Department of Permitting Services

Electronic Plan Submission Applicant User Guide

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Table of Contents

Electronic Plans Submission (ePlans)

"ePlans" is a web-based application that facilitates electronic plan submission and review that has been tailored to meet the Montgomery County Department of Permitting Services' (DPS) processes using ProjectDox software. ePlans allows drawings and documents to be submitted and reviewed electronically, improves the plan review cycle, and reduces costs associated with obtaining permits as well as supporting green initiatives.

DPS, through its' eServices suite, has the ability to receive permit applications through our Apply Online (ePermits) application and plans (ePlans) electronically however, there are a few prerequisites you will need to meet prior to using eServices for your permit application. This guide will help you through the process of electronic plan submittal. If you need assistance with ePermits (Apply Online) please visit the DPS homepage.

To begin the ePlans submittal process you will need to begin with the following steps:

1. Create a Montgomery County DPS ProjectDox (ePlans) account (if you do not have one already) by emailing dps.eservices@montgomerycountymd.gov. Please provide your business address, telephone and email with your request.
2. Review the ProjectDox System Use Requirements and ensure that your computer is arranged to accommodate the ProjectDox system needs.
3. Complete a permit application with DPS using ePermits (Apply Online) or in person indicating that you wish to use ePlans.
4. If you are *not* the **primary applicant** on the permit application, you will need to ask the applicant to include your ProjectDox user name in the comments section of the application so that you will have access to the project **or** contact DPS via dps.eservices@montgomerycountymd.gov to be added to the project.

Upon acceptance of your permit application, you will receive an email invitation to upload electronic plans and supporting documents.

You can access the DPS ePlans website at: https://eplans.montgomerycountymd.gov

Prior to uploading your information for review please read the following information to prevent rejection of your permit application and/or delays in the review process.

ProjectDox System Use Requirements

Prior to logging on to the ProjectDox application, please read the ProjectDox System Use Requirements document. It provides requirements needed for each browser to interact properly with ProjectDox application.

Please note that non-IE (Internet Explorer) browsers like Chrome, Firefox, or Safari change the way files and tools are used which may limit functionality of the ProjectDox program. At this time, DPS recommends operating ProjectDox in IE.

Login and Creating a Profile

You can access the login page from the green eServices tab on the DPS website or by using the link provided in any email received from ePlans. The web address is: https://eplans.montgomerycountymd.gov/projectdox/ See the figure below for a screen shot of the login page.

Initial Use of DPS ProjectDox on Your Computer

If this is your first time using DPS ProjectDox please scroll to the bottom of the login page until you see a box with a hyperlink titled "Install ProjectDox Components". ProjectDox has a MSI (Microsoft Silent Install) component required to install all necessary ProjectDox ActiveX controls. This installation is only necessary once for each computer that you access the program on. If you utilize a different computer, it will require another installation for each unique computer. You will also need to add ProjectDox as a trusted site to your computer's security and/or privacy settings. Often the computer will prompt you to do this automatically.

First time users must contact DPS to obtain their account information (username and password). This may be done by emailing dps.eservices@montgomerycountymd.gov or by calling 240-777-0311. Once logged in you will be directed to your profile page and asked to create a new password that will be used to access the application going forward. You will also be required to

create a security question and answer that can be used should you ever forget your password. Once all required fields are completed and the SAVE button selected you will be directed to your projects page.

If you are a returning user, logon to ProjectDox with your full email address and password. If you have forgotten your password, click on the Forgot Password button and follow the prompts. A new password will be emailed to you. You will need to know the answer to the security question entered when first setting up the account. If you cannot remember the answer to your security question you will need to contact DPS to have the password reset. This can be done by emailing dps.eservices@montgomerycountymd.gov or by calling 240-777-0311.

Plans and Documents Submission Standards

Project Information
1. Sheet/drawing identification shall conform to the permit type specific requirements which can be found on the DPS webpage by clicking the green eServices tab and then clicking on ePlans Submittal Requirements.

2. An index with sheets/drawings names should be included on the cover sheet or sheet(s) following it.

File Naming Conventions
Each sheet/drawing submitted through ProjectDox must be submitted as a single file. Multiple sheets for drawings are not permitted in a single file. Each file name must be no more than 20 characters and shall conform to the permit type specific submittal requirements.

File names for the drawings should match the sheet title if possible but they must not contain special characters ((! @ # $ % ^ & * _ + { } : " | < > ?) and shall not exceed 20 characters. This limit may require the abbreviation of the sheet name; the sheet number should never be abbreviated. Do not add the extension file designation (".pdf") to the end of the file name; the system automatically appends this to the end of the file name.

5

Some DPS processes require specialized naming conventions. You can view these on the DPS website under the specific permit type for which you are applying. Once on the DPS homepage click the green eServices tab followed by the ePlans tab and then the ePlans submittal requirements tab. The requirements for your specific permit application also appear in the Applicant Upload Task email by clicking the link noted in the screenshot below.

ProjectDox TEST

Upload Confirmation Task Assignment

Attention Aaron:

Please complete your Drawings & Document upload for Project: **COMBUILD-759592**

Project:	**COMBUILD-759592**
Description:	**-ALTER-BUSNSS-255 ROCKVILLE PIKE -ROCKVILLE**
Task:	**ApplicantUpload**
Assigned by:	**DPS PD**
	Project Access | **Login to ePlans**

Click here for information on uploading plans and additional instructions for a successful submittal.

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

CAUTION!- Improperly named files will not be reviewed. DPS permit technicians and/or plans examiners will return the task to you so that you may upload your information correctly. You are *not* currently able to delete information uploaded into the system. If you need information deleted please contact DPS and our staff will be happy to assist you.

File Type Requirements
Only PDF files are accepted. Files must be print ready, i.e. setup properly for printing with title block, no extra data outside the print page area, etc.

Only searchable PDF files are accepted for calculations, reports and other supporting documentation (non-drawing files). We will accept multiple page files for supporting documents.

File Size Requirements
The largest individual file size that can be uploaded at this time is 20 MB (megabytes). If you have a larger file that you wish to upload or you want to speed up the uploading process, you can compress (zip) the file(s) into a single file and upload the compressed file. The upload of a compressed file is much faster and ePlans will decompress the file and publish the individual files into the selected folder. Please keep in mind that your upload times may vary depending on your computer and network capacity.

Area for the DPS "Batch" electronic stamp

A 3" x 4" area must be reserved at the top center of *ALL **drawings*** for the DPS electronic approval/rejection/revision stamp. This area must completely blank on all sheets (with exception of a borderline). This is applicable to all sheet sizes.

A 2" X 3" area must be reserved at the top center of *ALL* supporting ***documents*** for the DPS electronic approval/rejection/revisions stamp. This area must completely blank on all documents (with exception of the borderline, if any).

CAUTION!- If the DPS inspector cannot read the DPS batch stamps and/or the information revisions may be required which can cause a delay in the construction/approval process. Ensure that information submitted allows for the placement of batch stamps.

Scale
All drawings must be to scale. *Each* scaled drawing must have a graphic scale clearly indicated. When more than one scale is used on a sheet, an independent graphic scale must accompany each scalable area.

Sheet Size
The preferred drawings minimum size should be 24" x 36". This will help facilitate an efficient review of the submission and prevent potential legibility problems at inspection. Illegible plans submitted to DPS inspection staff may result in a delay in the construction schedule and failed inspections.

Upload Folders
All drawings must be uploaded to the **DRAWINGS** folder for each project. Please remember that each sheet must be a separate file.

All supporting documentation should be uploaded into the **DOCUMENTS** folder for each project. Please review the submittal requirements for the permit type for which you are applying to ensure that you upload all of the required information correctly. These can be found under the ePlans submittal requirements pages (project specific) on the DPS homepage or by following the link in the ApplicantUpload task email.

Corrected files must always be re-submitted with the **EXACT SAME FILE NAME** as the original submission. ProjectDox (ePlans) will automatically perform version control for the information being submitted.

Caution!- The **REVISIONS** folders are to be used only if you are submitting information for a permit that has been approved by DPS. In order to submit revisions, you must apply for the revision online by using DPS' ePermits system. You may also contact DPS at dps.eservices@montgomerycountymd.gov or by calling 240-777-0311 for additional assistance in processing your permit revision.
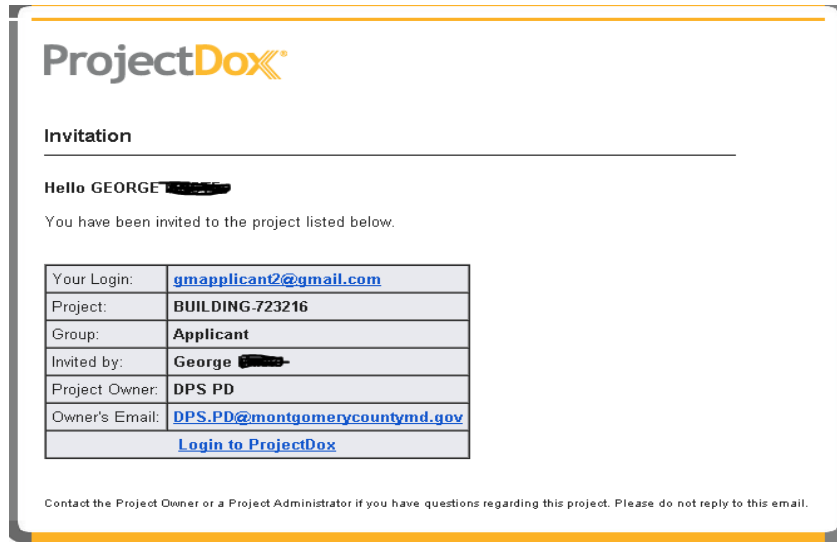
Design Professional's Electronic Seal and Signature
The Maryland Boards of Architects, Professional Engineers and Land Surveyors allow the use of digital signatures by design professionals. DPS only accepts digital signatures of the design professionals who prepared or approved the design plans and other documents. These signatures must be digitally encrypted and verifiable by a 3rd party in accordance with Maryland state law.

Please visit one of the [ePlans submittal requirements pages](#) to learn more about digital signature requirements. The design professional is not permitted to self-certify the design documents.

Initial Invitation to Upload Plans

When the permit application is accepted, an ePlans invitation will be sent to the email address(es) entered on the application submittal. The email, from DPS.DoNotReply@montgomerycountymd.gov,
will contain a link to the project which you can click on to log into ePlans and a link to this user guide.

Additionally, ePlans will send an Applicant Upload task to the email address entered on the application submittal. See the screenshot below for an example of this email.

Uploading Plans/Drawings and Documents

When you have successfully logged into ProjectDox (ePlans), the project list (home) screen will display. Please note the three tabs in the upper left-hand corner of the screen titled "Tasks (PF)", "Tasks (PD)" and "Projects." To see your current pending tasks, click the "Tasks (PD)" tab. Any outstanding tasks that require your action are displayed in the box and may be organized by clicking the headings. You can also see a list of current outstanding tasks due by clicking the button labeled "All Tasks" on the right side of the screen beneath the DPS logo.

To access any project that you have been invited to, click the tab labeled "Projects." You will also need to click the "All Projects" button on the right side of the screen. Simply enter information into any one of the fields to begin searching.

Select the specific project (e.g. building 123456) that corresponds to the information that you will be uploading. The project screen displays the project information and the folder list used for uploading drawings and supporting documents. See the picture below for an example of the project screen:
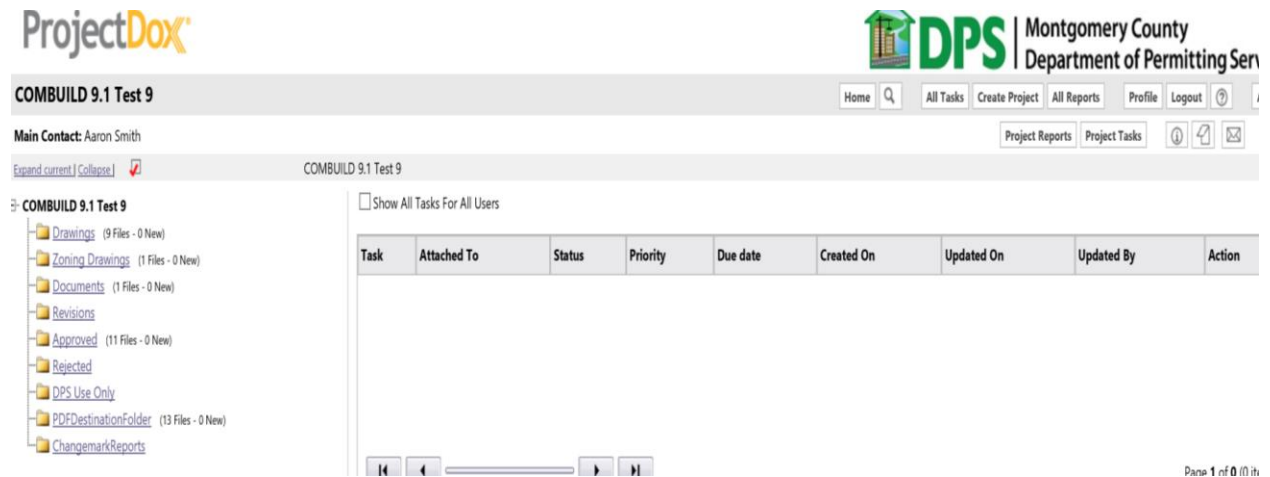
Accepting/Completing a Task

When you enter your project you can easily see if you have a task which needs to be completed by looking in the box to the right of the folders. If there is a hyperlink present, additional action is needed by you in order to move your project on to the next step.

Select the link (highlighted) under the task column and then click OK to accept the task within the popup window that appears. If you do not wish to accept the task click the cancel button within the popup window that appears. Clicking cancel will place the task back into the Active Task List.

CAUTION!-Only one participant can accept any task. Ensure that you are prepared to complete the task prior to accepting it. If a task has been accepted accidentally, contact DPS at dps.eservices@montgomerycountymd.gov to correct the problem. See the screenshot below for a project that has an active task:

1. After accepting the task your eForm will appear (see the next screen shot). The permit application information is auto-populated from the permitting system providing relevant project information. The eForm also serves as the means of communication between the applicant and DPS for the project.

2. After reviewing the information on the eForm minimize the form and return to the project page. You will come back to the eForm to complete your task and notify the County later in the uploading process.

On the project page click the **DRAWINGS** folder (and Zoning Drawings folder – for commercial projects) to upload your drawings. Similarly, click the **DOCUMENTS** folder to upload other related or required supporting documents. Once you are in the appropriate folder, click the Upload Files button (see below).
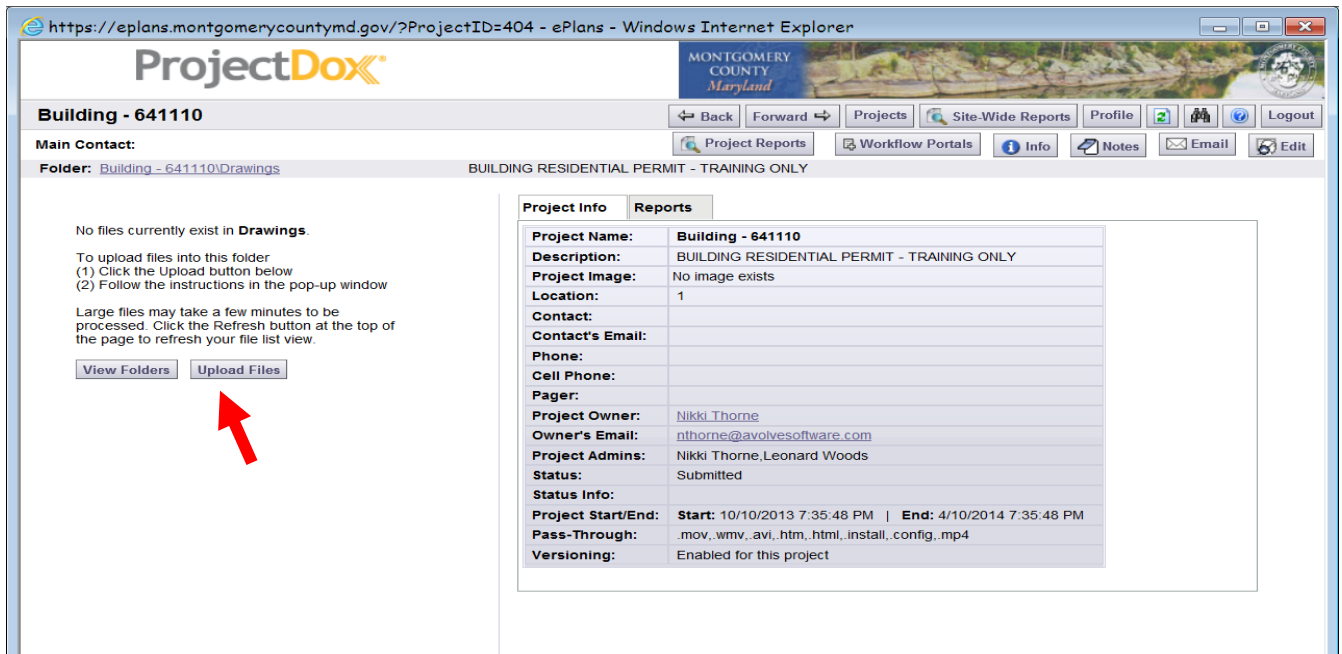
Select the file location on your computer. Select the files to upload; multiple files may selected by using the Shift or Ctrl keys. Click the Open button. The files will transfer to the upload window. You also have the option of dragging and dropping the documents into the file window.
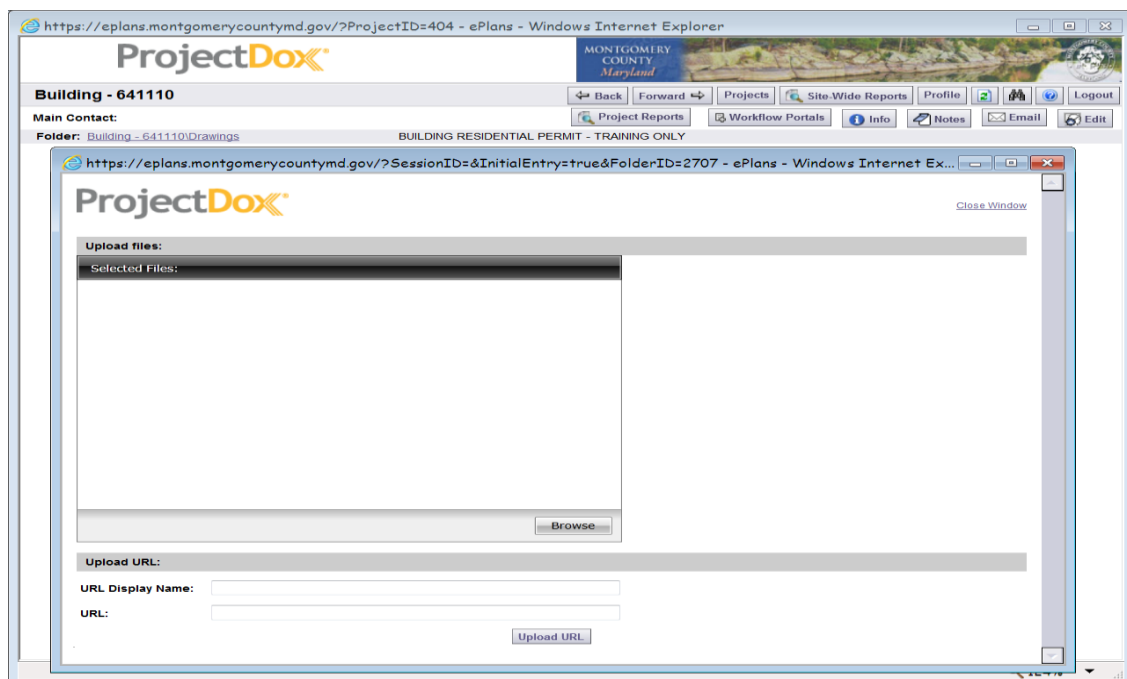
Upon completing the upload of files, click the close window button to exit the upload process. In each of the folders containing uploaded information you will now see a thumbnail of each file. Beside each thumbnail pertinent information such as the file name, author, date and available operational icons are displayed. Prior to closing the folder please ensure that all documents have

uploaded successfully and in the correct format and manner. If a document uploads incorrectly or is uploaded in error contact DPS at dps.eservices@montgomerycountymd.gov to have the file deleted.
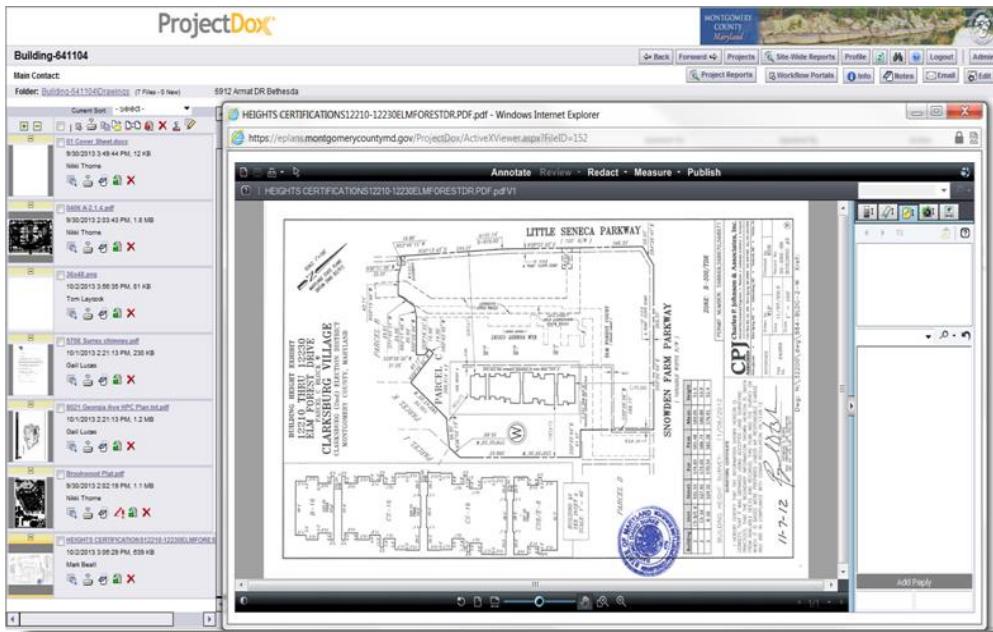
After you have successfully uploaded the information necessary for review of your permit application you will need to return to the eForm to complete your task. You can retrieve the form by clicking it in the task bar of your computer screen or by clicking on the hyperlink in the task area in the box on the right side of the project screen. Click the Upload Complete – Notify County button in the lower right hand corner of the eForm. *This must be completed* in order for your project to move forward and allow the department reviews to begin.
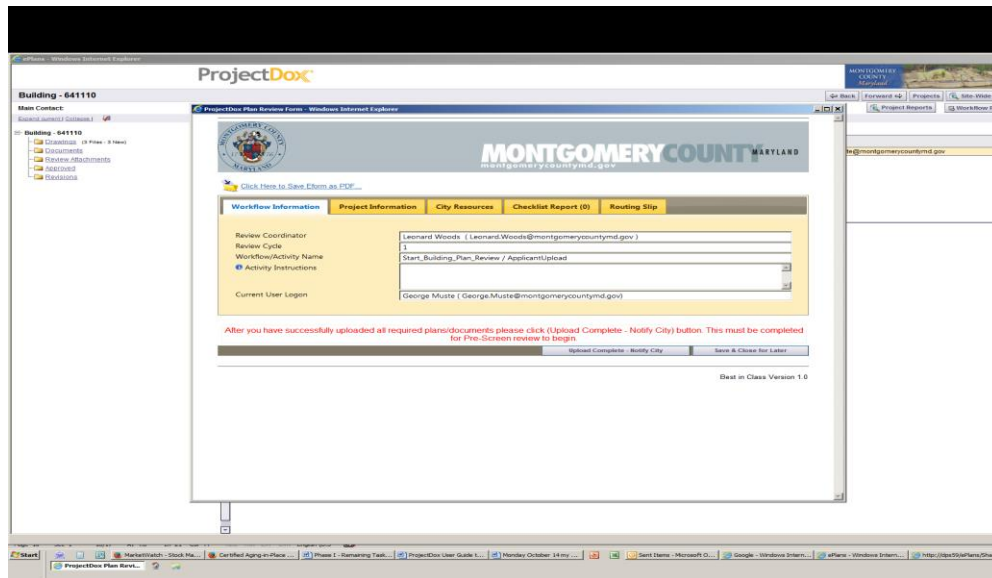
Congratulations! You have successfully finished part one of submitting your plans electronically. A notification will be sent to a DPS Permit Technician to start prescreening your plans to determine if all of the submittal requirements have been met.

Screening Review

Screening has been Approved

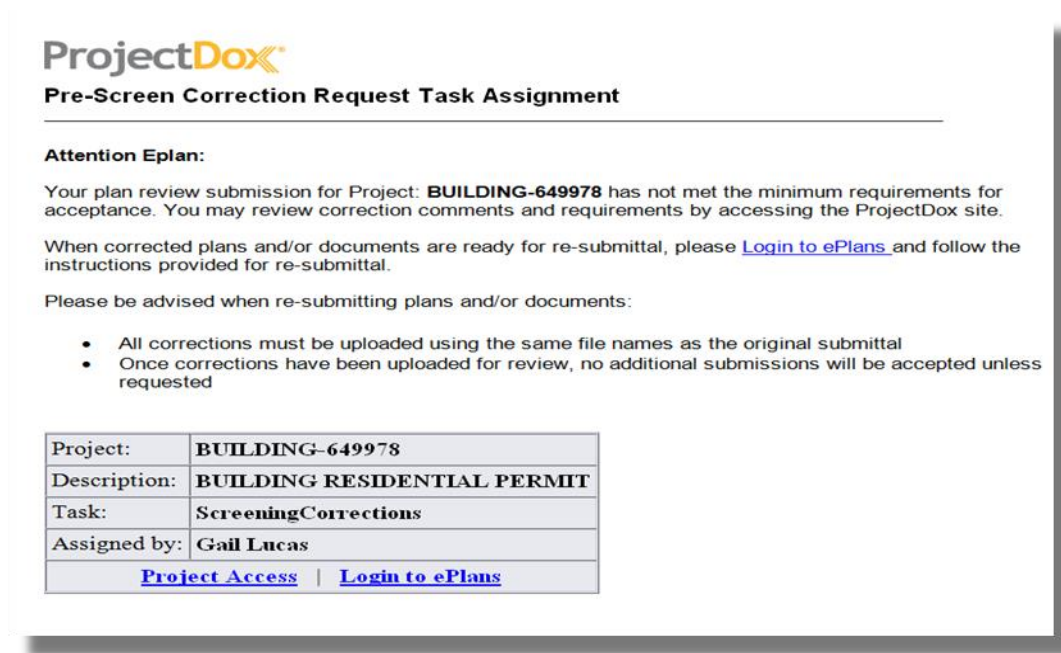If the submission has been approved the Permit Technician will then start the review process by inviting the reviewers to the project.

Screening has been Rejected

If the submittal requirements for your project are not met, you will receive an e-mail notification that the Screening Review has been rejected and that you are required to correct the drawings or documents.

ProjectDox

Pre-Screen Correction Request Task Assignment

Attention Eplan:

Your plan review submission for Project: **BUILDING-649978** has not met the minimum requirements for acceptance. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please Login to ePlans and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested

Project:	BUILDING-649978
Description:	BUILDING RESIDENTIAL PERMIT
Task:	ScreeningCorrections
Assigned by:	Gail Lucas
Project Access | **Login to ePlans**	

You can review the comments from the plan reviewer and/or permit technician by accessing the project. You will have a task that you must respond to and complete. The following steps will show you how to resubmit the plans.

1. If you are already logged on to ProjectDox you can select the permit from the My Active Task List or the Projects section of the ProjectDox home screen which will take you directly to the project. If you are not logged on to ProjectDox click either of the links provided in the email (Project Access or Login to ePlans).

2. Once you have selected your project click the task name shown in the box to the right of the folders to accept the task opening the eForm that will show you the deficiencies needing correction with the submission.
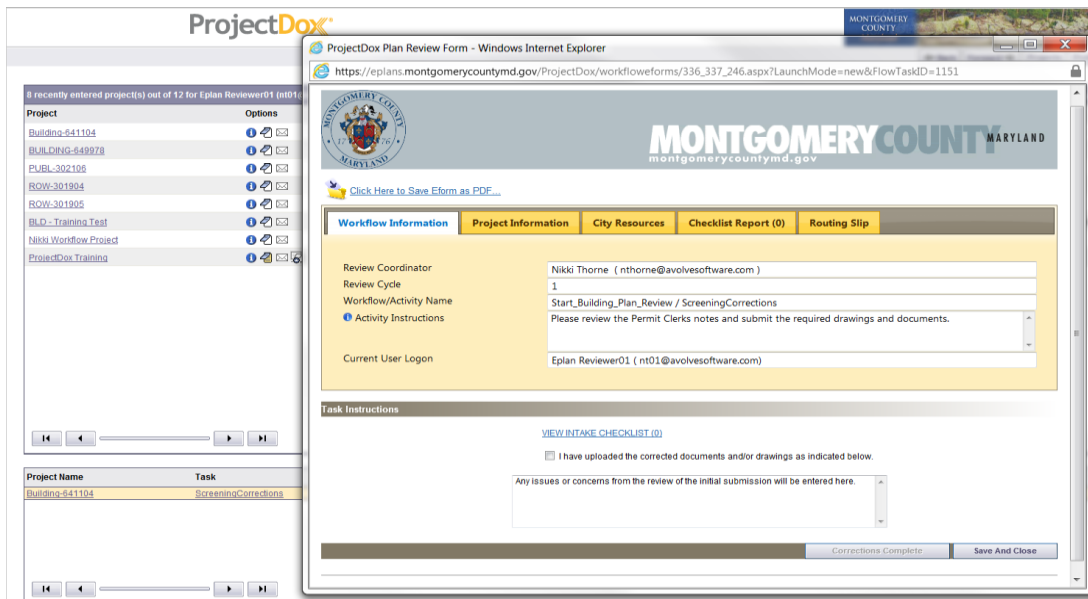
1. Click the Save and Close button to close the eForm or minimize the eForm as you will need to come back to it later.

2. Make all requested changes to the information submitted for review to include uploading new, corrected and/or additional drawings and support documentation.

Caution!- When replacing sheets or information that has already been submitted ensure that you are using the *exact file name* of the sheet you are replacing. *ProjectDox will perform version control for you.*

3. Re-open the eForm and check the "I have uploaded the corrected documents and drawings as indicated below" check box. This will activate the Corrections Complete button.

4. Click the Correction Complete button to complete the task and send notification to the Plan Review Coordinator.

Reminders to return corrections for re-review are sent to the applicant depending on the project type. Each permit type has slightly different resubmittal timelines and so it is important to read carefully the email

Markups on Drawings and Documents

A markup (noted by this icon)is any annotation, changemark or other marking that DPS personnel apply to a document or drawing. *Most* markups are able to be addressed in the field however a changemark requires information to be resubmitted to DPS for review. Changemarks are noted by a colored box generally and will appear on the eForm as a markup when plans are suspended or rejected so as to be easily recognized as a non-approvable plan deficiency.

Sending Email from ProjectDox

From the project list (home) screen there is an email icon that allows the applicant to send emails to DPS staff. This may be used to communicate between anybody associated with the project. To use this feature please follow the steps below:

1. From the project list (home) screen under options, select the email icon next to the project you wish to reference in the email. To email from a specific project click the email icon in the upper right hand corner of the screen.

2. Enter the subject of the email

3. Enter the body text of the email

4. Select the name of the staff person(s) from the user group list you wish to email. The names are listed by the group/division they belong to. Select the user by clicking the check box beside the staff person's name. Note: To email reviewers, select the email group. Reviewers are in the email group. Please ensure that you select only the reviewers for your project.

5. Click the send button. A confirmation screen will appear, listing all the staff persons that will receive the email.

6. Please make sure that you include your name and contact number in the email so that DPS staff can contact you should they have additional questions.

Tracking a Project's Review Status

To track your project's review status click the Project Reports button from the project screen. Next, click on the Workflow_ –_ Consolidated_Routing_Slip to find the status of the project.

ProjectDox®

Project and Workflow Reports for FIREALARM-723202

View	Report Name	Report Type	Report Description
🔍	Current Project - All Emails Sent Detailed Re...	Project	All Emails Sent Detailed Report
🔍	Current Project - All Emails Sent Summary R...	Project	All Emails Sent Summary Report
🔍	Current Project - All Files Report	Project	All Uploaded Files Report
🔍	Current Project - All Group Users	Project	All Project Group Users
🔍	Current Project - All Uploaded Files with She...	Project	All Uploaded Files with Sheet Sizes
🔍	Current Project - Files Viewed By Date	Project	Files Viewed By Date
🔍	Current Project - Folders Entered By Date	Project	Folders Entered By Date
🔍	Current Project - Project Markups Listing	Project	All File Markups Listing
🔍	Current Project - Unpublished Files	Project	Unpublished Files
🔍	Current Project - Users Entered By Date	Project	Users Entered By Date
🔍	Workflow - Checklist Report (Not Met Items ...	Workflow	Checklist Report (Not Met Items Only)
🔍	Workflow - Checklist Report	Workflow	Checklist Report (Met and Not Met)
🔍	Workflow - Department Review Status	Workflow	Department Review Status
🔍	Workflow - Routing Slip	Workflow	Workflow Routing Slip
🔍	Workflow_-_Consolidated_Routing_Slip	Workflow	Workflow Routing Slip

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Page **1** of **1** (15 items)

Resubmitting Corrected Drawings and Documents

If your information needs corrections, the applicant will receive an email after the reviews are complete indicating that the information does not meet the minimum requirements for acceptance. All changemarks are automatically attached to the eForm associated with the corrections required task. See email below.

Use the following steps to resubmit information to DPS for re-review:

1. Access ProjectDox using your email address and password.

2. Navigate to project link and open the project.

3. Accept the task from the task area to the right of the folders while in the project screen.

4. Click the "…Resubmit" link under task. The eForm will open and will show you the comments for all reviews.

5. You can see all review comments using the inside scroll bar in the review window.

At the top of the eForm you will see tabs; these tabs contain all the information submitted on the application. In the middle of the screen, you will see the review cycle number. Use this dropdown to move to the review cycle comments you need to see. Each submittal of information to DPS constitutes a review cycle. The next section is where comments from each of the selected reviewers can be reviewed by the applicant. If you scroll down in the eForm you will notice some questions that will need to be answered prior to resubmitting the information.

6. If work is required on the information prior to resubmitting you can save and close or minimize the form while this is completed.

7. Review the information in question and make the corrections as appropriate (done outside of ProjectDox in your design software).

8. Upload the corrected information into the project.

CAUTION!-

In order for ProjectDox to update the drawings, the applicant must replace the corrected drawings using the SAME FILE NAME. There is no need to update the drawings using a new file name. Any corrected drawing with a different file name will be rejected and you will need to upload the drawings again. Additionally, DPS will not review corrected plans which have been improperly submitted.

9. When you have finished uploading the corrected information, return to the eForm (accessed from the Workflow Portals button if you have previously closed the form) and provide responses for each of the comments.

10. Lastly, read the 3 questions at the bottom of the screen and, if all the requirements have been satisfied, select the check box for each question, and then click the complete button. This will return the information to DPS for review by completing your task.

Obtaining the Permit

Upon approval of all necessary reviews, the applicant will receive an email indicating all reviews have been approved. You will be required to pay all outstanding permit fees prior to the issuance of a permit.

Please note that you may use ePermits in order to not only create and submit certain permit applications, but also to make online fee payments using credit cards or electronic checks and download copies of your permits and receipts.

ProjectDox TEST

Final Fee Request Notification

Attention GEORGE:

Your permit is ready to be issued. You must pay any outstanding permit fees and/or Development Impact Taxes before your plans can be released and the permit issued.

You may pay the fees online, in person at the DPS office, or by mail. Paying fees online reduces the processing time considerably.

If you wish to pay the fees online, please go to **https://permittingservices.montgomerycountymd.gov/ApplyOnline/account/Login.aspx** .
Please remember to complete your PreApprovalQAResubmit in ePlans (ProjectDox) task after making the payment so that DPS can continue processing your permit.

Contact a DPS Permit Technician if you have questions regarding this projecct. Please do not reply to this email.

Project:	**BUILDING WF Test**
Description:	**Test**
Address:	**,,MD,**
Project Access | **Login to ePlans**	

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

Once the fees have been paid the permit will be issued and the approved drawings and supporting documents – having the DPS Electronic Approval Stamp on each drawing and document - will be moved to the Approved folder in the ProjectDox application. DPS will also upload a copy of your approved permit into the approved folder of ePlans.
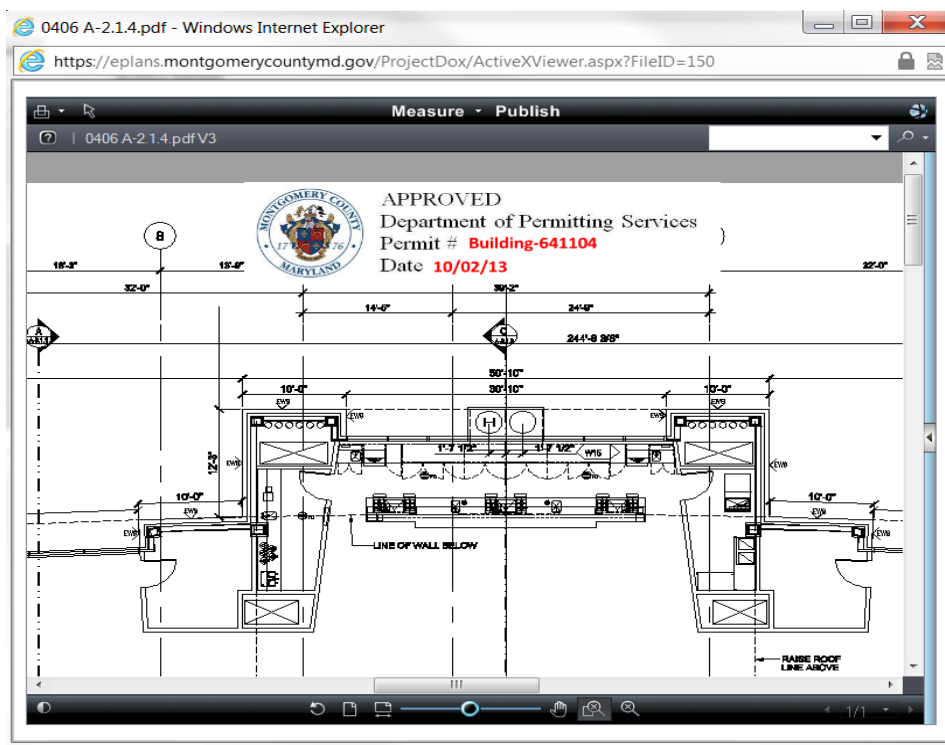
Once the drawings are placed in the approved folders, the applicant will receive an email and can download and print the drawings.

ProjectDox®

Approved Plans Ready for Download Notification

Attention Eplan:

Congratulations! Your approved plans are ready for download for Project BUILDING-649978.

To download your approved plans, please Login to ePlans and download your plans from the **Ap**
folder.

Project:	**BUILDING-649978**
Description:	**BUILDING RESIDENTIAL PERMIT**
Project Access | **Login to ePlans**	

Printing Approved/Rejected Information

All information uploaded into ProjectDox is converted to a PDF (Portable Document File). Adobe Acrobat Reader is required to review and print approved/rejected information. Adobe Reader is a free application that can be downloaded from the Adobe web site https://get.adobe.com/reader/ . To print the information you first must download it from the Approved or Rejected folders as appropriate. Below are the steps necessary to download the information:

1. Login to ProjectDox and open the project

2. Click on the Approved or Rejected folder as appropriate

3. Select the files to download. You may select all the files for download by checking the select all box above the first listed file. To download the files selectively select the check box beside the individual file you wish to download.

4. Download the file(s) by clicking the download icon (see figure below). To download all files in the folder or multiple selected files, use the download icon above the first listed file. To download individually, select the download icon next the selected file.

If you selected more than one drawing, the system will download the files to a zip file. After the download has been completed successfully, please delete the zip file from the server, for the protection of your intellectual property.

5. Click the Save button to place the file in a directory of choice. If you click the Open button, the files are placed in the user's windows profile. Take note of the folder Windows picks for the download. To print the plans at a later time, you will need to know the directory were the files were downloaded.

6. Open and Print the files using the Adobe PDF reader software.

Revisions to Approved Plans

When the application for revising the permit is approved, an ePlans invitation will be sent to the email address entered on the application submittal. The email, from DPS.DoNotReply@montgomerycountymd.gov,
will contain information about the project, including a link to the project. You will receive an email to upload all revised documents as a new workflow will start. All the tasks and instructions in this document apply, except that all revised drawings and supporting documents must be uploaded into the Revisions folder and the file naming convention for revised drawings shall conform to the naming conventions noted in the submittal requirements for the specific permit application type. These can be found on the DPS webpage by clicking the green eServices tab followed by ePlans and then ePlans Submittal Requirements.

Please be aware that it may take up to 24 business hours for your permit revision to be processed. Until your revised permit application has been processed you cannot pay revision fees or upload your plans into the project.