



TO: Development Services Customers

SUBJECT: **INFORMATION BULLETIN #216**  
Electronic Plan Review (EPR)

DATE: November 12, 2013 (*Revised June 1, 2014; December 1, 2015; March 24, 2020*)

CREATED BY: Plan Review Division

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### **Purpose**

This Information Bulletin provides guidance on submitting building plans for review in an electronic format. This Information Bulletin has been revised to clarify and update 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.)

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

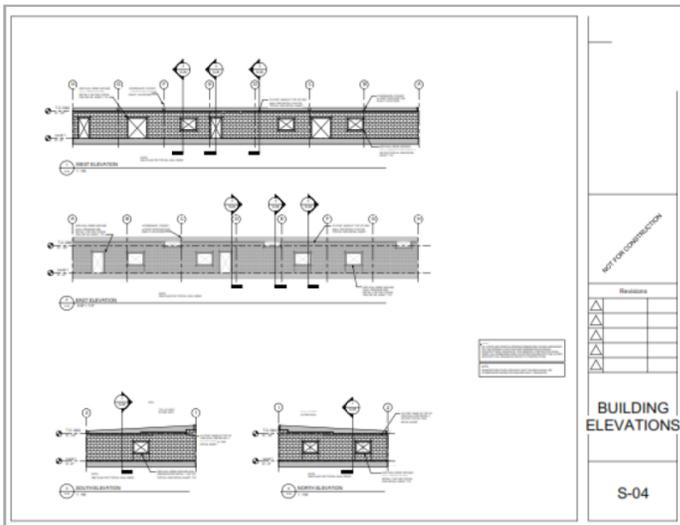
development in our City. Please adhere to these guidelines to ensure an efficient electronic plan review process.

### Plans and Drawings

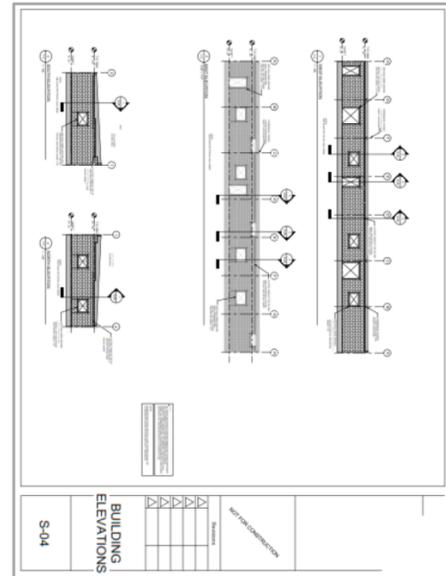
- ❖ **File Format:** Each Plan or Plan set must be saved in **PDF** format. Please flatten the drawing layers in your CAD program such as AutoCAD or Revit before creating the PDF.
- ❖ **File Quality:** Scanned documents are not recommended as scanning degrades the quality of the image and creates noise 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 email 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](mailto: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. Only submit the REVISED drawings for a post permit submittal.
- ❖ Each design discipline should have a separate file as described earlier in this information bulletin.
- ❖ The department requires adding a "-PR#" suffix to the file name for resubmittals following denial comments, as the following shows:
  - Architectural-PR1
  - Civil-PR1
- ❖ 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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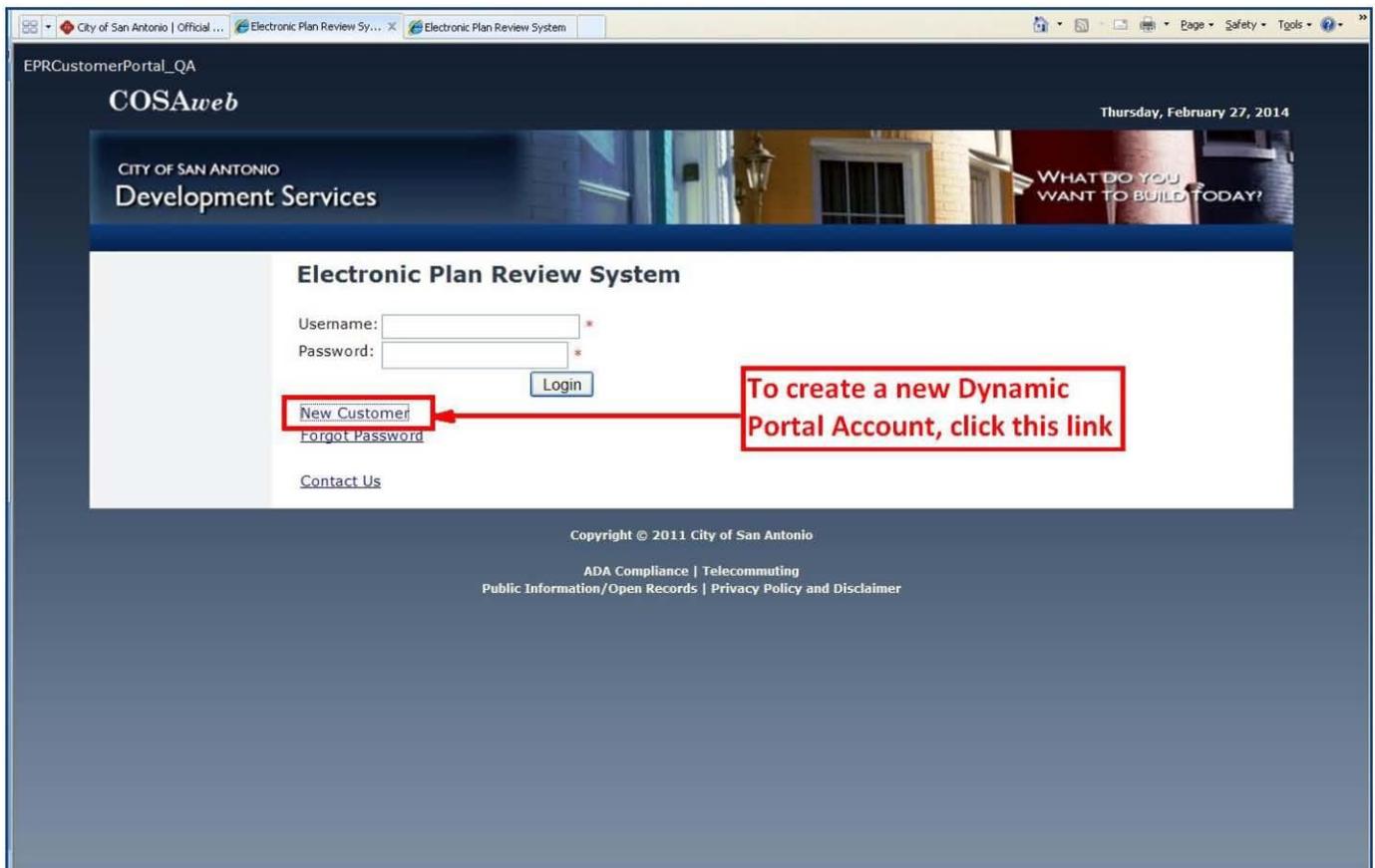
**Authorized by:**

**Terry Kannawin  
Assistant Director, Plan Review**

## 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 or think that your name is already in our system, please call the Development Services Customer Service Center at 207-1111 and 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. Please call DSD Call Center at 210-207-1111 Option "0" to make sure you are not already in the system.

The screenshot shows the City of San Antonio Development Services Department website. The page features a navigation menu on the left with links such as "INSPECTION SCHEDULER", "DEVELOPMENT SERVICES HOME", and "PERMITS". The main content area includes a "Login" section with a "Log In" button and a "Forgot your password?" section with a "Get Password" button. A red box highlights the "Create a new login" section, which contains a "Create Account" button and a link to "click here" for more information on Garage Sales. The footer contains copyright information and technical details.

City of San Antonio  
**Development Services Department**

**Log In**

- If you have already registered for an account, enter your user name and password and click "Log In".
- If you have registered for an account but can't remember your password, enter your user name below "Forgot your password" and click "Get Password". Your password will be mailed to you.
- If you are new to the system, click "Create Account".
- For use information, please read [City Policy and Fraudulent Use](#)

User Name:

Password:

**Log In**

**Forgot your password?**

User Name:

**Get Password**

**Create a new login**

For more information on Garage Sales, [click here](#).

**Create Account**

[Click here](#)

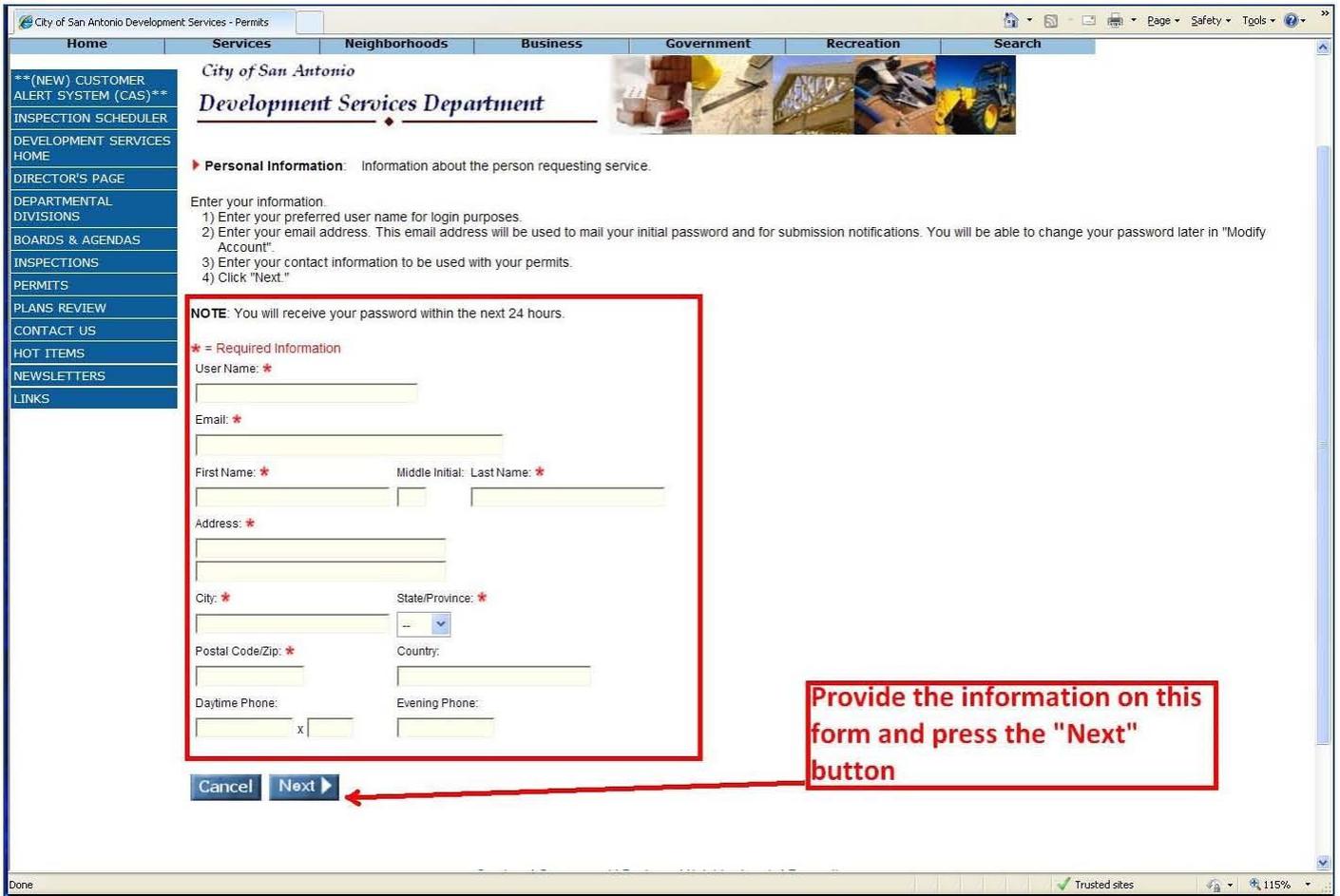
[Services](#) | [Government](#) | [Business](#) | [Neighborhoods](#) | [Recreation](#)  
[Home](#) | [Privacy Policy and Disclaimer](#) | [Text Only](#)

Website best viewed using [Microsoft Internet Explorer 6.0](#) or [Netscape 7.1](#)  
with screen resolution settings of 800x600.

DynamicPORTAL™ and online application process Copyright © 2002, Hansen Information Technologies  
Form Data: WP\_LOGIN, 1393515101496 Database: "QH1" Version/Date: 2.0.2/02.17.2014 SERVERID: D01::testpermits.sanantonio.gov PAYMENT SERVER:  
<http://wqjis08/ecommerce/hansen/payment.asp>

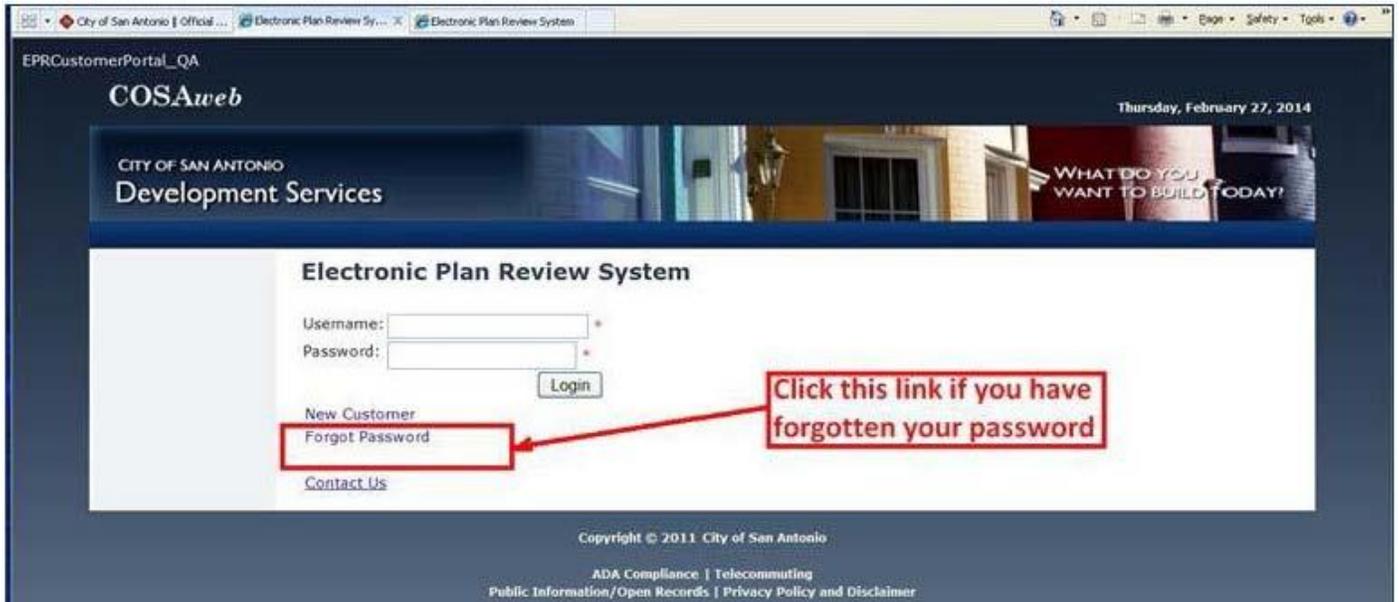
Creating a Dynamic Portal account requires minimal personal information, as detailed in the screenshot below. Please ensure that the email address you enter is correct, as this will be the primary means that the EPR Customer Portal will use to convey information to you from DSD staff.

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.

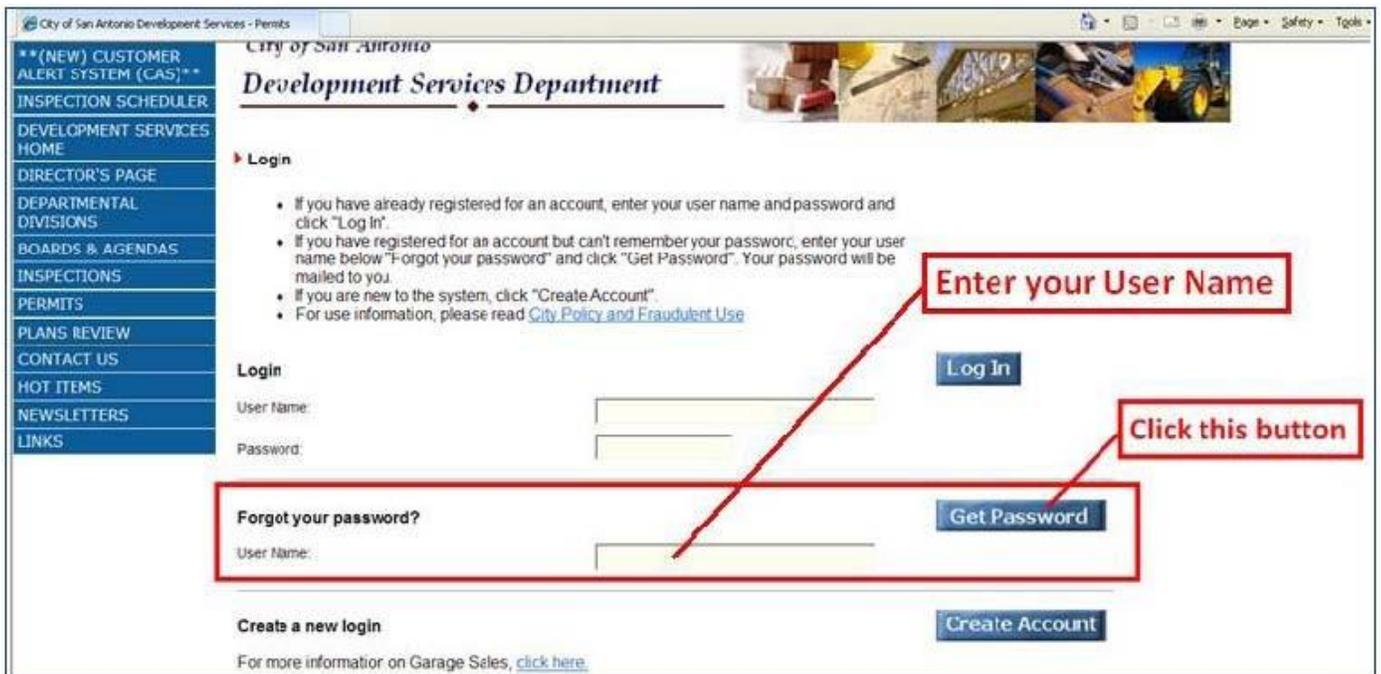


## Obtaining Access to an Existing Dynamic Portal Account

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.

<https://planreview.sanantonio.gov/EPRCustomerPortal/>



CITY OF SAN ANTONIO  
Development Services

WHAT DO YOU WANT TO BUILD TODAY?

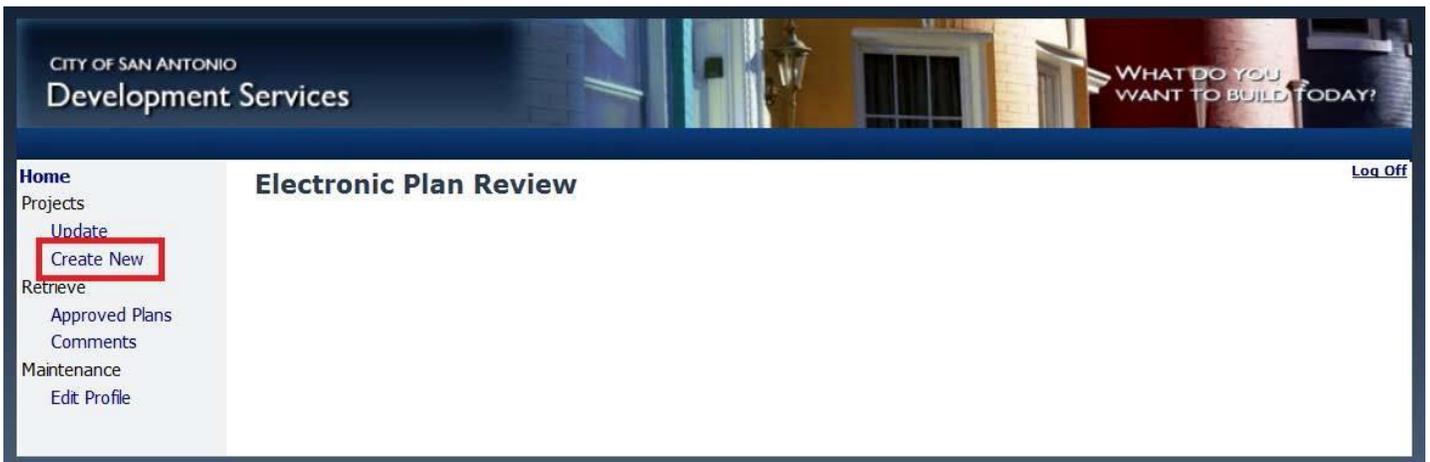
### Electronic Plan Review System

Username:

Password:

[New Customer](#)  
[Forgot Password](#)  
[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.



CITY OF SAN ANTONIO  
Development Services

WHAT DO YOU WANT TO BUILD TODAY?

### Electronic Plan Review

[Log Off](#)

- Home
- Projects
  - Update
  - Create New**
- Retrieve
  - Approved Plans
  - Comments
- Maintenance
  - 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 is highlighted with a red box and contains the text 'Star Shopping Center Interior Finish-Out'. The 'Application Type' dropdown menu is open, showing options: 'Select', 'Select', 'Commercial', 'Miscellaneous', and 'Residential'. A red arrow points from a red-bordered box containing the text 'Select the application type from the drop-down menu' to the 'Commercial' option. Below the form, there is an 'Attachments' section with an 'Additional Files' field and a 'Browse...' button. At the bottom, there are 'Submit' and 'Cancel' buttons. The page header includes 'CITY OF SAN ANTONIO Development Services' and a banner with the text 'WHAT DO YOU WANT TO BUILD TODAY?'. A 'Log Off' link is in the top right corner.

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 is set to 'Commercial'. The 'Document Type' dropdown menu is open, showing options: 'Select', '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 arrow points from a red-bordered box containing the text 'Select the document type (s) you are attaching to your project' to the 'Blueprints and Specifications - Commercial/Non Residential' option. Below the form, there is an 'Attachments' section with an 'Additional Files' field and a 'Browse...' button. At the bottom, there are 'Submit' and 'Cancel' buttons. The page header includes 'CITY OF SAN ANTONIO Development Services' and a banner with the text 'WHAT DO YOU WANT TO BUILD TODAY?'. A 'Log Off' link is in the top right corner.

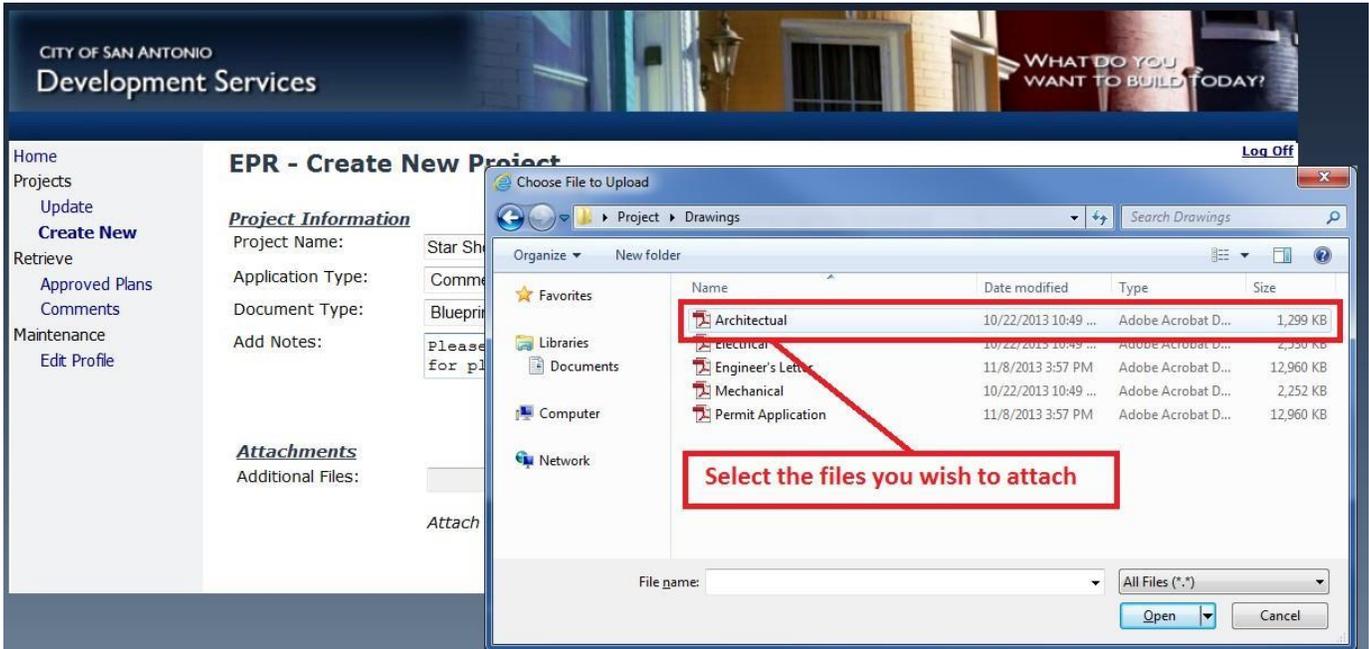
You can add notes, comments or special instructions for the intake team in the **"Add Notes"** field. This is not a required field for the original submission, but is required for re-submittal documents and post-permit revisions. For resubmittal documents, indicate which reviewer, department, or discipline (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 (Star Shopping Center Interior Finish-Out), Application Type (Commercial), and Document Type (Blueprints and Specifications - Commercial/Non Residential). The 'Add Notes' field contains the text 'Please use escrow for plan review fees'. A red callout box with a red border points to this field, containing the text: 'You can add comments for the intake team in this field'. Below the notes field is the 'Attachments' section with an 'Additional Files' field and a 'Browse...' button. At the bottom, there are 'Submit' and 'Cancel' buttons.

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.

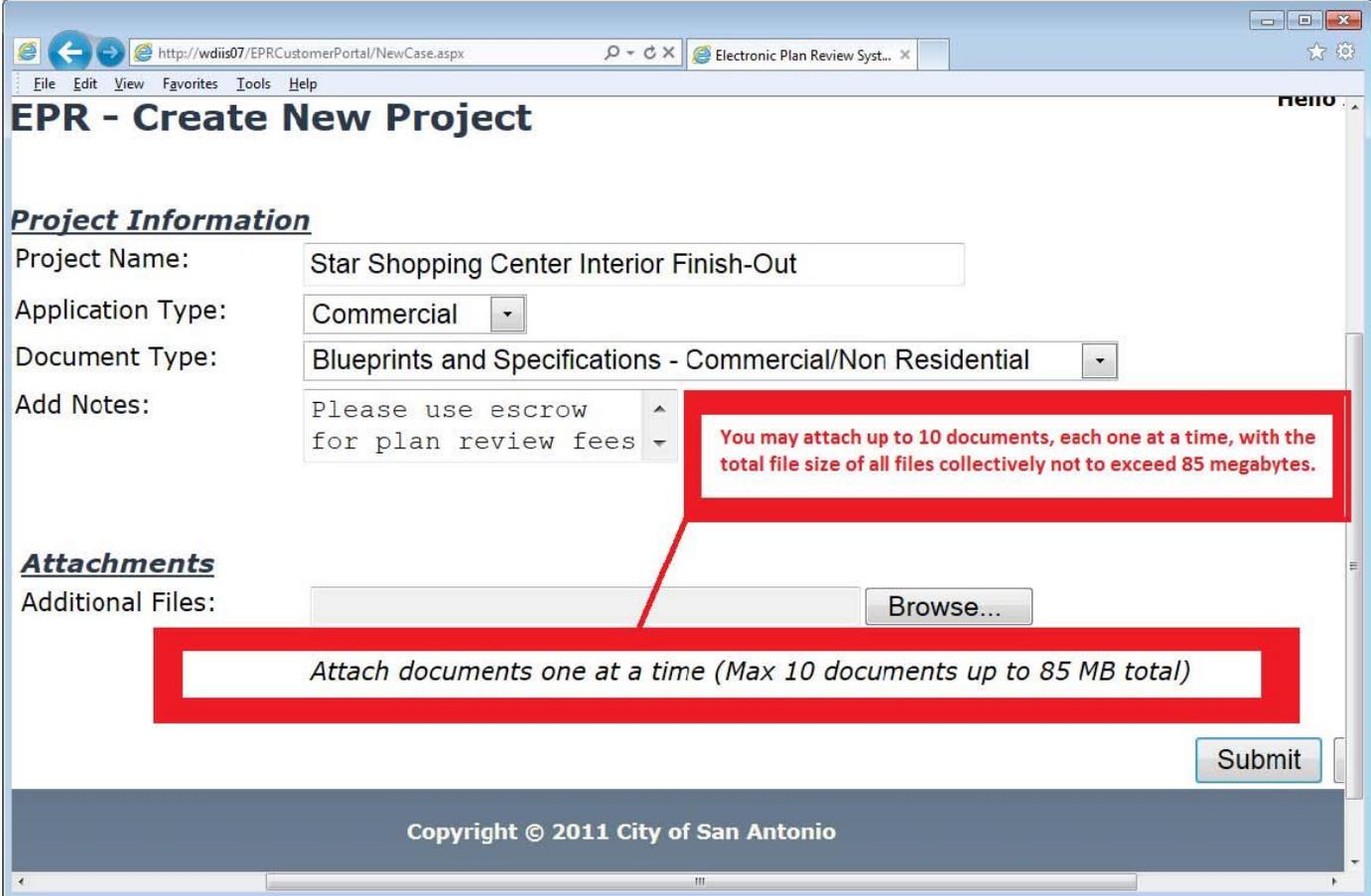
This screenshot is identical to the one above, showing the 'EPR - Create New Project' form. In this version, a red callout box with a red border points to the 'Browse...' button in the 'Attachments' section. The callout box contains the text: 'Attach drawings and other documents here'. The 'Add Notes' field still contains the text 'Please use escrow for plan review fees'.

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.



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.

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Home | Projects | Update | **Create New** | Retrieve | Approved Plans | Comments | Maintenance | Edit Profile

### EPR - Create New Project Log Off

**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)*

	Document Name	Plan Type	Size (MB)
<a href="#">View</a> <a href="#">Delete</a>	Architectual.pdf	<input type="text" value="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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WHAT DO YOU WANT TO BUILD TODAY?

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### EPR - Create New Project Log Off

**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)*

	Document Name	Plan Type	Size (MB)
<a href="#">View</a> <a href="#">Delete</a>	Architectual.pdf	<input type="text" value="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.

[Submit](#) [Cancel](#)

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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Home  
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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)
<a href="#">View</a> <a href="#">Delete</a>	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  
Development Services

Home  
Projects  
Update  
**Create New**  
Retrieve  
Approved Plans  
Comments  
Maintenance  
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)
<a href="#">View</a> <a href="#">Delete</a>	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  
Development Services

WHAT DO YOU WANT TO BUILD TODAY?

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Comments  
Maintenance  
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).

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

Home Log Off

Electronic Plan Review

Projects

- Update**
- Create New

Retrieve

- Approved Plans
- Comments

Maintenance

- Edit Profile

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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EPR - Update Project

Projects

- Update**
- Create New

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- Approved Plans
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- Edit Profile

Find your project and click the "Select" link

	Project Name	Reference #	Hansen #	Review Status	Date Created
<a href="#">Select</a>	Star Shopping Center Interior Finish-Out	EPR-14-498439		New	4/24/2014 11:31:37 AM
<a href="#">Select</a>	Star Shopping Center Interior Finish-Out	EPR-14-214168		Resubmit	6/26/2014 4:41:23 PM
<a href="#">Select</a>	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.

Update

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**Project Information**

Project Name: One-Stop

Reference#: EPR-14-735986

Hansen#:

Application Type: Commercial

Document Type: PW5250-01A

**Attachments**

Additional Files:

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

*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.

The screenshot shows a web browser window with the following elements:

- Browser Tabs:** COSAweb Intranet, Electronic Plan Review System (multiple instances).
- Page Header:** EPRCustomerPortal\_QA, COSAweb, Thursday, February 27, 2014.
- City of San Antonio:** Development Services banner with the slogan "WHAT DO YOU WANT TO BUILD TODAY?".
- User Greeting:** Hello JAMES FLOOD! [Log Off](#)
- Navigation Menu (Left):** Home, Projects, Update, Create New, Retrieve, Approved Plans, Comments, Maintenance, Edit Profile.
- Section Header:** EPR - View Comments
- Metadata:** [Back](#), **Type:** Approved Plans, **Hansen #:** 1395150, **Project Name:** TEST, **Contact Name:** JAMES FLOOD, **Contact Email:** james.flood@sanantonio.gov
- Form Fields:**
  - 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:** Attached Documents, No Package Items Found
- Buttons:** Save Documents, Remove

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.

## 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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### Electronic Plan Review

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

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

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Development Services

WHAT DO YOU WANT TO BUILD TODAY?

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### EPR - Retrieve Approved Plans

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

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

EPRCustomerPortal\_QA

**COSAweb** Thursday, February 27, 2014

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**EPR - View Approved Plans** Hello JAMES FLOOD! [Log Off](#)

[Back](#)

**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	Save
<input type="checkbox"/>	<a href="#">View</a>	Drawings Architectural.pdf	2/27/2014 12:47 PM	<a href="#">Save</a>

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

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Local Intranet 115%

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 displays the 'EPR - View Approved Plans' page on the COSAweb portal. The page includes a navigation menu on the left, a header with the COSAweb logo and date (Thursday, February 27, 2014), and a main content area. The main content area shows project details for 'Star Shopping Center Interior Finish-Out' and a table of attached documents. A red callout box points to the 'Save' link in the table header, with the text: 'To save the approved plan sets, click the "Save" link'. The 'Save' link in the table row is also highlighted with a red box.

**EPR - View Approved Plans**

Back

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 Inte

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"/> 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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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 the following information:

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

The message body states: "Your plans have been approved and a permit will be issued once all associated fees have been paid. Thank you."

The "Attached Documents" table is as follows:

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

At the bottom of the page, there are "Save Documents" and "Remove" buttons. The footer text reads "Copyright © 2011 City of San Antonio".

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 a web browser window displaying the 'EPR - View Approved Plans' page on the COSAweb portal. The page includes a sidebar with navigation options like 'Home', 'Projects', 'Update', 'Create New', 'Retrieve', 'Approved Plans', 'Comments', 'Maintenance', and 'Edit Profile'. The main content area shows details for a project: 'Star Shopping Center Interior Fin...', 'Hansen #: 1395150', 'Contact Name: JAMES FLOOD', and 'Contact Email: james.flood@sanantonio.gov'. A 'Save As' dialog box is open over the page, showing the file path 'BOOTCAMP (C:\)' and a list of folders including 'Project', which is highlighted with a red box. The 'File name' field contains 'Drawings Architectural' and the 'Save as type' is 'Adobe Acrobat Document'. The 'Save' button in the dialog is also highlighted with a red box. A red text box with arrows pointing to the 'Project' folder and the 'Save' button contains the instruction: 'Select the location on your computer you want to save the file and click the "Save" button'. Below the dialog, an 'Attached Documents' table is visible, showing a document named 'Drawings Architectural.pdf' with a 'View' button. At the bottom of the page, there is a 'Save Documents' button and a 'Remove' button. The footer of the page reads 'Copyright © 2011 City of San Antonio'.

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