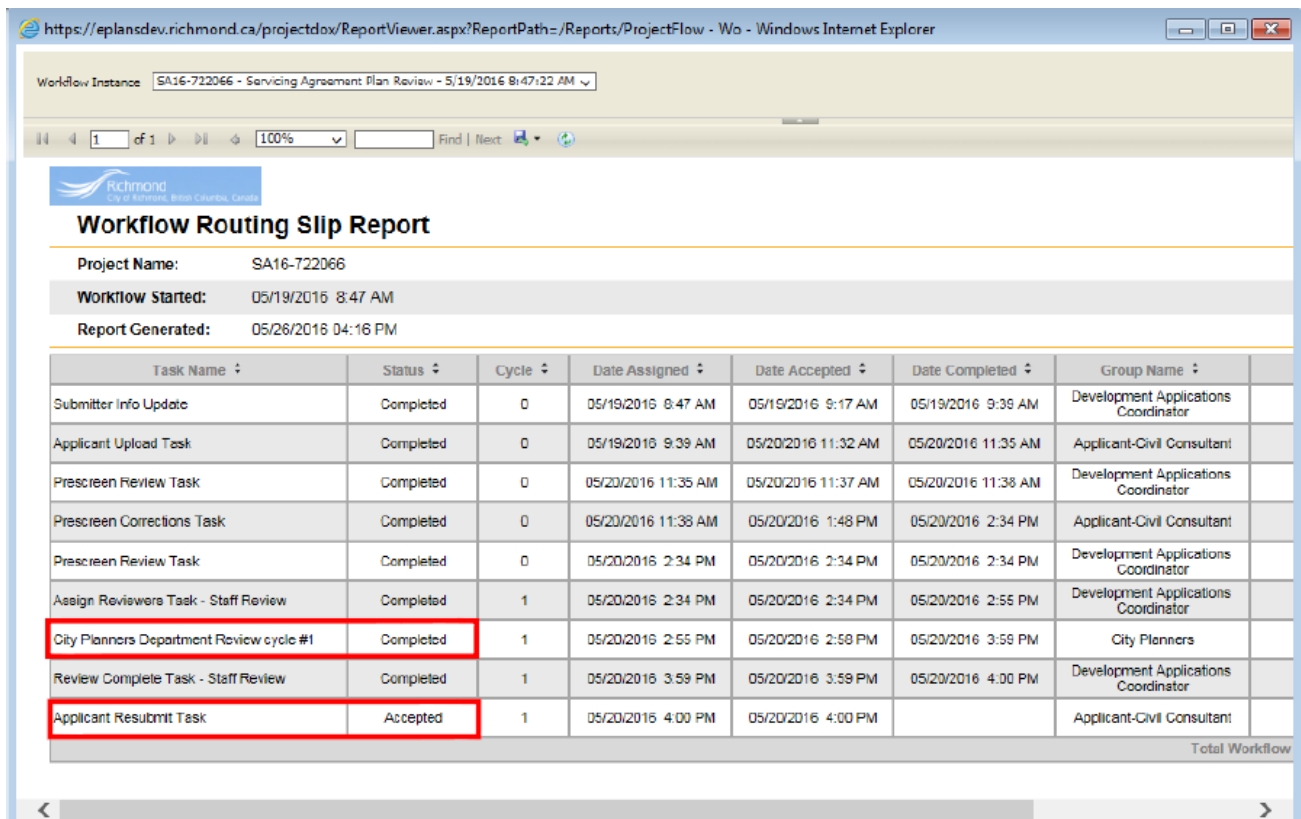
4. Click on the icon next to the report titled “ProjectFlow – Workflow Routing Slip”



- A dialogue box for the Workflow Routing Slip will open. Within the “Workflow Instance” dropdown, select the appropriate review cycle, then click “View Report”.



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



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 Development Applications 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.

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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.

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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.

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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.