

POLICIES & PROCEDURES



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Building Division**
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Electronic Plan Submittals

BPP 119

Adopted: June 7, 2021

Last Reviewed: Future Date

Next Review: Future Date

Summary

Outlines the process for the submittal, processing, and review of electronic plans.

Background/Discussion

This is an interim temporary BPP intended to be a bridge between a traditional paper plan submittal processes to a fully automated process that leverages our new Energov permitting platform (anticipated go-live Winter 2022). This BPP will be revised when Energov is live.

The following issues are driving early adoption of an interim electronic review process:

- Customer Needs:
 - We regularly receive requests from customers to submit electronic plans for review.
 - Changes/revisions to plan approvals are greatly expedited which saves the project time and money.
 - Customers have voiced appreciation for providing services online and not having to fight traffic to visit City Hall.
 - Electronic submittals allow for no physical contact between staff and applicants. Many customers throughout the pandemic have expressed concern about contact during the application process, and have mentioned how electronic submittals and issuance has helped alleviate that stress.
 - For field copies of plans, the customer can download electronic plans to their printer or email to a printing service.
 - The Clackamas County Assessor will no longer need to visit City Hall for their pre-assessment work. They can do their assessment work remotely with access to our approved electronic plans.
 - Electronic plan review is rapidly becoming an industry standard. The City has piloted and reviewed numerous projects electronically, including Street of Dreams and commercial projects have been reviewed electronically since fall/winter 2020.
 - While we encourage electronic submittals, for those who don't have access to technological tools or ability to submit electronically, we will accommodate via scanning internally if needed.
- Staff Efficiencies:
 - This is a shift in business practice. While archiving may potentially be much quicker and more efficient as it potentially skips paper filing, paper prep, sending off to be scanned, returning paper

and refiling, our experience dictates that there will be a lot more front-end quality control work and need for increased communication.

- Interdepartmental communication has proven to be more consistent with all CD staff cataloging project info similarly and in the same location.
- Adds projects to Outlook calendars for due date reminders. Saves Plans Examiners time not having to constantly check in on project status and manage due dates for other staff.
- The permit and review team has over a year of experience working in a remote/hybrid work environment. The team finds that electronic permit processing is much more efficient and enables staff to work from anywhere, while keeping projects moving.
- Eliminates the need for printing labels for plan sets to maintain in the inspectors office.
- Regulatory Influences:
 - Legislation was recently introduced to direct jurisdictions to utilize a digital system for permitting functions which includes plan reviews and inspections.
 - OSSC Section 107.2.1, and ORSC Section R106.1.1, indicates that electronic media can be submitted where approved by the Building Official. This BBP outlines the key steps and outlines the process for approval of electronic submittals.
- Challenges:
 - More up-front quality control is needed – If a project starts off with incomplete, invalid, or incorrect info, the entire process will suffer. This will potentially result in more front-end work for the Permit Technicians.
 - There is increased reliance with more email and more communications. There will need to be more communication with customers up-front to explain the process.
- Archiving:
 - When projects are finalized, the archiving process becomes much more streamlined and approved plans are readily available.
 - There is no need to send paper plans to a third-party scanner which saves time and money.

Policy

Where possible, staff will utilize the electronic plan review process as noted in this BPP for commercial and residential projects.

Procedure

The following general outline will be followed for the electronic plans submittal, review, and approval procedure:

Process outline/steps:

1. A building permit application and project plans are submitted to the *Permits* email address: permits@ci.wilsonville.or.us.
 - a. This email folder is monitored constantly by the Permit Technicians.
 - b. For large plan sets or documents, the Permit Technicians will send a link to the customer to upload larger documents through Mimecast. This will include a 7-day upload window.

2. A Permit Technician inputs the application information into Eden and creates a permit.
3. A Permit Technician creates a project folder in the N: shared drive, downloads the digital files, and saves them to the project folder:
 - a. N:\shared\Building-Commercial Plan Review; or
 - b. N:\shared\Building-Residential Plan Review
4. The Permit Technician sends a calendar invitation to Building, Engineering, and Planning review staff with a link to the digital review package in the N: drive.
5. Planning and Engineering staff will notate the project staff assignment in Eden (who is assigned to do the review).
6. The Building Plans Examiner (commercial or residential) reviews the project or reassigns to another Plans Examiner.
7. The Building Plans Examiner reviews plans for compliance with adopted codes.
8. The Building Plans Examiner receives Planning and Engineering comments within 14 calendar days for commercial and 10 calendar days for residential.
9. The Building Plans Examiner completes the plan review comment letter and emails the applicant along with a cc: to the Permits email and Planning and Engineering if applicable.
10. The Building Plans Examiner receives responses from the applicant and forwards to Planning, Engineering, and the Permits email.
11. The Building Plans Examiner will receive confirmation of approval via email from Planning and Engineering.
12. The Building Plans Examiner completes the final plan review letter; saves and attaches in Eden.
 - a. Plan addendums or revisions – In most cases a completely new set of plans with all revisions and addendums will be requested from the applicant once the final plans are reviewed and ready for approval just prior to permit issuance.
 - b. The Building Plans Examiner will overlay and compare documents to ensure the final approved set is accurate and reflects all changes.
13. The Building Plans Examiner will stamp the plans in Bluebeam, flatten the plans, and save to the N: shared drive in the building plan review permit application folder. The building plans examiner will email Planning that construction documents have been slip sheeted and/or compiled in new folder location with a link.
14. The Planning and Engineering reviewer will notate their approval in Eden and send or attach their stamped worksheet at that time.
15. Building Plans Examiner routes the completed review to the Permits email group for permit issuance.
16. The permit gets issued with the following completed by a Permit Technician:
 - a. Double check all submittals.
 - b. Double check Eden (route permit).
 - c. Calculate and collect fees.
 - d. Move the approved and stamped construction documents to the completed plan review folder as part of the issuance process.
 - e. Contact applicant – application is ready for payment and pickup. Once payment made, the permit can be issued. All digital documents are emailed to the applicant along with the signed permit.

- f. The applicant must provide a paper copy of the approved plans on the job site for inspectors.
 - g. Route to inspection workgroup within Eden –project is now in the issued/inspection phase.
17. Prior to final C of O there are a number of documents that typically get submitted. If these documents are in electronic form they will be added to the project folder in the N: shared drive. If paper documents are submitted, they will either be requested electronically, or scanned and added to the project folder.
 18. Once a C of O is issued, the project Building Inspector and Plans Examiner will review the project file and ensure all documents are submitted, reviewed, and approved. The project Building Inspector will then notify the Permit Technician who is responsible for archiving.
 19. The Permit Technician who is responsible for archiving will review the contents of the project folder and import the contents in to Laserfiche.
 20. Communication is critical:
 - a. The Building Plans Examiner is responsible to cc: the review/permit team (Permit Techs and other disciplines) throughout the review and resubmittal processes.

End.