

MEDFORD
PUBLIC WORKS

**ELECTRONIC
PUBLIC IMPROVEMENT PLAN REVIEW**

APPLICANT'S GUIDE

TABLE OF CONTENTS

| | |
|-----------------------------------------------------------------------|----|
| Electronic Public Improvement Plan Review Process | 2 |
| 1.0 Initial Submittal..... | 3 |
| 1.1 Initial Submittal Application Form and Applicant Definition | 3 |
| 2.0 First Review | 3 |
| 2.1 Invitation to ProjectDox..... | 3 |
| 2.2 Plan and Document Upload | 5 |
| 2.3 Completeness Check | 7 |
| 2.4 First City Review Comments | 7 |
| 3.0 Second Review | 8 |
| 3.1 Submittal of Revised Plans and Documents | 8 |
| 3.2 Second City Review and Comments | 9 |
| 4.0 Third Review..... | 9 |
| 5.0 Plan Review and Inspection Fee and Deposit Payment | 9 |
| 6.0 Outstanding Items for Approval | 10 |
| 7.0 Plan Approval..... | 11 |
| 8.0 Revisions to Approved Plans | 11 |
| | |
| Figure 1 – ProjectDox Invitation Email | 4 |
| Figure 2 – ProjectDox Applicant Upload Email..... | 5 |
| Figure 3 – ProjectDox Completeness Check Corrections Email | 7 |
| Figure 4 – ProjectDox Applicant Resubmittal Email | 8 |
| Figure 5 – ProjectDox Approved Plans Email | 11 |

ProjectDox Instructions

[Appendix A: How to Find Tasks and Projects](#)

[Appendix B: How to Upload New Plans and Documents and Complete the “Applicant Upload Task”](#)

[Appendix C: How to Complete the “Completeness Check Corrections Task”](#)

[Appendix D: How to Check Review Status](#)

[Appendix E: How to Review and Respond to Comments](#)

[Appendix F: How to Review Unresolved Changemarks](#)

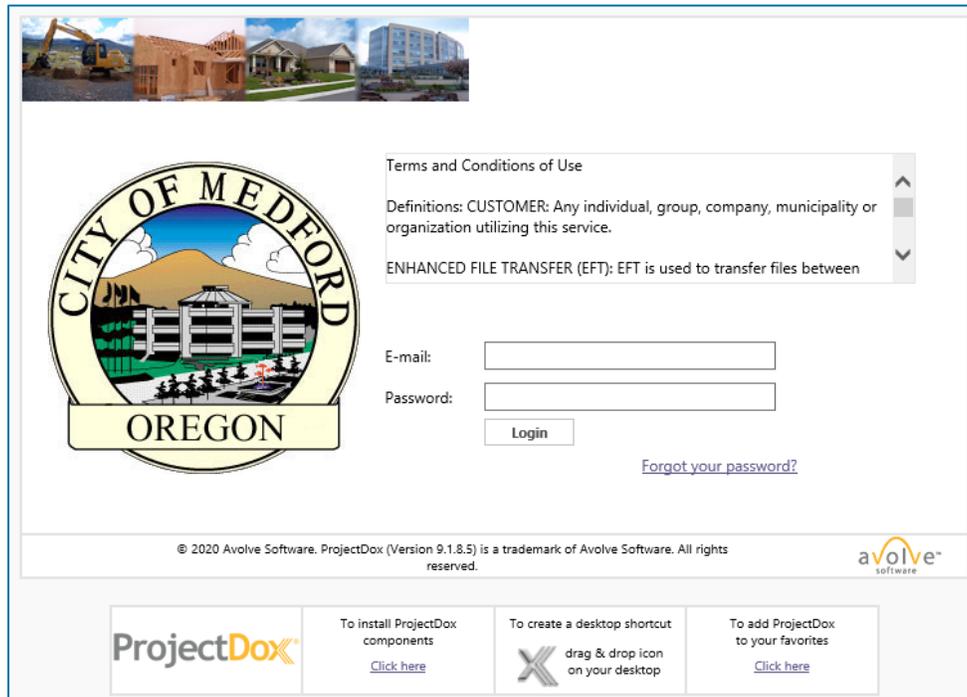
[Appendix G: How to Upload Revised Plans and Documents](#)

[Appendix H: How to Complete the “Applicant Resubmit Task”](#)

[Appendix I: How to Download Approved Plans](#)

Electronic Public Improvement Plan Review Process

This guidance document will provide an overview of the electronic public improvement plan review process through the city of Medford Public Works Engineering Division along with some instructions and tips for using the ProjectDox program.



1.0 Initial Submittal

1.1 Initial Submittal Application Form and Applicant Definition

The public improvement plan [Initial Submittal Application Form](#) must be filled out and submitted for the review process to be initiated. The application can be found on the [City of Medford Website](#) and must be submitted to engplanreview@cityofmedford.org. Once received, city staff will use the application document to set up the public improvement project in the ProjectDox program.

The Applicant's email listed on the application will be used for the "Applicant" in ProjectDox and all correspondence from the ProjectDox program will be sent to that email. The Applicant should be the licensed professional engineer responsible for the public improvement plans, but may instead be an individual working with the engineer.

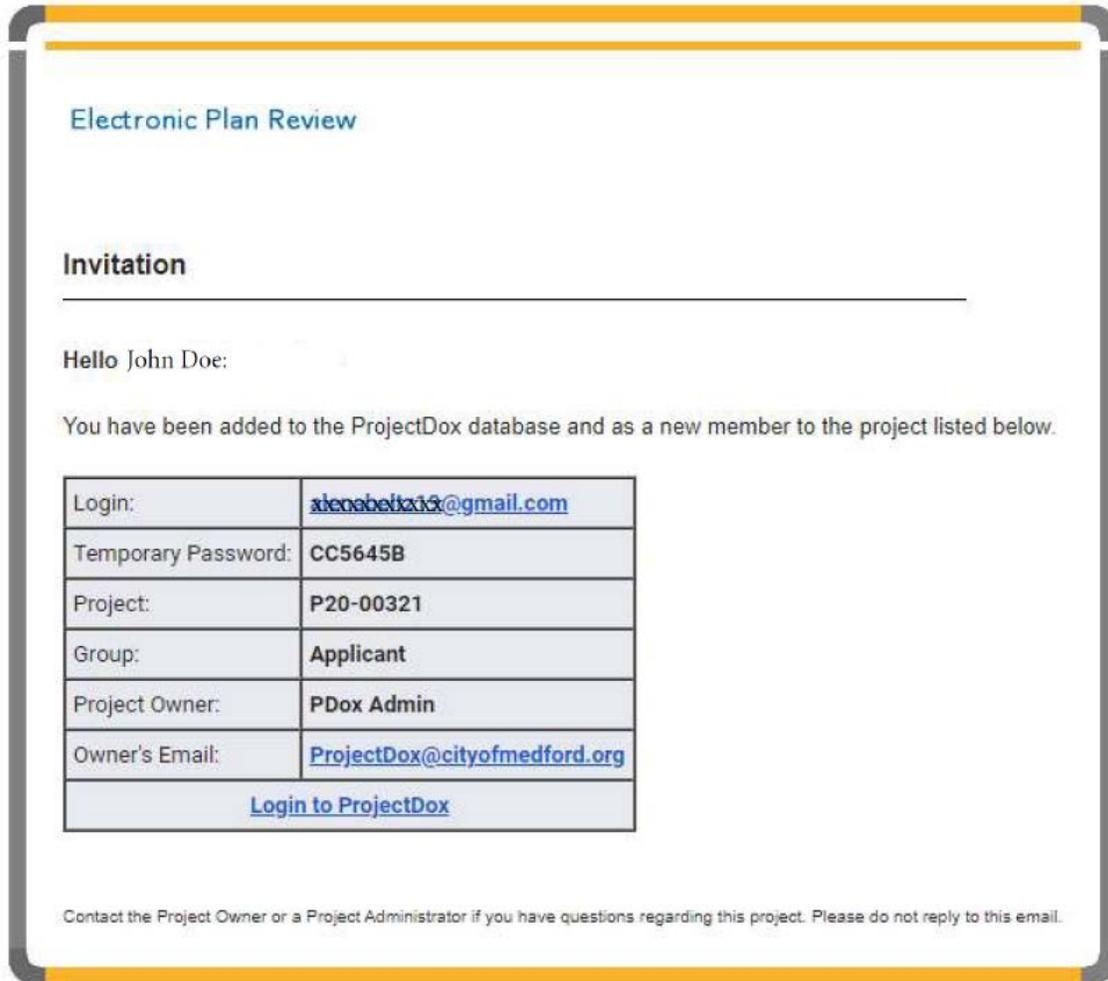
2.0 First Review

2.1 Invitation to ProjectDox (First Time Users Only)

After submitting the Application Form, new Applicants that do not already have a ProjectDox profile will receive an email prompting them to login to ProjectDox with a

temporary password. Once logged in, the Applicant will be prompted to create a permanent password and fill out a user profile.

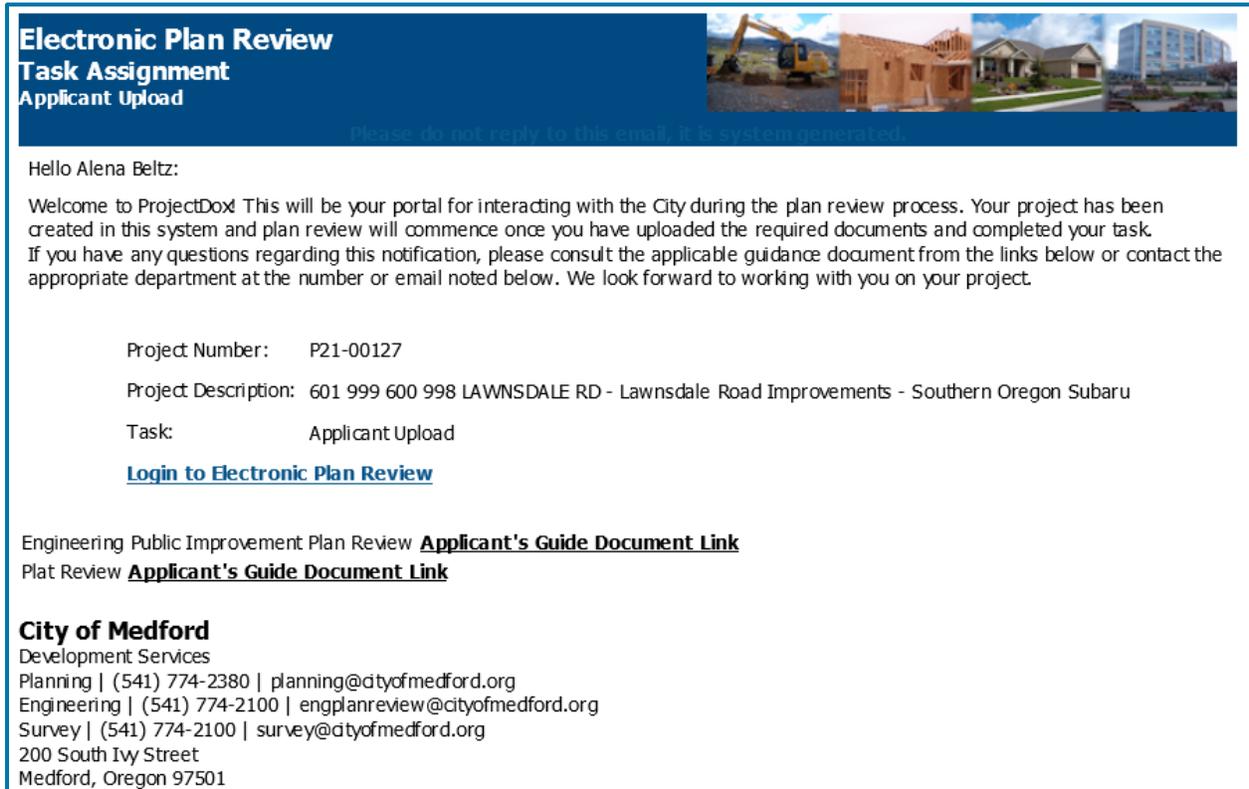
Figure 1 – ProjectDox Invitation Email



2.2 Plan and Document Upload

Once the public improvement project has been set up in the ProjectDox program, the Applicant will receive an email from Projectdox for the “Applicant Upload Task” containing a link to the ProjectDox program.

Figure 2 – ProjectDox Applicant Upload Email



Electronic Plan Review
Task Assignment
Applicant Upload

Please do not reply to this email, it is system generated.

Hello Alena Beltz:

Welcome to ProjectDox! This will be your portal for interacting with the City during the plan review process. Your project has been created in this system and plan review will commence once you have uploaded the required documents and completed your task. If you have any questions regarding this notification, please consult the applicable guidance document from the links below or contact the appropriate department at the number or email noted below. We look forward to working with you on your project.

Project Number: P21-00127

Project Description: 601 999 600 998 LAWNSDALE RD - Lawnsdale Road Improvements - Southern Oregon Subaru

Task: Applicant Upload

[Login to Electronic Plan Review](#)

Engineering Public Improvement Plan Review [Applicant's Guide Document Link](#)
Plat Review [Applicant's Guide Document Link](#)

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Engineering | (541) 774-2100 | engplanreview@cityofmedford.org
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200 South Ivy Street
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This section will review important details about what documents are required, where they should be uploaded, and naming conventions. Step-by-step instructions titled “[How to Find Tasks and Projects](#)” and “[How to Upload New Plans and Documents](#)” are included in Appendix A and B.

The document titled [Checklist for Submittals of Engineering Plans for Public Improvements](#) can be found on the city website and lists all items required in the first submittal for the plans to be routed to city reviewers. It is important to review any approved Planning Department documents and the Public Works Staff Report to make sure that the plans and documents uploaded to ProjectDox include all required elements.

When uploading plans and documents to ProjectDox, the **file names are extremely important**. To avoid issues, **do not** include dates or the words “draft” in the file name (unless it is the Draft Final Plat). File names should be simple and clearly describe what the document is. Upload files to ProjectDox as outlined:

Drawings Folder

- Public Improvement Plan Set
 - Upload all sheets in one combined pdf file.
 - Use the Project Name as the title and do not include dates. For example: "Clearview Subdivision Phase 4" or "Smith Road Street Improvements".
 - For first submittal, plans do not need to be stamped and signed.

Documents Folder

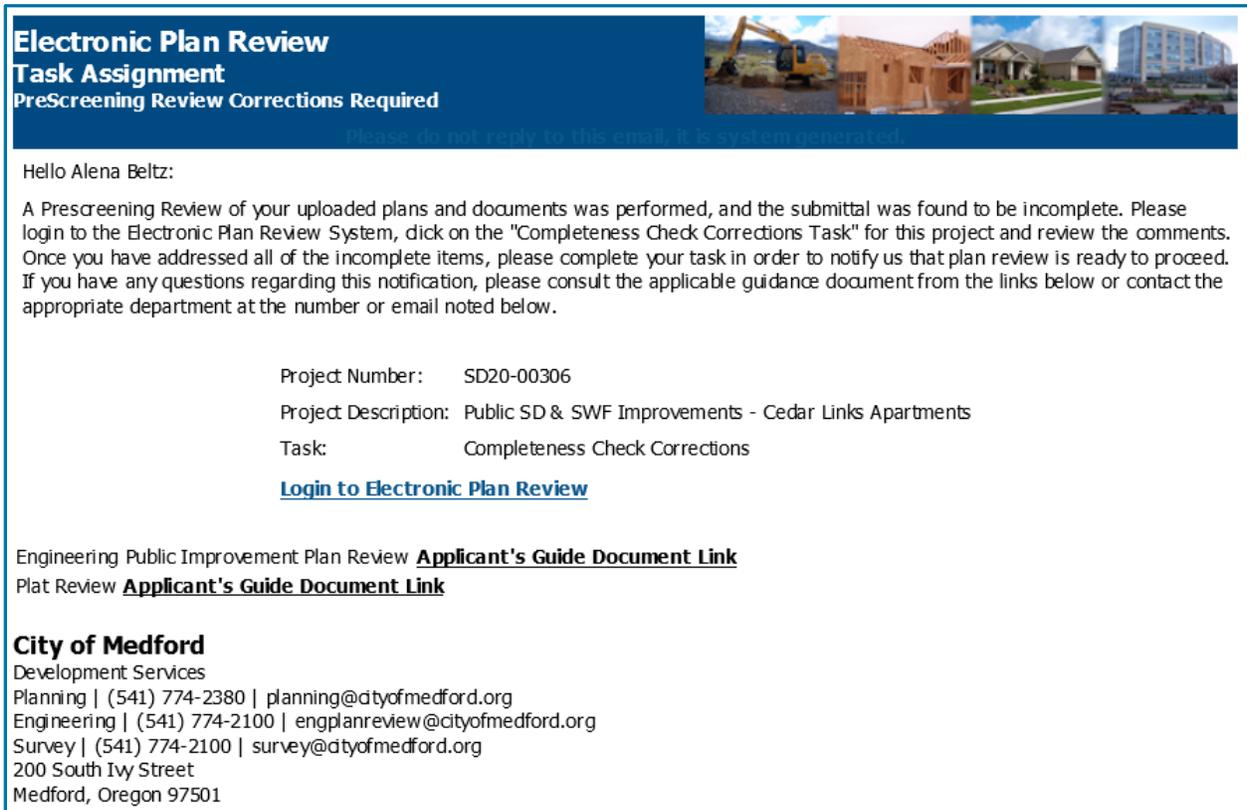
- All files except for the public improvement plan set should be uploaded to the Documents Folder
- Each file should be uploaded separately
- Use the document name and avoid dates. For example: "Voltage Drop Calculations", "Draft Final Plat", "Supplemental Fire Plan", and "Geotech Report".

Once all plans and documents have been uploaded, the Applicant must complete their ProjectDox "task" so that city staff are notified that the project is ready for review. Step-by-step instructions titled "[How to Complete the "Applicant Upload Task"](#)" are included in Appendix B.

2.3 Completeness Check

City staff will perform a completeness check by reviewing the submitted plans and documents for compliance with the [Checklist for Submittals of Engineering Plans for Public Improvements](#). If items are missing, then the Applicant will be notified with an email from the ProjectDox program for "Completeness Check Corrections".

Figure 3 – ProjectDox Completeness Check Corrections Email



The Applicant should then upload the requested documents and if needed, make the requested plan revisions and upload the revised plan set. See step-by-step instructions titled "[How to Complete the 'Completeness Check Corrections Task'](#)" in Appendix C and "[How to Upload Revised Plans and Documents](#)" in Appendix G.

2.4 First City Review Comments

Once a complete submittal has been received, city staff will use the ProjectDox program to review and make comments on the plans and documents. Once the review is completed, the Applicant will receive an invitation email from the ProjectDox program for Applicant Resubmittal.

Figure 4 – ProjectDox Applicant Resubmittal Email

Electronic Plan Review
Task Assignment
Applicant Resubmittal



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Hello Alena Beltz:

A review cycle of your plans and documents has been completed. Change requests and/or comments have been made requiring your attention. Please login to the Electronic Plan Review System, click on the "Applicant Resubmit Task" for this project and review the comments. Once you have addressed all of the change requests and/or comments, please complete your task in order to notify us that plan review is ready to proceed. If you have any questions regarding this notification, please consult the applicable guidance document from the links below or contact the appropriate department at the number or emailed noted below.

Project Number: M21-00098
Project Description: Delta Waters Impts - Delta Mini Storage
Task: Applicant Resubmit

[Login to Electronic Plan Review](#)

Engineering Public Improvement Plan Review [Applicant's Guide Document Link](#)
Plat Review [Applicant's Guide Document Link](#)

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Once logged into ProjectDox, the Applicant will be able to view and respond to all comments which will be in the form of ProjectDox "Changemarks". See the step-by-step instructions titled "[How to Review and Respond to Comments](#)" in Appendix E.

3.0 Second Review

3.1 Submittal of Revised Plans and Documents

After reviewing the changemark comments, the Applicant should address the comments and upload revised plans and documents along with any new documents that are requested. See step-by-step instructions titled "[How to Upload Revised Plans and Documents](#)" in Appendix G.

Once all documents and plans have been uploaded and the Applicant has commented on the changemarks, the Applicant should complete the "Applicant Resubmit task". See step-by-step instructions titled "[How to Complete the "Applicant Resubmit Task"](#)" in Appendix H. If the task is not "completed" in ProjectDox, the city staff will not be notified that the project is ready for second review.

City staff won't accept the project for second review and may send the Applicant another "Resubmit Task" if all changemarks were not responded to and if revised plans, revised calculations, and the public improvement cost estimate were not uploaded to ProjectDox.

3.2 Second City Review and Comments

During second review, city staff will review all the changemark comments made during the first review, will "resolve" all changemarks that have been addressed, and may make new changemarks. Resolving changemarks allows other reviewers and the Applicant to see which changemarks are left unresolved – unresolved changemarks are items that still need to be addressed before the plans can be approved.

Once city staff has reviewed the plans and documents, they will usually schedule a meeting with the Engineer to discuss all unresolved changemarks. After this meeting, the city will formally complete the second review and the Applicant will receive an invitation email from the ProjectDox program for Applicant Resubmittal (see Figure 4).

Once logged into ProjectDox, the Applicant will be able to view and respond to all changemark comments that remain unresolved. See the step-by-step instructions titled "[How to Review Unresolved Changemarks](#)" in Appendix F, and "[How to Review and Respond to Comments](#)" in Appendix E.

4.0 Third Review

The process for submitting revised plans and documents for third review is the same for second review (see section 3.1) except for the fact that the revised plans uploaded for third review should be the plans that will be approved and signed by the City Engineer and therefore need to be stamped and signed by the Licensed Professional Engineer.

In most cases, plan revisions are not required after third review, but outstanding items may still be required and when that is the case, the Applicant will again receive an invitation email from the ProjectDox program for "Applicant Resubmittal" (see Figure 4). See section 6.0 for more information about outstanding items required for plan approval.

If all items are addressed and additional plan revisions are not required, the plan set uploaded for third review will be approved. See section 7.0 for more information on plan approval.

5.0 Plan Review and Inspection Fee and Deposit Payment

Once the project cost estimate has been received with the second review submittal, city staff will determine what the plan review and inspection deposit and fees will be for the public improvement project. City staff will then email an invoice to the Engineer, Applicant (if different than the Engineer), and Developer. The invoice will contain instructions on how to make the payment. Plans won't be approved and signed by the City Engineer until the payment is received.

6.0 Outstanding Items for Approval

In some cases, plan review is completed before all required items are received, such as executed easements, and environmental permit letters. When that is the case, the Applicant will again receive an invitation email from the ProjectDox program for “Applicant Resubmittal” (see Figure 4).

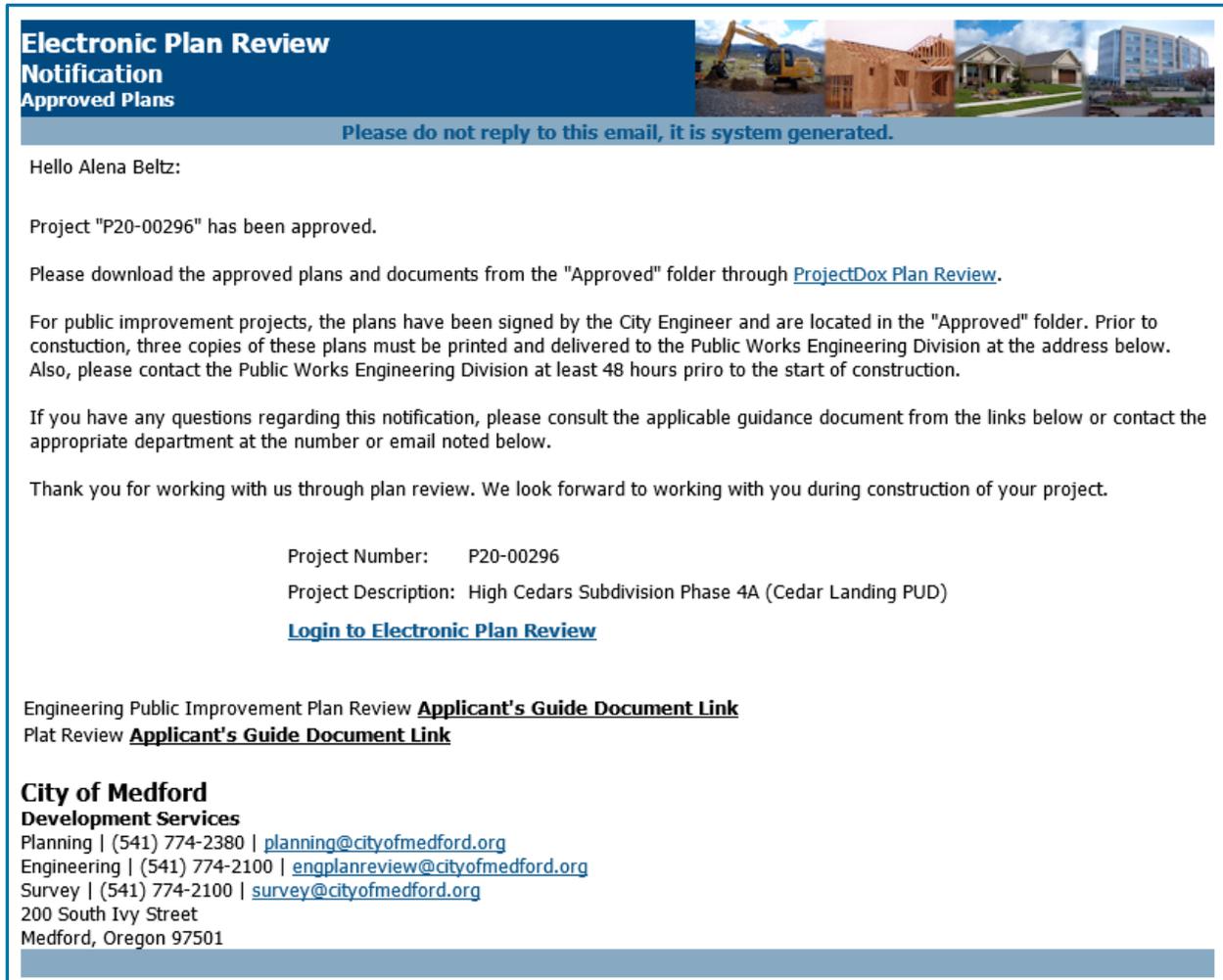
If the fee payment is the only item required once plan review is complete, then city staff will hold the ProjectDox workflow (will not send the Applicant a task) until the fee is received and will then begin the plan approval process.

The Applicant shouldn’t complete the “Applicant Resubmit Task” until they have uploaded or addressed all required items (see [“How to Review Unresolved Changemarks”](#) in Appendix F, [“How to Upload Revised Plans and Documents”](#) in Appendix G, and [“How to Complete the “Applicant Resubmit Task””](#) in Appendix H). Documents such as executed easements, environmental permits, and agreements should be uploaded to the ProjectDox Documents folder.

7.0 Plan Approval

Once plan review is complete and all items have been addressed, the Applicant will receive an "Approved Plans" email from ProjectDox.

Figure 5 – ProjectDox Approved Plans Email



**Electronic Plan Review
Notification
Approved Plans**

Please do not reply to this email, it is system generated.

Hello Alena Beltz:

Project "P20-00296" has been approved.

Please download the approved plans and documents from the "Approved" folder through [ProjectDox Plan Review](#).

For public improvement projects, the plans have been signed by the City Engineer and are located in the "Approved" folder. Prior to construction, three copies of these plans must be printed and delivered to the Public Works Engineering Division at the address below. Also, please contact the Public Works Engineering Division at least 48 hours prior to the start of construction.

If you have any questions regarding this notification, please consult the applicable guidance document from the links below or contact the appropriate department at the number or email noted below.

Thank you for working with us through plan review. We look forward to working with you during construction of your project.

Project Number: P20-00296
Project Description: High Cedars Subdivision Phase 4A (Cedar Landing PUD)

[Login to Electronic Plan Review](#)

Engineering Public Improvement Plan Review [Applicant's Guide Document Link](#)
Plat Review [Applicant's Guide Document Link](#)

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The approved plan set signed by the City Engineer will be located in the ProjectDox "Approved" folder. The Applicant will need to download the signed plans, and then deliver three hard copies to the Public Works Engineering desk. For step-by-step instructions see "[How to Download Approved Plans](#)" in Appendix I.

8.0 Revisions to Approved Plans

When approved public improvement plans need to be revised, the revised sheets need to be emailed to engplanreview@cityofmedford.org so that they can be reviewed and approved by the City Engineer.