



ePs Quick Start Guide

Step 1 – Register New Account

Visit the [e Plan Solutions](#) select “Get Started” under the proper jurisdiction.

you must first register for an account and additional information will follow upon account confirmation.

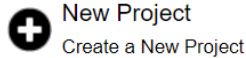
ePlan Solutions will provide support for registered users via telephone and email (support@eplansolution.com).

[Login to EPS...](#)

[Register new Account...](#)

Select Register New Account. Complete the User information and submit. The User will receive two emails (1) to validate the user account (2) to gain permission to send email notification. If a User doesn't receive both notifications, check the spam or junk folders of your email application and then contact ePs support.

Step 2 – Create a New Project



From the ePs Home Page, Select “New Project”, complete Step 1 for the new project. (note: Use login information is checked for applicant and owner).

Create Project: Step 2 of 3
In this web flow, you are going to create a new project in EPS.

Project Name: Testing OPT [« Change](#)

Project Location Where is your project located?
Make sure you select the most accurate location for your project. This is how fields such as tax identifier are calculated, and selecting the wrong location may delay your project.

Yes, I have an Address No, I don't have an Address

3060 Hollys Springs Parkw

3060 Holly Springs Parkway, Holly Springs, GA, USA in the box above.

3060 Holly Springs Road, Amisville, VA, USA

3060 Green Holly Springs Lane, Oakton, VA, USA

On Step 2 enter the address of the project and select the correct address from the list (This is the same as Google Maps).

Home » Create Project (3 of 3)

Create Project: Step 3 of 3
In this web flow, you are going to create a new project in EPS.

Select Project Type What type of Permit or Plan Review are you submitting?

Other Permit / Application Type

Building Commercial

Building Residential

Fire Plan Review

Final Plat

Other Permit / Application Type

Site Plan

Simple Subdivision Plat

Other Type of Permits

ed Business License Application

Regulatory Application

Sign Permits

PTV Permits

Select the project type from the drop-down menu. Failure to select the correct project type will delay your project review/permit approval

On Step 3 Select the Permit/Plan Review type being submitted. (Contact support for addition help if needed.) Complete the remaining project information.

Project Type

Renovation / Alteration

Total Work Area (sqft)

4321

Starred and bolded items are required.



ePs Quick Start Guide

Hint: Parcel information can be found using the GIS website of the appropriate city or county.

Step 3- Pay for the Project

Once the project application is submitted, the project page will be created. **Prior to uploading plans, applicants are required to pay the ePs fees. City fees will be due upon the issuance of the permit.** Select the payment button and complete the payment information.

Holds Details Open Files (0) Submittals (1) Communication **Fees (\$5.00)**

Fees

This page keeps track of all fees and special assessments. You can select the button at the bottom to create a new fee, c

Total Account Balance: **\$5.00**

\$5.00 - ePlan Solution Fee (2020-03-17)

The ePs service fee is required prior to uploading files for review.



Once payment has been made, a confirmation page will be displayed that will have a receipt and "Go Back To". Select to go back to ePs.

Step 4 – Upload Plans and Documents for Review

Holds Details Open Files (0) **Submittals (1)** Communication Fees (\$0.00) Other ▾

Submittals

For a new submittal, starting with submittal 2, select "New Submittal". To upload files for review, select Manage Files.

Submittal 1

Not Ready For Review! This submittal is not ready for review for the following reasons:
✘ There are no files uploaded; you must upload at least 1 file.

Type	Size	Create Date	Name
No files exist in this submission.			

Manage Files

Review »

Select the "Submittals" Tab, then Manage Files



ePs Quick Start Guide

Upload Files for Submittal 1

This page allows you to upload/remove/rename files for Submittal 1 on project OPT2020-001.

Not Ready For Review! This submittal is not ready for review for the following reasons:
 ✖ There are no files uploaded; you must upload at least 1 file.

Files(0)
 Select a file using the "Upload" button to start uploading. To remove a file that has been previously approved, select the file and then Delete.

Type	Size	Name	Comment
There are no new files in this submittal.			

File uploads not working?

Select Upload and find the file(s)

A file explorer window showing a list of files. The file 'Business License Application' is selected. The 'Open' button is highlighted with a red arrow.

Select your file(s) and select Open

The files should be appropriately named to make it easy for the reviewer to recognize what it is.

If a file tag is required, Select Manage Tags next to the uploaded file name.

Type	Size	Name	C
	104 KB	Change of Occupancy Submittal Package.pdf	<input type="button" value="Manage Tags"/>

File uploads not working?

After completing your uploads, select "Submit for Review"

Communication

Project Communication
 Add general comments, site visit information, inspection information, meeting minutes, and emails to the project communicator. In order to add a new communication, select "New Comment".
 Select the appropriate comment type, and complete the information and submit.

To communicate with the City or County, select the Communication tab then New Comment



ePs Quick Start Guide

Direct To:

If your comment is not directed, this can lead to delays processing your project.

Direct the comment to a government user by selecting Add

Direct Comment

Direct to Department: Community Development

Direct to User: Morris, Winston

Select a Department or User, then select Add

Direct To: Morris, Winston

Type your comment and Submit

Type your comment and select Submit

Grant other users access to a project.

Select the "Details" tab, then "Change User Access Permissions". Enter their email address in the box on the right and select "Grant".

There are no permission grants.

new-user@gmail.com

Help and Information

Help and Information

All the links provided on this sheet can be found at

<https://eplansolution.com/wordpress/>

For additional support contact us by email at support@eplansolution.com or by phone at 678.898.0610