

# Plan Comments Retrieval For Applicant.docx

## Oak Lodge Accela

1. Purpose: this document is for an applicant / customer / citizen. It illustrates the steps used to retrieve documents after the applicant / customer has received a notification that the application is “incomplete” and there are either plan comments or a checksheet or other document to download from Accela. In these reviews, Oak Lodge does not email the applicant the documents, they are uploaded to the “permit record”, such as UP2020-999 or ECSL2020-999.

Login to the Accela system and click on the “permits” tab on the top left of the screen.

The screenshot displays the Oak Lodge Accela user interface. At the top, a blue header bar contains the text "Logged in as: Oak Water Services" followed by links for "Collections (0)", "Account Management", and "Logout". Below this, a navigation bar features a "Home" button and a "Permits" button, with a red arrow pointing to the "Permits" button. A search bar is located to the right of the navigation bar. Below the navigation bar, the text "Hello, Oak Water Services" is displayed. The main content area is divided into two sections. The first section, titled "My Collection (0)", contains the message "You do not have any collections right now." The second section, titled "Work in progress", contains a table with the following columns: "Record Name", "Record ID", "Module", "Creation Date", and "Action". The table currently displays the message "No records found".

Logged in as: Oak Water Services [Collections \(0\)](#) [Account Management](#) [Logout](#)

Search...

Home Permits

Dashboard My Records My Account Advanced Search ▼

Hello, Oak Water Services

My Collection (0) View Collections

You do not have any collections right now.

Work in progress View All Records

Record Name	Record ID	Module	Creation Date	Action
No records found				

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## Oak Lodge Accela

- Click on the subject permit.

Logged in as: Oak Water Services [Collections \(0\)](#) [Reports \(1\)](#) [Account Management](#) [Logout](#)

Search...

Home **Permits**

Create an Application Obtain a Fee Estimate **Search Applications** Schedule an Inspection

### Records

[Show on Map](#)

Showing 1-8 of 8 | [Download results](#) | [Add to collection](#)

<input type="checkbox"/>	Date	Record Number	Record Type	Project Name	Address	Status	Action
<input type="checkbox"/>	02/10/2020	<a href="#">UP2020-011</a>	Utility Placement	Test for inspection	14611 SE river Rd, milwaukie OR 97267 United States	Final Approved	<a href="#">Pay Fees</a>
<input type="checkbox"/>	12/31/2019	<a href="#">ECSL2019-132</a>	Erosion Control Small Lot	test for inspection routing	14611 SE RIVER RD, MILWAUKIE 97267	Review Note	<a href="#">Pay Fees</a>
<input type="checkbox"/>	11/25/2019	UP2019-128	Utility Placement	Test for Post-submittal Update	14611 SE RIVER Rd, MILWAUKIE 97267	In Review	<a href="#">Edit</a>
<input type="checkbox"/>	10/28/2019	<a href="#">UP2019-114</a>	Utility Placement	test for water service	14611 SE RIVER RD, MILWAUKIE 97267	Final Approved	<a href="#">Pay Fees</a>
<input type="checkbox"/>	08/23/2019	<a href="#">ECSL2019-096</a>	Erosion Control Small Lot	Erosion Control LOT 3	4175 SE Jennings Ave, Milwaukie OR 33172 United States	Issued	<a href="#">Pay Fees</a>
<input type="checkbox"/>	08/13/2019	<a href="#">ECSL2019-092</a>	Erosion Control Small Lot	Test ECSL Pay Pal	14611 SE RIVER Rd, MILWAUKIE 97267	Inspection Note	<a href="#">Pay Fees</a>
<input type="checkbox"/>	08/06/2019	<a href="#">ECSL2019-081</a>	Erosion Control Small Lot	Test for email	14611 SE RIVER Rd, MILWAUKIE 97267	Closed	
<input type="checkbox"/>	07/30/2019	<a href="#">UP2019-074</a>	Utility Placement	14611 SE River RD	14611 SE RIVER Rd, MILWAUKIE 97267	Fees Owed	<a href="#">Pay Fees</a>

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### Search for Records

Enter information below to search for records.

- Site Address

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## Oak Lodge Accela

- Click on the blue triangle next to the tab labeled "record info".

The screenshot displays the Oak Lodge Accela web application interface. At the top, a blue header bar contains the text "Logged in as: Oak Water Services", a checkbox for "Accessibility Support", and links for "Collections (0)", "Account Management", and "Logout". Below the header, a search bar with the placeholder text "Search..." and a magnifying glass icon is visible. The main navigation area includes a "Home" link and a "Permits" tab. Below the navigation bar, there are four main action buttons: "Create an Application", "Obtain a Fee Estimate", "Search Applications", and "Schedule an Inspection". The central content area displays a record titled "Record ECSL2019-132: Erosion Control Small Lot" with a status of "Review Note" and an "Add to collection" link. Below the record title, there are five tabs: "Record Info", "Payments", "Conditions", "Education", and "More...". The "Record Info" tab is selected, and its dropdown menu is open, showing options: "Record Details", "Processing Status", "Related Records", "Attachments", and "Inspections". Two red arrows point to the blue triangle next to the "Record Info" tab and the "Attachments" option in the dropdown menu.

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### Oak Lodge Accela

- Click on the document desired. Typically, this will be a “checksheet xxx” or “plans comments XXX” Download the document and review.

[Home](#) [Permits](#)

[Create an Application](#) [Obtain a Fee Estimate](#) [Search Applications](#) [Schedule an Inspection](#)

**Record ECSL2019-081:** [Add to collection](#)  
**Erosion Control Small Lot** [Tweet](#)  
**Record Status: Closed**

[Record Info](#) [Payments](#) [Education](#) [Custom Component](#)

### Attachments

The maximum file size allowed is 100 MB.  
ade;adp;bat;chm;cmd;com;cpl;exe;hta;htm;html;ins;isp;jar;js;jse;lib;lnk;mde;mht;mhtml;msc;mst;php;plf;scr;sct;shb;sys;vb;vbe;vbs;vxd;wsc;wsf;wsh  
are disallowed file types to upload.

Name	Record ID	Entity Type	Type	Size	Latest Update	Action	Record Type
<a href="#">plat covenants- rev1 mar 11, 2011.doc</a>	ECSL2019-081	Record	Document	88.50 KB	08/06/2019	<a href="#">Actions</a>	Erosion Control S Lot

[Add](#)

End of Actions