# Table of Contents

State Agency Manual ........................................................................................................... 1

Table of Contents .................................................................................................................. 2

Introduction ............................................................................................................................. 4

- Getting Setup ...................................................................................................................... 5

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

- System Highlights .............................................................................................................. 18

Home Page ............................................................................................................................. 19

Jurisdictions ............................................................................................................................ 20

- Jurisdiction Search ............................................................................................................ 20

- Jurisdiction Basics ............................................................................................................. 21

- Jurisdiction Contacts and Addresses ................................................................................. 22

- Primary Contacts ............................................................................................................... 22

- Jurisdiction Attachments ................................................................................................. 22

- Jurisdiction Submittals ....................................................................................................... 23

- Jurisdiction Cases .............................................................................................................. 23

Contacts ................................................................................................................................. 24

- Contact Search .................................................................................................................. 24

- Contact Details .................................................................................................................. 25

Daily Report Settings -- Tag your Profile with Categories and Jurisdictions ............................ 26

- Contact Categories for Daily Report .................................................................................. 26

- Security Roles .................................................................................................................... 26

- Associated Jurisdictions ................................................................................................... 26

Submittals ............................................................................................................................... 27

- Submittal Search ................................................................................................................. 27

- Submittal Basics .................................................................................................................. 28

- Submittal Intake ................................................................................................................... 29
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submittal Categories</td>
<td>30</td>
</tr>
<tr>
<td>Submittal Contacts and Addresses</td>
<td>30</td>
</tr>
<tr>
<td>Submittal Attachments</td>
<td>31</td>
</tr>
<tr>
<td>Submittal Comments</td>
<td>32</td>
</tr>
<tr>
<td>Submittal Workflows</td>
<td>32</td>
</tr>
<tr>
<td>Create a workflow to track your agency’s response to the Submittal</td>
<td>33</td>
</tr>
<tr>
<td>Workflow Details</td>
<td>34</td>
</tr>
<tr>
<td>Submittal Attachments</td>
<td>35</td>
</tr>
<tr>
<td>Submittal Contacts and Addresses</td>
<td>35</td>
</tr>
<tr>
<td>Submittal Comments</td>
<td>36</td>
</tr>
<tr>
<td>Submittal Workflows</td>
<td>36</td>
</tr>
<tr>
<td>Submittal Attachments</td>
<td>37</td>
</tr>
<tr>
<td>Submittal Contacts and Addresses</td>
<td>37</td>
</tr>
<tr>
<td>Submittal Comments</td>
<td>38</td>
</tr>
<tr>
<td>Submittal Workflows</td>
<td>38</td>
</tr>
<tr>
<td>Cases</td>
<td>39</td>
</tr>
<tr>
<td>Case Search</td>
<td>39</td>
</tr>
<tr>
<td>Case Basics</td>
<td>40</td>
</tr>
<tr>
<td>Case Milestones</td>
<td>40</td>
</tr>
<tr>
<td>Case Contacts and Addresses</td>
<td>41</td>
</tr>
<tr>
<td>Case Categories</td>
<td>42</td>
</tr>
<tr>
<td>Case Attachments</td>
<td>43</td>
</tr>
<tr>
<td>Case Comments</td>
<td>43</td>
</tr>
<tr>
<td>Case Workflows</td>
<td>44</td>
</tr>
<tr>
<td>Reports and Definitions</td>
<td>47</td>
</tr>
<tr>
<td>Daily Reports</td>
<td>47</td>
</tr>
<tr>
<td>Attachment Types</td>
<td>47</td>
</tr>
<tr>
<td>Categories</td>
<td>47</td>
</tr>
<tr>
<td>Download Troubleshooting</td>
<td>47</td>
</tr>
<tr>
<td>System Access Request Form</td>
<td>47</td>
</tr>
</tbody>
</table>
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 to Appendix A. Appendix A guides you through creating a Secure Access Washington (SAW) account and adding the PlanView Service to your new account. After you create your account, the first place to do is to Contacts. This is where you can complete your profile and select your preferences the Daily Report.

The rest of the manual serves as a reference tool for the use of PlanView. You can also use the Table of Contents 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 the 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”.
You will be sent an email to activate your account.

An activation link has been sent to your email. You must click the link to activate your account before you can login.

Go to your email account and click the link provided on your email. The email will be titled 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  
You are almost finished....

Thank you for signing up with Secure Access Washington.

Your username is: [mask]

To activate your account, please click: https://test-secureaccess.wa.gov/public/saw/pub/regConfirm.do?r=23551&userId=[mask].

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 PlanView System Access Request Form, scan and email to reviewteam@commerce.wa.gov.

---

### 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/](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.

#### Requestor Information

<table>
<thead>
<tr>
<th>USER INFORMATION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>FIRST NAME</td>
<td>LAST NAME</td>
</tr>
</tbody>
</table>

**CONSULTING FIRM (IF APPLICABLE)**

This is required for Consultants working on behalf of a Jurisdiction.

<table>
<thead>
<tr>
<th>ORGANIZATION INFORMATION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ORGANIZATION NAME</td>
<td>TITLE WITH ORGANIZATION</td>
</tr>
</tbody>
</table>

None of the Organization you are requesting access to. Consultants, provide your title with your Consulting Firm.

**PRIMARY CONTACT**

☐ 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**

<table>
<thead>
<tr>
<th>SAW EMAIL</th>
<th>SAW USER NAME</th>
<th>SECURITY ROLE(S)</th>
</tr>
</thead>
</table>

User accounts will be set up with this email address.

☐ Read Only  
☐ Editor  
☐ Administrator

**Requestor Agreement**

By signing this form, I certify that I am authorized to view and/or submit information on behalf of the Organization listed above, will practice adequate Password management by keeping Passwords confidential and agree to the Conditions of Use Access Agreement [http://www.commerce.wa.gov/privacy-information/conditions-use-access-agreement/](http://www.commerce.wa.gov/privacy-information/conditions-use-access-agreement/).

**Organization Approval**

By signing this form, I approve this Person to access the PlanView system on behalf of the Organization listed above and the selected Security Roles.

<table>
<thead>
<tr>
<th>ORGANIZATION TITLE</th>
<th>EMAIL</th>
<th>PHONE NUMBER</th>
</tr>
</thead>
</table>

---

*Updated 07/15/2019*
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.*

<table>
<thead>
<tr>
<th>JURISDICTIONS AND CONSULTANTS</th>
<th>Administrator</th>
<th>Planner</th>
<th>Read Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Submittals</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>View and Track Submittal Progress</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View and Track Periodic Update Progress</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View and Track Hearings Board Cases</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update Contact Information for your Organization</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STATE AGENCIES ONLY</th>
<th>Administrator</th>
<th>Planner</th>
<th>Read Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalize Submittal Notifications</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Create Workflows to track Comment Letters</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create and update Contacts for your Organization</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.
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 service.
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 and the PlanView system will 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 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 types of objects to organize work: Cases, Submittals and Workflows.

- Cases represent something a local government is working on. It could be as 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.
- A Submittal 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 Workflow represents something a state agency person needs to do in response. It could be as 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. The list of open workflows for you is your to-do list.

It is helpful to think about the planning process at the local government level to see how this work is organized. The process starts when a local government decides it needs to start working on something. After they start the project, they reach out to you or your agency for help. Nothing has been submitted for review yet, but they are working on it. At this point, you can create a Case.

You can then use the Case to keep track of this work throughout the process. Using a case to keep track of this allows you to track who you are working with. It also allows other staff in other agencies to see who is working on something and know what different jurisdictions are working on.

As you work with them, there will be times when you need to research an answer to a question and get back to them. When you make a commitment to provide an answer, you can create a Workflow to keep track of what you need to do and when you need to get back to them. Each of these workflows will be attached to the case.

At some point in the life cycle of this project a local government will need to provide official notice as part of the required state agency notice process. They will create a Submittal that will be assigned to you for review. One or more of these submittals will be attached to the case so you can see that the submittal is related to ongoing work you have been helping the local government with. The task of reviewing the item and producing a letter will be tracked with a workflow attached to the submittal.
System Highlights

- View **Submitt Documents and Track Responses** by all State Agencies.
- Indicate an interest in commenting by creating a **Workflow**. This will allow Commerce, the Jurisdiction and other State Agencies know you are planning to respond.
- Manage your user profile by **selecting the Jurisdiction and subject areas** you want to receive notifications.
- **Add and Update Contacts** for your agency, 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 to go directly to the screen.

1. **Home Page** → Access new Submittals, Workflows and Contact List Reports
2. **Jurisdictions** → View Contacts, Addresses, Submittals and Cases
3. **Contacts** → Update Profile Information, Categories and Jurisdictions
4. **Submittals** → View Submitted Documents and track Commerce’s response
   a. Create a Comment Letter Workflow for your Agency.
   b. Track other State Agency Responses
5. **Cases** → View progress of Jurisdiction Periodic Updates and Hearings Board Cases
6. **Manage Primary Contacts** → Update the primary contact person for each Jurisdiction.
7. **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.
The Home Page is the first page you will see when PlanView opens. It provides a list of Submittals received by the Department of Commerce for the past 7 days and lists the open Workflows for your Agency.

See a description of the numbered areas below.

1. Clicking on the submittal row opens the details for that Submittal and gives you access to attachments and workflows.
2. The Submittals list will be initially filtered to your preferences. These are set up on your Contact screen. You can view all Submittals or all Categories by selecting the desired radio buttons.
3. The Workflows section lists the active workflows for your agency. Clicking on the row opens the Submittal, where you are able to view the submittal, add attachments and/or close the workflow.
4. You can print Contact lists for the Primary Contacts for Jurisdictions or other state agencies by selecting the agency or Jurisdiction and clicking the Print link. A pdf report will be generated.

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.
Jurisdictions

When you select the Jurisdictions option off the Main Menu the Jurisdiction Search screen opens, displaying a list of all the Jurisdictions in Washington State.

Jurisdiction Search
Use the Jurisdiction search screen to navigate to all of the Jurisdictions.

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.
Jurisdiction Basics
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
   b. 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
   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. The Comprehensive Plan and Development regulation link takes you to the jurisdiction’s current comprehensive plan on the jurisdiction web site, or to their development regulations—often on Code Publishing. 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. Only Active contacts are initially displayed. Clicking on the contact row opens the Contact Details. The State Agency contacts shows state agency staff that have selected that jurisdiction in their profile. 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 individuals are the main point of contact for that Jurisdiction.

Jurisdiction Attachments
Attachments specific to the Jurisdiction can now be added by Commerce.
**Jurisdiction Submittals**

The Submittals screen displays a list of active submittals for the Jurisdiction. An active submittal is a submittal with one or more active workflows. Select the All Amendment Types 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.
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. Use this screen to manage the types of submittals they receive on the Daily Report by creating a list of categories. Some agency staff have regional assignments and work with a subset of jurisdictions. Some agency staff are an expert on a particular topic, but work with jurisdictions throughout the state. This screen allows you to select jurisdictions that you are interested in. Selecting a jurisdiction also means that users from that jurisdiction can see that you are an agency staff member they can reach out to if they have questions.
**Daily Report Settings -- Tag your Profile with Categories and Jurisdictions**

Check the Yes, send me the Daily Reports checkbox to opt in to receiving the Daily Report email. Next, customize the notifications you receive by adding Categories to your profile with the types of submittals you are interested in receiving. See a complete list [here](#). Finally, select the Jurisdictions you would like to receive in the report. **During the initial rollout of PlanView, if you are a primary contact for a jurisdiction, you will receive all of the new Submittals on their Daily Report.** Eventually, primary contacts will be able to customize their reports too.

**Contact Categories for Daily Report**

Click the Add and Remove buttons to manage your list.

![Add and Remove buttons](image_url)

**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**

You can be associated to specific Jurisdictions to limit your Daily Submittal notifications. You will be notified for all new Submittals if you are the primary contact for a Jurisdiction.

![Associated Jurisdictions](image_url)
Submittals

Submittals are the notice local governments provide when they are either proposing amends or when they adopt amendments to their plans and regulations. State agency notice is required by RCW 36.70A.106. Local governments provide notice using the portal and entering this information directly into PlanView. When you select the Submittals option off the Main Menu the Submittal Search screen opens, displaying a list of all the Submittals currently active. A submittal is active if it has one or more open workflows.

Submittal Search

Use the Submittal Search screen to find a contact. 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
  - Comprehensive Plan Amendment
  - Development Regulation Amendment
  - 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.
  - 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. As described on the Contact Details section, these categories will also help you customize the notifications you receive for new submittals. See a complete list here.

![PlanView](PlanView.png)

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 reviewteam@commerce.wa.gov with the updated information.

![Submittal Contacts and Addresses](Submittal_Contacts_and_Addresses.png)

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.

You will also be able to add your own documents to the submittals. See instructions on how to add an attachment below.

1. Select an Attachment Type. See a list of the Attachment types and allowable file types [here](#).
2. Select the Browse.
   a. Navigate to the file location and select the desired file.
   b. Click the Open button.
3. Click Add Attachments
   a. Attachment Title and Notes are optional.
4. You can see if you were successful by looking at Uploaded By and Uploaded Date fields.
Submittal Comments
You can view the Comments for the Submittal and add your own.

1. Enter the comment in the Comment field.
2. Click the Add new Comment button.
3. View the Comment in the Comment Grid.

Submittal Workflows
A workflow represents a task you and your agency intends to complete. A workflow never exists on its own. Either it is a workflow about a case, or it is a workflow about a submittal. This section shows how to create and use a workflow related to a submittal. If a submittal comes in that you intend to review and possible comment on. Create a workflow for this task. This shows other users that you are interested in the item and may prepare comments. At the end of the process, attaching your comment letter to the workflow will keep your comments attached to the submittal for future reference. Track the progress of the work being completed for the Submittal.

1. View the day this Submittal was on the Daily Report email.
2. Commerce Workflows ➔ Click on the row to open the workflow details.
3. View the workflows of all the State Agencies that are going to respond to the Submittal.
4. Create a Workflow for your state agency to indicate that you will provide a response to the submittal.

**Create a workflow to track your agency’s response to the Submittal**

Click the dropdown and select the State Agency Submittal Review workflow and Click the Create New Button.

A workflow will be created and assigned to you. Click on the workflow row to open the Workflow Details.

The workflow’s default Due Date is 10 Days. The status icons will change based on the # of days left. You can update that date on the Workflow Details screen.

<table>
<thead>
<tr>
<th># of Days To Complete</th>
<th>Green</th>
<th>Yellow</th>
<th>Red</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>0-7</td>
<td>8-9</td>
<td>10+</td>
</tr>
</tbody>
</table>
**Workflow Details**
This screen is where you manage the workflow. You can complete it by selecting an Action link to document what response was completed by your agency. You can change the due date or reassign the workflow to another person in your agency.

1. **Workflow Details** → Select an Action to complete the workflow. Double click in the Comments box to enter a comment. Use the Update Due Date and Reassign to change them.
2. **Attachments** → You can view and add Submittal attachments here.
3. **Audit Log** → The Audit log tracks all actions, due date updates and reassignments.
The Case area of the system is a Commerce tool to track long term action items. All State Agencies have read-only access to this area. A case represents something a local government is working on. Cases may result in one or more submittals of its life. Cases allow PlanView to track technical assistance to local governments well in advance of a formal submittal. It also allows users to see where multiple submittals are related to each other because they are part of an ongoing case. There are three types of cases:

- **General Case:** This represents most of the items local governments work on and can be used to keep track of any item you are providing technical assistance on.

- **Periodic Update case:** This is a special type of case that represents the required periodic update. PlanView generates a periodic update case for every jurisdiction two years before their statutory due date. The case then remains open until the end of the update. Periodic update cases have milestones that show progress on the update for each jurisdiction.

- **Hearings Board case:** This is a case that keeps track of outstanding hearings board cases. Commerce generates a case when it received a final decision and order where a local government was found out-of-compliance. The case remains active until the Growth Management Hearings Board issues and order closing the case. Note that a case is not created unless the local government needs to take action to address a finding of noncompliance. If a jurisdictions is upheld by the Growth Management Hearings Board, PlanView does not create a 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.
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.

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.

![Dashboard Image]

**Fields**

- **Case Types** ➔ There are three Case Types
  - Periodic Update
  - Hearings Boards
  - 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. Other cases only have one (case closed).

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 Case.

The Primary contact for a Case 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 reviewteam@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.
Reports and Definitions

Daily Reports

Commerce send emails to notify State Agencies of the receipt of Amendments to review. If you are a Primary Contact for a Jurisdiction, you will receive all notifications for that Jurisdiction. Otherwise, you can request notifications by adding that Jurisdiction to your User Profile. You can further customize your notifications by limiting the notifications to your areas of interest by adding Categories to your User Profile.
## Attachment Types

<table>
<thead>
<tr>
<th>Attachment Types</th>
<th>Submittals</th>
<th>Online Submittals</th>
<th>Workflows</th>
<th>Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comprehensive Plan Amendment - Draft</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Development Regulation Amendment - Draft</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Combined Comp Plan and Dev Reg Amend - Draft</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comprehensive Plan Amendment - Adopted</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Development Regulation Amendment - Adopted</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Combined Comp Plan and Dev Reg Amend – Adopted</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Countywide Planning Policy</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Critical Areas Ordinance</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Meeting Minutes</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Correspondence</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Checklist</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Map</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Staff Report</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Supporting Documentation or Analysis</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Ordinance or Resolution</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>SEPA Materials</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Public Notice</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Comprehensive Plan</td>
<td>Development Regulation</td>
<td>CWPP</td>
<td>Critical Area Ordinance</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>--------------------</td>
<td>------------------------</td>
<td>------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Administrative/Procedural</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Adult Entertainment</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Airport Safety Zone</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Animal Control and Licensing</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Annual Docket</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Capital Facilities</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Clearing and Grading</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Concurrency</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Critical Areas Ordinance</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Design Standards/Design Review</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Economic Development</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Emergency</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Environment</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Essential Public Facilities</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Fully Contained Communities</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Historic Preservation</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Housing</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Impact Fee</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Infrastructure Development Standards</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Interim</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Land Use</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Marijuana</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Mineral Lands</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Moratorium</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Open Space</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Optional Plan Elements</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Parks and Recreation Element</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Periodic Update</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Public Participation</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Resource Lands</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Rural Lands</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Schools</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Shoreline Master Program</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>State Environmental Policy Act (SEPA)</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
### 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 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). Go to [https://secureaccess.wa.gov/](https://secureaccess.wa.gov/) to create a SAW account, if you do not have one. 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.

### Requestor Information

<table>
<thead>
<tr>
<th>USER INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>FIRST NAME</td>
</tr>
<tr>
<td>LAST NAME</td>
</tr>
<tr>
<td>WORK PHONE</td>
</tr>
<tr>
<td>CELL PHONE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CONSULTING FIRM (IF APPLICABLE)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>ORGANIZATION INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORGANIZATION NAME</td>
</tr>
<tr>
<td>TITLE WITH ORGANIZATION</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PRIMARY CONTACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes, I am the Primary Contact for my Organization. I understand that I will replace the current Primary User for this Organization.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SECURE ACCESS WASHINGTON (SAW) INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAW EMAIL</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Requestor Agreement

By signing this form, I certify that I am authorized to view and/or submit information on behalf of the Organization listed above, will practice adequate Password management by keeping Passwords confidential and agree to the Conditions of Use Access Agreement. [http://www.commerce.wa.gov/privacy-information/conditions-use-access-agreement/](http://www.commerce.wa.gov/privacy-information/conditions-use-access-agreement/)

<table>
<thead>
<tr>
<th>PRINTED NAME</th>
<th>SIGNATURE</th>
<th>DATE</th>
</tr>
</thead>
</table>

### Organization Approval

By signing this form, I approve this Person to access the PlanView system on behalf of the Organization listed above and the selected Security Roles.

<table>
<thead>
<tr>
<th>PRINTED NAME</th>
<th>SIGNATURE</th>
<th>DATE</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>ORGANIZATION TITLE</th>
<th>EMAIL</th>
<th>PHONE NUMBER</th>
</tr>
</thead>
</table>