Department of Commerce PlanView System

Local Government Manual





Table of Contents

	Local Government Manual	1
Γά	ble of Contents	2
	Introduction	4
	Step 1 – Create your Secure Access Washington (SAW) account (one-time only)	6
	Step 2 – Submit a PlanView System Access Request Form	10
	Step 3 – New User Registration Email	12
	Step 4 – Add the PlanView System service	13
	SAW Time Out	16
	PlanView	17
	Home Page	19
	Online Submittals	20
	Create a New Submittal	20
	Online Submittal	21
	Amendment	22
	Attachments	23
	Contact	25
	Review, Certify and Sign	26
	Receipt	27
	Submittal Email	28
	Acknowledgement Letter	28
	Submit a Supplemental Submittal	29
	Jurisdiction	30
	Jurisdiction Basics	30
	Jurisdiction Contacts and Addresses	31
	Primary Contacts	31
	Jurisdiction Attachments	31
	Jurisdiction Submittals	32
	Jurisdiction Cases	32
	Jurisdiction Search (Consultants Only)	32
	Contacts	33
	Contact Search	33



PlanView

Contact Details	33
Security Roles	34
Associated Jurisdictions (Consultants Only)	35
Add New Contacts	35
Submittals	37
Submittal Search	37
Submittal Basics	38
Submittal Intake	39
Submittal Categories	40
Submittal Contacts and Addresses	40
Submittal Attachments	41
Submittal Comments	41
Submittal Workflows	42
Workflow Details	42
Cases	43
Case Search	43
Case Basics	44
Case Milestones	45
Case Contacts and Addresses	45
Case Categories	46
Case Attachments	46
Case Comments	47
Case Workflows	47
Definitions and Troubleshooting	48
Categories	48
Download Troubleshooting	50
System Access Request Form	53





Introduction

Welcome to the PlanView data system. This system connects local government planners with state agency staff who help them with our shared responsibility to implement Washington's Growth Management Act(GMA) This manual will guide you through the features in this system so you can make the best use of it.

If you are new to this system, start by going through the Getting Setup steps to create a Secure Access Washington (SAW) account and add the PlanView Service to your new account.

The rest of the manual serves as a reference tool for the use of PlanView. You can also use the <u>Table of Contents</u> to navigate through this document. When you are using PlanView, please keep these points in mind:

- The PlanView Data System is for official use only. Do not use PlanView anything other than state agency business. Do not loan your account or pass your credentials out to anyone but you.
- The PlanView system is a hub connecting state your agency with other agencies and local governments. As such, the comments you enter and the draft information in PlanView are viewable by any user with access. Please choose your words with this in mind.
- Although there is no public access function in PlanView, all of the material in PlanView is a public document subject to the public records act.

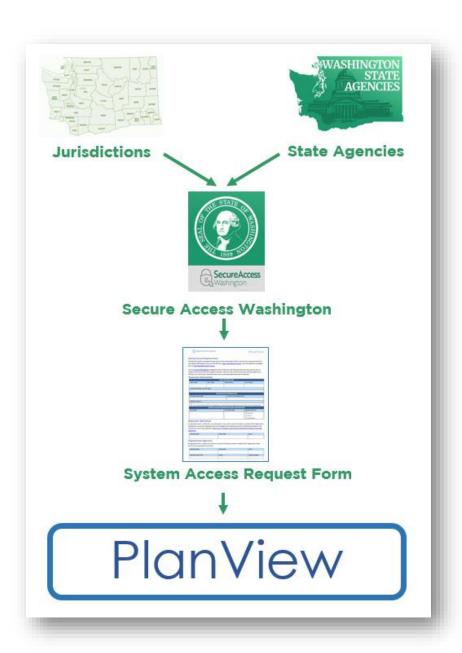
If you have any questions, contact your agency lead, or contact Dave Andersen at Commerce (509) 434-4491.



Getting Setup

In order to gain access to system you must first complete a few initial steps:

- 1. Create a Secure Access Washington (SAW) account.
- 2. Submit a PlanView System Access Request form.
- 3. Receive a New User Registration Email.
- 4. Add the PlanView System service to your SAW Account.





Step 1 — Create your Secure Access Washington (SAW) account (one-time only)

In order to access Commerce applications, you will need to create a Secure Access Washington (SAW) account. If you already have a SAW account, go to Step 2.

Go to the Secure Access Washington site at https://secureaccess.wa.gov/

Click the "Sign Up!" button to begin.





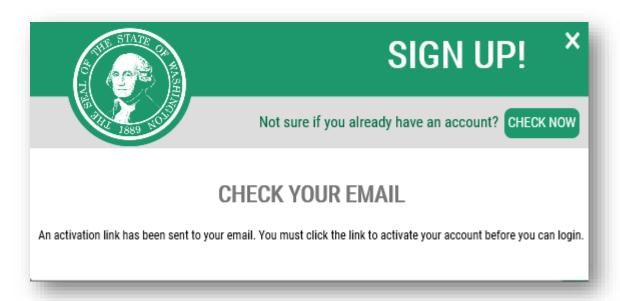


Enter your name, email and create a Username. Note the requirements for a secure password. You will also need to verify that you are not a "Not a robot".

	SIGN UP! X
1889	Not sure if you already have an account? CHECK NOW
	FIRST NAME
	LAST NAME
	[]
	EMAIL
	USERNAME
	PASSWORD REQUIREMENTS
	Add at least 10 more characters
	Add a special character or a lower case letter or an uppercase letter or a number
	PASSWORD
	CONFIRM PASSWORD
	l'm not a robot reCAPTCHA Privacy - Tama
	SUBMIT



You will be sent an email to activate your account.



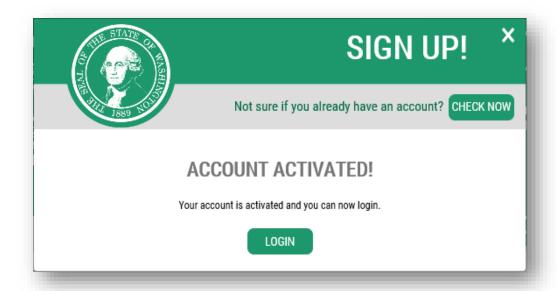
Go to your email account and click the link provided on your email. The email will be titled \rightarrow SecureAccess Washington: Welcome to SecureAccess Washington. Click the link to activate your account.

From: "secureaccess@cts.wa.gov" <secureaccess@cts.wa.gov> To: '> Sent: Fri, Jul 13, 2018 at 2:59 PM Subject: SecureAccess Washington : Welcome to SecureAccess Washington You are almost finished,</secureaccess@cts.wa.gov>
Thank you for signing up with Secure Access Washington.
Your username is:
To activate your account, please click: https://test-secureaccess.wa.gov/public/saw/pub/regConfirm.do?s=23551&userId=
For questions or concerns about your SecureAccess Washington account, please visit https://test-secureaccess.wa.gov/public/saw/pub/help.do
Thank you, The Secure Access Washington Team





You will get an Account Activated message when you have successfully activated your SAW account.





Step 2 – Submit a PlanView System Access Request Form

After establishing a SAW account, you will need to submit a <u>PlanView System Access Request Form</u>, scan and email to reveiwteam@commerce.wa.gov.

Department of Commerce					Plan	View	
			System Access Request Form				
vstem Acces	stem Access Request Form						
The PlanView System is accessed through Secure Access Washington (SAW). Use this link to access the SAW site and create a SAW account, if you do not have one: https://secureaccess.wa.gov/ . Scan and email this completed form to reviewteam@commerce.wa.gov .							
Go to the <u>Growth Management</u> webpage for links to PlanView User Manuals that have instructions on how to create a SAW account and how to login to PlanView. After you have a SAW account, and we have added you to PlanView, you will receive a welcome email when you have been granted access to PlanView.							
Requestor In	formation						
ELDOT NAME	LACT NAME		ORMATION	CPI I	PHONE		
FIRST NAME	LAST NAME	V	ORK PHONE	CEL	L PHONE		
CONCHI TINO PIRE	WE ADDITION OF THE						
CONSULTING FIRM (IF APPLICABLE) r Consultants working on l	habalf of a Iv	nicdiation				
This is required to			N INFORMATION				
ORGANIZATION NAM			TITLE WITH ORGANI	ZATION			
Name of the Organi	ization you are requesting	access to.	Consultants, provid	e you title wi	ith your Consu	lting Firm.	
PRIMARY CONTACT							
SAW EMAIL	Yes, I am the Primary Contact for this Organization. I understand that I will replace the current Primary User for this Organization. SECURE ACCESS WASHINGTON (SAW) INFORMATION AW EMAIL SAW USER NAME SECURITY ROLE(S)						
	be set up with this email a				Read Only Planner Administrator	See descriptio below	
oser accounts will							
	reement						
Requestor Ag y signing this form, sted above, will pra onditions of Use Ac	I certify that I am author ctice adequate Password ccess Agreement http://w	d manageme	ent by keeping Passwo	mation on be	ntial and agre	e to the	
Requestor Ag y signing this form, sted above, will pra onditions of Use Ac	I certify that I am author ctice adequate Password	d manageme	ent by keeping Passwo erce.wa.gov/privacy-ir	mation on be	ntial and agre	e to the	
Requestor Ag y signing this form, sted above, will pra onditions of Use Ac greement/. PRINTED NAME Organization	I certify that I am author actice adequate Password access Agreement http://w	d manageme	ent by keeping Passwo erce.wa.gov/privacy-in	nation on be ords confide offormation/	ntial and agre conditions-us DATE	e to the e-access-	
Requestor Ag y signing this form, sted above, will pra onditions of Use Ac greement/. PRINTED NAME Organization y signing this form,	I certify that I am author actice adequate Password access Agreement http://w	d manageme	ent by keeping Passwo erce.wa.gov/privacy-in	nation on be ords confide offormation/	ntial and agre conditions-us DATE	e to the e-access-	
Requestor Ag y signing this form, sted above, will pra onditions of Use Ac greement/. PRINTED NAME Drganization y signing this form, pove and the select PRINTED NAME	I certify that I am author actice adequate Password access Agreement http://w	SIGNATURE SIGNATURE	ent by keeping Passwo erce.wa.gov/privacy-in	nation on be ords confide offormation/	ntial and agreconditions-us DATE Organization	e to the e-access-	
requestor Ag r signing this form, ted above, will pra onditions of Use Ac reement/. PRINTED NAME Organization r signing this form, to ove and the select PRINTED NAME	I certify that I am author citice adequate Password ceess Agreement http://w Approval I approve this Person to teed Security Roles.	SIGNATURE SIGNATURE	ent by keeping Passwo erce.wa.gov/privacy-in	nation on be ords confide offormation/	ntial and agreconditions-us DATE Organization	e to the e-access-	





Security Roles

Below is a summary of the permissions by role and contact type. You may request multiple security roles. *Administration will only be granted to users who have an email address with the requested Organization.*

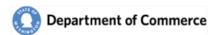
		Administrator	Planner	Read Only
	Online Submittals		Χ	
SNC	View and Track Submittal Progress		X	X
DICTIC	View and Track Periodic Update Progress		Χ	X
JURISDICTIONS AND CONSULTANTS	View and Track Hearings Board Cases		Χ	X
	Update Contact Information for your	X		
	Organization			
Si	Personalize Submittal Notifications		Χ	
SCE	Create Workflows to track Comment		X	
AGE	Letters			X X
O F	Create and update Contacts for your	X		
STATE AGENCIES ONLY	Organization			

Consultants

If you are a Consultant and need access to multiple Organizations, please submit a separate form for each Organization.

Primary Contacts

Primary Contacts are considered the lead user for an organization, will receive all Submittal notifications and will be contacted first when there are questions.



Step 3 – New User Registration Email

Once your Growth Management Planner registers you as a PlanView user, you will receive an email like the one pictured below.



Next log into SAW using your new username and password.



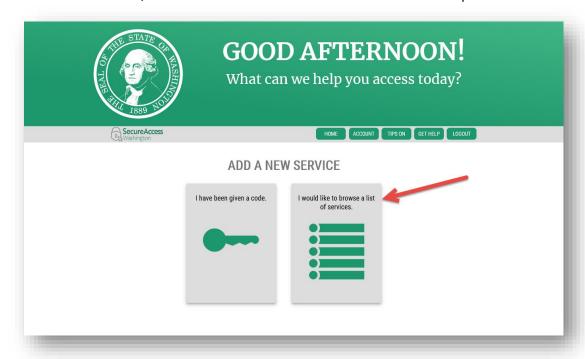


Step 4 – Add the PlanView System service

Once you've logged into SAW, you can add your selected services by clicking on the "Add a New Service" button.



Next, select the "I would like to browse a list of services" option.



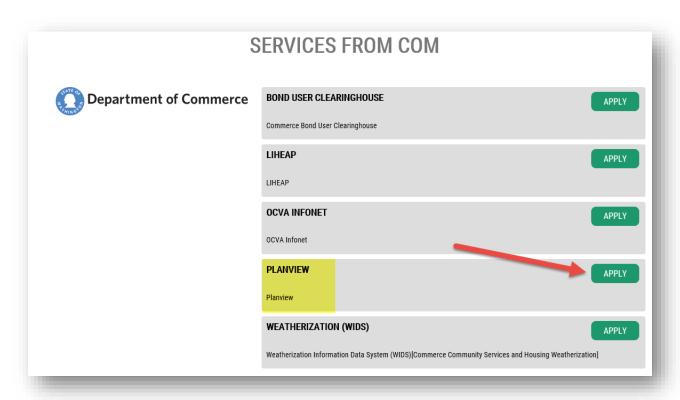




This will take you to a list of state agencies. Click on Department of Commerce to see the list of available Commerce services.



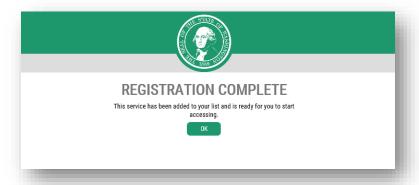
Click Apply for the PlanView System.



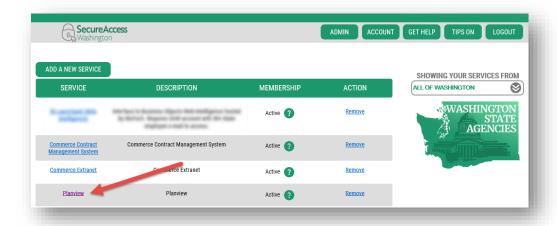




You will get a Registration Complete message. You will also get two emails, a User Registered for Service email and an Access Approved email. They are informational only and you do not need them to continue.



You will be redirected to the Service Screen. Click on the PlanView link to access the system.



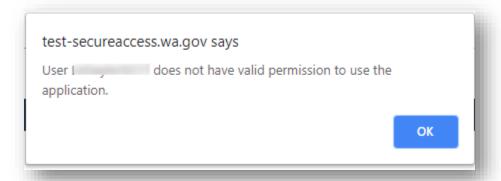
You will get an assistance notice, click Continue. The PlanView system should now be displayed.





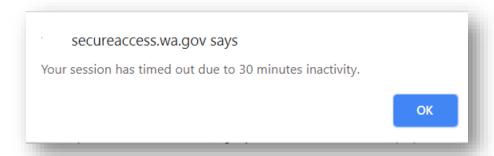


If you have not been set up you will get the following error message. Please note the display may be slightly different, depending on the internet browser you are using. Please contact reviewteam@commerce.wa.gov if you have not received a New User Registration email.



SAW Time Out

SAW automatically times users out after 30 minutes of inactivity. You will see the following message if you are timed out. Please note the display may be slightly different, depending on the internet browser you are using.



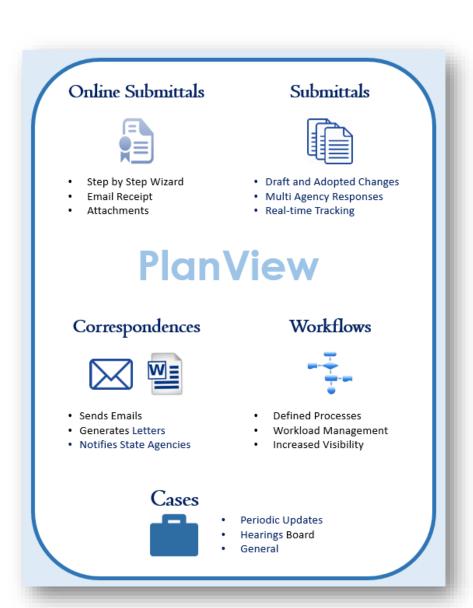


PlanView

PlanView is a tracking system to connect local government planners to the state agency review and technical assistance professionals. It allows users to see the progress and responses of documents submitted by local Jurisdictions.

To understand how to make the most of PlanView, it is important to understand how the system organizes information and work. PlanView uses three main areas to organize work:

- A <u>Submittal</u> represents a change to a plan or regulation, in either draft or adopted form. Most comment letters and testimony in PlanView will be related to a specific submittal.
- A <u>Workflow</u> represents something a state agency person needs to do in response. It could be a simple as making a call to the local government and noting a comment, or it could be the process of drafting and sending a comment letter.
- Cases represent something Commerce is working on. It could be a simple as a question to you or another staff member, or as complex as a multiyear projects such as a periodic update to the plans and regulations.





System Highlights

Commerce has worked hard to provide a modern, transparent experience. Below are some of the new features that are available with the new system.

- Ability to Return to Incomplete Online Submittals
- View Submittal Documents and Track Responses by all State Agencies.
- Submit a Supplemental Submittal to update
- Manage your user profile by selecting the subject areas you want to receive notifications.
- Add and Update Contacts for your jurisdiction, if you are an Administrator.
- View Hearings Board Cases and track the Periodic Update progress.

This guide will review all the screens and their functionality. Use the links provided for you throughout the guide to go directly to the section. If you have any questions or need assistance, contact the reviewteam@commerce.wa.gov.

- 1. Home Page → Return to Incomplete Online Submittals and View active Submittals
- 2. <u>Jurisdiction Information</u> → View Contacts, Addresses, Submittals and Cases
- 3. Contacts → Update Profile Information and Categories
- 4. Submittals → View Submitted Documents and track State Agencies responses
- 5. Cases → View progress of Jurisdiction Periodic Updates and Hearings Board Cases
- 6. System Access Request Form → Use the form to request system access for a new person or update the security for an existing user.



ATTENTION: Be advised that most information displayed in the following screen shots are fictitious and for demonstration purposes only.



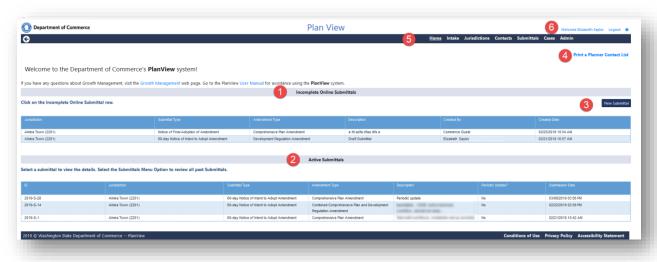


Home Page

Once you are granted Access, logged into SAW and selected the PlanView Service. You will be in the PlanView System.

The Home Page is the first page you will see when PlanView opens. It provides a list of Incomplete submittals and a list of active Submittals.

See a description of the numbered areas below.



- 1. Incomplete Online Submittals → Clicking on the row opens the Online Submittal wizard and allows you to complete and submit.
- 2. Active Submittals → This is a list for the active Submittals for your Jurisdiction. Click on the row to open the Submittal Details.
- 3. New Submittal → Select this button to start a new Submittal.
- Print a Planner Contact List → This is a report of all the state agency Primary contacts for your jurisdiction.

Note: Notification of the pdf document download will depend on the internet browser. The file may also be blocked, depending on your settings.

- 5. Use the Main Menu to navigate through the system. Each option has a detailed explanation of the available functionality throughout this document.
- 6. Use the Name Link to go to your profile. Use the logout link to log out of the system.



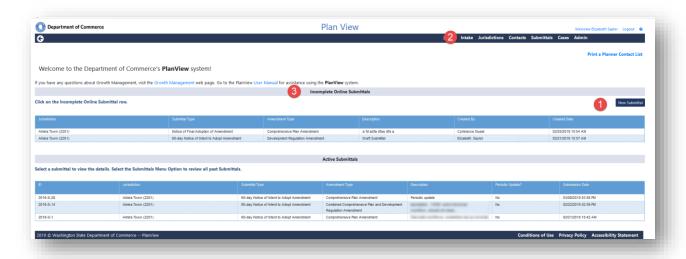
Online Submittals

The new Online Submittal is a wizard like process where you are stepped through each section. When you are logged in, you can return to your online submittal via the Home page in the Incomplete Online Submittal section.

If you have any questions about the Growth Management Act requirements, please visit our <u>Growth Management</u> webpage for links to guidebooks and resources.

Create a New Submittal

Once you are logged into PlanView you can create new submittals from you Home page.

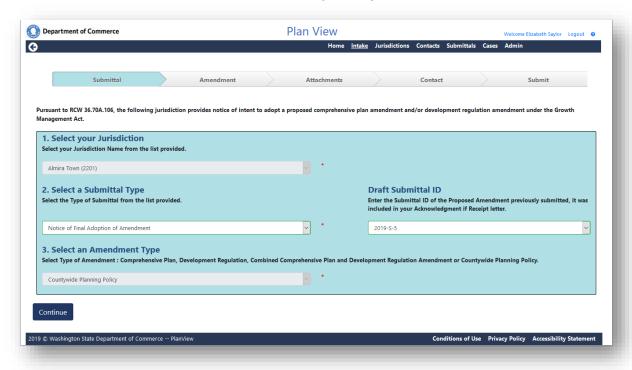


- 1. Click the New Submittal button
- 2. Select the Intake Main Menu option
- 3. Click of the row to open and complete your Online Submittal.

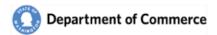


Online Submittal

1. The first step lets us know the type of document you are submitting for review. **Note: the Continue button will be disabled until the required information is selected.**



- 1. Select your Jurisdiction → This is filled in for you if you are logged into the PlanView system. If you are a Consultant, you will get a dropdown of the Jurisdictions you have be authorized to submit documents on their behalf.
- 2. Select a Submittal Types
 - **60-day Notice of Intent to Adopt Amendments** → Use this type to submit your drafts on any type of amendment.
 - Request for Expedited Review / Notice of Intent to Adopt Amendments → This type is just for
 Development Regulations. The Amendment Type (Question #3) will default to Development
 Regulations if this is selected.
 - Supplemental Amendment for existing Notice of Intent to Adopt Amendments → Use this type if you have to update an existing 60-day Notice or an Expedited Review. You will need the Draft Submittal ID to let us know which one you want to update.
 - Notice of Final Adoption of Amendment → When your documents have been finalized and
 officially adopted, use this type to notify Commerce that it is complete.
 - Draft Submittal ID → If you are submitting a Supplemental or Adopted amendment you will be
 asked for the ID of the Draft Submittal you initially submitted for review. A list of active
 Submittals will be in the dropdown for your convenience.

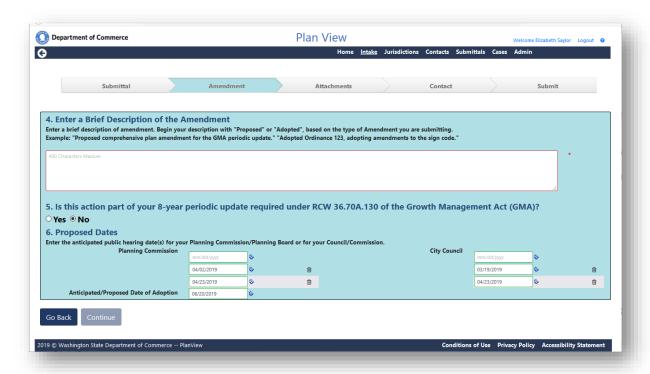




- 3. Select an Amendment Type → We encourage you to submit your plans and regulations separately. That way we can direct your submittal to interested parties easily. Below is a list of Amendment Types.
 - a. Comprehensive Plan
 - b. Development Regulations
 - c. Combined Comprehensive Plan and Development Regulations
 - d. Countywide Planning Policies
 - e. Critical Areas Ordinances

Amendment

In this section you will describe the document you are submitting for review, let us know if it is a part of your 8-year periodic update and the key dates for the document.



- 4. Enter a Brief Description → The Submittal's brief description should describe your Amendment as Proposed or Adopted, if it is a part of your periodic update, etc. There is a 400 character maximum for the Brief Description. This field also has some spellcheck capabilities. You will see a <u>red line</u> under words that may have an error. Right click on it to get a list of corrections.
- 5. Is this action a part of your 8-year periodic update? → Select "Yes" if your Amendment is a part of your periodic update. Go to our <u>Growth Management</u> webpage for formation information on the Growth Management Act.





- 6. Proposed Dates → Dates requested by Commerce depend on the type of Amendment you are submitting. You can manually enter a date using the mm/dd/yyyy format or click on the calendar
 - Icon to select a date. Use the trash can icon to delete dates.

Draft amendments request dates for the following:

- a. Planning Commissions
- b. County Commissioners / City Councils
- c. Anticipated / Proposed Dates of Adoptions

Adopted Amendments only request one date:

a. Adoption Date

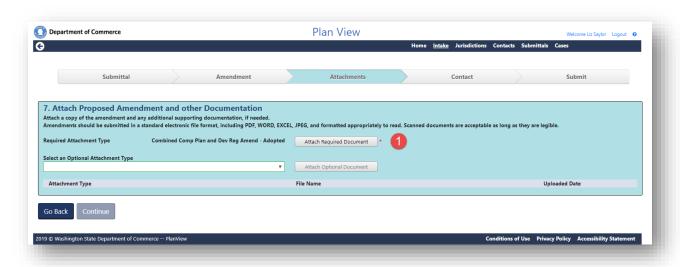
Attachments

An Attachment of the Amendment type is required for each submittal. The maximum file size is 50 MB. File types are limited to the list below:

- .doc
- .gif
- .jpg
- .pdf
- .xls

- .docx
- .jpeg
- .msg
- .png
- .xlsx

See below for instructions on adding attachments.

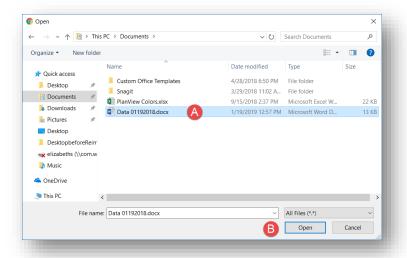


Required Attachment

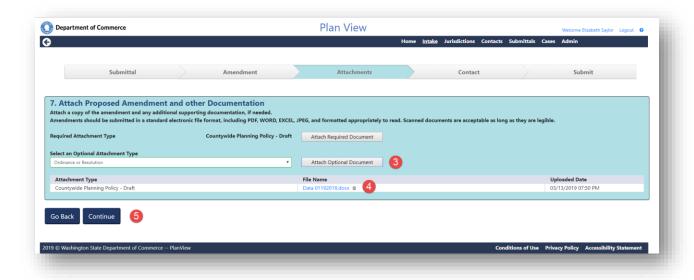
1. Select the Attach Required Document button. *Note: the Continue button will be disabled until the required document is attached.*



- 2. Navigate to the file location
 - a. Select the desired file.
 - b. Click the Open button.



Additional Documents



- 3. Select an Optional Attachment type from the dropdown and click the Attach Optional Document button and attach as many documents as you need to complete your Submittal.
- 4. If you need to see the file you just added, select the File Name link or to delete the file, select the trash can icon

 ...
- 5. The Continue button will become enabled after the required attachment is entered. If you are done adding attachments, click Continue to save your information and move to the next step.

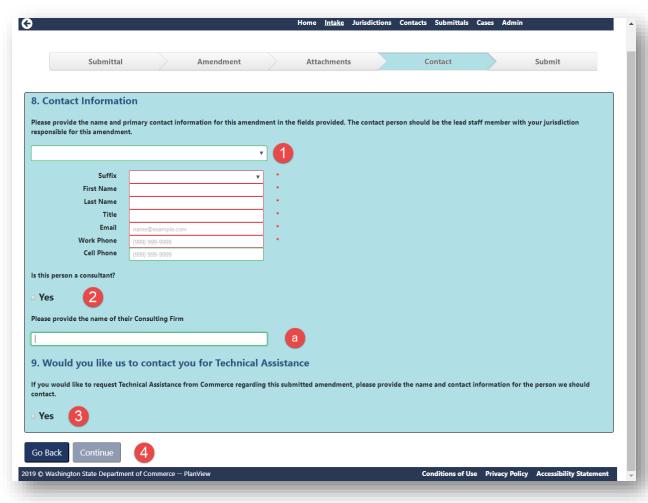




Contact

A primary contact is required for all Submittals. This person will receive all correspondence associated with this Submittal.

See a description of the numbered areas below.



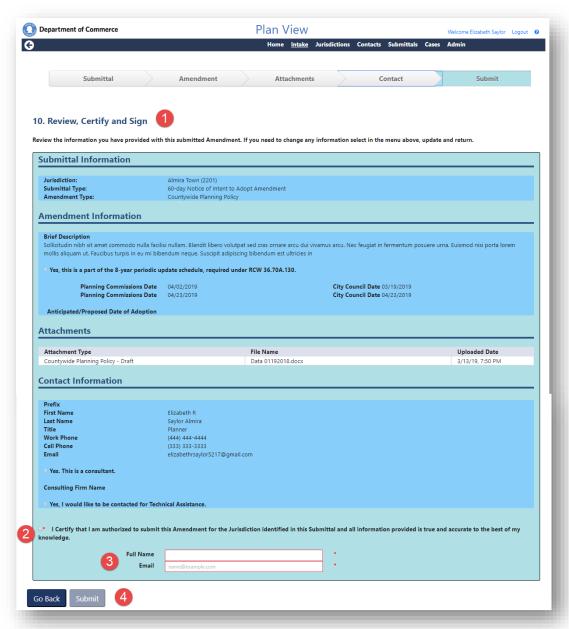
- 1. Because you are logged into PlanView, you can select from a list of existing contacts to use as the primary or enter a new contact by completing the required fields marked with a *.
- 2. If the contact is a consultant, select the Yes checkbox and enter their Consulting Firm.
- 3. If you would like to be contacted for some Technical Assistance, select the Yes checkbox. A Commerce Planner will contact you shortly after you complete the Online Submittal.
- 4. The Continue button will become enabled after all of the required fields are entered. Click Continue to save your information and move to the next step.



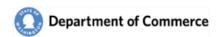
Review, Certify and Sign

1. Review the entered information. If you find an error, use the Back buttons or select the area on the menu bar.

See a description of the rest of the numbered areas below.



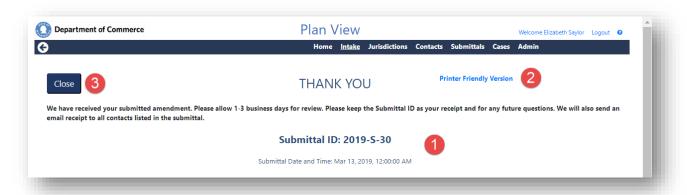
- 2. Click the checkbox to certify that you are authorized to submit the documents on behalf of the Jurisdiction
- 3. Enter your full name and email address. You and the person on the Contact screen will receive a receipt email.
- 4. When you have finished reviewing the entered information click the Submit button.





Receipt

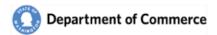
Thank you! When you see this message, you have successfully submitted your documents to Commerce. A receipt email will be immediately sent to the contact person and the submitter.



- 1. You will be issued a Submittal ID. This ID will be used to reference this submittal.
- 2. Use the Printer Friendly Version link to print a copy of your Submittal. It is also attached to your receipt email.

Note: Notification of the pdf document download will depend on the internet browser. The file may also be blocked from downloading, depending on your settings. Go to the <u>Download</u> <u>Troubleshooting</u> section to view common downloading issues.

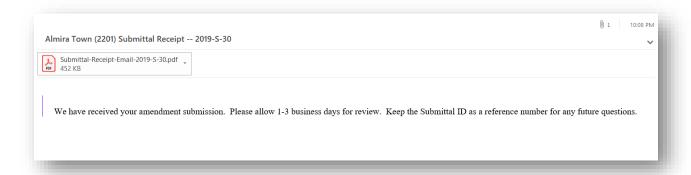
3. Click the Close button when you are done. You will be returned to the Home page.





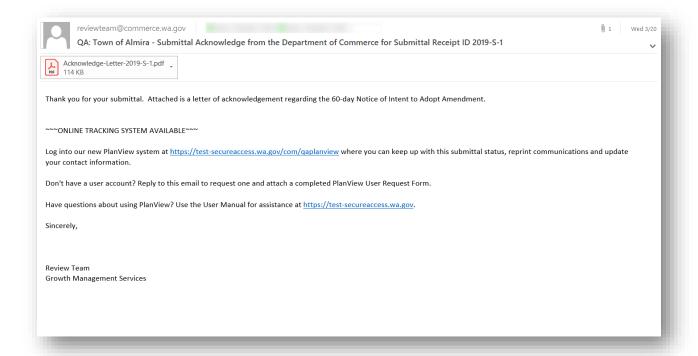
Submittal Email

The Submittal contact and submitter (if different) will receive a receipt email with a copy of the Online Submittal report.



Acknowledgement Letter

When Commerce has processed you submittal, you and the Submittal contact (if different) will receive an Acknowledgement Letter via email stating that Commerce has received your document(s) and has started the review process.

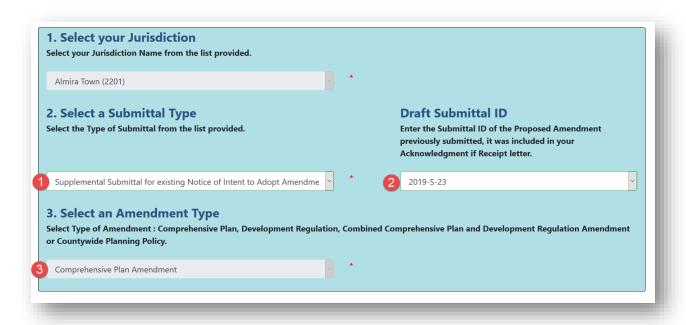






Submit a Supplemental Submittal

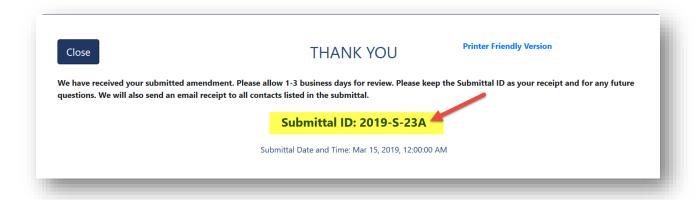
If you need to submit additional documentation, you can amend your submittal by creating a Supplemental Submittal for



- 1. Select the Supplemental Submittal for existing Notice of Intent to Adopt Amendment
- 2. The Draft Submittal ID field will display. Select the ID you want to update.
- 3. The Amendment Type will be fill out to the Amendment Type you selected in the original Submittal.

Continue completing the Submittal as describe above for the Amendment through Receipt sections.

When you are successful, your Submittal ID will be updated with a letter, it will be incremented with each supplemental. You will also get a Submittal receipt email and Acknowledgment Letter email.





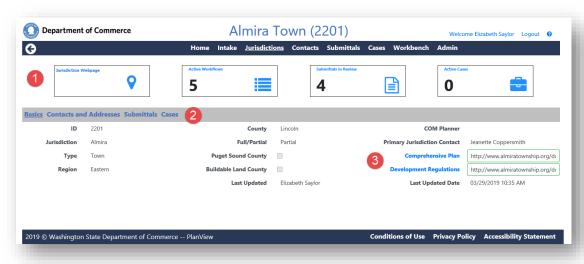
Jurisdiction

When you select the Jurisdictions option off the Main Menu the Jurisdiction Search screen opens, your Jurisdiction information will be displayed.

<u>**Iurisdiction Basics**</u>

The Jurisdiction Basics screen contains the general information for the Jurisdiction as well as a Dashboard that shows system-wide activities for the Jurisdiction.

See a description of the numbered areas below.



1. Jurisdiction Dashboard

- a. Jurisdiction link -- under construction
- Active Workflows Displays a count of the active workflows for the Jurisdiction. Selecting
 this box takes the user to the Workbench with a list of the active workflows for this
 Jurisdiction.
- c. Submittals in Review Displays a count of the Active Submittals for the Jurisdiction. Selecting this box takes you to the Submittal Search with the list of active Submittals.
- d. Active Cases Displays a count of the Active Cases for the Jurisdiction. Selecting this box takes you to the Case Search screen with a list of active Cases for the Jurisdiction.
- 2. Use the Jurisdiction menu to view Contact and Address, a list of Submittals and Cases for the Jurisdiction.
- 3. Click on the Comprehensive Plan and Development Regulations link labels to view the selected document.

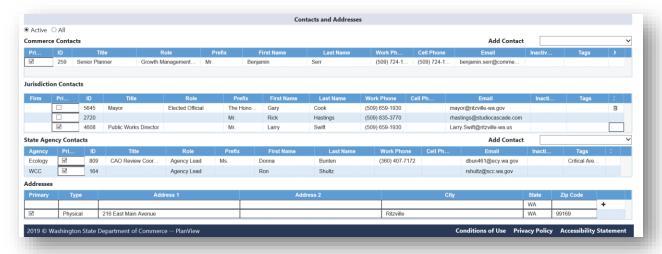






Jurisdiction Contacts and Addresses

The contacts and Addresses screen displays the contacts by contact type. Clicking on the contact row opens the Contact Details. Contact the ReviewTeam@commerce.wa.gov if you need any updates.



Primary Contacts

Every Jurisdiction has a Primary Commerce, Jurisdiction and State Agency Contact for all participating state agencies. These are individuals are the main point of contact for that Jurisdiction.

Jurisdiction Attachments

Attachments specific to the Jurisdiction can now be added by Commerce. This feature will be available to Jurisdiction Users in the future.





<u>**Jurisdiction Submittals**</u>

The Submittals screen displays a list of active submittals for the Jurisdiction. Select the All radio button to see all of the Submittals for the Jurisdiction. Click on the Submittal row to display the Submittal details.



Jurisdiction Cases

The Case screen displays a list of active Cases for the Jurisdiction. Click on the Case row to display the Case details.

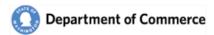


<u>Jurisdiction Search (Consultants Only)</u>

If you are a consultant for multiple Jurisdictions. You will see the Jurisdiction search screen to navigate to all of the Jurisdictions you have access to. .



- 1. Click on the row to open the Jurisdiction details, to view their Contacts, Addresses, Submittals and Cases
- 2. Use the Search field to search for a specific Jurisdiction. You can search for text in any column.





- 3. Use the Back button to return to your prior screen.
- 4. Click on the column headers to sort the column contents.

Contacts

Use the Contact search screen to find a contact. Click on the Contact row to open the Contact Details. Click on the column headers to sort the content.

Contact Search

Use the Contact search screen to view Contacts and navigate to the contact details.

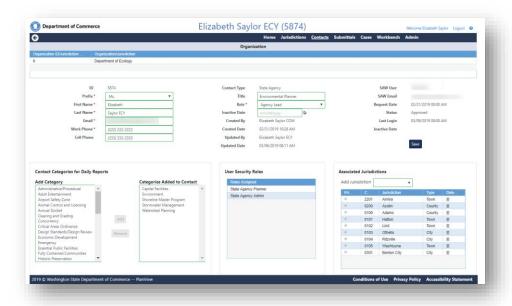


- 1. Because there are so many contacts, the screen initially loads without results.
- 2. Enter search criteria in the search field and click the magnifying glass or the Enter key. You can search by name, Jurisdiction, etc.
- 3. Use the All radio button to view inactive Contacts.

Contact Details

The Contact Details screen allows a person to view and update their profile, allows users to manage the types of submittals they receive on the <u>Daily Report</u> by creating a list of categories and a list of Jurisdictions.

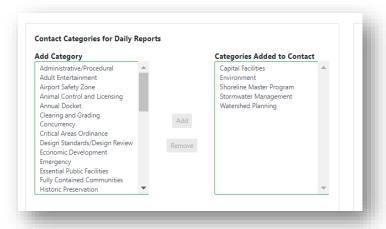




Tag your Profile with Categories

You can customize your Daily Email Notification by tagging your profile with the types of submittals you are interested in receiving. See a complete list <u>here</u>.

Click the Add and Remove buttons to manage your list.



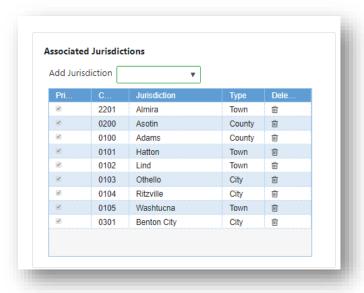
Security Roles

Only users who have requested access to PlanView will have security roles. You can see a breakdown of the user roles in the Submit a PlanView System Access Request Form section.



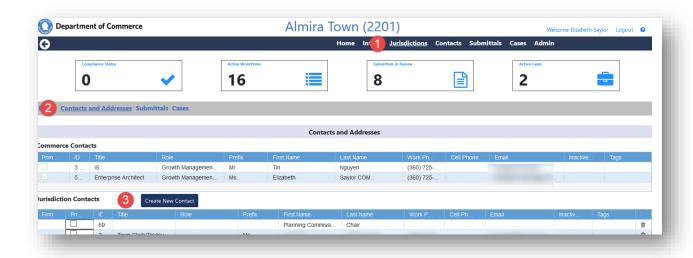
Associated Jurisdictions (Consultants Only)

You can be associated to specific Jurisdictions to do work on their behalf. Submit a System Access Request form for each Jurisdiction.



Add New Contacts

If you have the Administrative role, you can add and update contacts for your Jurisdiction.

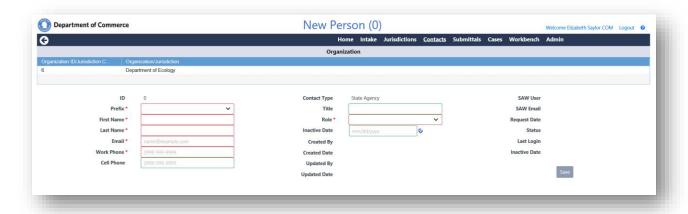


- 1. Click the Jurisdiction option on the Main Menu
- 2. Click Contact and Addresses on the Jurisdiction Menu
- 3. Click Create New Contact





Complete the user information. Required fields are in Red. The Save button will be activated when all required information is entered.



If this user needs access to the system, they need to complete the <u>Setup steps</u>, including submitting a <u>System Access Request</u> Form at the end of this document.

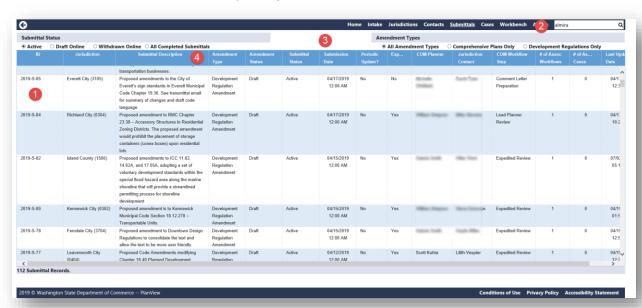


Submittals

When you select the Submittals option off the Main Menu the Submittal Search screen opens, displaying a list of all the Submittals currently active for your Jurisdiction.

Submittal Search

Use the Submittal Search screen to find a specific Submittal. Click on the Submittal row to open the Submittal Details. Click on the column headers to sort the content.



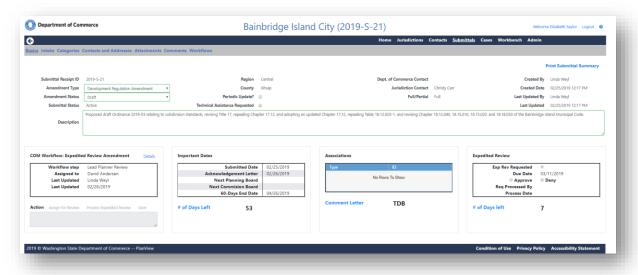
See a description of the numbered areas below.

- 1. Submittal Results you will see a list of all active Submittals. Click on the Submittal row to open the Submittal Details.
- 2. Use the Search field to search for a specific Jurisdiction. You can search for text in any column.
- 3. Use the filters to further refine the results. Select the Draft Online or Withdrawn Online to see incomplete submittals.
- 4. Click on the column headers to sort the column contents.



Submittal Basics

This screen provides a summary of the Submittal and a Dashboard that provides a snapshot of the key elements for the Submittal.



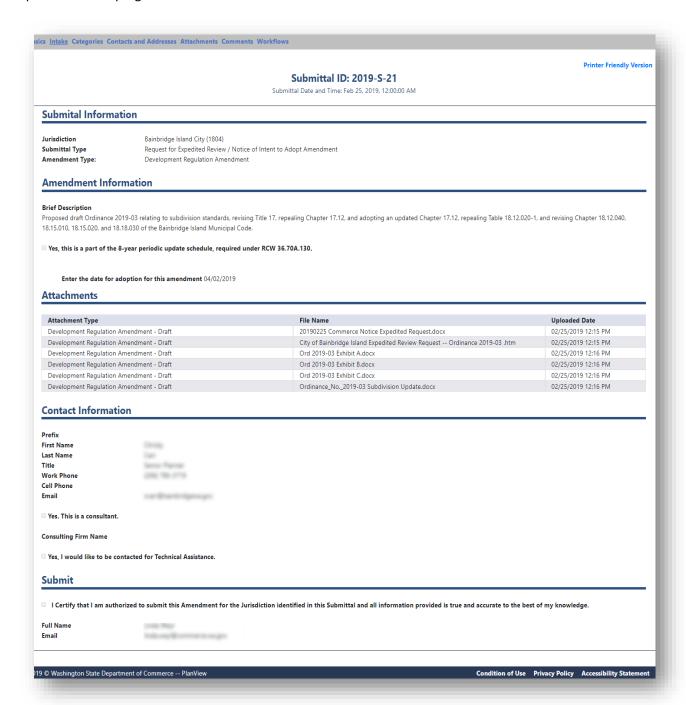
Fields

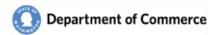
- Amendment Types → There are five basic Amendment Types
 - o Comprehensive Plan Amendment
 - Development Regulation Amendment
 - o Combined Comprehensive Plan Amendment Development Regulation Amendment
 - Countywide Planning Policy
 - Critical Areas Ordinance
- Amendment Statuses
 - Draft
 - Adopted
- Submittal Status
 - Active status is when there are an active workflows
 - Completed status is when all workflows are complete AND
 - 60 days after submission date for 60-day Reviews and Expedited Reviews
 - 20 days after submission for Adopted Amendments
- Periodic Update? → This indicates that this submittal is a part of the Jurisdiction's Periodic Update.
- Submittal Dashboard
 - COM Workflow → The primary Commerce workflow is displayed here. Click the Details link to view the Workflow details to see all of the workflow steps.
 - o Important Dates → A summary of key dates for the submittal.
 - Associations → Displays the associated Submittals and Cases.
 - Expedited Review → Displays the expedited review request and result.
- Print Submittal Summary → This is a summary report of the submittal.



Submittal Intake

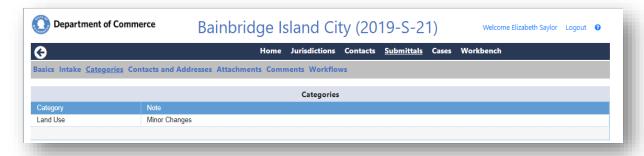
The Submittal Intake screen displays the information submitted on-line. There is a Printer Friendly option on the top right of the screen.





Submittal Categories

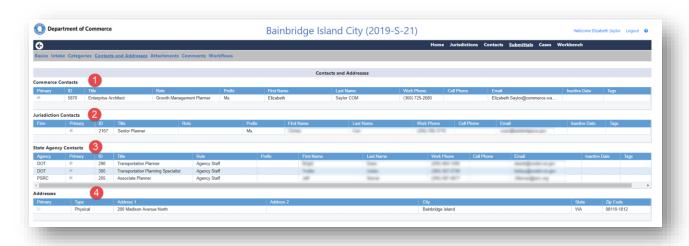
Submittals will be categorized to help explain the areas impacted by the Submittal. See a complete list <u>here</u>.



Submittal Contacts and Addresses

Each Submittal will have a Primary contact for all State Agencies and for the Jurisdiction. These contacts will automatically receive various correspondence throughout the review of the Submittal.

The Primary contact for a Submittal does not need to be the same Primary contact that is assigned to the Jurisdiction, although that is the default for new submittals. If you need a Primary Contact updated, email the reveiwteam@commerce.wa.gov with the updated information.



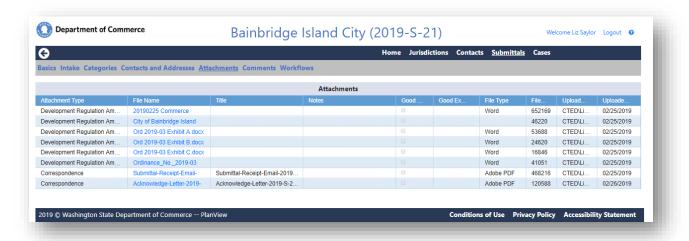
- 1. The Primary Commerce Contact is the person to contact if you have any questions relating to Commerce's response to the Submittal.
- 2. The Primary Jurisdiction Contact is the person to contact if you have any questions for the Jurisdiction and the contact for your responses.
- 3. All State Agencies will have a Primary Contact assigned to a Submittal. Please contact them if you have any questions.
- 4. Use the Address to mail any correspondence to the Jurisdiction.





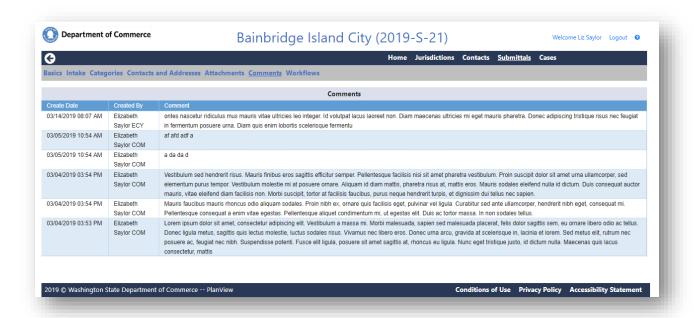
Submittal Attachments

You will be able to view all of the attachments for a submittal. Click on the File name to open the document.



Submittal Comments

You can view the Comments for the Submittal. All State Agencies can add a comment.







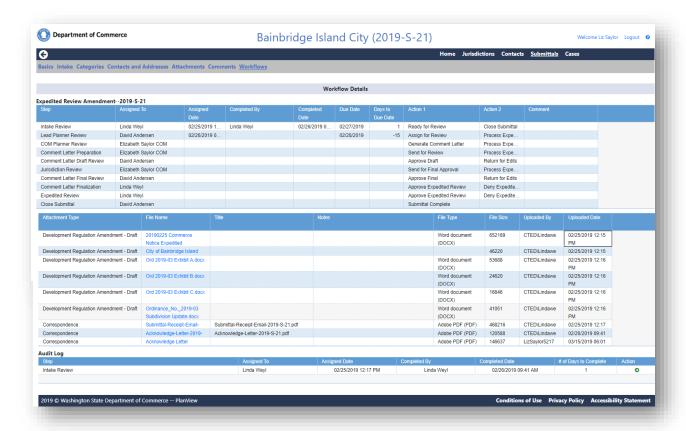
Submittal Workflows

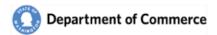
Track the progress of the work being completed for the Submittal. Click on the row to open the workflow details.



Workflow Details

The Workflow Details displays the steps of a workflow, where it is in the process and the assignments by step.





Cases

The Case area of the system is a Commerce tool to track long term action items. You have read-only access to this area. There are three types of cases:

- The Periodic Update case
- Hearings Board case
- General Case

When you select the Case option off the Main Menu the Case Search screen opens, displaying a list of all the Cases currently active for you Jurisdiction.

Case Search

As with all search screens, click on the row to open the Case Details. Click on the column headers to sort the content.

Department of Commerce Plan View G Home Jurisdictio Active All (3) Case ID 2019-C-8 Asotin Active Elizabeth Saylor COM Hearings Board 2019-C-7 Asotin Active Elizabeth Saylor COM General Elizabeth Saylor COM Elizabeth R Saylor Almira Almira Active Hearings Board 2019-C-5 Ocean Shores 2019-C-4 Ocean Shores Elizabeth Saylor COM 2019-C-3 Asotin Active General 0 Elizabeth Saylor COM 2019-C-2 Almira Active Elizabeth Saylor COM Elizabeth R Saylor Almira 2019-C-1 Almira Active General Elizabeth Saylor COM Elizabeth R Saylor Almira 8 Case Records. 2019 © Washington State Department of Commerce -- PlanView Conditions of Use Privacy Policy Accessibility Statem

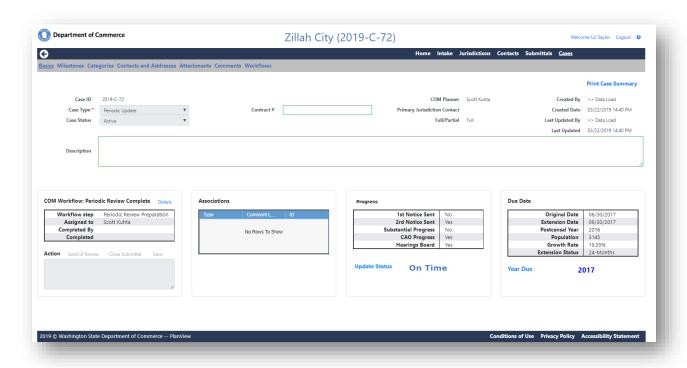
See a description of the numbered areas below

- 1. A list of active cases are displayed when the screen initially loads. Click on the row to view the details.
- 2. Enter search criteria in the search field and click the magnifying glass or the Enter key. You can search for text in any column.
- 3. Use the All radio button to view inactive Cases.



Case Basics

This screen provides a summary of the Case and a Dashboard that provides a snapshot of the key elements for the Case.



Fields

- Case Types → There are three Case Types
 - o Periodic Update
 - Hearings Boards
 - o General
- Case Status
- Contract # → This is used for the Jurisdictions who received funding to assist with their Periodic Update.

Dashboard

- COM Workflows → Displays the information about the current step for the Commerce workflow.
- Associations → A list of associated Submittals and Cases for this Case.
- Progress → This box is only for Periodic Update Cases and summarizes key milestones.
- Due Dates → This box is only for Periodic Update Cases and displays the calculation of a potential due date extension.





Case Milestones

Milestones are used to track the progress of the Case. The Periodic Update cases have multiple milestones over several years.



Case Contacts and Addresses

Just like Submittals, Cases have a Primary contact for all State Agencies and for the Jurisdiction. These contacts will automatically receive various correspondence throughout the review of the Submittal.

The Primary contact for a Submittal does not need to be the same Primary contact that is assigned to the Jurisdiction, although that is the default for new submittals. If you need a Primary Contact updated, email the reveiwteam@commerce.wa.gov with the updated information.

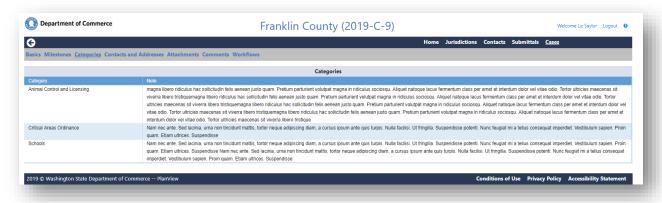






Case Categories

Cases are also categorized to help explain the areas impacted by the Case. See a complete list with descriptions here.



Case Attachments

You will be able to view all of the attachments for a Case. Click on the File name to open the document.

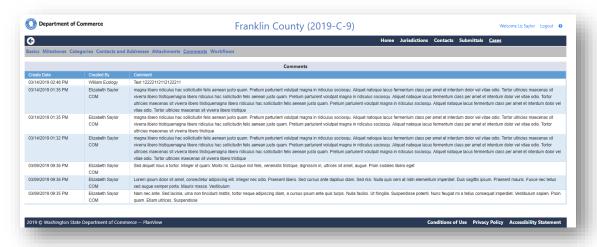






Case Comments

You can view the Comments for the Case.



Case Workflows

Track the progress of the work being completed for the Case.

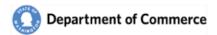




Definitions and Troubleshooting

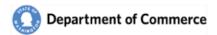
Categories

eguries						
Category	Comprehensive Plan	Development Regulation	CWPP	Critical Area Ordinance	Contact Tag	Cases
Administrative/Procedural		Х			Х	Х
Adult Entertainment	Х	Х	Х		Х	Х
Airport Safety Zone	Х	Х			Х	Х
Animal Control and Licensing		Х			Х	Х
Annual Docket	Х	Х			Х	Х
Capital Facilities	Х				Х	Х
Clearing and Grading	Х		Х		Х	Х
Concurrency	Х	Х	Х		Х	Х
Critical Areas Ordinance	Х	Х		Х	Х	Х
Design Standards/Design Review		Х			Х	Х
Economic Development	Х	Х	Х		Х	Х
Emergency	Х		Х		Х	Х
Environment	X	Х			Х	Х
Essential Public Facilities	X	Х	Х		Х	Х
Fully Contained Communities	X	Х	Х		Х	Х
Historic Preservation	X	Х			Х	Х
Housing	X	Х	Х		Х	Х
Impact Fee		Х			Х	Х
Infrastructure Development Standards	X	Х			Х	Х
Interim		Х			Х	Х
Land Use	X	Х			Х	Х
Marijuana		Х			Х	Х
Mineral Lands	X	Х	Х		Х	Х
Moratorium		Х			Х	Х
Open Space	Х	Х			Х	Х
Optional Plan Elements	Х				Х	Х
Parks and Recreation Element	X				Х	Х
Periodic Update	X	Х	Х	Х	Х	Х
Public Participation		Х			Х	Х
Resource Lands	X	Χ			Χ	X



PlanView

Category	Comprehensive Plan	Development Regulation	СМРР	Critical Area Ordinance	Contact Tag	Cases
Rural Lands	Х	Х	Х		Х	Х
Schools	Х	Х			Х	Х
Shoreline Master Program	Х	Х			Х	Х
State Environmental Policy Act (SEPA)		Х			Х	Х
Stormwater Management		Х			Х	Х
Subarea Plans	Х	Х			Х	Х
Subdivision		Х			Х	Х
Transfer of Development Rights	Х	Х	Х		Х	Х
Transportation	Х	Х	X		Х	Х
Urban Centers	Х	Х	X		Х	Х
Urban Growth Areas	Х		Х		Х	Х
Utilities	Х				Х	Х
Watershed Planning		Х			Х	Х
Wireless Communication Facilities		Х			Х	Х
Zoning Code		Х			Х	Х





Download Troubleshooting

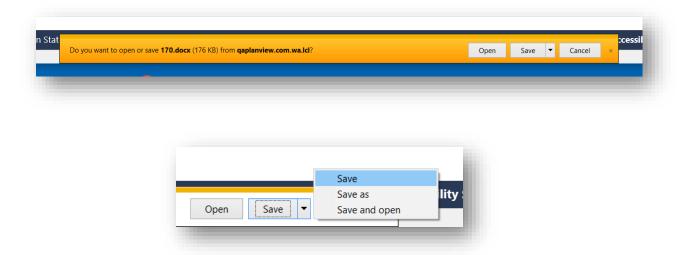
Commerce is dedicated to help their customers use our services easily and with the resources available to our customers. We strive to make all of our systems compatible with as many Internet browsers as we can, but there are simply too many of them. We recommend using one of the following three browsers for the PlanView system:

- Internet Explorer
- Chrome
- Firefox

When downloading a report or file, these three browsers have very different ways on displaying the downloaded file. We have some examples below, but your experience may be different depending on the version of the browser you are using.

Internet Explorer

When a file is downloaded via Internet Explorer, a popup window is displayed in the bottom center of the screen. You can open the file by clicking the Open button, or you can save it to your PC by clicking the Save or clicking the arrow and Save As option. If you click the Save button, the file will be saved in the folder you select. If you are unsure of that location, click the arrow and Save As option to select the location yourself.





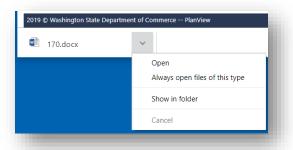


Chrome

Chrome displays the files on the bottom left of the screen.



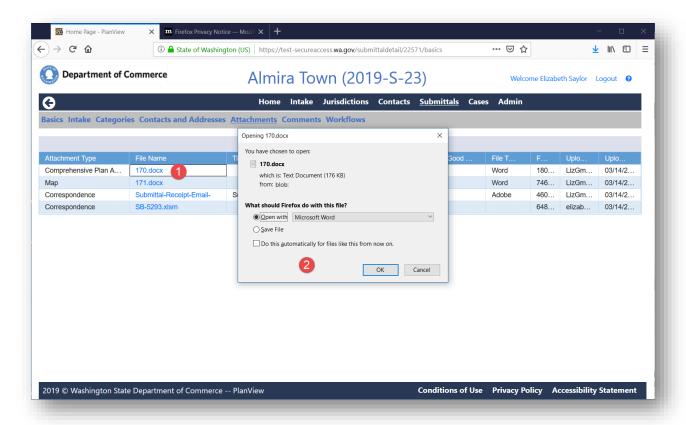
- 1. Click on a file.
- 2. Click on the box to open the file, or click on the arrow to select an option.





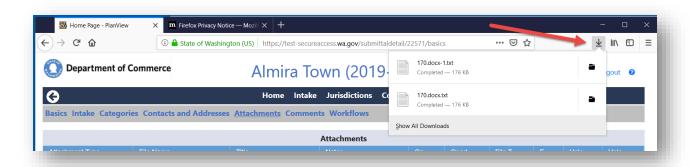
Firefox

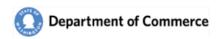
Firefox displays downloads in the top right corner of the screen.



- 1. Click a file name
- 2. Select an option and click Ok.

Notice the down arrow. Clicking this displays a list of your recently downloaded files.







System Access Request Form

The PlanView System is accessed through Secure Access Washington (SAW). Use this link to access the SAW site and create a SAW account, if you do not have one: https://secureaccess.wa.gov/. Scan and email this completed form to reviewteam@commerce.wa.gov.

Go to the **Growth Management** webpage for links to PlanView User Manuals that have instructions on how to create a SAW account and how to login to PlanView. After you have a SAW account, and we have added you to PlanView, you will receive a welcome email when you have been granted access to PlanView.

Doguester Information

		USER II	NFORMATION			
FIRST NAME	LAST NAME		WORK PHONE	L PHONE		
CONSULTING FIRM (II	E ADDITICADI E)					
CONSOLTING FIRM (II	AFFEICABLE					
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ORGANIZATION NAME TITLE WITH ORGANIZATION						
PRIMARY CONTACT						
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res, i am the Prim			stand that I will replace the NGTON (SAW) INFOR	•	oser for this Organization.	
SAW EMAIL	SECURE ACC.	ESS WASHI	SAW USER NAME	URITY ROLE(S)		
SAW EMAIL			SAW USER NAME			
					Read Only	
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ted above, will prac	certify that I am autho	rd manager	nent by keeping Passv	vords confider	chalf of the Organization ntial and agree to the conditions-use-access-	
PRINTED NAME		SIGNATU	RE		DATE	
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rganization A	Approval					
		o access the	PlanView system on	behalf of the (Organization listed	
pove and the selecte	d Security Roles.					
PRINTED NAME		SIGNATU	RE		DATE	
ORGANIZATION TITLE	<u> </u>	EMAIL			PHONE NUMBER	