

Septic & Onsite Wastewater Online Application Training

October 3, 2023







Benefits



VALUE to the customer/public

- Available 24/7/365
- Reduce printing costs
- Save time and travel submitting and receiving updates online
- Easy access to final documents set for download
- Automatic file versioning (see files at previous points in time)
- Online information access & project tracking







- Help Videos (under heading: "Using Development Direct")
- Simplified and Secure Login/Dashboard
- Easy Status Look-up
- eForm upload capabilities
- Centralized communication
 - View and Respond to Review Comments Online
 - View and Respond to Review Comments via Excel







Getting Started





Browser Requirements

- Supported browsers:
 - Chrome
 - Edge
 - Firefox
 - Safari
- Must turn off browser pop-up blocker







Septic and Onsite Wastewater Projects Introduction:



- Go live date for using Development Direct to apply for Septic projects is <u>October 4</u>
- Development Direct: https://clackamas-or-us.avolvecloud.com/Portal/Login/Index/Clackamas-County-OR
- Septic Resources/FAQ: https://www.clackamas.us/septic
- Septic forms for using for a Development Direct application: https://www.clackamas.us/septic/forms





Septic and Onsite Wastewater Project Application Types:



- Authorization Notices
- Existing System Repair Evaluations
- Existing System Verifications
- Inspection Paperwork Uploads
- Major and Minor Repairs
- Major and Minor Alterations
- Septic Permits
- Site Evaluations
- Pumper Truck Inspections
- Revisions (changes to already approved project)





Workflow Overview & Terms



- Steps in the application influence each other
- Some steps may be required and will need to be addressed before Development Direct accepts an application

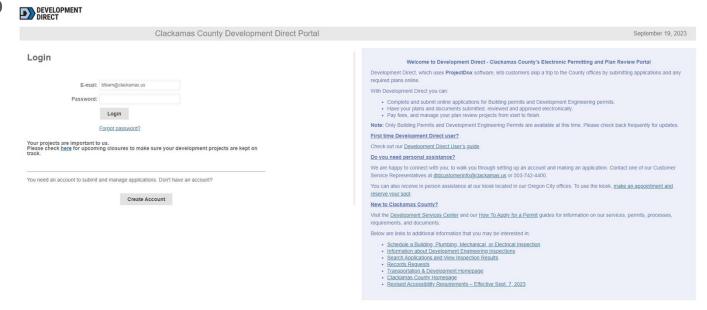
Helpful terms:

- Upload and submit uploading files after the application was submitted successfully
- Prescreen check to make sure all documents are present
- Formal review review of all submitted documents



New Account/Login

- Follow instructions to apply for a Septic project.
- Email invitation from Development Direct to create an account.
- Forgot your Password? Easy to reset!







Initial Application



Onsite Wastewater (Septic) Projects

For a full description of permit types, visit https://www.clackamas.us/how-to-apply-for-a-permit.

- · Onsite Wastewater (Septic) Permit
- Site Evaluation
- · Authorization Notice
- · Existing System Verification
- · Pumper Truck Inspections
- · Inspection Paperwork Uploads

Click the button below to apply for onsite wasterwater permits or manage previous submittals. Need help? 503-742-4740 / soilsconcern@clackamas.us.

Apply + Manage Onsite Wastewater Projects

Onsite Wastewater Revisions

Revisions: Issued Permits ONLY

- Changes to a project with an already <u>issued/approved</u> project
 - Only for revisions when the original application was submitted through Development Direct (after 10/04/2023)
- Please complete the short application by clicking below and following the steps
- <u>Important</u>: If you were NOT the original applicant, please contact our permits team to be added to the project <u>prior</u> to submitting a revision: 503-742-4740 or <u>soilsconcern@clackamas.us</u>

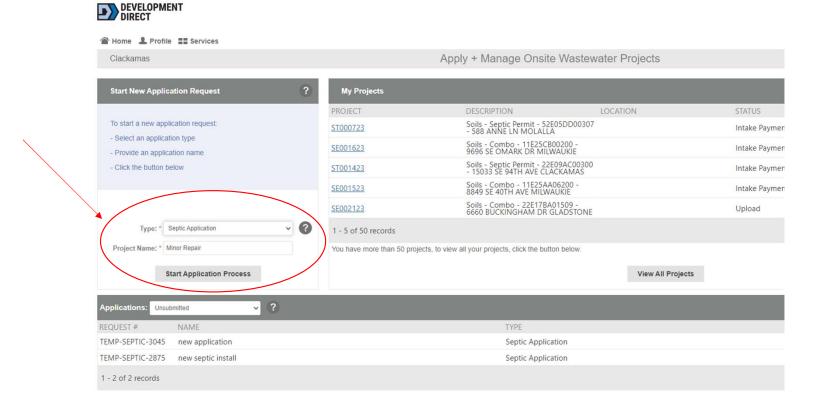
If you have <u>corrections to plans</u> currently under review (project not issued/approved), please go to **Apply + Manage Onsite Wastewater Projects** to access the project and upload corrections.

Click the button below to apply for Onsite Wastewater Revisions or manage previous submittals.

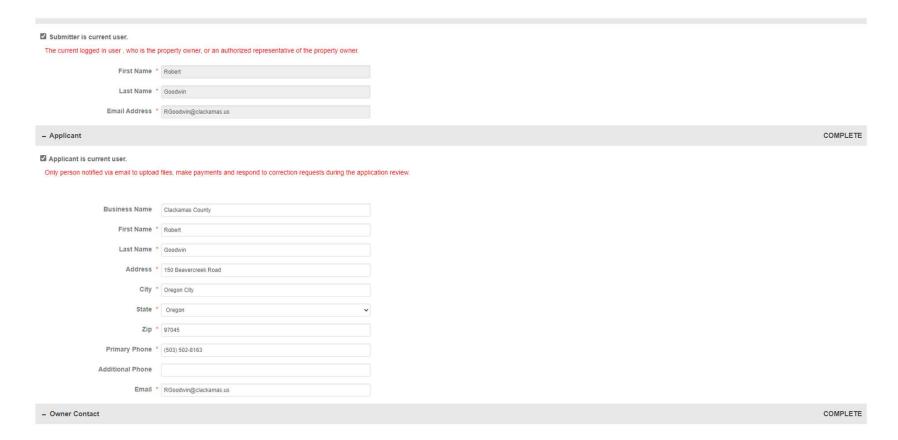
Need help? 503-742-4740 / soilsconcern@clackamas.us.

Apply + Manage Onsite Wastewater Revisions

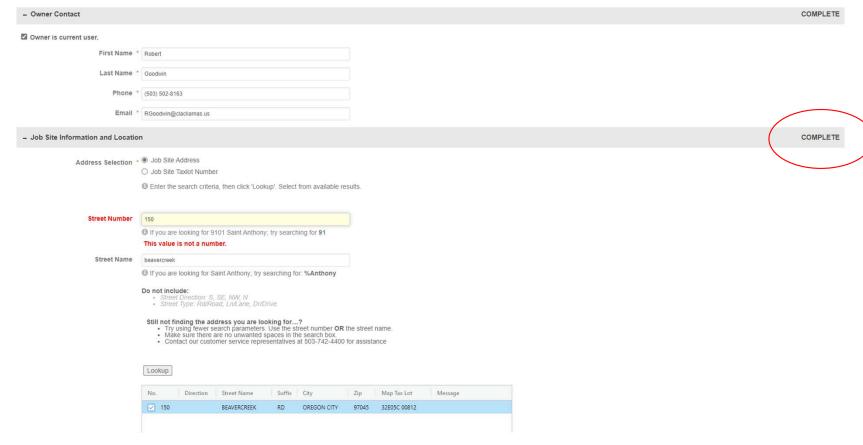




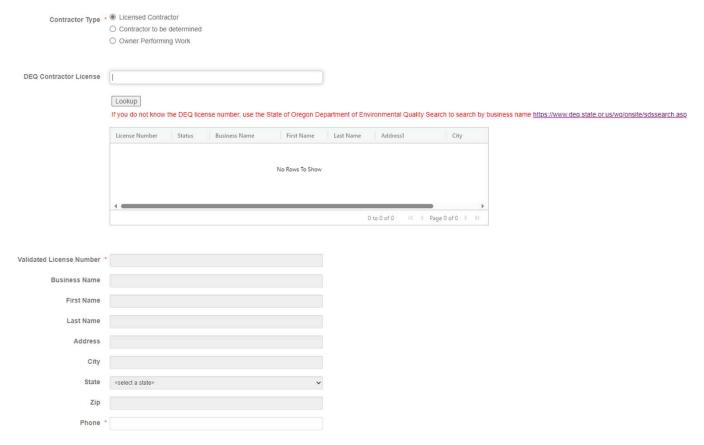




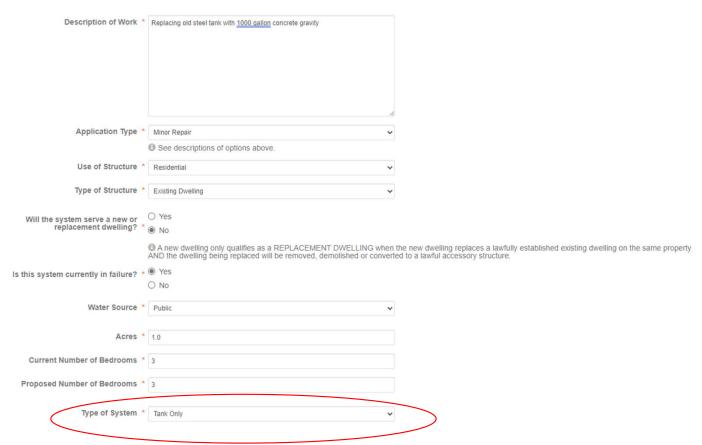














Applicant - Email

- User Tips
- Direct link to Tasks
- Workflow notifications
- Direct link to Download Approved Files



Action Items

Warning: External email. Be cautious opening attachments and links.



UPLOAD AND SUBMIT

Hello Bryan,

You have a task to complete to start your plan review.

TIP: Are you a New User?

First complete your account setup (required), if you haven't already. Open the separate invite email you received, or to request a new password <u>click here</u> and then select "forgot password".

To begin, please click on "Start Task" below.

Start Task

To submit your files

for SE001423 : Soils - Combo - 21E07DB05500 - 16015 SW WALUGA DR LAKE OSWEGO





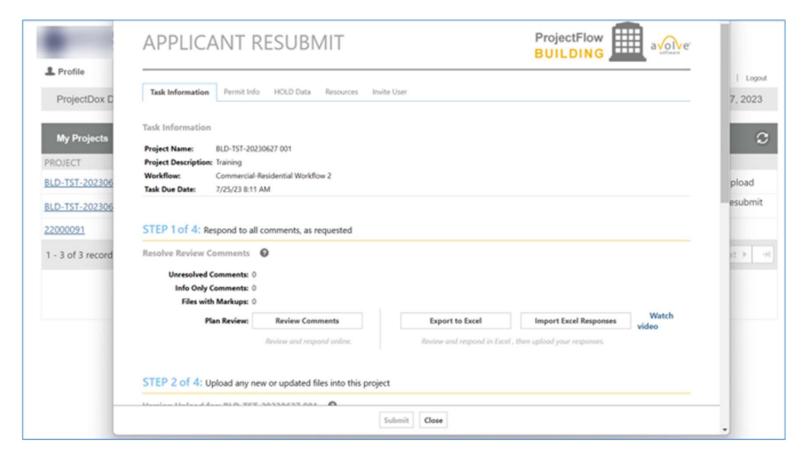
Dashboard

Apply + Manage Onsite Wastewater Projects September 19, 2023 2 My Projects **PROJECT** DESCRIPTION LOCATION STATUS TASKS (50) Soils - Combo - 53E03 02602 - 21121 S DEER CREEK LN COLTON - Site SE004923 Open Prescreen Review Prescreen Evaluation Open Prescreen Review SP004023 Soils - Pumper Truck - Pumper Truck Prescreen SP004123 Soils - Pumper Truck - Pumper Truck Upload Open Upload and Submit Open SP003623 Soils - Pumper Truck - Pumper Truck Payment Due Intake Payment Soils - Septic Permit - 12E31CA00422 - 5050 SE APPENINE WAY MILWAUKIE ST001923 Payment Due Intake Payment 6 7 8 9 10 46 - 50 of 50 records ◆ Prev Next ▶ You have more than 50 projects, to view all your projects, click the button below. View All Projects



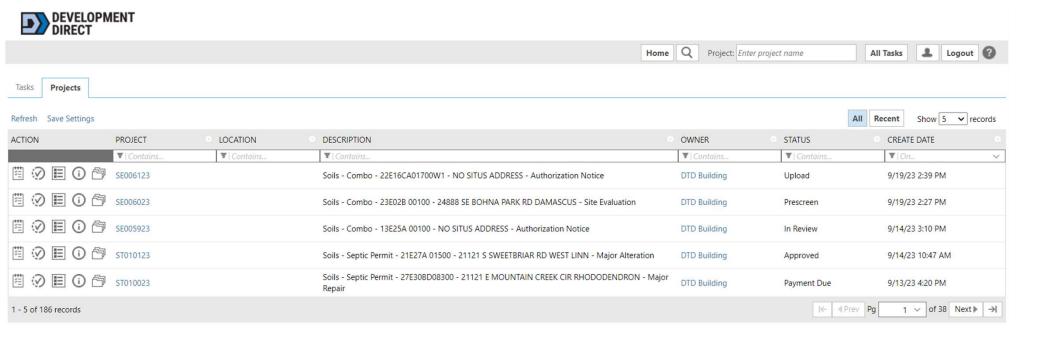


Dashboard





Home Page







Initial Upload



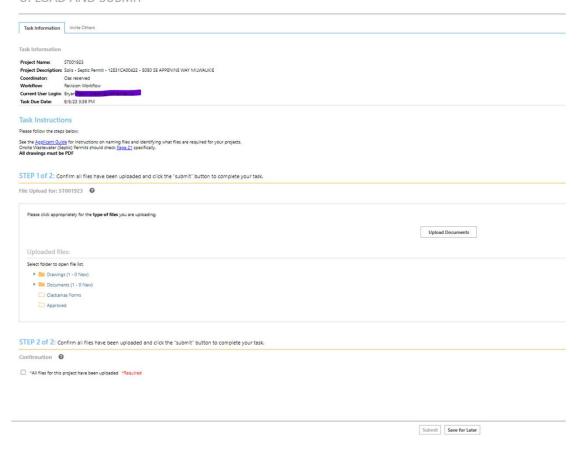
Initial Submission – Document Requirements

- Site Plans must go in "Drawings" Folder
 - PDFs only
 - File naming "001 Site Plan"
 - Portrait or Landscape ok
 - If you have more than 1 drawing upload as separate files
- All other submittal paperwork "Documents" Folder
 - PDFs only
 - Can combine all forms into one file



Initial Submission – Upload via eForm

UPLOAD AND SUBMIT





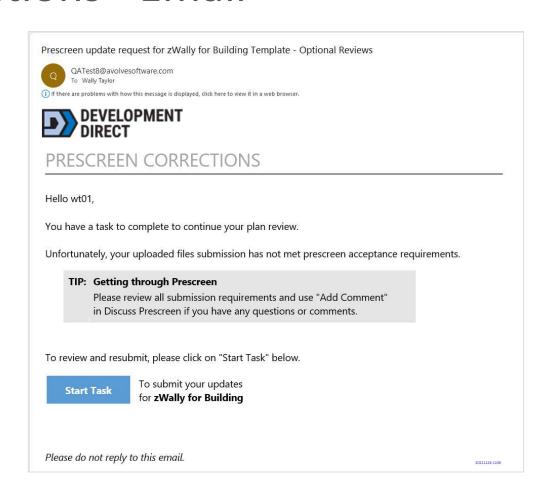


Prescreen Corrections



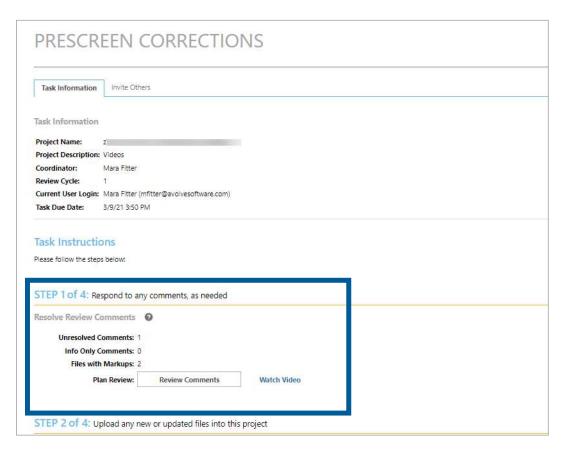
Prescreen Corrections - Email

- Clackamas County does
 Prescreen prior to Formal
 Review
- Email notice for corrections needed



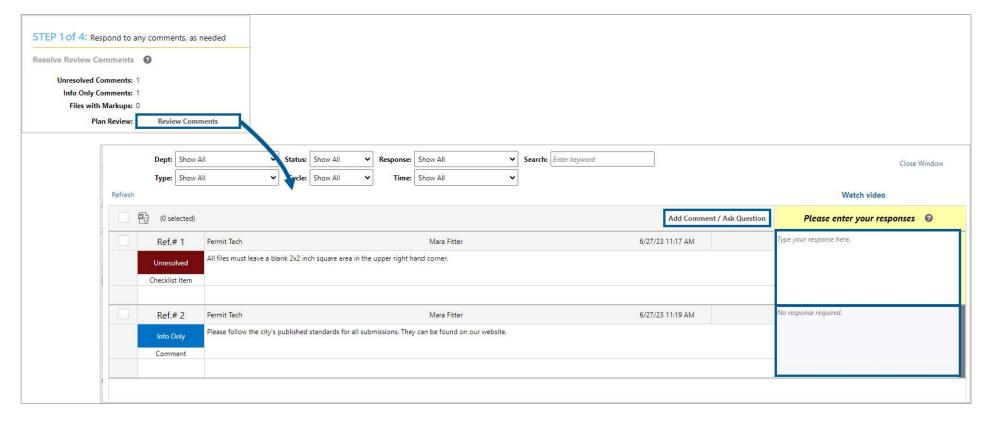
Prescreen Corrections - eForm

Follow the steps:



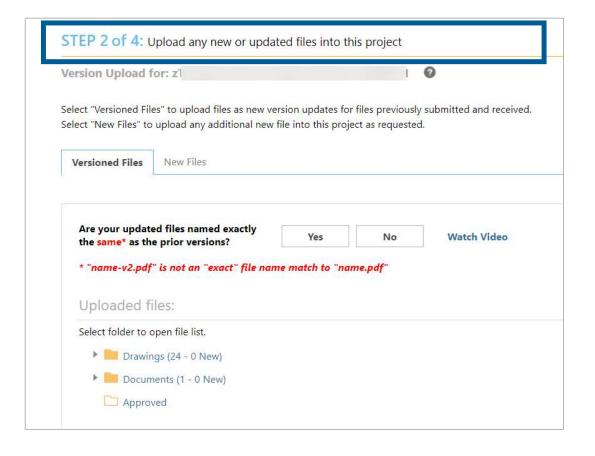


Prescreen Corrections – Review Comments Grid



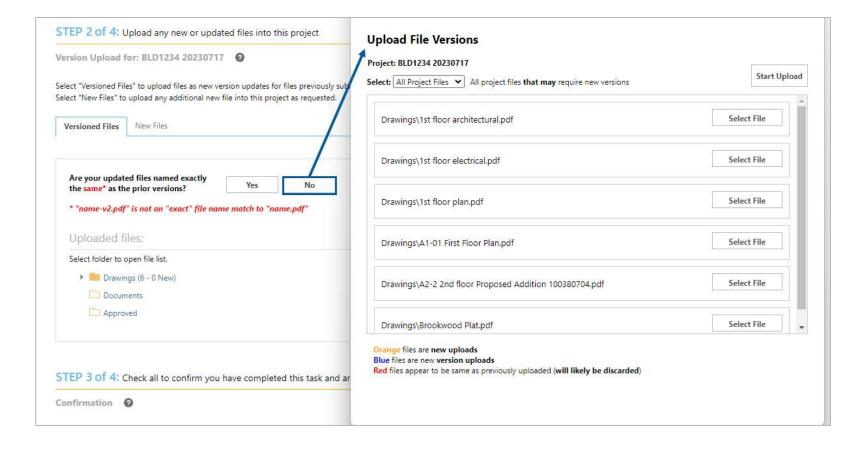


Prescreen Corrections - eForm



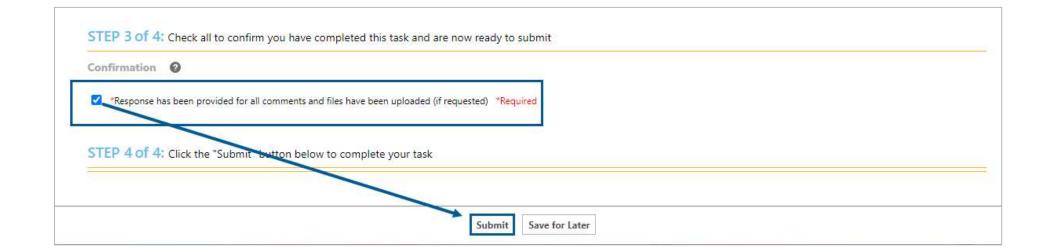


Applicant - Upload Versioned Files





Prescreen Corrections - eForm



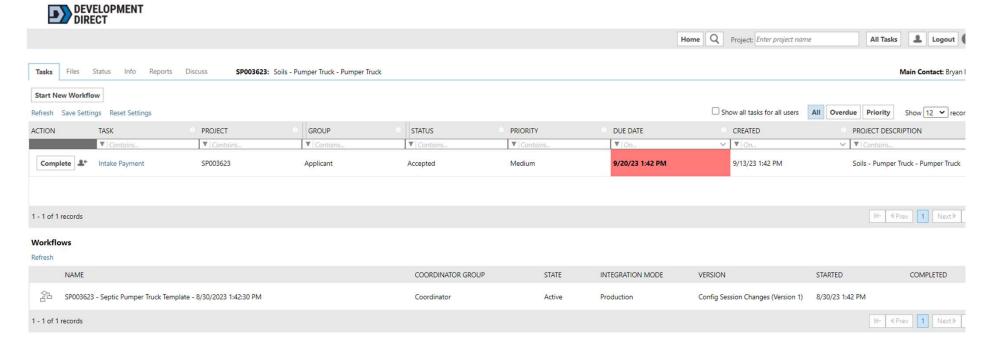




Payment

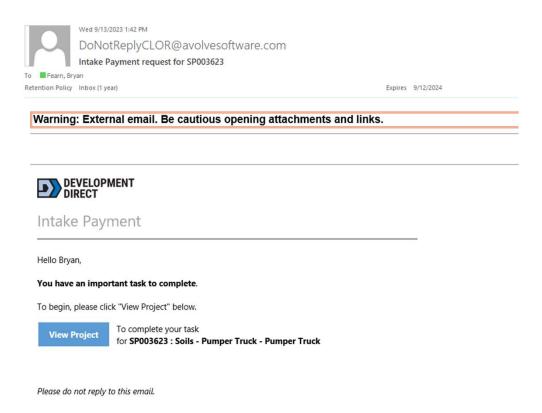


Applicant – Intake Payment for initial submission – Dashboard



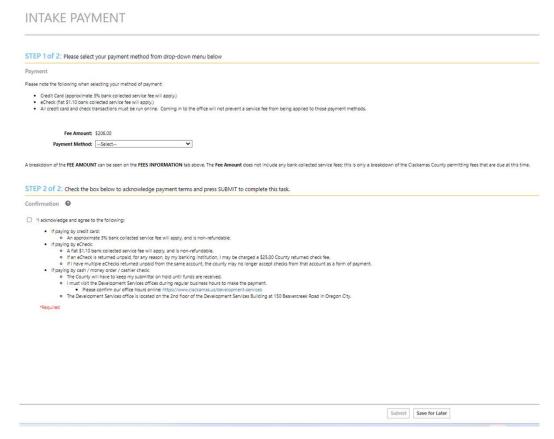


Applicant – Intake Payment for initial submission – email





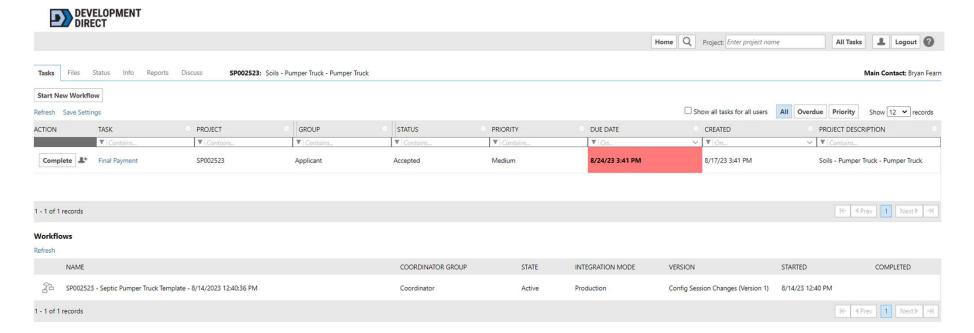
Applicant – Intake Payment for initial submission – eform





Applicant – Final Payment (after prescreen review) - Dashboard

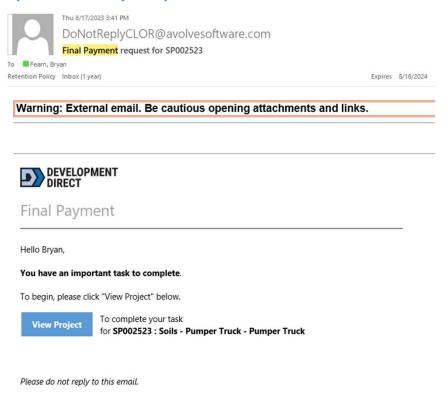
Note: the final payment step is not always required





Applicant – Final Payment (after prescreen review) - email

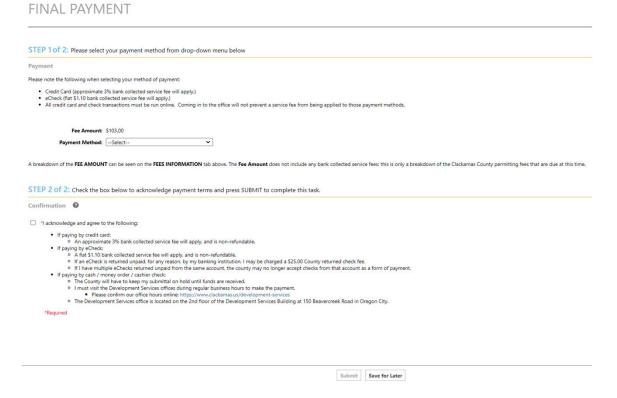
Note: the final payment step is not always required





Applicant – Final Payment (after prescreen review) - eform

Note: the final payment step is not always required







Review



Project Status – What's Going On?

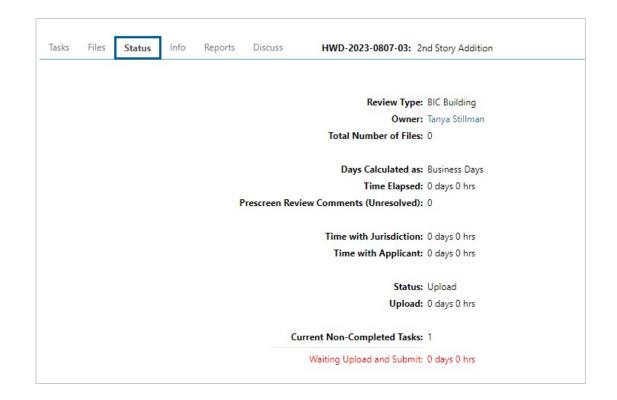
- Departments are reviewing your submission during this time.
- No action is required on your part until you receive notification.
- You can easily check the status of your project at any time.





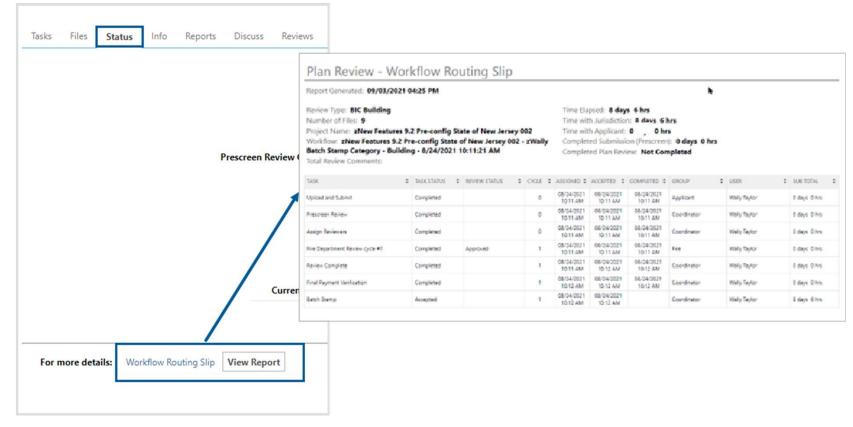
Project Status – In the Project

Project Status tab





Project Status - Workflow Routing Slip







Respond and Resubmit



Respond and Resubmit - Email



RESPOND AND RESUBMIT

Hello Bryan,

Review comments are now available.

Your responses and requested file corrections are required for your plan review to continue.

NOTE: Your review will go faster if new versions are uploaded properly.

TIP: Naming new file versions

It's easier to upload many files when new versions are named the same. Put all the new versions to be uploaded into a separate folder on your computer. Now rename each new version to the exact same file name you submitted prior. For example, if "file.pdf" was submitted before and "file-v2.pdf" is new version, then rename "file-v2.pdf" to "file.pdf", removing any suffixes (like -v2, _v2, or -r2).

To begin, please click on "Start Task" below.



To submit your corrections

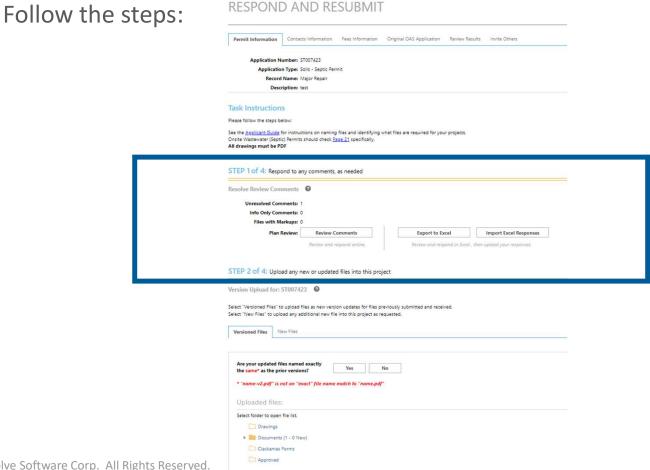
for ST007423 : Soils - Septic Permit - 22E20BA06000 - 1140 HIGH

ST GLADSTONE - Major Repair

Please do not reply to this email.

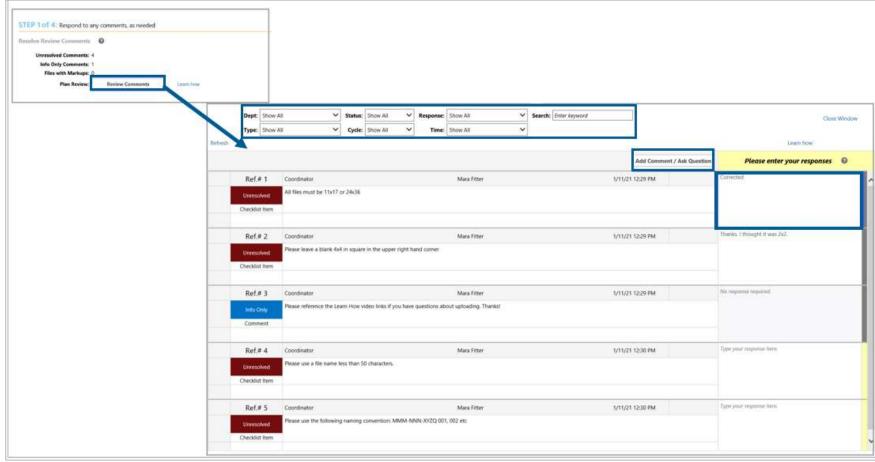


Respond and Resubmit - eForm

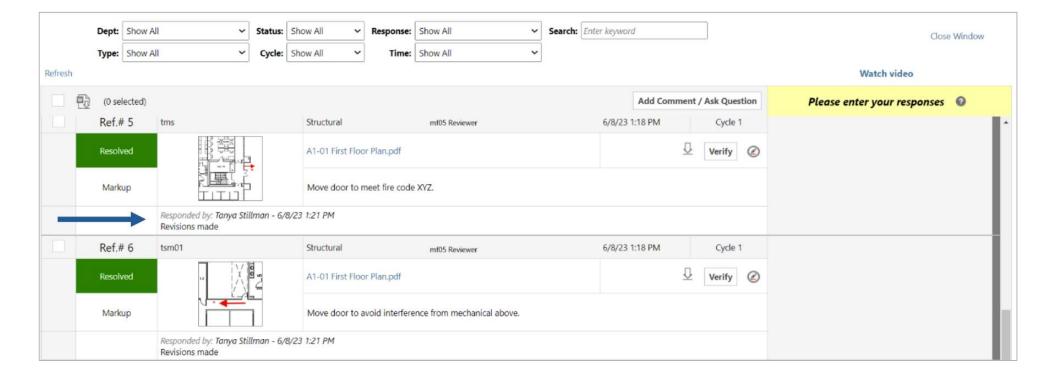




Applicant – Review Comments

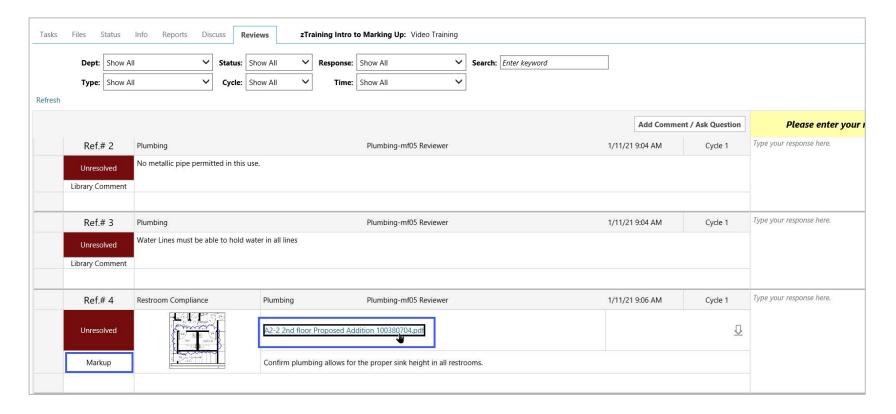


Review Comments Grid



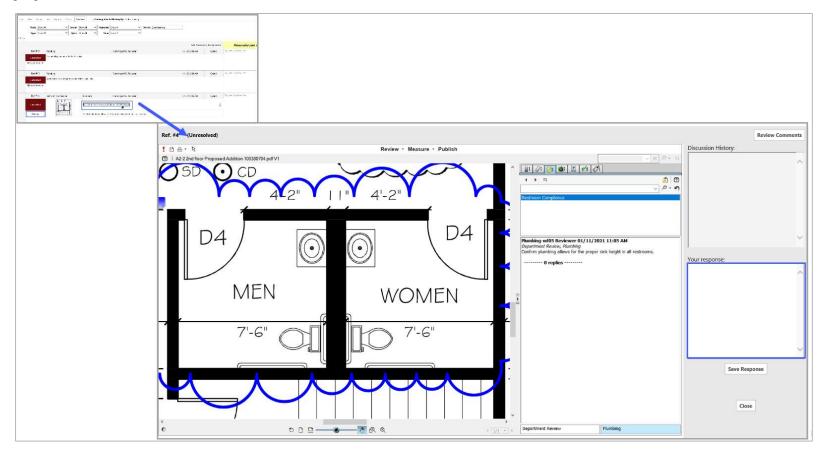


Applicant – Review Comments

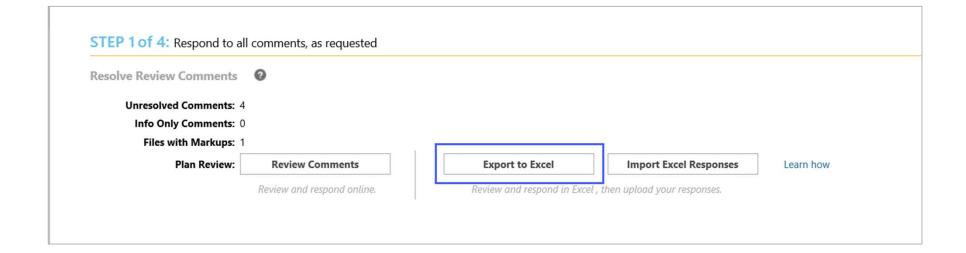




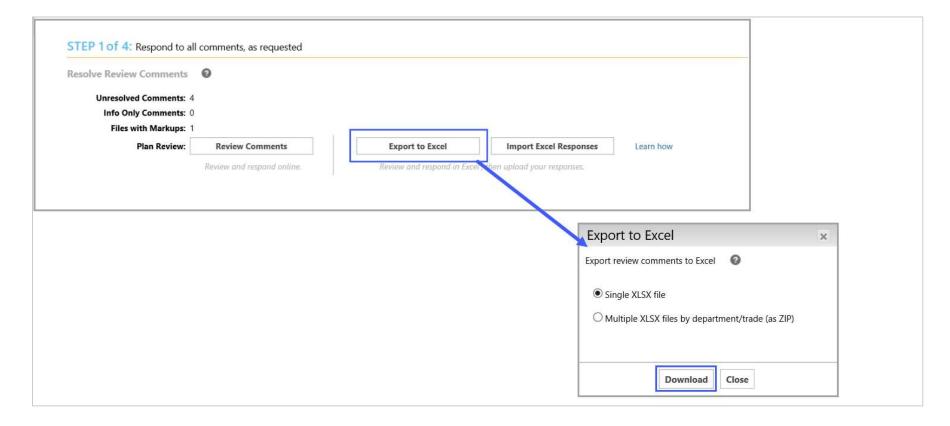
Applicant – Review Comments







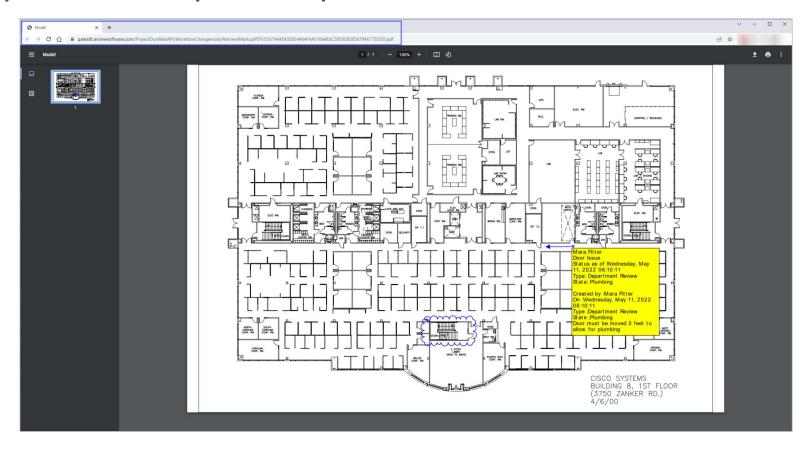




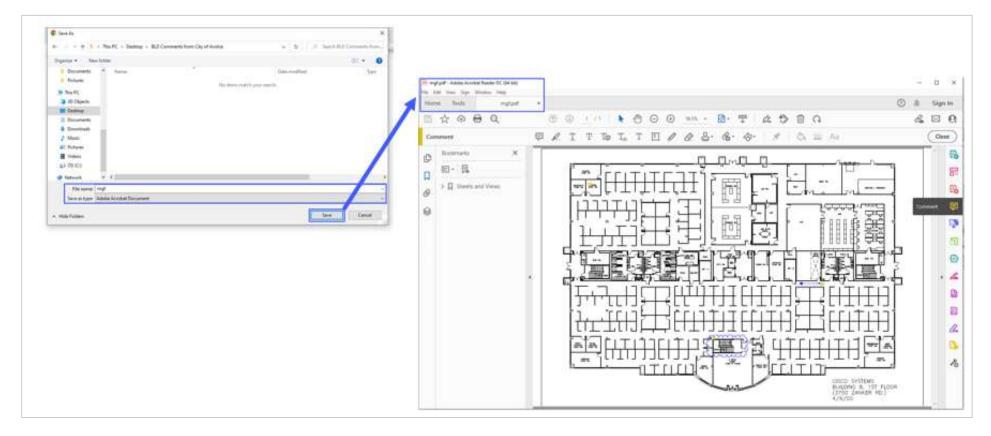


REF#	REVIEWED BY	TYPE	VIEW	ENTER YOUR COMMENT RESPONSE HERE	DISCUSSION CYCLE	STATUS
	Plumbing Plumbing-mf05 Reviewer 1/11/21 9:03 AM	Comment Add comment allows the Coordinator or Reviewer to add comments using their own words, or to copy and paste from an outside document. Rich-Text is an option.			1	Unresolved
	Plumbing Plumbing-mf05 Reviewer 1/11/21 9:04 AM	Ubrary Comment No metallic pipe permitted in this use.			1	Unresolved
	Plumbing Plumbing-mf05 Reviewer 1/11/21 9:04 AM	Library Comment Water Lines must be able to hold water in all lines			1	Unresolved
	Plumbing Plumbing-mf05 Reviewer 1/11/21 9:06 AM	Markup A2-2 2nd floor Proposed Addition 100380704.pdf Restroom Compliance Confirm plumbing allows for the proper sink height in all restrooms.	open		1	Unresolved

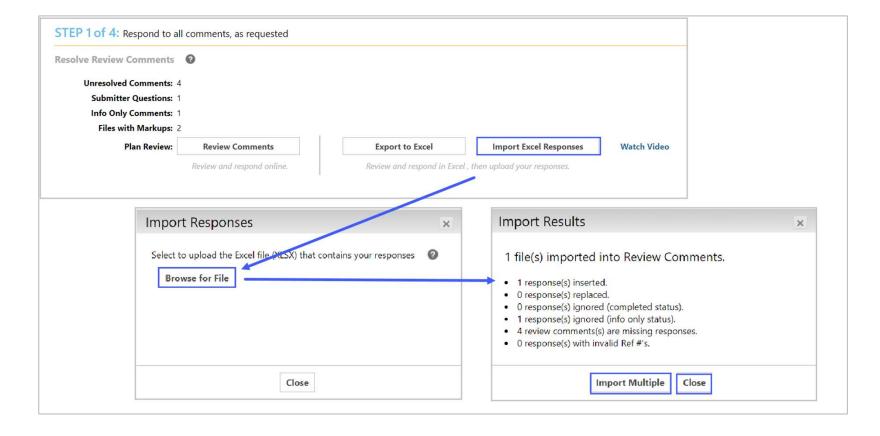




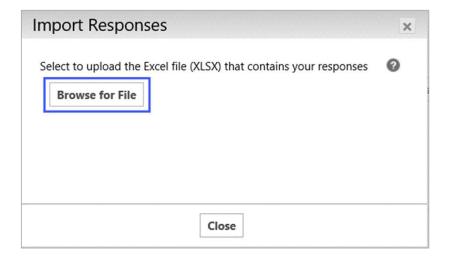








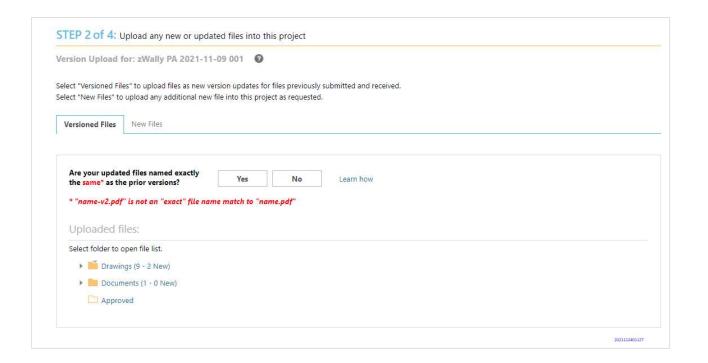






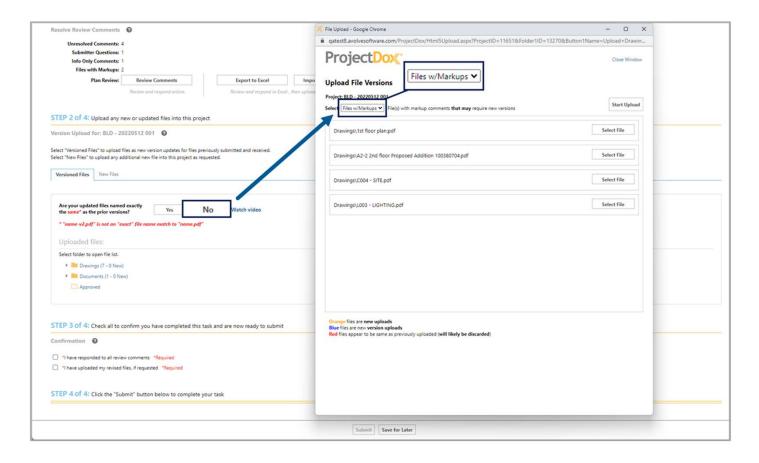
Respond and Resubmit - eForm

Follow the steps:





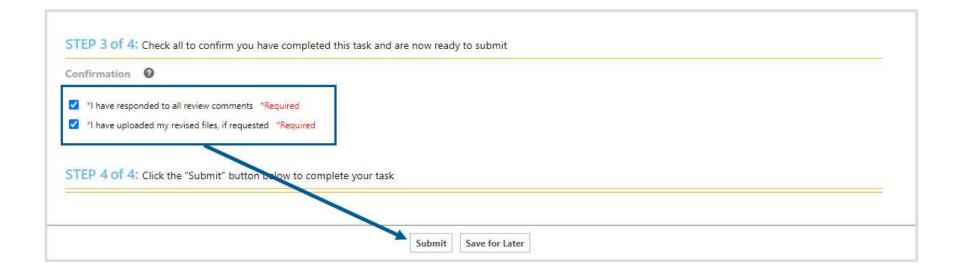
Applicant - Upload Versioned Files





Respond and Resubmit - eForm

Follow the steps:







Final Documents



Applicant - Download Approved Files Using Email



Warning: External email. Be cautious opening attachments and links.



DOWNLOAD APPROVED FILES

Hello Robert,

Congratulations, your approved plans are ready for download.

To download your approved files, click on "Download" below. You will be redirected to your Project portal and you will enter your login & password. Once logged in, a window will open prompting you to select a location on your local computer to download and save your approved plans.

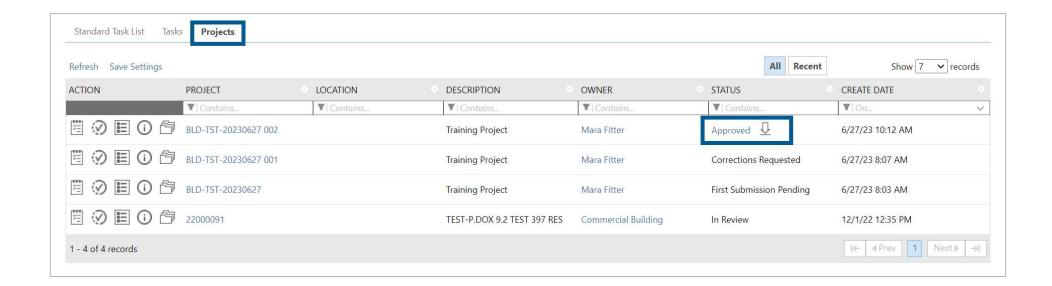


Please do not reply to this email.



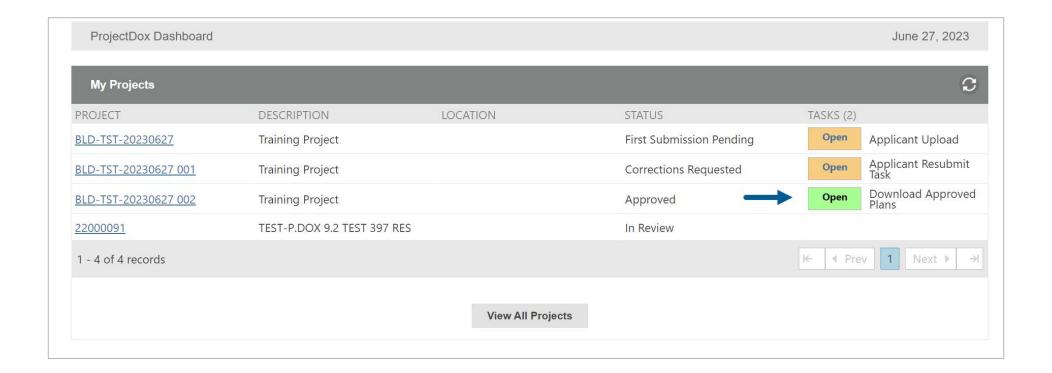
Expires 9/5/2024

Applicant - Download Approved Files Using Projects Tab





Applicant - Download Approved Files Using Dashboard





Applicant - Download Approved Files

Project Name: BLD-TST-20230627 002

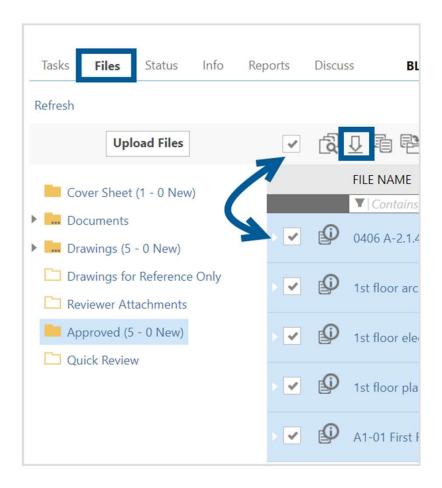
Click the button below to access your project files to select and download your Approved Plans

Access Project Files





Applicant - Download Approved Files





Need to take the customer name out. I have this image and will edit and replace Mara Fitter, 2023-07-17T20:34:41.382 MF0





Revisions to issued permits + inspection documents





Revisions

Onsite Wastewater (Septic) Projects

For a full description of permit types, visit https://www.clackamas.us/how-to-apply-for-a-permit.

- · Onsite Wastewater (Septic) Permit
- Site Evaluation
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Apply + Manage Onsite Wastewater Projects

Onsite Wastewater Revisions

Revisions: Issued Permits ONLY

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- Please complete the short application by clicking below and following the steps
- Important: If you were NOT the original applicant, please contact our permits team to be added to the project <u>prior</u> to submitting a revision: 503-742-4740 or <u>soilsconcern@clackamas.us</u>

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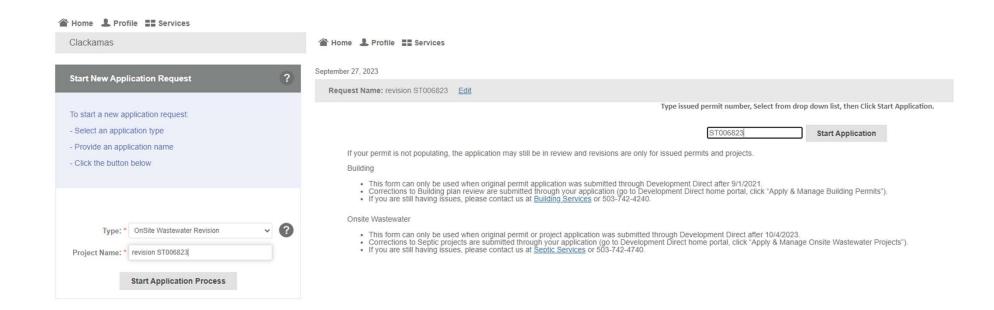
Need help? 503-742-4740 / soilsconcern@clackamas.us.

Apply + Manage Onsite Wastewater Revisions





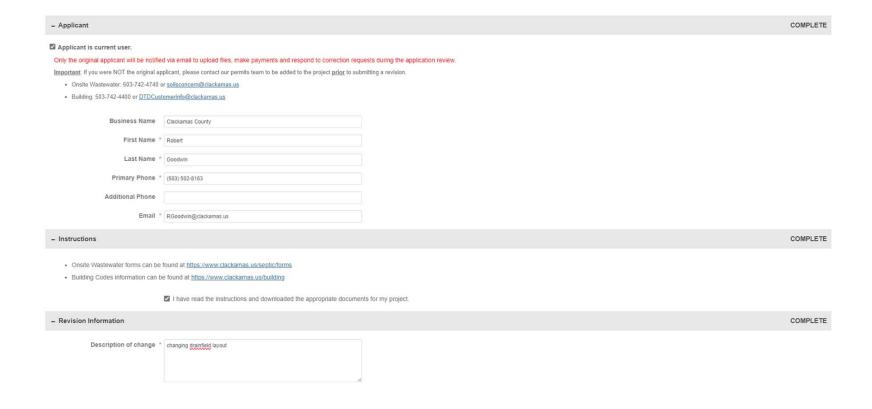
Revisions







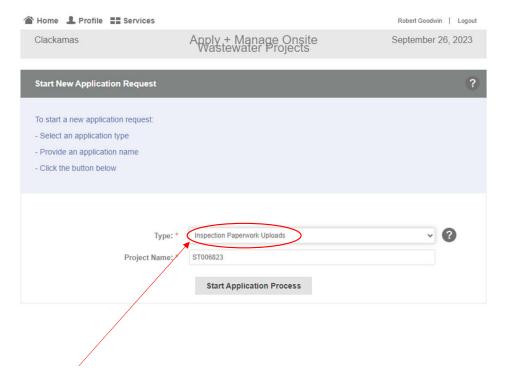
Revisions

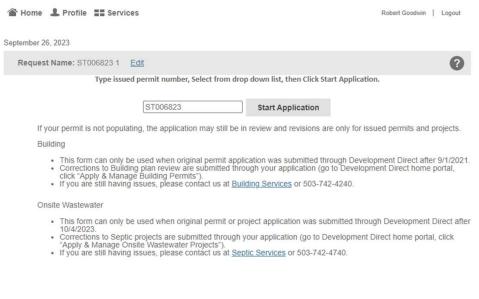






Inspection documents



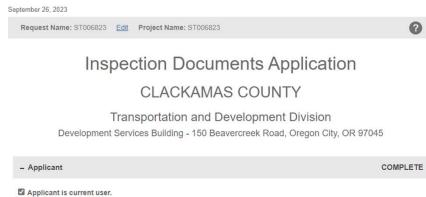






INCOMPLETE

Inspection documents



Only the original applicant will be notified via email to upload files, make payments and respond to correction requests during Important: If you were NOT the original applicant, please contact our permits team to be added to the project prior to submitting a document upload application: 503-742-4740 or soilsconcem@clackamas.us Business Name Clackamas County First Name * Robert Last Name * Goodwin Primary Phone * (503) 502-8163 Additional Phone Email * RGoodwin@clackamas.us

Required uploads include an As-Built drawing and the Installed Materials List form. If applicable, you may need to upload the Certification of Existing System Decommissioning form and the accompanying pump receipt. All Septic forms can be found at www.clackamas.us/septicforms Please note, after completing the inspection paperwork upload task you will need to schedule an inspection. ☐ I have read the instructions and downloaded the appropriate documents for my project. + Acknowledgments COMPLETE COMPLETE - Signature I hereby declare that I have read and understood the above, and the information contained in this application, attached schedules, attached plans and specifications, and other documents is true to the best of my knowledge. I, being the authorized applicant, acknowledge that:

 I have personally examined and am familiar with all the information submitted in response to the questions contained in this notice, and any attachments, and attest that all information submitted is true, correct and complete: and 2. I understand and agree that clicking the box above will be deemed the equivalent of a signature in electronic form Applicant: Robert Goodwin

Signature date: 2023-09-26 3:15 PM

Submit Request

Save for Later

- Instructions





Get additional assistance:

How to Apply For A permit

(see snip below for making an appointment)

If you do not have a computer, or need assistance with online services, you can make an appointment and reserve your spot for assistance at our Development Direct kiosk. Making an appointment reserves the kiosk for your use with a staff member and allows us to provide the quality of service that every customer needs and deserves.

Email: Soilsconcern@clackamas.us

Phone: 503-742-4740

