



## **APPLICANT RESUBMITTAL GUIDE**




## Accept your Applicant Resubmit task

After logging into ProjectDox, the Applicant Resubmit task will display on the main page with your project number and description.

### ProjectFlow Task List

 Refresh

	TASK NAME	PROJECT NA...	INSTANCE	GROUP NAME	ASSI
	<b>Applicant Resubmit Task</b>	ZTEST PROJECT 001	ZTEST PROJECT 001 - Building Plan Review - 5/10/2016 4:48:40 AM	Applicant	Firstl

1 - 1 of 1 records

## Review and respond to Changemarks and Checklist items

After choosing the task (above), the eForm (below) will guide you to the Changemark and Checklist grids and drawing markups which include the itemized comments and corrections from all reviewing departments.



### APPLICANT RESUBMIT



Review Information Resources Global File Compare Workflow Report

**Project Name:** Ztraining 18-209398-000-05-CO  
**Project Description:** Applicant Training - Resubmit  
**Coordinator:** Wally Taylor  
**Review Cycle:** 1  
**Workflow/Activity Name:** Building Plan Review/Applicant Resubmit  
**Current User Login:** Angie Tomlinson (Angie.Tomlinson@portlandoregon.gov)

#### Task Instructions

After you have successfully uploaded all required plans and documents, please click the (Resubmit Complete) button.

**View/Edit Changemark Items (1)** **View/Edit Checklist Items (2)**

Project: Ztraining 18-209398-000-05-CO

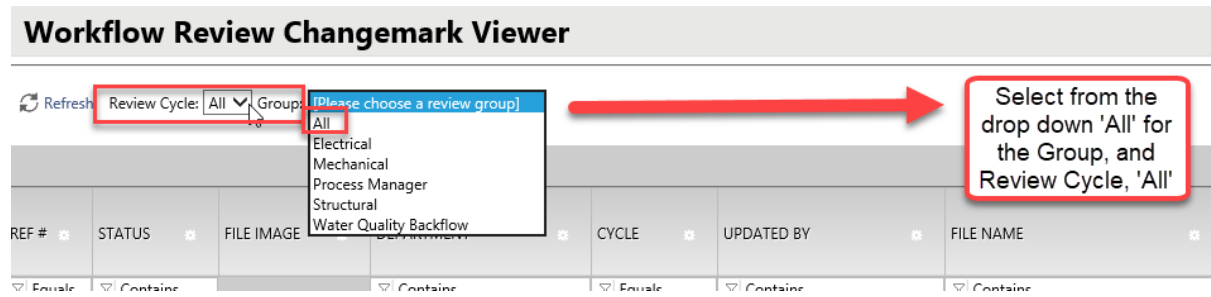
Select destination folder for files:

- Ztraining 18-209398-000-05-CO
    - Drawings (3 Files - 0 New)
    - Documents
    - Reference Only
    - City Attachments
    - Approved
    - TRIM
    - Training Material

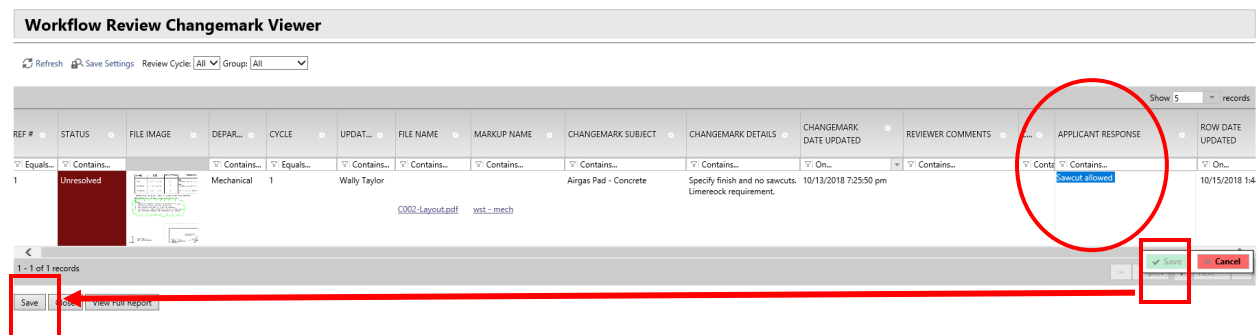
Complete Close

For all review cycles, upload the updated drawings and documents AND make sure to address the comments in the Changemark and Checklist grids.

To address the Changemark comments, click on the “View/Edit Changemark Items” button (above). It will take you into the Changemark grid. Select the filter at the top of the grid labeled ‘Review Cycle’ and ‘Group’ and select ‘ALL’, this will ensure you see all the comments from all review groups (below screen).



To address the Changemark comments, click on the “View/Edit Changemark Items” button (above). It will take you into the Changemark grid (below). Make sure to have All group comments listed. Read all the Changemark details and write a DATED response to each one of the comments in the Applicant Response column. **Comments cannot be resolved without an Applicant Response in the Changemark grid.** Please make **sure to date** all comments to keep the history of the conversation.

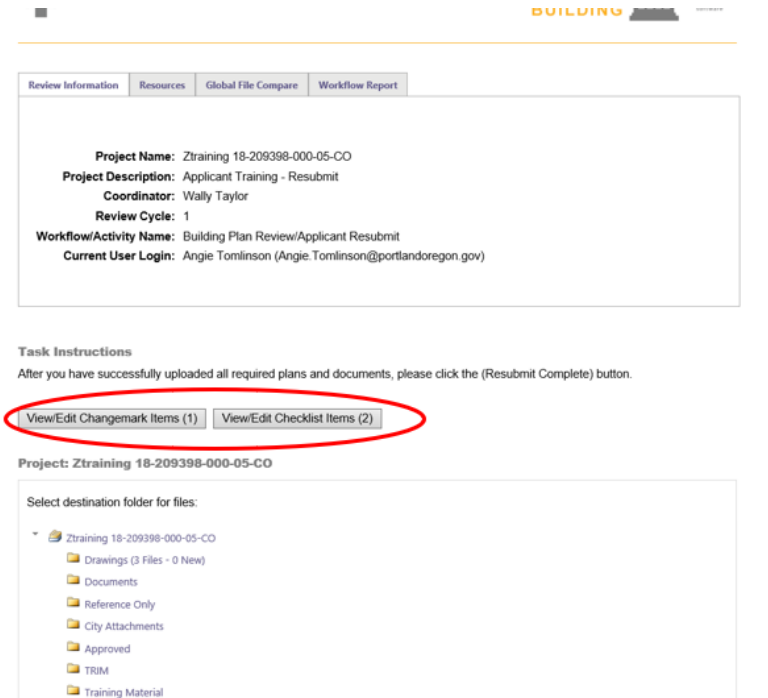


Make sure to “Save” after writing your comments by selecting the ‘Save’ button in green, within the grid. Then, when you are done addressing all the comments on the page, click “Save” in the bottom left corner, then click “Close”.

When replying to Changemark items in subsequent review cycles **do not delete previous comments** and please place comment text in the Applicant Response field **above the original comment**, enter the date and the initial of your first name(dot)last name and enter your response.

*Example: 7/28/19 J.Smith – Uploaded a copy of the revised plans.*

Go back to your eForm and choose the “View/Edit Checklist Items” button to address all of the Checklist items. Checklist items are general comments from the reviewers, that are not linked to specific assets on the drawings.



**Project Name:** Ztraining 18-209398-000-05-CO  
**Project Description:** Applicant Training - Resubmit  
**Coordinator:** Wally Taylor  
**Review Cycle:** 1  
**Workflow/Activity Name:** Building Plan Review/Applicant Resubmit  
**Current User Login:** Angie Tomlinson (Angie.Tomlinson@portlandoregon.gov)

**Task Instructions**  
 After you have successfully uploaded all required plans and documents, please click the (Resubmit Complete) button.

**View/Edit Changemark Items (1)** **View/Edit Checklist Items (2)**

**Project:** Ztraining 18-209398-000-05-CO

Select destination folder for files:

- Ztraining 18-209398-000-05-CO
  - Drawings (3 Files - 0 New)
  - Documents
  - Reference Only
  - City Attachments
  - Approved
  - TRIM
  - Training Material

**Workflow Review Checklist Item Viewer**

Refresh

**Selected Checklist Items for All Review Cycles**

Review Cycle: All Save Settings

REF #	PERMIT TYPE	DEPARTMENT	COMMENT TYPE	CYCLE	COMMENT TEXT	APPLICANT RESPONSE	COORD.	CORRECTION DATE UPDATED	STATUS	STATUS UPDATED BY	STATUS DATE UPDATED
1	Commercial Building Permit	Mechanical	Plan Review	1	Please show gas meter location	See updated plan		10/15/2018 1:50:06 PM	Not Met	Wally Taylor	10/13/2018 7:26:07 PM
2	Commercial Building Permit	Planning and Zoning	Plan Review	1	11.55.040 Tree Preservation Standards. Please provide a tree plan showing the size	Not met		10/15/2018 1:50:06 PM	Not Met	Wally Taylor	10/13/2018 7:26:47 PM

1 - 2 of 2 records

Save Close View Full Report

Read all of the comment details, in the Comment Text column and write a response to each one of the comments in the Applicant Response column. Comments cannot be “Met” without an Applicant Response in the Checklist grid.

When replying to Checklist items in subsequent review cycles please place comment text in the Applicant Response field **above the original comment**, enter the date and the initial of your first name(dot)last name and enter your response.

*Example: 7/28/19 J.Smith – Uploaded a copy of the revised plans.*

When you are done addressing all of the comments, click “Save” in the bottom left corner, then click “Close”.

### Selected Checklist Items for All Review Cycles

Review Cycle: All  Save Settings

REF #	PERMIT TYPE	DEPARTMENT	COMMENT TYPE	CYCLE	COMMENT TEXT	APPLICANT RESPONSE	COORDINATOR COMMENTS	CORRECTION DATE/UPDATED	STATUS	STATUS UPDATED BY	STATUS
1	Commercial Building Permit	Process Manager	Intake Checklist		Storm Drainage Report includes BES		Test Comments	11/6/2016 1:00:02 PM	Not Met	Arena Spozito	11/6/2016

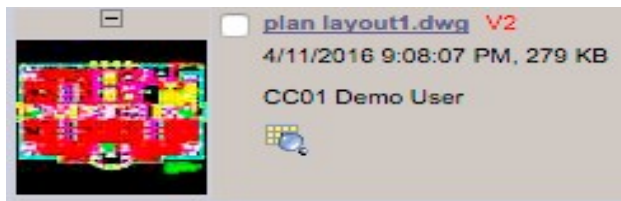
1-1 of 1 records

Save Close View Full Report

## Complete the file upload to resubmit to the City

Once all plans have been updated and all comments captured, the updated files should be uploaded into ProjectDox.

Updated files should display the version number, V2 for example, because the correction was uploaded with the SAME FILE NAME as the original file name.



### Please take special note of these items:

- Please upload the file to the same original folder and save the file with the original name- this is the only way the files will version correctly.
- If the file names are changed, the reviewers will not be allowed to compare the original files with the newly uploaded files.
- There are a couple ways you can check this:
  - After upload (but before you submit back to the City) go to the drawings folder in your project, sort "Newest to Oldest". All drawings that versioned correctly will have a small v2 or v3 at the end of the name.
  - Run the "Current Project - All Files Report". although this includes everything in all folders, you can export into Excel and sort numerically to see if there are unintended duplicates.
- Please make sure you cloud and delta your revisions on the drawings, this will assist the reviewers with the corrections.

Verify and Complete Checkboxes 1, 2, and 3 on the bottom of the Eform.

**Task Instructions**

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- I have reviewed and addressed, including responses where appropriate, all Checklist Items accessed by clicking on the "Checklist Items" button above.
- I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above.
- I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review.

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Checkboxes 1 and 2 are confirmation that you have read and corrected the issues, while checkbox 3 is confirmation you have uploaded all new and/or corrected files. Make sure you have completed these steps, then mark the checkboxes appropriately.

Click the "Complete" button to complete the submission to resubmit all the corrections and updated files to the City.

**Task Instructions**

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- I have reviewed and addressed, including responses where appropriate, all Checklist Items accessed by clicking on the "Checklist Items" button above.
- I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above.
- I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review.



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## Complete the Applicant Resubmit Checklist form

Complete the Applicant Resubmit Checklist form for EVERY resubmittal and upload to the Documents folder in ProjectDox. An incomplete form could delay review of your submittal. You must answer 'Yes' or 'No' to each Yes/No question.

Example of the Applicant Resubmit Checklist can be found on our External Applicant website for PDXePlans located here [Applicant resubmit checklist](#)


Sample image of the Applicant Checklist form:

**Bureau of  
Development  
Services** FROM CONCEPT  
TO CONSTRUCTION

### Applicant Resubmit Checklist

Complete this form with every resubmittal and upload it to the Documents folder in ProjectDox. An incomplete form could delay review of your submittal. You must answer Yes or No to each Yes/No question. When answering Yes, additional details will be requested and must be answered in full.

1. Have there been any changes to the Site Plan?  Yes  No  
 If yes, please provide the details below 
2. Have any structures been added or removed?  Yes  No
3. Have any exterior elements been changed?  Yes  No

## Approval process

When the plan review is approved by all reviewers, you will be notified via email the plan set is approved and completed. The e- mail will indicate that your permit is ready and instructions on how to download and print your files. These files will then need to be printed and in place at the job site.



### Approved Plans Ready for Download Notification

Attention Anna:

**C**ongratulations, your approved plans are ready for download for Project 19-238406-000-00-CO.

In order to download your approved plans [Login to ProjectDox](#) and download your plans from the **Approved Plans** and **Approved Supporting Docs** folders.

Project:	19-238406-000-00-CO
Task:	Notify Applicant Download
Assigned by:	EPlans Admin
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	