

CITY OF SAN ANTONIO
DEVELOPMENT SERVICES DEPARTMENT
1901 S. ALAMO | SAN ANTONIO, TEXAS 78204 | (210) 207-1111 | www.sanantonio.gov/dsd



TO: Development Services Customers

SUBJECT: **INFORMATION BULLETIN #216**
Electronic Plan Review

DATE: November 12, 2013 (*Revised June 1, 2014; December 1, 2015*)

CREATED BY: Plan Review Division

Purpose

This Information Bulletin provides guidance on submitting building plans for review in an electronic format. This Information Bulletin has been revised to clarify file submission requirements.

Scope

Electronic plan review is available for the following permit types:

- ❖ **Residential building permits:** New one-and two-family dwellings and townhouses as defined by the International Residential Code as well as additions to existing residential
- ❖ **Commercial building permits:** New commercial structures; additions, interior remodels and first time finish outs; grading permits, site work permits, foundation permits; and shell permits
- ❖ **Trade permits:** Tree, mechanical, electrical, plumbing permits requiring plan review
- ❖ **Fire system permits:** Fire system permits (e.g., fire sprinkler, fire alarm, fire extinguishing suppression systems, hazardous material tanks, underground fire mains, etc.)

Please note that electronic plan review is not yet available for these permit types:

- ❖ **Commercial walk-through permits:** also referred to as “same-day” permits
- ❖ **Complex commercial projects:** commercial projects that would typically require multiple rolls of paper plans if printed (such as hospitals, apartment complexes, etc).
- ❖ **Miscellaneous (“Over-the-Counter”) permits:** (e.g., general repair, swimming pool permits, etc.)

Customers can log in to the EPR Customer Portal using their Dynamic Portal account credentials at <https://planreview.sanantonio.gov/> to electronically submit plans and construction documents. **Customers must have a Dynamic Portal account (username and password) to access the EPR Customer Portal.**

Detailed, step-by-step instructions on using the EPR Customer Portal can be found in Attachment 1. In general, customers create an electronic submission package that allows for the upload of all pertinent documents (permit application, drawings, building permit checklist, applicable reports, affidavits, engineering letters, other supporting documents). Customers can also add notes to the intake team and use the portal to upload and send additional documents after an initial successful submission.

- ❖ Refer to [IB 101](#) for a description and checklist of residential project requirements
- ❖ Refer to [IB 147](#) for a description of the completeness review process for commercial projects

Best Practices for Electronic File Submittal Procedures

Please use the following guidelines to prepare your documents for electronic plan review. The format conventions and standards listed below are culled from best practices related to electronic plan review and are meant to facilitate the work undertaken by your Development Services staff in support of development in our City. Please adhere to these guidelines to ensure an efficient electronic plan review process.

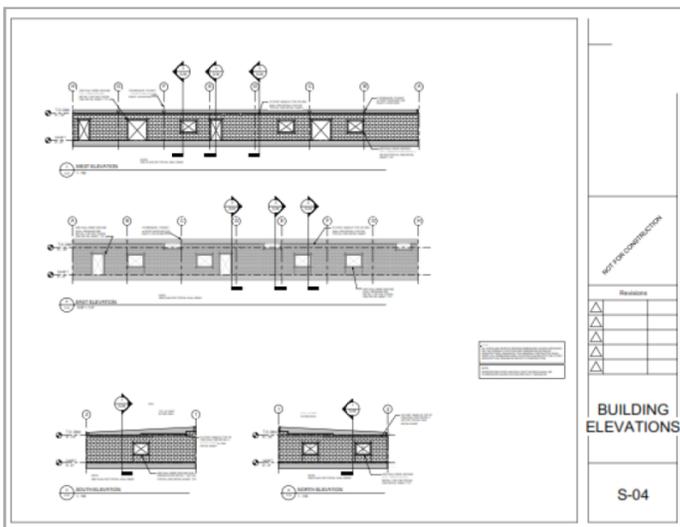
Plans and Drawings

- ❖ **File Format:** Each Plan or Plan set must be saved in **PDF** format. Please flatten the drawing layers in your CAD program such as AutoCAD or Revit before creating the PDF.
- ❖ **File Quality:** Scanned documents are not recommended as scanning degrades the quality of the image and creates noise for the plan review software. If you must scan documents, the resolution should not be less than 300 dpi (dots per inch). Plans submitted in an unacceptable or unreadable format will be rejected during the intake process.
- ❖ **File Names:** Files should be named in such a way that the intake and review teams can quickly identify files. Please do not use special characters or symbols, including commas.
 - For small plan review projects, where the page count is under 20 pages, creating a single PDF document is acceptable and the file name should be unique and descriptive of the project.
 - For example, residential projects can be identified by the Project/Site Address, such as "123 Main Street.pdf"
 - For larger projects, such as commercial projects, submit like files grouped by their type to facilitate file identification. Identify each file with an industry standard discipline name, as shown below:

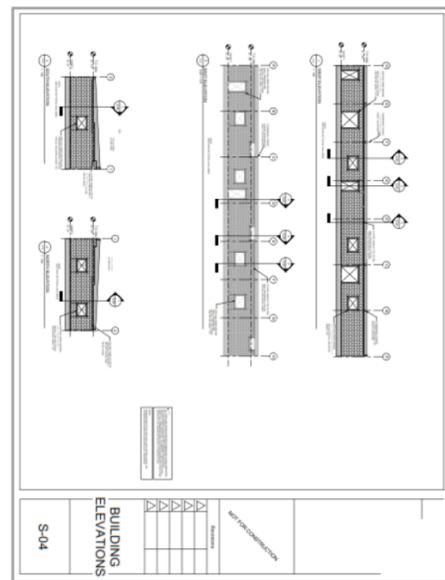
Architectural	Fire Protection
Civil	Landscaping
Electrical	Mechanical
Irrigation	Plumbing
Structural	Other - Name

- For example, a commercial project for electronic review should have all architectural drawings in a PDF file titled "Architectural.pdf", all structural drawings in a PDF file titled "Structural.pdf", all electrical drawings in a PDF file titled "Electrical.pdf", etc.

- ❖ **File Size:** Each PDF file is limited to a maximum of 85MB. If your design files for each discipline exceeds 85 MB, please separate and identify them accordingly. Example; if the architectural file was 104 MB total, split it into two files (Architectural-1.pdf at 85 MB and Architectural-2.pdf at 19MB).
- ❖ **Plan Set Size:** The total size for all files submitted at one time through the EPR Customer Portal cannot exceed 85MB total. If individual plans are under 85 MB each but the total project combined exceeds 85 MB, customers can still submit plans electronically but must do so in groups of files 85 MB or smaller at a time. Customers can use the "Update" link to add additional files to their project if they exceed 85 MB.
- ❖ **Scale and Orientation:** Plans must be saved at "full-size" and "to-scale" (100%) to ensure proper measuring of lines and areas electronically. Pages must all be properly "oriented," meaning upright and **not** sideways or upside down, so that the document can be viewed without rotation.



CORRECT



NOT CORRECT

- ❖ **Page Alignment:** Customers should create plan drawings so that drawing perimeters "line up" exactly when overlaid electronically. Overlays are used to compare any differences between initial and subsequent plan submissions.
 - Revised/corrected plans must "line up" with the original submittal to facilitate comparing versions electronically.
- ❖ **Color:** Plans should be plotted/drawn using a black and white plot style. Colored pens on the drawings are discouraged, as colors are reserved for use by the Plans Examiners to perform markups and annotations during the review process.
- ❖ **File Security/Accessibility:** Files should not be password-protected or locked documents. PDF files shall have permissions set to allow annotations/markups and stamps by Development Services staff.
- ❖ **Stamping:** The lower-left or -right hand corner of the plan sets should be left blank in order to allow for the plan review team to place approval stamps. Do not place critical design information in both corners.

Supplemental documents and attachments: Additional documents or attachments that are not CAD plans but that convey information pertinent to the project should also be submitted as part of the submission package through the EPR Customer Portal. These supplemental documents include items such as energy reports, specifications, calculations, images, etc. Supplemental documentation must also be submitted in PDF format with a unique, descriptive filename.

Intake and Completeness Review

The DSD Intake Team will complete the intake process and ensure the electronic submittal package is complete per governing information bulletins and department guidance. Intake staff will check for adherence to the guidelines stated in this information bulletin, as these are meant to assist in the identification of files by Plans Examiners during the plan review process. If any files or required forms or letters are missing or if the submission package contains corrupt files, the project will be placed on hold and the applicant/owner will be notified. Customers will submit required missing items using the "Update" link in the EPR Customer Portal to add additional files, following the same guidelines.

Once the electronic plan review submittal package is deemed complete, Development Services staff will issue an AP number, and notify customers of fees due. After fees are paid, Plans Examiners will be assigned plan reviews.

General Plan Review Process

Any given development project, be it submitted via paper or electronically, will have an array of Plans Examiners assigned to conduct required discipline reviews. Plans Examiners will review electronic plans and other permit submittal documents using the City's electronic plan review software. Each Plans Examiner will either approve or deny their respective review similar to the paper permit submittal process. The review status will be updated in the City's system of record for plan review. If the plans are denied, the Plans Examiner will send denial comments through the EPR Customer Portal and may send annotated drawings in some cases to clarify comments.

- ❖ The status of reviews can be viewed online and in real time through the Development Services Department webpage by entering your AP# in the following permit search page: <http://www.sanantonio.gov/DSD/Online/Search.aspx>.

Responses to Plan Review Denial Comments

Responses to plan review denial comments (i.e., re-submittal form, cover letters, revised plans and other constructions documents, etc.) shall be submitted to Development Services in the same manner as outlined in [IB 111](#) for the paper permit submittal process, with the exception that all revised documents and re-submittal cover letters shall be submitted through the EPR Customer Portal in a PDF format as described in this information bulletin. Please also note the following:

- ❖ Use the same filename as the original submittal as the basis for the resubmitted file. Do not change the file names when submitting new versions of your plans. Revised files should be named to note the revision and named in a way so the reviewer can quickly identify each file. The department requires adding a "-R#" suffix to the file name for resubmittals following denial comments, as the following shows:
 - Architectural-R1
 - Civil-R1
 - Determination of Special Inspections-R1

Subsequent reviews should follow this naming convention (i.e., Civil-R2 for the second revision).

- ❖ Use revision clouds and/or markers to identify all plan changes on your corrected drawing set.
- ❖ A complete set of any plans/drawings (as a file) that were revised must be uploaded, with all revisions clearly marked. Do NOT submit individual plan sheets as separate PDF documents.
 - For example, if only the original architectural file submitted required changes, only submit a revised set of that architectural file and not the entire set of plan files containing all other disciplines. Please ensure the entire original file with the changes is submitted and not just the individual revised sheets (i.e.: complete architectural file or complete civil file).
- ❖ Do not *reorder*, *extract* or *insert* pages in the middle of your corrected plan sets. For example, if a 4-page set of structural plans was returned to you for corrections, resubmit a 4-page set of corrected structural plans in the same page order.
 - Rearranging, extracting or inserting pages out of order can result in delays for completing your plan review, as the software used to undertake electronic plan review is optimized for comparing versions of files with overlay tools.
- ❖ If *new* plans, plan sets or supplemental documents are being submitted:
 - Revised/corrected plans **must** be submitted in the same page order as the previous submittal.
 - Place new pages at the end of the corrected plan set document. Do not place new pages in the middle or beginning of the document.
 - If pages need to be removed from the plan set, instead of excluding them, place a 'slash' across those pages in CAD, mark them as *'Omit'* and *include the date they were omitted*.

Permits and Approved Plans

When all reviews have been completed and approved, Development Services will notify the customer that permit fees are due and request the applicant pay for the permit. Fees can be paid [on-line](#) using a credit card or escrow account. Once the permit fees are paid, please contact the plans management team at dsdfrontcounter@sanantonio.gov and they will issue the permit and work with staff to upload the approved electronic plan set to the EPR Customer Portal.

- ❖ The approved plans will be all of the customer submitted PDF files (with latest revisions and redlined approval notes from Plans Examiners) that include a City approval stamp. In some instances, the approved plans package sent by DSD may also include additional documentation such as notes to building inspectors. Plans are read and print only and no modifications or design changes can be made.
- ❖ The customer will be able to make as many printed copies as needed from the approved plan set.

After permit issuance, Customers are required to provide one hard copy of the approved plans at the project site for City Inspectors. The City would prefer the approved plans be printed in color in order to assist the inspectors in quickly identifying key inspection items.

Post-Permit Issuance Revisions

After a permit has been issued, there may be circumstances necessitating revisions to construction documents previously approved. In situations requiring approval of changes made after the permit has been issued, Customers must follow the guidelines listed below:

- ❖ Revised drawings, forms and reports shall be named to note the revision number and date, and be named in a way so the reviewer can quickly identify each file. The remainder of this process is the same as above.
- ❖ Prepare a completed set of REVISED drawings and identify all changes with revision clouds and/or markers.
- ❖ Each design discipline should have a separate file as described earlier in this information bulletin.
- ❖ The department requires adding a "-PP#" suffix to the file name for resubmittals following denial comments, as the following shows:
 - Architectural-PP1
 - Civil-PP1
- ❖ Prepare other revised supplemental documents (i.e., REVISED Plans, REVISED calculations, REVISED engineering reports, and other REVISED permit documents) and submit to Development Services with all the files in PDF format through the EPR Customer Portal. Please include a cover letter as an attachment explaining the design changes.

Summary

The intent of electronic plan review is to provide Customers with a more efficient means of shepherding a development project from concept to construction with tools that streamline communication and transportation costs, among others. As your partners in the development process, Development Services plans to make continuous improvement to its Electronic Plan Review program. Since we are all pioneering this new process, your feedback is appreciated to help improve the process, our service delivery and your next visit.

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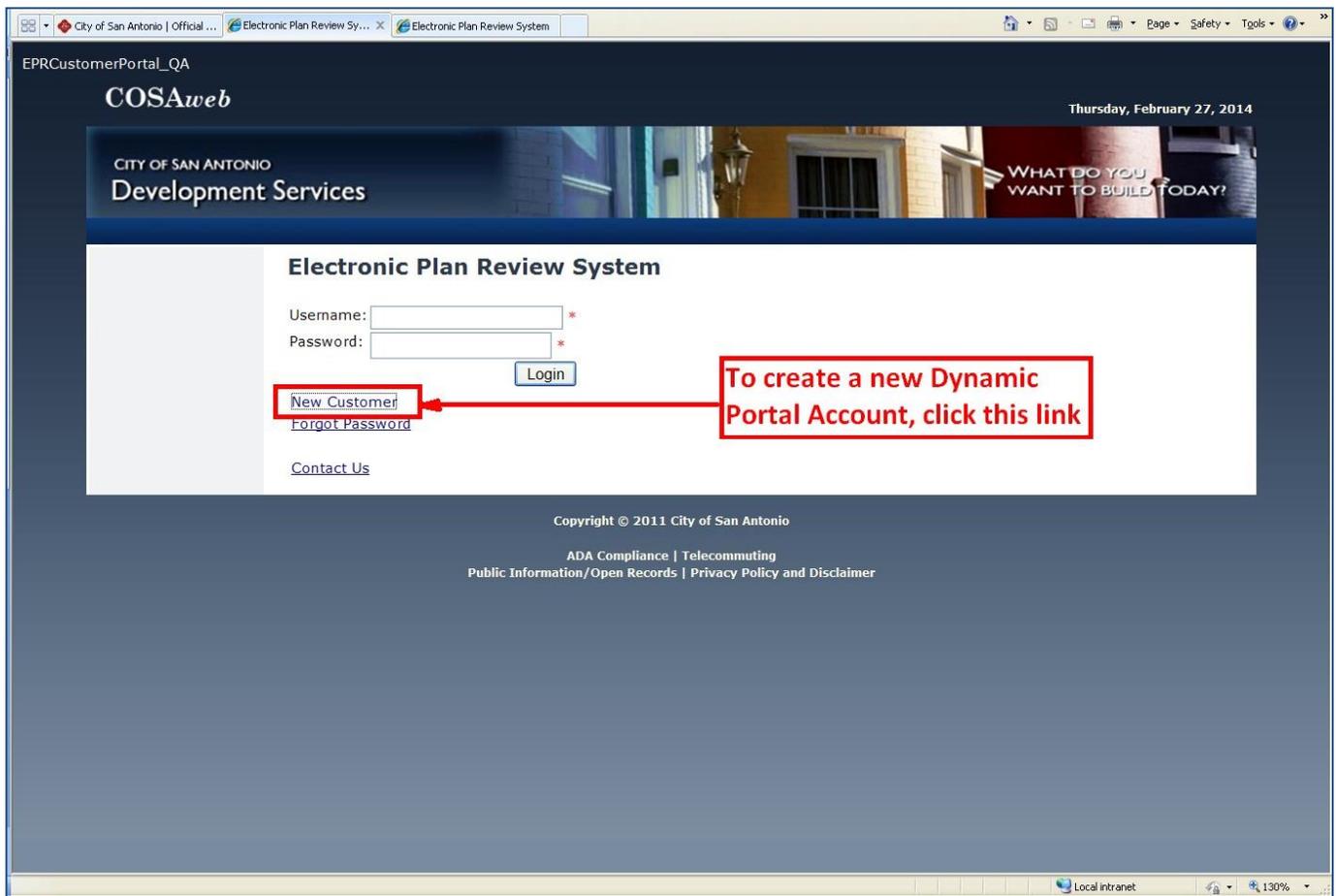
Authorized by:

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A Guide to the Electronic Plan Review Customer Portal

The Electronic Plan Review Customer Portal is a mechanism for customers to upload and submit construction plan sets, as well as other submittal documents, that are part of a permit application. The EPR Customer Portal is a repository for electronic plan files, and allows the DSD Intake team to ensure electronic documents and plans are complete per applicable guidance and checklists that the department provides to our customers. Once files have been accepted, the review process commences, and customers can use the EPR Customer Portal to obtain provide reviewer comments, annotated drawings and approved plan sets.

The EPR Customer Portal is available at: <https://planreview.sanantonio.gov/EPRCustomerPortal/>



To use the Electronic Plan Review Portal, you must have a Hansen Dynamic Portal account.

- If you have never created a Dynamic Portal account, click on the “**New Customer**” link and you will be redirected to the Dynamic Portal to create a new account. Go to the next page of this guide.
- If you have created an account but cannot remember your login information, click on the “**Forgot Password**” link and you will be guided through the steps to reset your password. Skip to page 4.
- If you have your Dynamic Portal username and password, go to page 5.
- **If at any time you need assistance, please call the Development Services Customer Service Center at 207-1111 and one of our team members will help you.**

Creating a New Dynamic Portal Account

This is the Dynamic Portal landing page. From here you can log in to the Dynamic Portal and check the status of your projects. If you have never created an account before, click on the **"Create Account"** button.

The screenshot shows the City of San Antonio Development Services Department Dynamic Portal. The page has a blue navigation menu on the left with links such as **** (NEW) CUSTOMER ALERT SYSTEM (CAS) ****, **INSPECTION SCHEDULER**, **DEVELOPMENT SERVICES HOME**, **DIRECTOR'S PAGE**, **DEPARTMENTAL DIVISIONS**, **BOARDS & AGENDAS**, **INSPECTIONS**, **PERMITS**, **PLANS REVIEW**, **CONTACT US**, **HOT ITEMS**, **NEWSLETTERS**, and **LINKS**. The main content area is titled **City of San Antonio Development Services Department** and includes a **Login** section with instructions and a **Log In** button. Below the login section is a **Forgot your password?** section with a **Get Password** button. At the bottom of the main content area, there is a **Create a new login** section with a **Create Account** button. A red box highlights the **Create Account** button, and a red arrow points to it from a callout box labeled **Click here**. The footer contains links for **Services**, **Government**, **Business**, **Neighborhoods**, and **Recreation**, as well as **Home**, **Privacy Policy and Disclaimer**, and **Text Only**. It also includes a note about the best browser for viewing the site and copyright information for Hansen Information Technologies.

Creating a Dynamic Portal account requires minimal personal information, as detailed in the screenshot below. Please ensure that the email address you enter is correct, as this will be the primary means that the EPR Customer Portal will use to convey information to you from DSD staff.

Once the form is complete and you click the **"Next"** button, it may take several minutes for an account to be created, but could take up to 24 hours. Once the account is established, you will receive an e-mail with your login information.

City of San Antonio Development Services - Permits

Home Services Neighborhoods Business Government Recreation Search

City of San Antonio
Development Services Department

Personal Information: Information about the person requesting service.

Enter your information.
1) Enter your preferred user name for login purposes.
2) Enter your email address. This email address will be used to mail your initial password and for submission notifications. You will be able to change your password later in "Modify Account".
3) Enter your contact information to be used with your permits.
4) Click "Next."

NOTE: You will receive your password within the next 24 hours.

* = Required Information

User Name: *

Email: *

First Name: * Middle Initial: Last Name: *

Address: *

City: * State/Province: *

Postal Code/Zip: * Country:

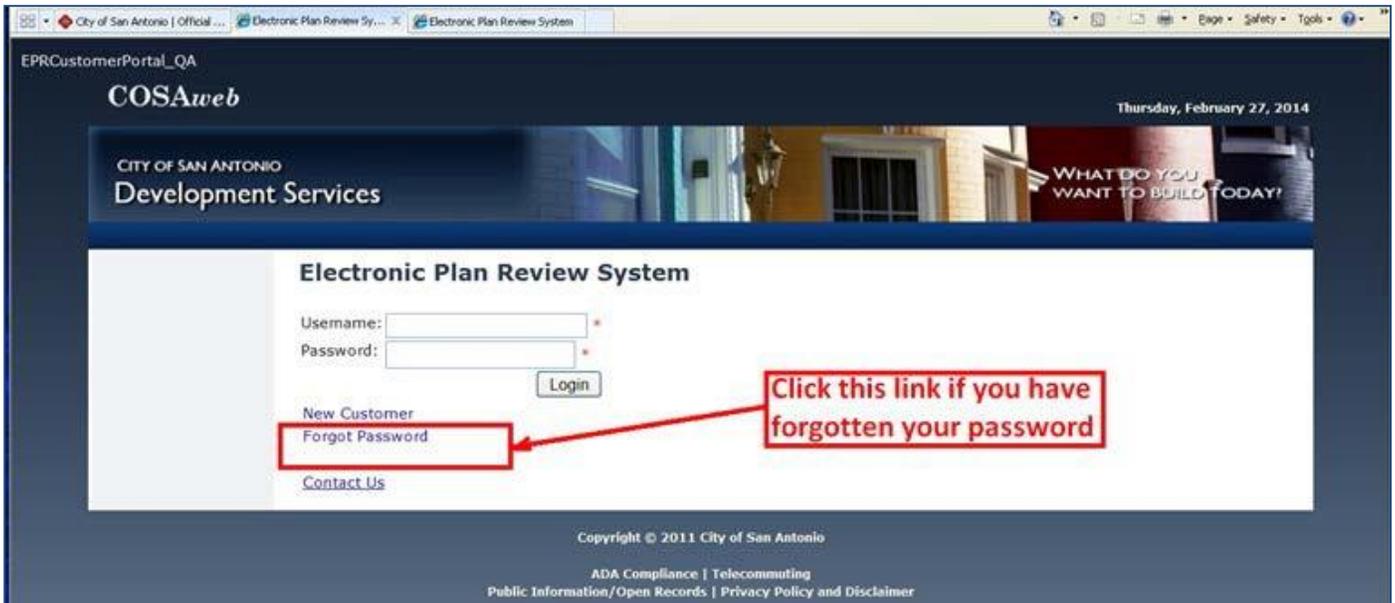
Daytime Phone: Evening Phone:

Cancel Next

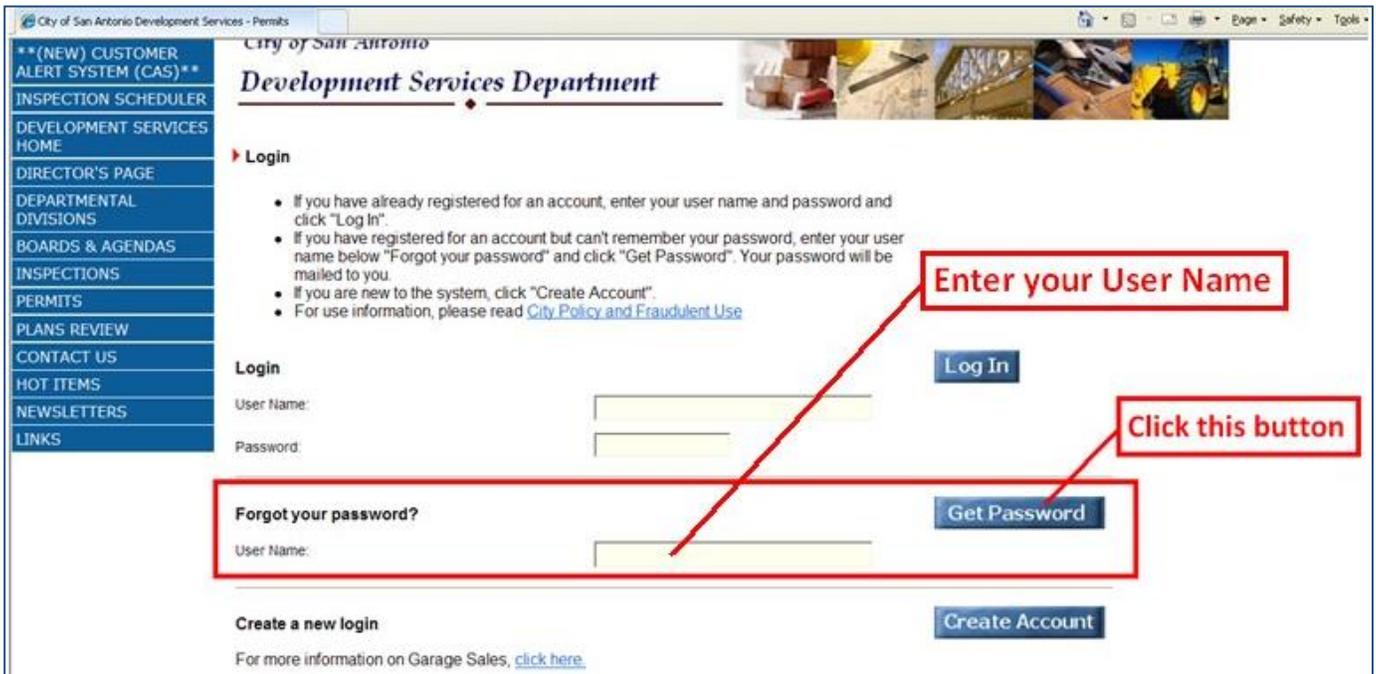
Provide the information on this form and press the "Next" button

Obtaining Access to an Existing Dynamic Portal Account

If you have already created a Dynamic Portal account but cannot remember your password, click on the **"Forgot Password"** link and you will be directed to the Dynamic Portal page.



Enter your User Name and then click the **"Submit"** button. You will receive an e-mail to help you recover your password.



If you cannot remember your User Name, please contact the Development Services Customer Service Center at 207- 1111 and a team member will assist you.

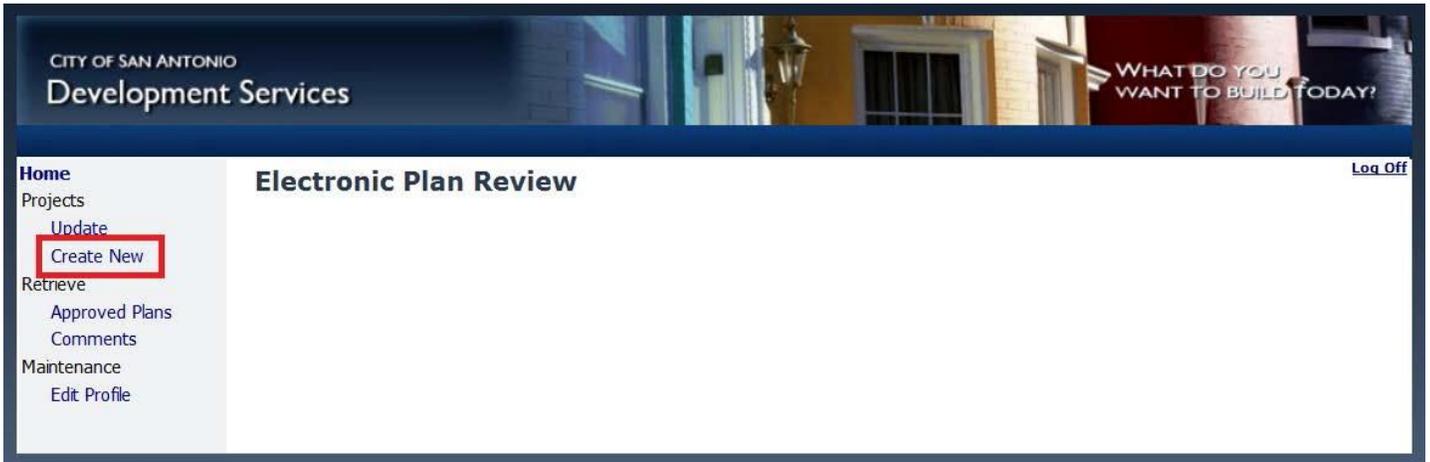
Creating a New Project

On the Customer Portal page, enter in your login information and click the **“Login”** button.



The screenshot shows the login interface for the Electronic Plan Review System. At the top left, it says "CITY OF SAN ANTONIO Development Services". On the right, there is a banner with the text "WHAT DO YOU WANT TO BUILD TODAY?". The main heading is "Electronic Plan Review System". Below this, there are two input fields: "Username:" with the value "JSMITH" and "Password:" with a masked password of ten dots. A "Login" button is positioned to the right of the password field. Below the login fields, there are three links: "New Customer", "Forgot Password", and "Contact Us".

To create a new project, click the **“Create New”** link. A project consists of a single permit application. Multiple building permits for a larger construction project will require a separate **“Project”** created in the Customer Portal for each permit.



The screenshot shows the dashboard for the Electronic Plan Review system. At the top left, it says "CITY OF SAN ANTONIO Development Services". On the right, there is a banner with the text "WHAT DO YOU WANT TO BUILD TODAY?". The main heading is "Electronic Plan Review". In the top right corner, there is a "Log Off" link. On the left side, there is a navigation menu with the following items: "Home", "Projects", "Update", "Create New" (highlighted with a red box), "Retrieve", "Approved Plans", "Comments", "Maintenance", and "Edit Profile".

Enter the name of the project (the name you want reflected on the permit) or address in the “**Project Name**” field. This field may be modified later. Please use only a combination of letters and numbers when naming your permit. Do not use special characters or symbols. Select the permit application type (Commercial, Residential, etc.) from the drop-down menu.

The screenshot shows the 'EPR - Create New Project' form. The 'Project Name' field contains 'Star Shopping Center Interior Finish-Out'. The 'Application Type' dropdown menu is open, showing options: 'Select', 'Commercial', 'Miscellaneous', and 'Residential'. A red box highlights the 'Project Information' section, and another red box with an arrow points to the 'Application Type' dropdown with the text 'Select the application type from the drop-down menu'. Below the form, there is an 'Attachments' section with a 'Browse...' button and a note: 'Attach documents one at a time (Max 10 documents up to 85 MB total)'. 'Submit' and 'Cancel' buttons are at the bottom right.

At this stage you will add documents (drawings, permit application, forms, reports, letters, etc) to your permit. Select the appropriate document type from the drop-down list..

The screenshot shows the 'EPR - Create New Project' form. The 'Project Name' field contains 'Star Shopping Center Interior Finish-Out'. The 'Application Type' dropdown menu is set to 'Commercial'. The 'Document Type' dropdown menu is open, showing options: 'Select', 'Blueprints and Specifications - Commercial/Non Residential', 'Blueprints and Specifications - Miscellaneous', 'Blueprints and Specifications - Residential', 'Construction Project Files - Local Government-Owned Facilities', 'Maps and Plats - Engineering/Public Transportation', and 'Zoning Maps'. A red box highlights the 'Document Type' dropdown, and another red box with an arrow points to it with the text 'Select the document type (s) you are attaching to your project'. Below the form, there is an 'Attachments' section with a 'Browse...' button and a note: 'Attach documents one at a time (Max 10 documents up to 85 MB total)'. 'Submit' and 'Cancel' buttons are at the bottom right.

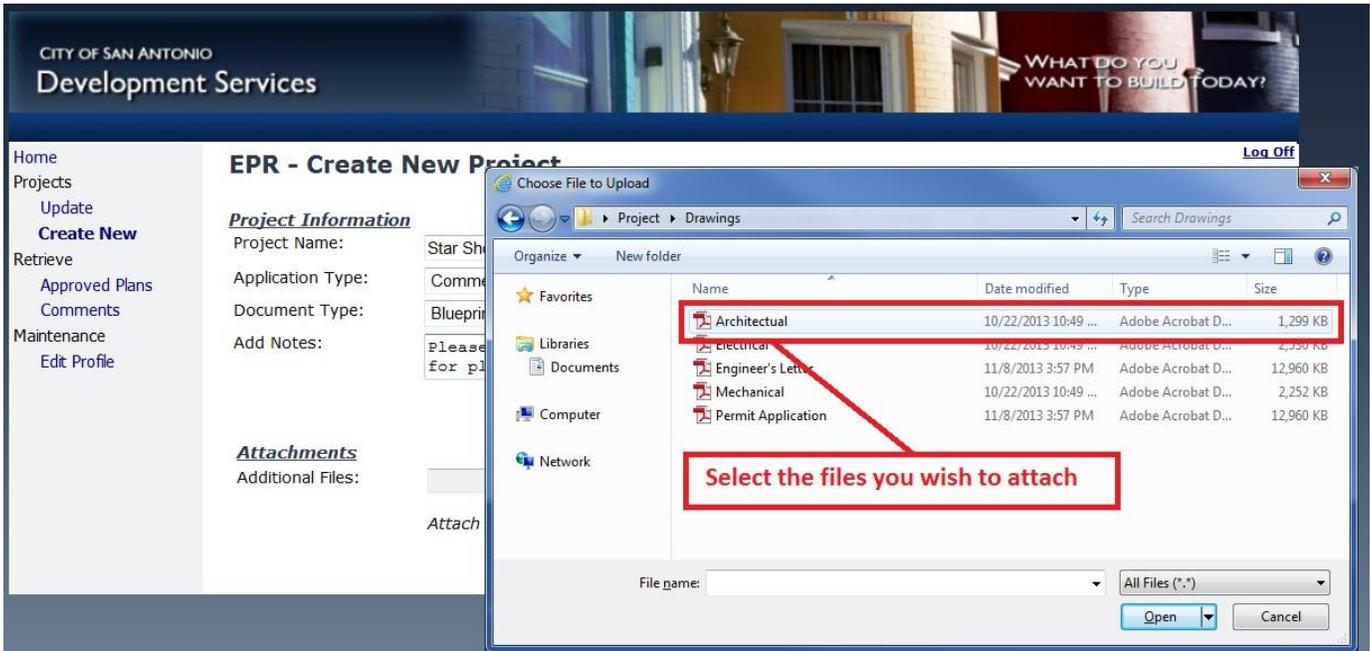
You can add notes, comments or special instructions for the intake team in the “**Add Notes**” field. This is not a required field for the original submission, but is required for re-submittal documents and post-permit revisions. For resubmittal documents, indicate which reviewer, department, or discipline (building, fire, mechanical, etc) the documents are intended for.

The screenshot shows the 'EPR - Create New Project' form. The 'Project Information' section includes fields for Project Name, Application Type, and Document Type. The 'Add Notes' field is highlighted with a red box, and a callout box points to it with the text: "You can add comments for the intake team in this field". Below the 'Add Notes' field is the 'Attachments' section, which includes a file upload field and a 'Browse...' button. The form also includes a 'Submit' button and a 'Cancel' button.

In the “**Attachment**” section, you can add plan sets, permit applications, special reports, engineering letters, affidavits and other documents required to obtain a permit. After clicking the “**Browse**” button another window will be displayed showing you the files and folders on your computer.

The screenshot shows the 'EPR - Create New Project' form. The 'Project Information' section includes fields for Project Name, Application Type, and Document Type. The 'Add Notes' field is highlighted with a red box, and a callout box points to it with the text: "Attach drawings and other documents here". Below the 'Add Notes' field is the 'Attachments' section, which includes a file upload field and a 'Browse...' button. The form also includes a 'Submit' button and a 'Cancel' button.

Navigate to the drive or folder containing the files you wish to upload. Double-click the file or click the file once to highlight it and then click the **“Open”** or **“OK”** button to select and upload the file.



Per the Electronic Plan Review Information Bulletin, design sheets should be named so the intake team and plan reviewers can quickly locate plans based on their discipline (architectural, civil, electrical, mechanical, etc). If one file is larger than 85 megabytes, please divide them into separate files and name them accordingly. In this example, if the architectural sheets (Architectural.pdf) were 100 megabytes, the file should be saved as two files and named Architectural 1 and Architectural 2.

Please note that there is a limit to the number of files you can attach and a limit on the total file size of all of your attachments combined. You can add up to 10 files, each one at a time, with a total file size of 85 megabytes for all documents submitted together. The Customer Portal will calculate the file size for you.

EPR - Create New Project

Project Information

Project Name:

Application Type:

Document Type:

Add Notes:

Attachments

Additional Files:

Attach documents one at a time (Max 10 documents up to 85 MB total)

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Tip: If your project has 30 PDF files, you would add the first 10 files (up to 85MB) under the **"Create New"** link and then use the **"Update"** link to add the additional files. All documents will be submitted and stored under the same project, even if they are added at different times.

The EPR Customer Portal will calculate the total size of your selected files and display it in the attachments section. It will also let you know how many attachments you have included in your submission.

CITY OF SAN ANTONIO
Development Services

WHAT DO YOU WANT TO BUILD TODAY?

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EPR - Create New Project Log Off

Project Information
Project Name: Star Shopping Center Interior Finish-Out
Application Type: Commercial
Document Type: Blueprints and Specifications - Commercial/Non Residential
Add Notes: Please use escrow for plan review fees

Attachments
Additional Files: Browse...

Attach documents one at a time (Max 10 documents up to 85 MB total)

	Document Name	Plan Type	Size (MB)
View Delete	Architectual.pdf	Select	1.27

1 of 10 possible files attached. 1.27 MB of max 85 MB attached.

You can view any of the documents you've uploaded and remove them individually if you change your mind about including a particular file.

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EPR - Create New Project Log Off

Project Information
Project Name: Star Shopping Center Interior Finish-Out
Application Type: Commercial
Document Type: Blueprints and Specifications - Commercial/Non Residential
Add Notes: Please use escrow for plan review fees

Attachments
Additional Files: Browse...

Attach documents one at a time (Max 10 documents up to 85 MB total)

	Document Name	Plan Type	Size (MB)
View Delete	Architectual.pdf	Select	1.27

1 of 10 possible files attached. 1.27 MB of max 85 MB attached.

After selecting the document you want to attach, select the **"Plan Type"** from the drop-down menu.

Indicate the type of documents attached by clicking the "Select" button and choosing from the drop-down menu

Document Name	Size (MB)
Architectual.pdf	1.27

1 of 10 possible files attached. 1.27 MB of max 85 MB attached.

The list is pretty extensive and meant to cover document types normally submitted as part of the permit application. Select the Plan Type most applicable to the file(s) you have uploaded. You may select "Drawings Other" or "Miscellaneous" for drawings and other PDF files that do not seem from the list options.

After selecting all of your files and indicating the types of documents they are, click the **“Submit”** button.

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Development Services

WHAT DO YOU WANT TO BUILD TODAY?

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Edit Profile

EPR - Create New Project

[Log Off](#)

Project Information
Project Name: Star Shopping Center Interior Finish-Out
Application Type: Commercial
Document Type: Blueprints and Specifications - Commercial/Non Residential
Add Notes: Please use escrow for plan review fees

Attachments
Additional Files: Browse...

Attach documents one at a time (Max 10 documents up to 85 MB total)

	Document Name	Plan Type	Size (MB)
View Delete	Architectual.pdf	Drawings Architectural	1.27

1 of 10 possible files attached. 1.27 MB of max 85 MB attached.

After attaching all documents, click the "Submit" button

The submission will be saved and all files will be uploaded.

CITY OF SAN ANTONIO
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Edit Profile

EPR - Create New Project

[Log Off](#)

Project Information
Project Name: Star Shopping Center Interior Finish-Out
Application Type: Commercial
Document Type: Blueprints and Specifications - Commercial/Non Residential
Add Notes: Please use escrow for plan review fees

Attachments
Additional Files: Browse...

Attach documents one at a time (Max 10 documents up to 85 MB total)

	Document Name	Plan Type	Size (MB)
View Delete	Architectual.pdf	Drawings Architectural	1.27

1 of 10 possible files attached. 1.27 MB of max 85 MB attached.

Saving Application

After the files have been successfully uploaded, the system will generate a unique EPR number. This number can be used to locate projects until the Intake Team conducts a completeness review to ensure all applicable and required documents were included in your project submission. Please note this is not a permit (AP) number. AP numbers are assigned only when the appropriate fees are paid and all required documents have been received.

CITY OF SAN ANTONIO
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WHAT DO YOU WANT TO BUILD TODAY?

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Edit Profile

EPR - Create New Project [Log Off](#)

A new project has been created in the system. Please use the following reference number to retrieve the project.
EPR-14-214168

Project Information
Project Name:
Application Type:
Document Type:
Add Notes:

Attachments
Additional Files:

Attach documents one at a time (Max 10 documents up to 85 MB total)

Updating a Submitted Project

Use the **"Update"** link to add more files to your project to complete the completeness review, for a plan review re-submittal, or to add post permit changes (changes that require plan review and approvals for inspection purposes).



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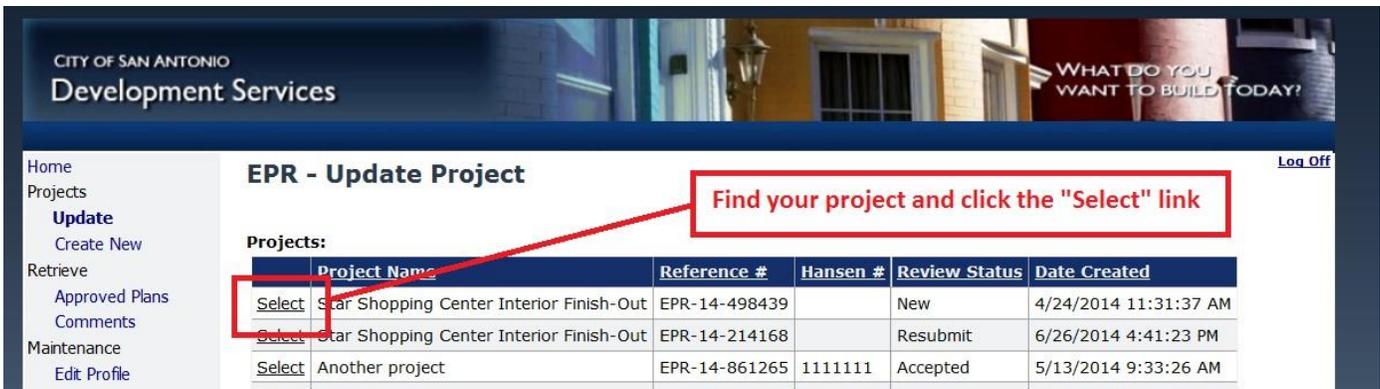
WHAT DO YOU WANT TO BUILD TODAY?

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Click the "Update" link

Find the applicable project and click the **"Select"** link. If you have multiple projects in queue, they will all be listed here. If there is no Hansen number, then the project is still in intake and plan review has not started. If the **"Review Status"** is **"New"** the plans/permit application is still in completeness review. Sorting by **"Review Status"** and selecting **"New"** projects will show all projects that are in completeness review.



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Find your project and click the "Select" link

Projects:

	Project Name	Reference #	Hansen #	Review Status	Date Created
Select	Star Shopping Center Interior Finish-Out	EPR-14-498439		New	4/24/2014 11:31:37 AM
Select	Star Shopping Center Interior Finish-Out	EPR-14-214168		Resubmit	6/26/2014 4:41:23 PM
Select	Another project	EPR-14-861265	1111111	Accepted	5/13/2014 9:33:26 AM

Once you have selected the EPR project that you wish to update, you will see details pertaining to the previously submitted project, with some options locked down (like the Hansen # field). The lower portion of the screen will show what files were previously uploaded.

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Project Information

Project Name: One-Stop
 Reference#: EPR-14-735986
 Hansen#:
 Application Type: Commercial
 Document Type: PW5250-01A
 Status: Accepted
 Date Project Created: 7/9/2014 9:14 AM
 Add Notes:

Attachments

Additional Files:

Attach documents one at a time (Max 10 documents up to 85 MB total)

Current Documents

Document Name	Date Added	Document Status	Date Migrated	Plan Type
Inventory Batch #1.pdf	7/9/2014 9:14 AM	Migrated	7/9/2014 9:21 AM	Drawings Architectural
Architectual.pdf	7/9/2014 9:38 AM	Migrated	7/9/2014 9:39 AM	Drawings Architectural
Electrical.pdf	7/9/2014 9:38 AM	Migrated	7/9/2014 9:39 AM	Drawings Electrical
Mechanical.pdf	7/9/2014 9:38 AM	Migrated	7/9/2014 9:39 AM	Drawings Mechanical
Structural.pdf	7/9/2014 9:38 AM	Migrated	7/9/2014 9:40 AM	Drawings Structural
Architectual.pdf	10/9/2014 10:46 AM	Migrated	12/17/2015 11:30 AM	Drawings Architectural

To upload additional files, follow the same steps to browse and select files found in this guide beginning on page 7. You may also add notes which may be useful to clarify what files are being added and why.

Once you are ready to submit, click **“Update Project”** to send the files to the DSD Intake Staff for review.

Tip: When you re-submit documents in response to plan review comments, use the **"Add Notes"** section to indicate who the re-submittal files are intended for. Identifying the name of the reviewer or discipline requiring the documents helps ensure the proper reviews are routed and performed in a timely manner.

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Project Information
Project Name: Star Shopping Center Interior Finish-Out
Reference#: EPR-14-498439
Hansen#:
Application Type: Commercial
Document Type: PW5250-01A
Status: ~~New~~
Date Project Created: 4/24/2014 11:31 AM
Add Notes:

Attachments
Additional Files:

Attach documents one at a time (Max 10 documents up to 85 MB total)

	Document Name	Plan Type	Size (MB)
View Delete	Electrical.pdf	Select	2.47

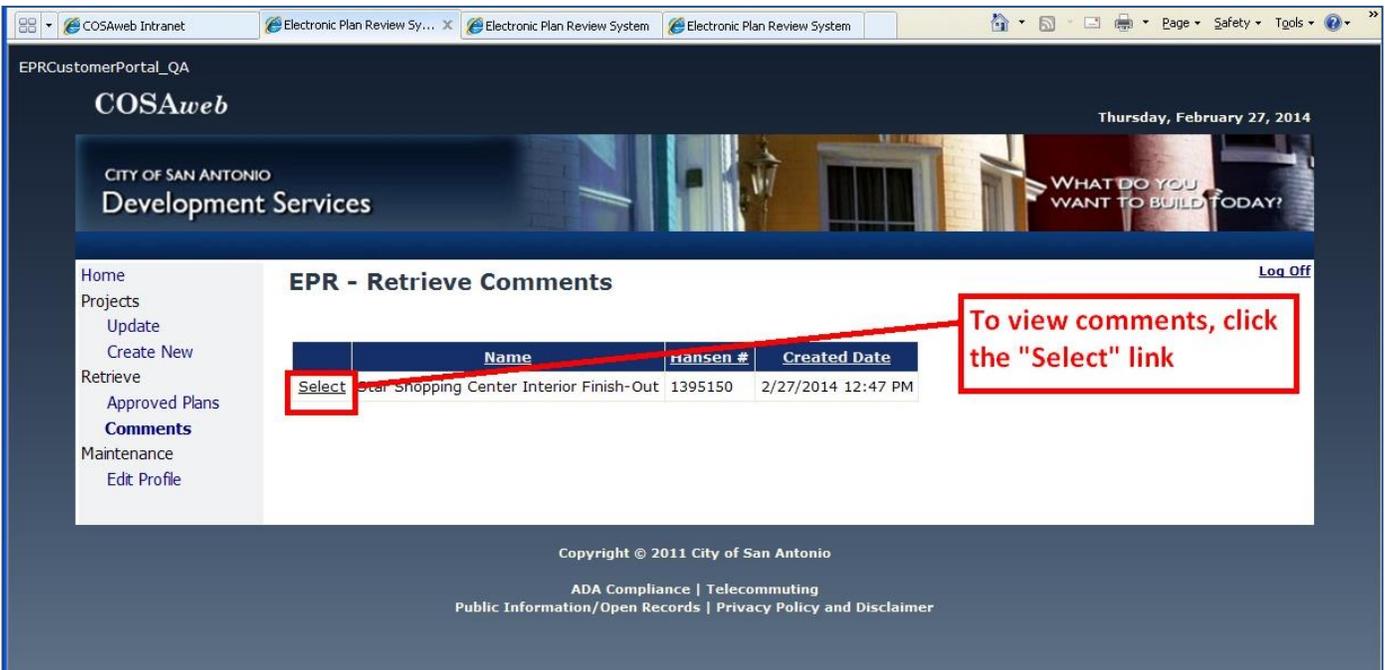
1 of 10 possible files attached. 2.47 MB of max 85 MB attached.

Checking Staff Comments

During the submission process, you may receive notification from the DSD Intake Team that further documents are needed (engineer's letter, tree affidavit, etc). To view the comments from the intake team, click on the **"Comments"** link on the main portal page after you log in. (Later you will also choose **"Comments"** to review plan review comments from plan examiners who have reviewed your plans.)



Click on the **"Select"** link for the project you received comments or questions for. As you add projects or reviews are conducted, you may see many comments in the system. You may click on the **"Hansen #"** column heading to sort by AP number, **"Name"** to sort by project name, or **"Created Date"** to sort by the date you created the project.



In this example, a fire flow report is required for this project. Specific information will be typed into the "Comments" section and the "Message Body" will be sent to you via e-mail informing you there are comments concerning your project.

EPRCustomerPortal_QA

COSAweb Thursday, February 27, 2014

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EPR - View Comments Hello JAMES FLOOD! [Log Off](#)

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Type: Approved Plans
Hansen #: 1395150
Project Name: TEST
Contact Name: JAMES FLOOD
Contact Email: james.flood@sanantonio.gov

Name: Fire Flow Test

Comments: Please submit a fire flow report for this project. Thank you.

Message Subject: AP# 2075097, New Comments created: Fire Flow Test

Message Body: Please submit a fire flow report for this project. Thank you.

[Attached Documents](#)
No Package Items Found

The "Comments" feature may also be used by Plans Examiners to communicate review comments, which can also include back marked-up/revise drawings for your review. You can view any attachments and annotations the review team has attached by clicking on the "View Document" link below.

EPR - View Comments [Log Off](#)

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Type: Comments
Hansen #: 1315150
Project Name: Star Shopping Center Interim Finish-Out
Contact Name: JOEL DOLE
Contact Email: joel.dole@interwebs.com

Name: Star Shopping Center Interim Finish-Out

Comments: Please review change notes on plan sets. Minor code modifications required. Fire wall and fire blocking concerns. Thank you.

Message Subject: AP# 1315150 New Comments created

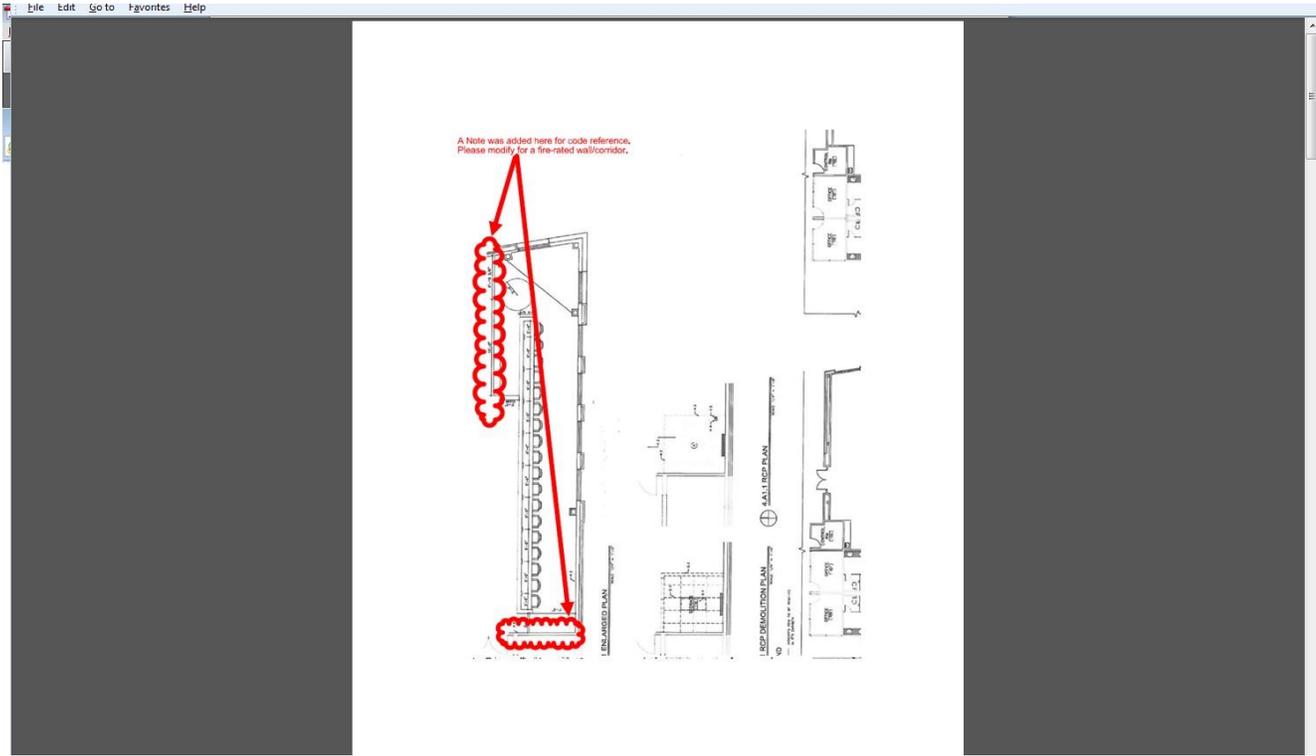
Message Body: Please review change notes on plan sets. Minor code modifications required. Fire wall and fire blocking concerns. Thank you.

Attached Documents

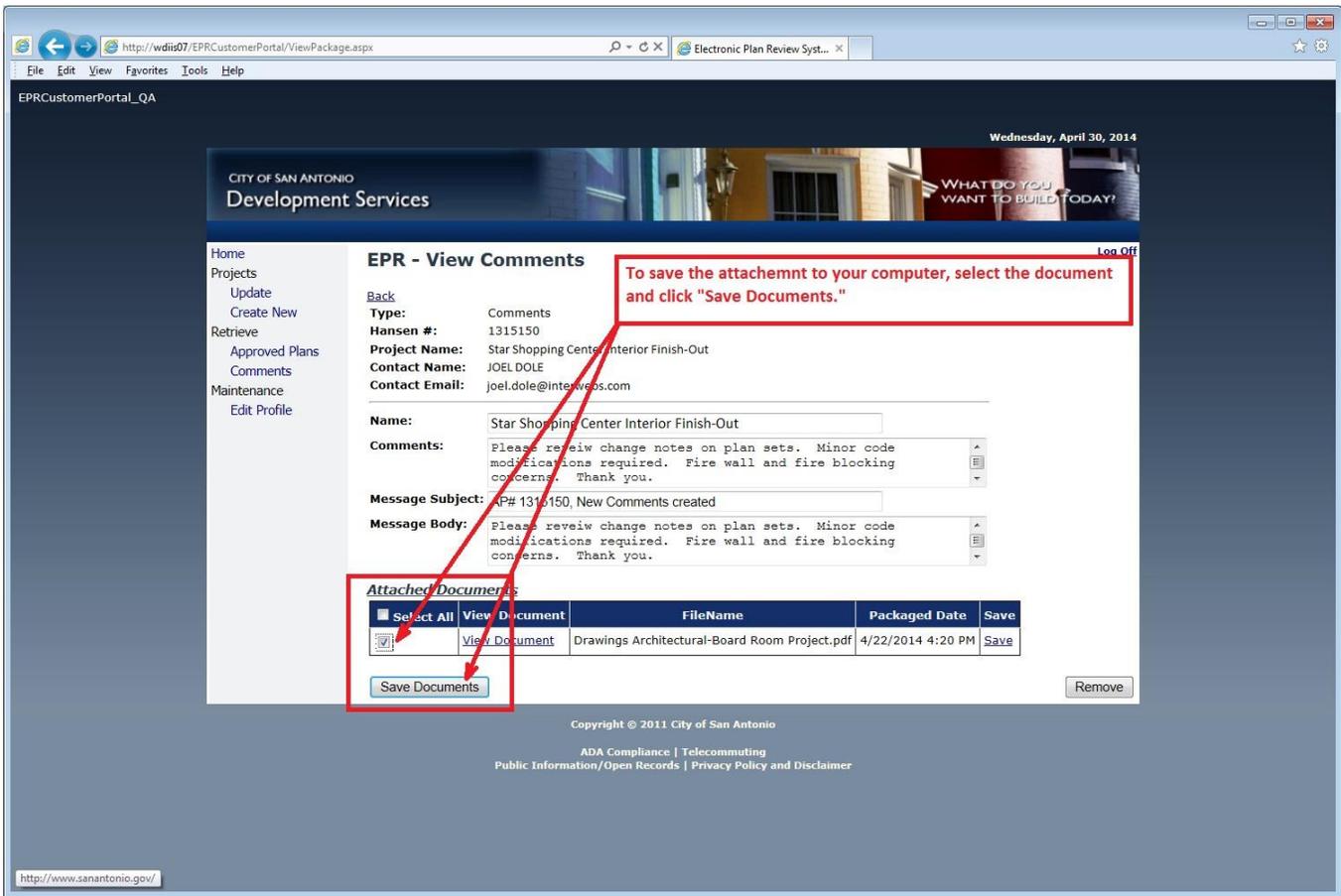
Select All	View Document	FileName	Packaged Date	Save
<input type="checkbox"/>	View Document	Drawings Architectural.pdf	4/22/2014 4:20 PM	Save

[Save Documents](#) [Remove](#)

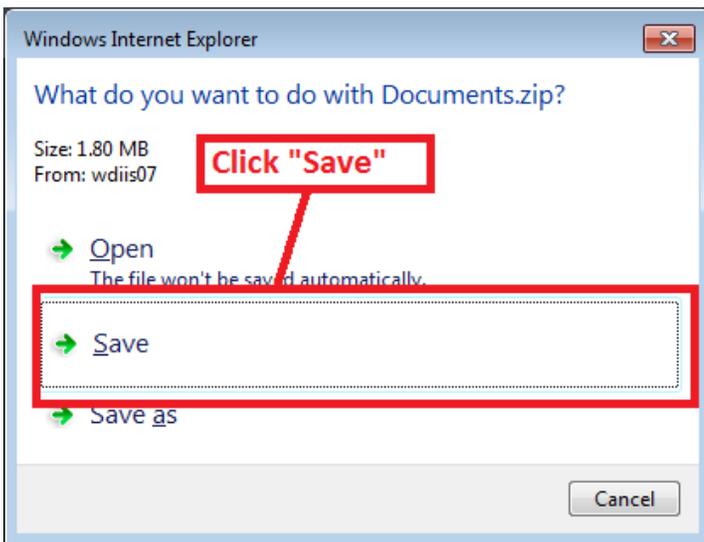
After clicking the **“View Document”** link another window will open displaying the attachment with notes or annotations.



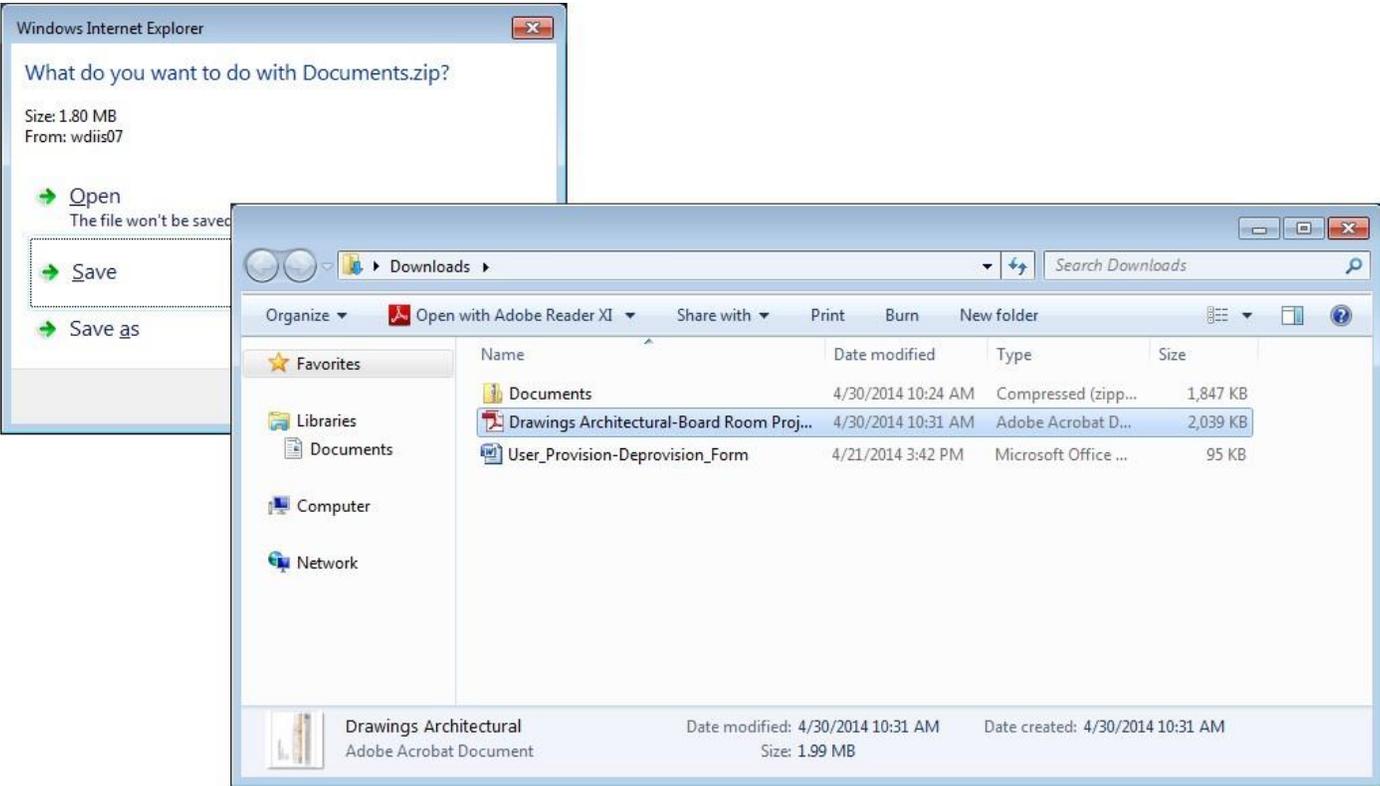
You can save the attachments to your computer by placing a check mark in the box next to the attachments you wish to save and then click the **"Save Documents"** button.



A pop-up window will appear prompting you to open, save the attachment, or save and modify the name or file type. Click **"Save."** Depending on your operating system, these options may be different than depicted here.



Another pop-up window will appear prompting you to select the location on your computer to save the file.



Obtaining Approved Plan Sets

Once your plans are approved, you can download them and save them to your computer by clicking on the "Approved Plans" link. You are required to retrieve the final city approved plans, print them and have them available on the job site for inspectors. **It is highly recommended to print plans in color to see approval comments, markups and annotations.**

Use the "**Approved Plans**" link to view and download approved single drawings submitted for "post permit" review. These are submittals that show change orders or significant changes to the city approved plans and required to be submitted for plan review. Plan examiners will have retrieved the "post permit" submittal, reviewed the changes to the plan and are returning the approved changes back to you to have available in the field as a hard copy.

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Retrieve approved plans by clicking on the "Approved Plans" link

Click on the "**Select**" link for the plan sets.

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EPR - Retrieve Approved Plans

	Name	Hansen #	Created Date
Select	Approved Plan Sets	1888888	6/17/2014 3:51 PM
Select	Plans	1999999	6/18/2014 8:46 AM
Select	Approval Notes - Fire Review	1111112	6/20/2014 8:41 AM

Special notes or comments from the review will be displayed here.

The screenshot shows the 'EPR - View Approved Plans' page on the COSAweb portal. The page header includes the COSAweb logo, the date 'Thursday, February 27, 2014', and the user name 'Hello JAMES FLOOD!'. A navigation menu on the left lists options like 'Home', 'Projects', 'Update', 'Create New', 'Retrieve', 'Approved Plans', 'Comments', 'Maintenance', and 'Edit Profile'. The main content area displays project information: Type: Approved Plans, Hansen #: 1395150, Project Name: Star Shopping Center Interior Finish-Out, Contact Name: JAMES FLOOD, and Contact Email: james.flood@sanantonio.gov. Below this, the 'Name' field is filled with 'Star Shopping Center Interior Finish-Out'. The 'Comments' field contains the text: 'Your plans have been approved and a permit will be issued once all associated fees have been paid. Thank you.' The 'Message Subject' is 'AP# 1395150, New Approved Plans created: Star Shopping Center Inter' and the 'Message Body' is identical to the comments. An 'Attached Documents' section contains a table with one row: 'Drawings Architectural.pdf' with a 'View' link and a 'Save' link. Red boxes and arrows highlight the 'Comments' field and the 'View' link in the document table.

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Type: Approved Plans

Hansen #: 1395150

Project Name: Star Shopping Center Interior Finish-Out

Contact Name: JAMES FLOOD

Contact Email: james.flood@sanantonio.gov

Name: Star Shopping Center Interior Finish-Out

Comments: Your plans have been approved and a permit will be issued once all associated fees have been paid. Thank you.

Message Subject: AP# 1395150, New Approved Plans created: Star Shopping Center Inter

Message Body: Your plans have been approved and a permit will be issued once all associated fees have been paid. Thank you.

Attached Documents

Select All	View	FileName	Packaged Date	...
<input type="checkbox"/>	View	Drawings Architectural.pdf	2/27/2014 12:47 PM	Save

Save Documents Remove

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To save your approved plans, click on the **"Save"** link. If you have multiple plan sets (for larger projects), check each of the boxes for the plans you want to save or check the **"Select All"** box in the header. The plans will be saved as PDF documents and maintain the naming convention listed in the **"File Name"** column. In this case the saved file will maintain the name "Drawings Architectural.pdf."

The screenshot shows the 'EPR - View Approved Plans' page in the COSAweb system. The page includes a navigation menu on the left, a header with the COSAweb logo and date, and a main content area. The main content area displays project details and a table of attached documents. A red box highlights the 'Save' link in the table, with a callout box stating 'To save the approved plan sets, click the "Save" link'.

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Type: Approved Plans
Hansen #: 1395150
Project Name: Star Shopping Center Interior Finish-Out
Contact Name: JAMES FLOOD
Contact Email: james.flood@sanantonio.gov

Name: Star Shopping Center Interior Finish-Out

Comments: Your plans have been approved and a permit will be issued once all associated fees have been paid. Thank you.

Message Subject: AP# 1395150, New Approved Plans created: Star Shopping Center Inter

Message Body: Your plans have been approved and a permit will be issued once all associated fees have been paid. Thank you.

Attached Documents:

<input type="checkbox"/>	View	FileName	Packaged Date	Save
<input type="checkbox"/>	View	Drawings Architectural.pdf	2/27/2014 12:47 P-4	Save

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After clicking the "Save" link, a file download dialog box will be displayed prompting you to open or save the file; click the "Save" button.

The screenshot shows the COSAweb interface for viewing approved plans. The main content area displays details for a plan titled "Star Shopping Center Interior Finish-Out". A "File Download" dialog box is open, showing the file "Drawings Architectural.pdf" (1.31MB) and prompting the user to "Do you want to open or save this file?". The "Save" button in the dialog is highlighted with a red box, and a red arrow points to it from a text box that says "Click the 'Save' button".

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Type: Approved Plans
Hansen #: 1395150
Project Name: Star Shopping Center Interior Finish-Out
Contact Name: JAMES FLOOD
Contact Email: james.flood@sanantonio.gov

Name: Star Shopping Center Interior Finish-Out

Comments: Your plans have been approved and a permit will be issued once all associated fees have been paid.

Message Subject: AP# 1395150, New Approved Plans created: Star Shopping Center Interior Finish-Out

Message Body: Your plans have been approved and a permit will be issued once all associated fees have been paid. Thank you.

Attached Documents

Select All	View	FileName	Packaged Date	Save
<input type="checkbox"/>	View	Drawings Architectural.pdf	2/27/2014 12:47 PM	Save

[Save Documents](#) [Remove](#)

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Another window will be generated asking you to select the location on your computer to save the file. In this example we have selected the **"Project"** folder on the computer's local drive (C:\).

The screenshot shows the COSAweb portal interface. The main content area displays 'EPR - View Approved Plans' with details for a project named 'Star Shopping Center Interior Fin...'. A 'Save As' dialog box is overlaid on the page, showing the file 'Drawings Architectural.pdf' being saved to the 'Project' folder on the C: drive. A red box highlights the 'Project' folder in the file list, and another red box highlights the 'Save' button. A red callout box with the text 'Select the location on your computer you want to save the file and click the "Save" button' points to the 'Save' button.

Select the location on your computer you want to save the file and click the "Save" button

All approved plans must be printed and kept on the job site after construction starts and must be available to inspectors at all times.