



Customer Best Practices – Electronic Plan Review (EPR)

Created by: Community Development Department (CDD)

Step by Step Highlights:

- **STEP 1** : Properly Prepare Your Documents for Submission
 - o All documents for plan review *must be* flattened.
- **STEP 2** : Upload Documents in the Proper Location
- **STEP 3** : Use the Tools Available to Address Correction Items
 - o The Require Revisions Letter is like a map to success!
- **STEP 4** : Upload “New Versions” of Documents.
 - o Only use “Browse” when submitting a new document or if directed by City staff to do so.

Properly prepared documents will not guarantee a decrease in the amount of time it takes to review a plan set. Properly prepared documents will decrease the preparation time needed by pre-screen staff to get the plan set to reviewing staff. The amount of time spent on a review will be determined by the content of the plan set submitted by the customer. Following best practices set for customers will assist in creating a flow of information between reviewers and customers.

STEP 1: Preparing Documents for Submission

Submittal documents must be properly prepared before submitting for permit review. **This procedure is critical for successful plan review*.**

Here are a few key items to note before uploading them to the Online Permit Center (for the complete list of requirements, please see the end of this document or in the submittals area within the Online Permit Center):

- **Are the documents flattened?**
 - o Expectation: layers, markups/text boxes, signatures, drawings, stamps, and so on should not be locked and the must be “burned” or “printed” onto the documents.
 - o Walkthroughs for how to flatten documents via AutoCAD can be found at the end of this document.
 - o If there is some other software used and it isn’t clear how to flatten the documents, please send a help request to permitcenter@bendoregon.gov with the subject line: “ATTN: Document Flattening Help Needed”.
- **Documents submitted for plan review should be submitted as a .pdf, not .pdfa or any other file type.**
 - o Other file types can be accepted as submissions for submittal types that are **not**, or do not contain, plan sets. The full list of these can be found at the end of the document.
- **Are the documents drawn to scale?**
- **Consistent and Clear File Naming Convention**
 - o When corrections are sent back for review, this will allow for easier detection of where and what items need to be addressed. Plan reviewers will be using the file name assigned by the customer to indicate which plan sheet contains the correction item.



Accommodation Information for People with Disabilities

To obtain this information in an alternate format such as Braille, large print, electronic formats, etc. please contact Online Permit Center at permitcenter@bendoregon.gov or 541.388.5580; Relay Users Dial 7-1-1.

STEP 2: Where to Upload Submittals

- In the Online Permit Center Portal, locate the Upload Submittals area of the permit. This can be found under “My Items” or within the Permit Status (the landing area after clicking the reference number which pulls up permit details) at the bottom of the page.

My Building Permit, Permanent Sign & SDC Estimate Applications

Show Active

Reference Number *	Address *	Type *	Status *	Date Created
PRSDCE202200530	710 NW WALL ST, BEND, OR 97703	Systems Development Charge (SDC) Estimate	Returned for Correction	02/07/2022
Description:				
Add A Permit	Upload Submittals			

Upload Documents

This application requires all documents to be attached to a submittal. [Click Here](#) to Upload Documents.

[Submittals](#) | [Portal Home](#)



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- **Do not to upload to conditions** unless it is to satisfy the requirements of the condition. This is not an area to add additional documents for plan review, nor an area to submit revisions.
 - o Revisions have a separate process that cannot be completed until a permit is in issued status. For questions on how to submit a revision, contact building@bendoregon.gov or engineering@bendoregon.gov for building permits or engineering applications, respectively.
 - o If additional submittals are provided in this area for plan review, **they will not be reviewed** until the next round of reviews or they may be rejected.
 - o Documents should not be submitted outside of review cycles unless requested by the reviewer. These requested documents should then be directly emailed to the reviewer for upload.

Only use this field to satisfy the condition's requirement. In this example, Browse and Upload should only be used to upload the signed agreement outlined in the description.

Conditions

Guidelines For Electronically Submitting Documents:

Condition	Status	Department	Description	Category	Expiration Date	Due Date
Miscellaneous File Upload - Building/Engineering	Open	Community Development	Provide or upload your signed agreement document.	Information		
Date/Time Condition: 12/03/2021 Resolved: User who resolved: devdhig Documents: <input type="button" value="Browse"/>						
Miscellaneous Condition	Resolved	Community Development	Recording fees must be paid prior to agreement execution.			
Date/Time Condition: 11/30/2021 Resolved: User who resolved: devdhig						
Miscellaneous Condition	Open	Community Development	Agreement can be released once infrastructure is 100% complete		12/24/2021	



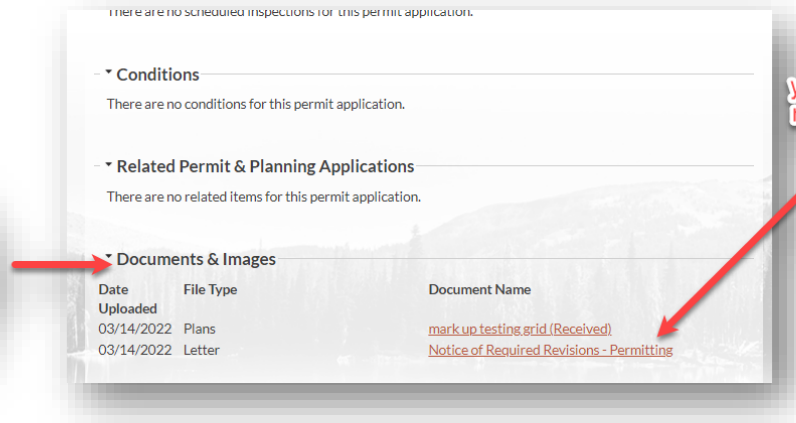
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STEP 3: Where to Find Documents that Have Been Sent Back for Corrections

- When documents are sent back for correction, they are intermixed within the entire application's Documents & Images section.
 - o Use the "Notice of Required Revisions" Letter to cross reference correction details and correction markups that are on each document. This can be found as an email to the primary applicant or under "Documents & Images".
 - o The "Notice of Required Revisions" will indicate which corrections are found on documents as markups, the document's title, and the associated correction items.
 - o Documents that have had correction markups that have been fixed and subsequently approved by staff will now have (RESOLVED) at the end of the correction comment and will no longer appear on the correction letter.
 - o Resolved markups will remain on the document until they have been stamped and approved or until a new version has been uploaded.

Documents & Images show ALL documents of the project (some with corrections and some without).



The Notice of Required Revisions letter will be your guide to successfully navigate and address any correction items.



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STEP 4: Uploading New Versions of Documents

- Using the same criteria and preparation methods as outlined in STEP 1, prepare the new submittal items.
- Locate the Submittal area as outlined in STEP 2.
- To upload a new version of a document after the correction items have been addressed, you must upload the document using the button “New Version”.

Current Submittal

Submittal #2) Permit Application Submittal (03/14/2022) [Print Requirement Items](#)

Type	Status	Date Verified
Site Plan - Residential	Pending	
A04_2_1 Main Floor Plan <input type="button" value="New Version"/>		
Select a new document for this requirement: <input type="button" value="Browse.."/>		
Construction Details	Pending	
mark up testing.grid (Received) <input type="button" value="New Version"/>		
Select a new document for this requirement: <input type="button" value="Browse.."/>		

- o Unless otherwise requested by City of Bend staff, documents in black text do not need to be modified. Documents with red text have had correction items at one point and may require revisions – refer to the revisions letter to determine if a New Version is required.
 - Once a New Version is uploaded, any resolved corrections on documents will no longer be visible.
- o If a completely new upload is required, utilize the “Browse” button.



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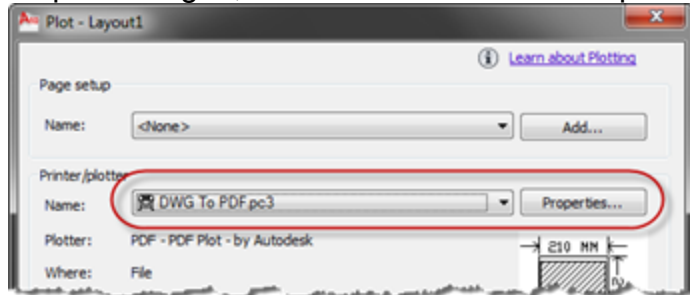


How to Flatten Files in AutoCAD Before Upload in Portal Application

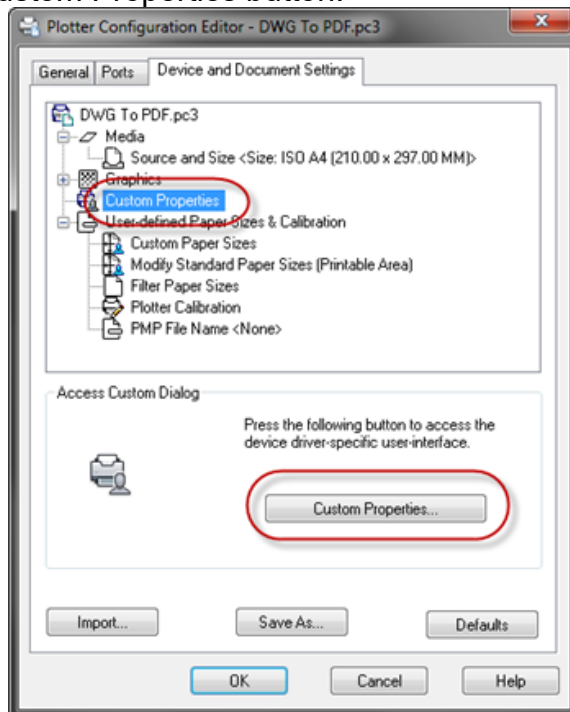
The City is unable to accept files or plan sets with unflattened layers, and will return these to the applicant to be corrected before plan review may occur. To make sure your files are flattened before uploading, use this guide.

Step 1 – How to Turn Off Layer Export for DWG to PDF Files (aka ‘Flatten’ Before Upload) Using Plotter

1. Check to ensure the EPDFSHX setting is set to 0.
2. Type EPDFSHX in the Autocad command line. Verify that it is set to 0. This should only need to be done once per drawing. If you use a template to create new plan sets or sheets update this setting in the template.
3. Open the plot dialogue, and select ‘DWG To PDF.pc3’ under Printer/Plotter.

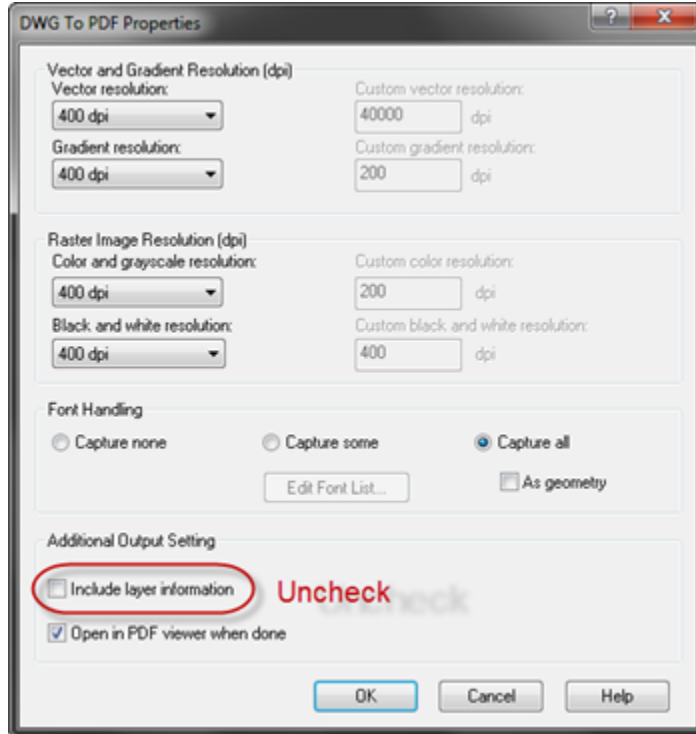


4. In the Plotter Configuration dialogue select ‘Custom Properties’, and then click the ‘Custom Properties button.

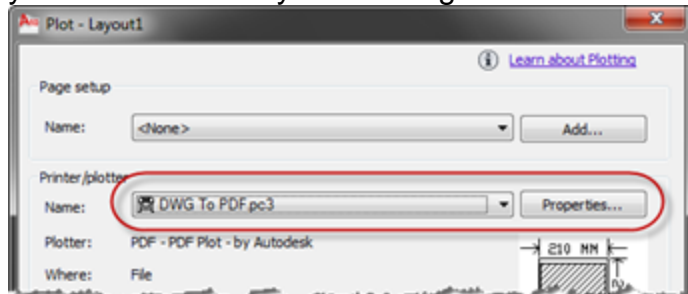




- Finally, uncheck 'Include layer Information' in the DWG To PDF Properties dialogue.



- You will be prompted to save the changes in a temporary printer configuration file, or you can write over your existing DWG To PDF PC3 file.

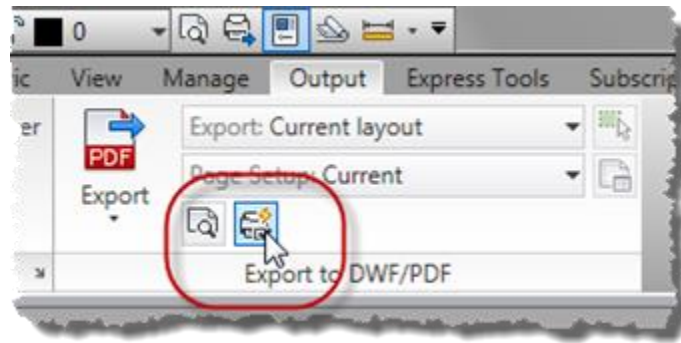


*This method will only turn off layer export for PDF's that are created with AutoCAD's plot command.

If you prefer to use AutoCAD's 'Export' command to create your PDF's, you can turn off layer export here too. See the next step.

Step 2 – How to Turn Off Layer Export for DWG to PDF Files (aka 'Flatten' Before Upload) Using Exporting PDFs

- To turn off Layer export for AutoCAD's 'EXPORTPDF' Command, first click on the Export to DWF/PDF options button:
Output tab > Export to DWF/PDF Panel > Export to DWF/PDF Options



TIP: If you are using the Classic interface type 'exportsettings' at the command line, and choose 'Options'.

2. Pick 'Don't include' from the Layer Information settings drop down, to turn off layer export.

