SJePlans Applicant User Manual

Revised 10-29-2023



Instructions for using the San José ePlans portal for submitting electronic plans and for resubmitting plans after receiving comments.

City of San José Development Services Permit Center 200 E. Santa Clara Street, San José, CA 95113 408-535-3500

www.sanjoseca.gov/PermitCenter





About SJePlans

SJePlans is an online portal that enables you to submit development plans and documents to the City of San José Development Services Permit Center. It enables you to track and respond to the plan review comments online.

The types of projects that can be processed at SJePlans are continually evolving and are listed on the SJePlans webpage.

Underpinning SJePlans is **ProjectDox**, a software application that handles more than 200 file types including AutoCAD, MicroStation, Microsoft Word, PDFs, and other formats. SJePlans can be accessed from any location via a network, cellular, or Wi-Fi connection, and it supports Apple, Android, and Microsoft tablet devices.

Users of SJePlans enjoy the following benefits:

- Save time by electronically uploading project plans and documents
- View and respond to the City plan reviewer's comments
- Project team may participate in the SJePlans portal
- Know the status of your project at all times
- Obtain permit issuance



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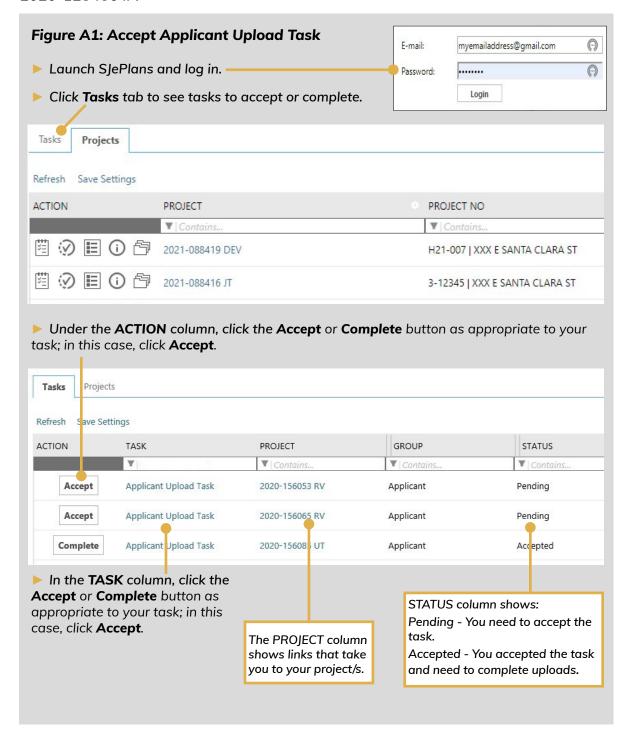
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Need help with SJePlans? Contact your assigned City of San José Project Manager.

A1. Accept Applicant Upload Task

Uploading your project files to SJePlans begins with logging in and accepting the **Applicant Upload Task.** Log in at https://eplan.sanjoseca.gov/ProjectDox.

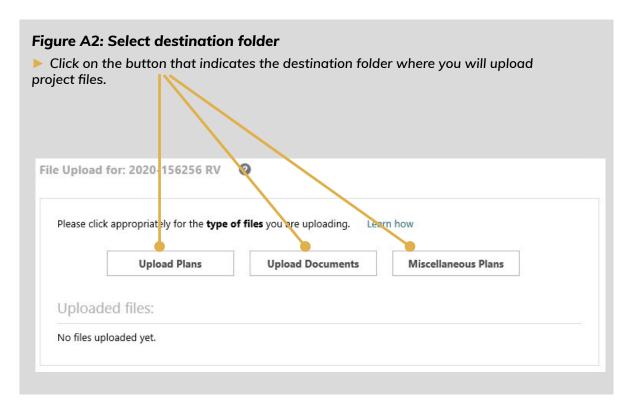
The initial screen opens, see Figure A1. If you have already loaded any projects, they will display here. Projects are listed in order by the Project Name, for example: 2020-123456 IP.



A2. Select Destination Folder

After Step 1, the **File Upload** window opens, see Figure A2. It shows buttons that indicate available destination folders that are relevant to your project. These folders may include:

- Plans Upload all required individual plan sheets to this folder.
- **Documents** Upload permit applications, checklists, calculations, and other documents as may be required for your project to the Documents folder.
- **Miscellaneous Plans (Public Works Only)** Upload miscellaneous plans such as site plans, exhibits, etc. This is only for Public Works department items and may or may not appear for your project.
- Calculations (Fire Department Only) Upload calculation documents to this folder.



REQUIRED!

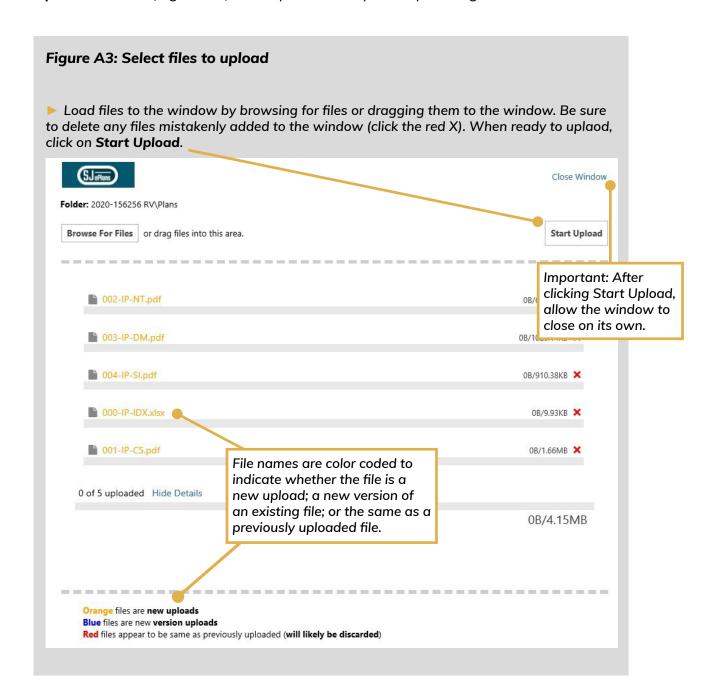
Name the files you upload according to the SJePlans file naming conventions. See Resources section.

A3. Select Files to Upload

After selecting a destination folder in Step A2, the upload window will open as shown in Figure A3.

If you mistakenly add a file to the window, you can delete it by clicking the red X by the file size. In the event you do mistakenly upload a file, you can later delete it by following the the instructions in Section C3.

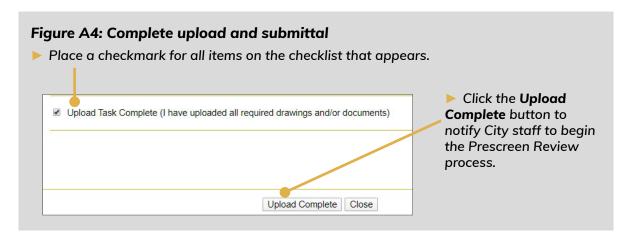
To upload more files to the same or a different folder, navigate back to the **File Upload** window (Figure A2) and repeat the steps for uploading files.



A4. Complete the Submittal

Do you need to upload more plans or delete any files mistakenly uploaded? Perhaps you need to add a user or reassign tasks within your group of users. To use these features of SJePlans, see Section C: Using SJePlan Features.

When finished with uploading plans and documents, take the final steps shown in Figure A4.



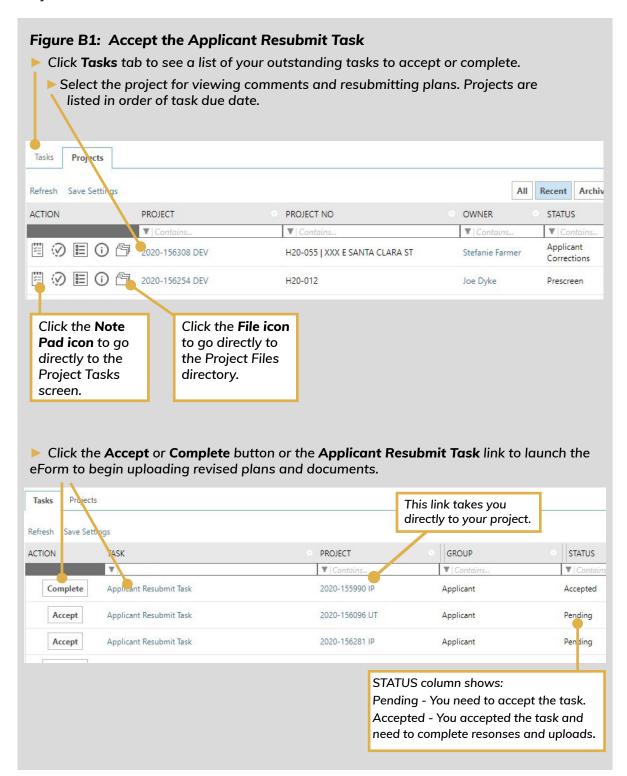
Once you click **Upload Complete**, you cannot upload additional plans or documents.

Did you forget to upload something? Contact your City Project Manager, if assigned, to allow you to upload any additional plans and/or documents.

Congratulations! You have successfully finished the initial process of submitting your plans and documents electronically.

B1. Accept Applicant Resubmit Task

To get started with resubmittal tasks, log in to SJePlans and follow the steps in Figure B1. Your available projects will display in the initial screen. Typing in the Project Name will filter the results.



B2. View Applicant Resubmit eForm

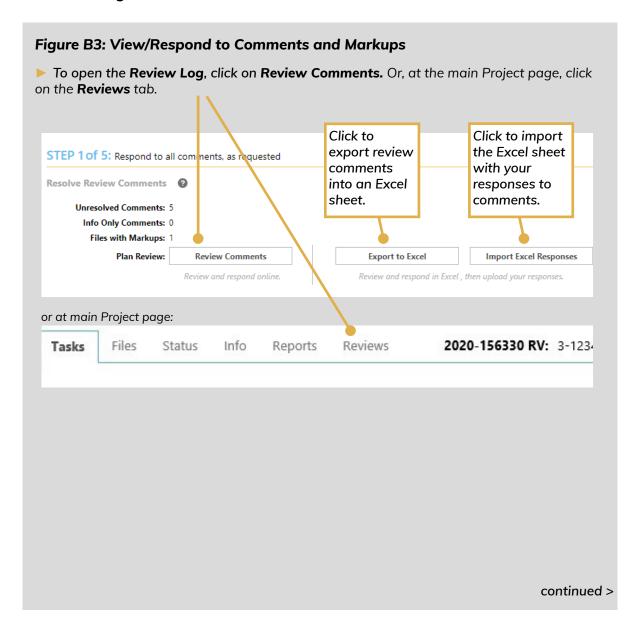
After accepting the task, the **Applicant Resubmit eForm** window opens. Figure B2 highlights some basic functions of the eform. As described in the following sections, from this window you can view general or specific review comments; upload revised plans and documents; and more.

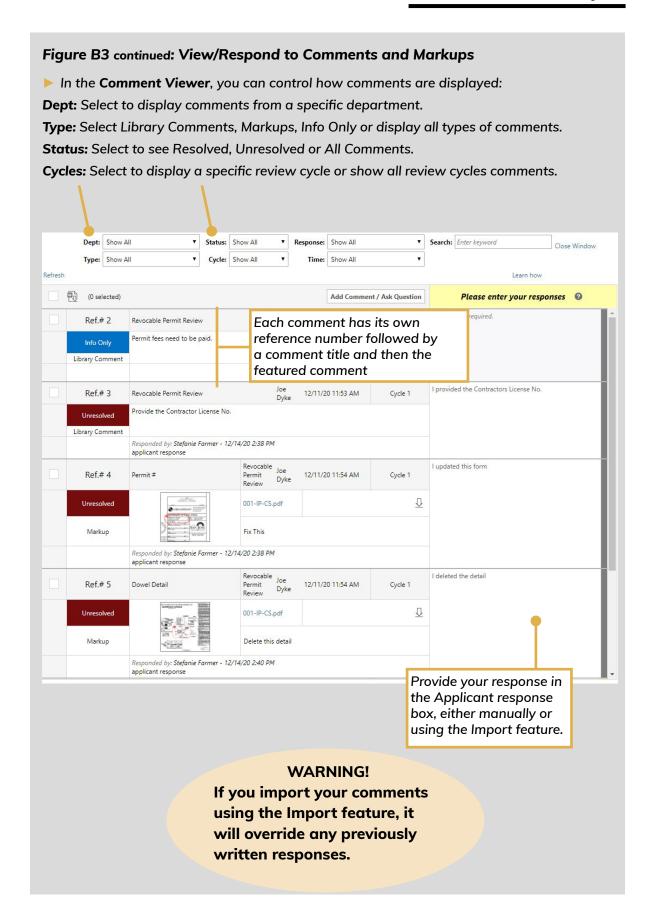


B3. View/Respond to Comments

As shown in Figure B3, **Review Comments** allows you to look at the City's comments and markups. Markups are redline comments on plans or documents that you need to address. After accepting the **Applicant Resubmit Task** (Figure B1), you will be able to:

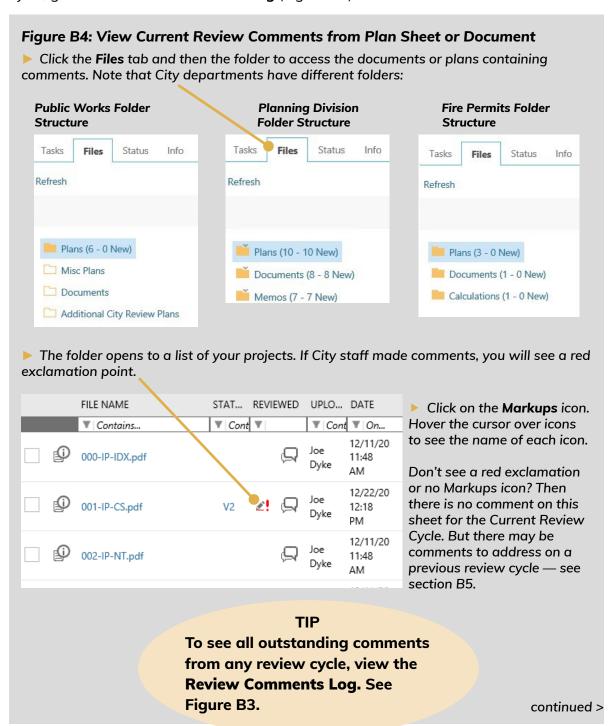
- View the **Review Log** that shows each department's comments in a separate eForm window.
- Export either one Excel excel sheet containing comments by all departments or separate sheets for each department. Provide your responses on the sheet/s.
- Import the Excel sheet with your responses to the **Applicant Response** of the **Review Log**.

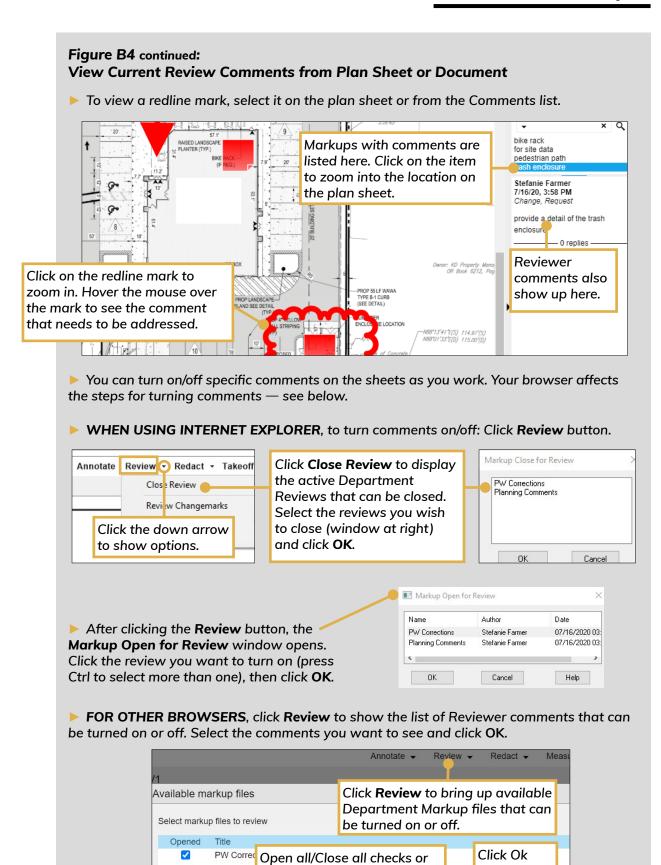




B4. View Current Review Comments from Plan Sheet or Document

In addition to using the **Review** tab, you can click on the **Files** tab to find comments on plans or documents that need to be addressed. To view comments for the **Current Review Cycle**, see instructions in Figure B4. To view all comments from any review cycle, go to the **Review Comments Log** (Figure B3).





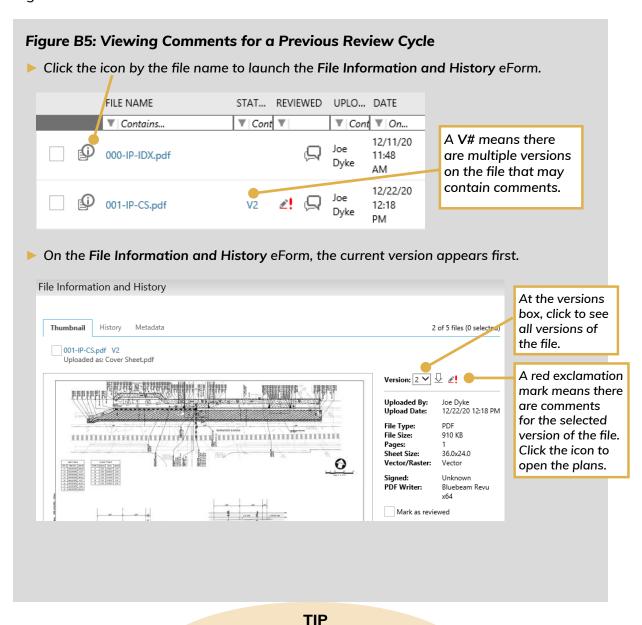
unchecks available markups.

Open all Close all

when done.

B5. Viewing Comments for a Previous Review Cycle

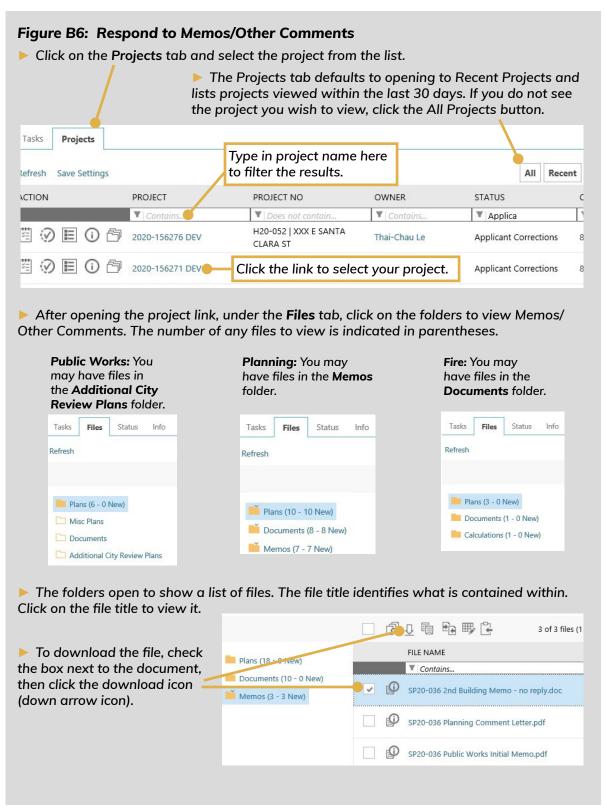
To view comments for a **Previous Review Cycle**, first click the folder that contains your plans or documents (Figure B4). To see all outstanding comments from any review cycle, view the **Review Comments Log** (Figure B3). Next, follow the instructions in Figure B5.



To see all outstanding comments from any review cycle, view the **Review Comments Log.** See Figure B3.

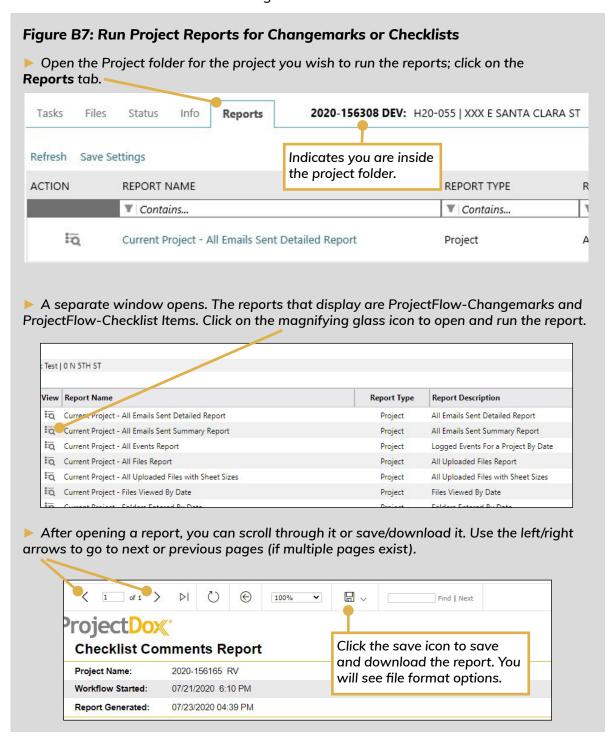
B6. Respond to Memos/Other Comments

There may be folders that contain memos or other comments from City reviewers for you to address. Figure B6 shows how to find these folders.



B7. Run Project Reports for Changemarks or Checklists

You can run reports that list all Changemarks and Checklists from all Department Reviews and the comments and responses to each. You can also download the report in multiple formats (Word, Excel, PDF, etc.), enabling you to share the report if needed. Follow the instructions in Figure B7.

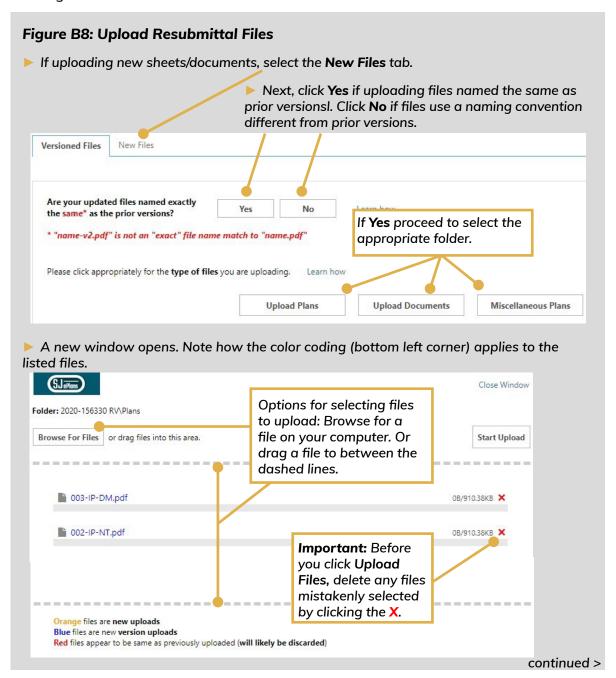


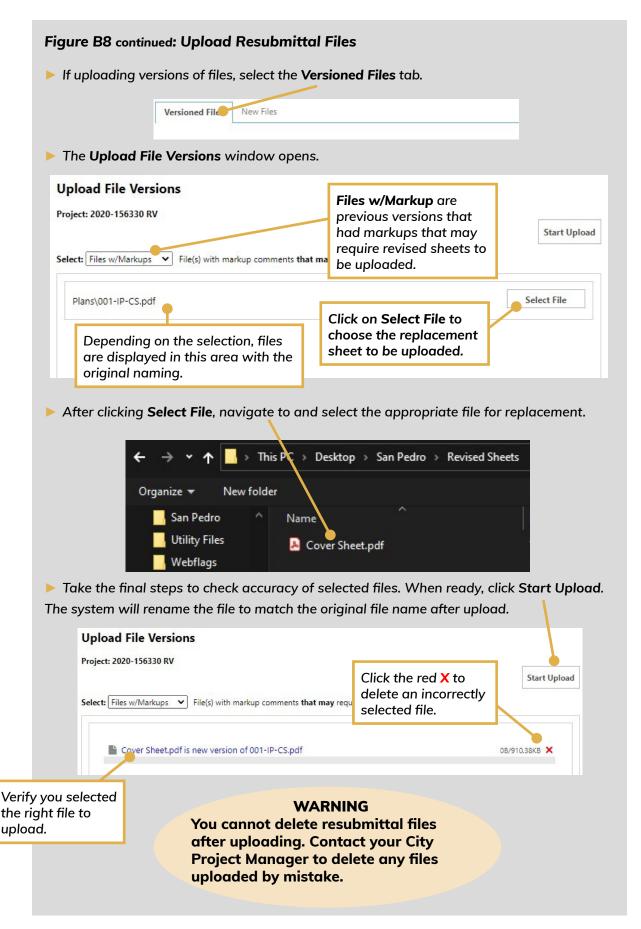
B8. Upload Resubmittal Files

From the **Tasks** or **Project** tab, open the **Applicant Resubmit** window (Figure B2). It shows destination folders that are relevant to your project.

You may upload files for revisions that use file names according to City conventions or according to your own conventions. The instructions in Figure B8 show steps for uploading files named with City conventions as done on the previous submittal.

If uploading files that use your own conventions, follow the steps in Figure B8 so that the system will rename the files to match the City naming conventions used in the original submittal.

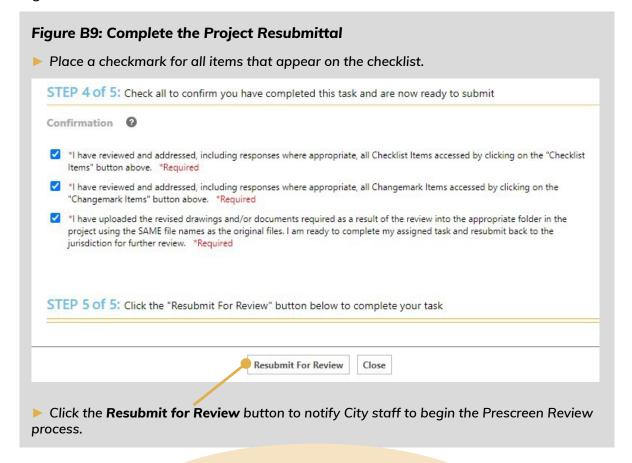




B9. Complete the Project Resubmittal

Do you or a consultant need to upload more plans? Perhaps you need to add a user or reassign tasks within your group of users in order to complete the upload tasks. To use these features for adding a user or reassigning tasks, see Section C: Using SJePlan Features.

When finished with uploading plans and documents, take the final steps shown in Figure B9.



WARNING

Once you click **Resubmit for Review**, you cannot upload additional plans or documents.

Did you forget to upload something? Contact your City Project Manager, if assigned, to allow you to upload any additional plans and/or documents.

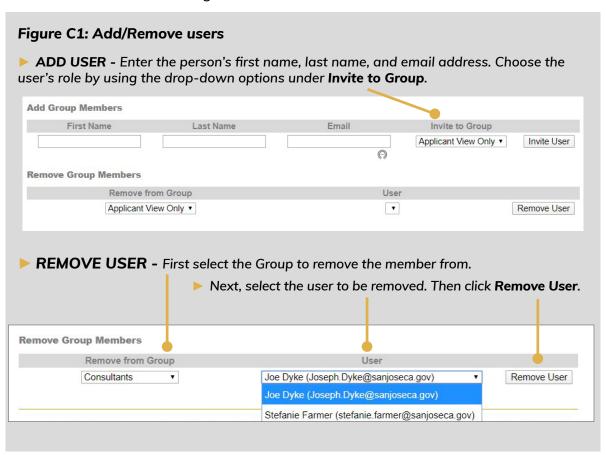
Congratulations! You have successfully finished the electronic resubmittal process for your project.

C1. Add/Remove Users

To add or delete users (such as consultants or employees) so they can handle tasks in the SjePlans portal, follow the steps below and in Figure C1.

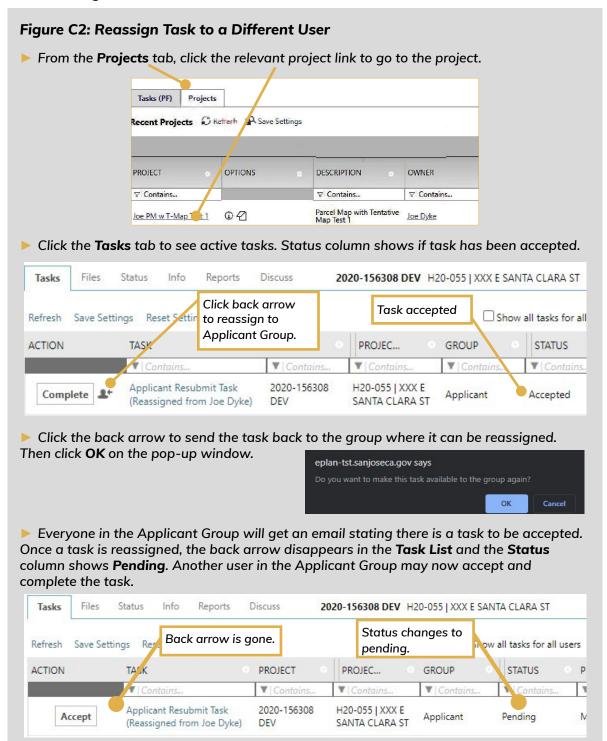
Choose the user's role by using the drop-down options under **Invite to Group**. Multiple people may be assigned the same role:

- Applicant View Only Can monitor the project and view plans and documents but will not see the City staff markups.
- Applicant Can upload files, review markups, print plans and documents with the changemarks burned onto a PDF, and respond to changemark and review comments. Only one user within this group who has accepted the task will be able to respond to the comments.
- **Consultant** Can view City comments and changemarks and print the plans and documents with the changemarks burned onto the PDF.



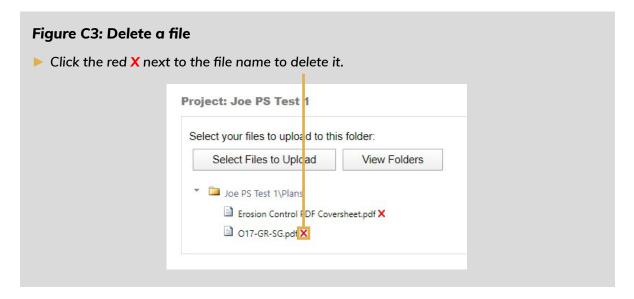
C2. Reassign Task to a Different User

A user who accepted a task can reassign it to another user, which is useful if a user is unable to complete a task. These steps should be taken by the user who accepted the **Applicant Upload** task. Before making a reassignment, the user must be added to the system (see **Add/Remove Users** section). Follow the steps in Figures C2 and C3 to reassign a task.



C3. Deleting a File

To delete files that were uploaded by mistake: navigate to the **Applicant Upload** window. Click the red X next to the file name to delete it. See Figure C3.



Resources

Building Division

 Instructions for using SJPermits + SJeplans for submitting a building project, including file naming conventions:

https://www.sanjoseca.gov/businesses/development-services-permit-center/sjeplans-electronic-plan-submittal-review/sjeplans-for-building-permits-applications

 Building Permit Services www.sanjoseca.gov/BuildingPermitServices

• Building Bulletins - information on types of projects, forms, worksheets, etc. www.sanjoseca.gov/BuildingBulletins

Fire Department/Bureau of Fire Prevention

- File naming conventions for submitting files to Fire Department: https://www.sanjoseca.gov/Home/ShowDocument?id=69633
- Fire Prevention/Permits information www.sanjoseca.gov/FirePermits

Planning Division

- File naming conventions for submitting projects to Planning Division: https://www.sanjoseca.gov/home/showpublisheddocument?id=63569
- Planning Division applications/forms/fee info: www.sanjoseca.gov/PlanningApplications

Public Works

- File naming conventions for submitting projects to Public Works https://www.sanjoseca.gov/Home/ShowDocument?id=56782
- Public Works/Development Services website: www.sanjoseca.gov/DevResources