

Purpose

This document contains FAQs available to external Administrators and Users in support of the Electronic Plan Review Portal.

1: General Questions

I do not have a customer account with ESA. Can I submit through the Portal?

No, we are unable to create an ESA “online” account for customers that do not have a customer account with ESA. Please contact the ESA Plan Review department at 1-800-746-6480 to discuss.

How will I know if I can use the portal?

To use any of the ESA online services, you must have a customer account with the ESA. If you are an existing customer and would like to set up a new Electronic Plan Review online account, please contact the ESA Plan Review department at 1-800-746-6480. More information on customer accounts may be found at esasafe.com.

How do I open a customer account with ESA?

If you are a registered business that does repeated business with ESA, you may be eligible to open a customer account. More information on customer accounts may be found at esasafe.com.

Why did I not get a Plan Review notification number once I clicked Submit?

A notification number is issued once a new submission is registered. Before registering, the submission is evaluated to ensure the minimum information is provided. You can monitor the status of your notification using the Status tab.

2: Online account, Administrator and User Management

How do I change my ESA account information – Address/Phone/Fax/Email?

You are currently unable to make any changes to your ESA account via the Portal. Please email your changes to plan.review@electricalsafety.on.ca. A Plan Review Representative will respond to help with your request.

If I'm an existing customer, do I automatically get an account for the online portal?

No, the Electronic Plan Review Portal is one of a number of ESA online services provided by the ESA and requires a different online account from the others. Please contact the ESA Plan Review department at 1-800-746-6480 and a Plan Review Representative will help set up a new Electronic Plan Review online account and Administrator. Having computer access during this call helps speed up the registration process.

How do I set up an online account to use the Electronic Plan Portal?

You are not able to set up a new online account using the portal. Please contact the ESA Plan Review department at 1-800-746-6480 and a Plan Review Representative will help set up a new Electronic Plan Review online account and Administrator. Having computer access during this call helps speed up the registration process.

What is the difference between the role of an account Administrator and a User?

Administrators – are responsible for managing Users within their ESA online account. They can add, edit, deactivate or delete a User however, they cannot add or edit another Administrator. Administrators can create new submissions and access all other submissions created within the company.

Users – are only able to edit their own ESA online account user information. They can create new submissions and access any other submissions within the company that have been shared to them.

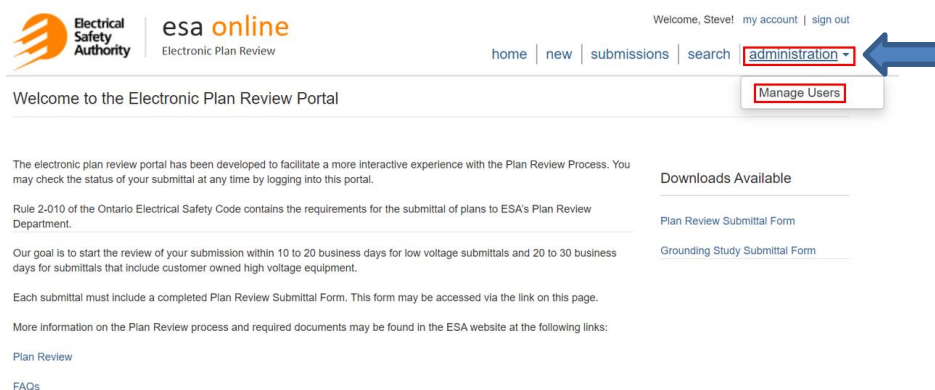
As an online account Administrator for my company, how do I set up another Administrator?

Administrators can only be added by ESA. Please contact the ESA Plan Review department at 1-800-746-6480 and a Plan Review Representative will help.

As an online account Administrator, how do I set up a new User?

Step 1:

To add a new User within your company, from the Portal home page select “administration” in the top menu. A drop down menu will appear and from there choose “Manage Users”.



Step 2:

From the Manage Users page, click “add new user”, then populate user info in the pop-up window and save.

HOME / USERS

Manage Users [add new user](#)

User Name	First Name	Last Name	Email Address	Role Name	Status
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An email will be sent to the new User's email address with their system assigned user name and temporary password.

As an online account Administrator, I set up a new User but they did not get an email with temporary login credentials.

If the new User did not receive their registration email, there are a few troubleshooting steps you can take:

1. Confirm the email address is correct and it was entered properly.
2. Ensure the User is actually set up and showing on the list of users for your online account.
3. Ask the User to check their junk folders for the email.

After checking these items, try re-issuing the email. To do so, from the Home Page click "administration" then "Manage Users". Once you are on the Manage Users page click on the User Name. From the User Detail window click on "click here to resend the registration email". A new email will be sent to the User.

HOME / USERS / TEST USER

User Details - Test User [edit user](#) | [deactivate user](#) | [delete user](#)

This account was created on March 25, 2020, but the user has not logged in yet. If the user has not received the ESA Online registration email, please confirm and/or correct the email address shown below, then [click here to resend the registration email](#).

User Name	222162user	Last Login Date	
Email Address	123@email.com	TOS Acceptance Date	
Phone Number		Password Reset Req'd	True
Role Name	User	Status	Pending

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If the User still does not receive the registration email, it may be that antivirus software is blocking the User from receiving the email and you may wish to contact your IT department.

What is the difference between a deactivated and deleted user?

Deactivated Users - remain listed as a User within the ESA online account. They are unable to log into the Portal.

Deleted Users - are no longer listed as a User within the ESA online account. They are unable to log into the Portal.

Note: Existing submissions created by a deleted or deactivated user will still be accessible by the online account Administrator and any other User shared to the submission.

How do I remove/disable an active User?

Step 1:

You must be set up as an online account Administrator to perform this function. Login to the Portal and from the Home Page select “administration” in the top menu. There is a drop down menu and from that menu choose “Manage Users”.

Welcome to the Electronic Plan Review Portal

The electronic plan review portal has been developed to facilitate a more interactive experience with the Plan Review Process. You may check the status of your submittal at any time by logging into this portal.

Rule 2-010 of the Ontario Electrical Safety Code contains the requirements for the submittal of plans to ESA's Plan Review Department.

Our goal is to start the review of your submission within 10 to 20 business days for low voltage submittals and 20 to 30 business days for submittals that include customer owned high voltage equipment.

Each submittal must include a completed Plan Review Submittal Form. This form may be accessed via the link on this page.

More information on the Plan Review process and required documents may be found in the ESA website at the following links:

[Plan Review](#)
[FAQs](#)

Downloads Available

- [Plan Review Submittal Form](#)
- [Grounding Study Submittal Form](#)

Step 2:

From the “Manage Users” screen, select the User by clicking their name. In the example below the user is “epr-ta”

Manage Users

User Name	First Name	Last Name	Email Address	Role Name	Status
epr-admin	EPR	Admin	[epr].admin@[epr].ca	Administrator	Active
epr-ta	EPR	TA	[epr].ta@[epr].ca	User	Active

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Step 3:

Once you have selected the User, you can edit, deactivate or delete the User.

User Details - Test User

[edit user](#) | [deactivate user](#) | [delete user](#)

This account was created on March 25, 2020, but the user has not logged in yet. If the user has not received the ESA Online registration email, please confirm and/or correct the email address shown below, then [click here](#) to resend the registration email.

User Name	222162user	Last Login Date	
Email Address	123@email.com	TOS Acceptance Date	
Phone Number		Password Reset Rqrd	True
Role Name	User	Status	Pending

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As a new User, what do I do if I deleted or did not receive my registration email?

Please contact your company's online account Administrator and they can re-issue your registration email containing your user name and temporary password.

Why is my temporary password not working?

If you have been typing in your temporary password, try to copy and paste the temporary password instead. If you are already copying and pasting, then ensure there are no spaces at the end of what is being copied. Even one space will cause an error. If you are still unable to login, request a password reset from your online account Administrator.

How do I reset my password?

From the Home page click "my account". From the My Account page, click "change password" on the right side of the page.

Electrical Safety Authority | esa online | Electronic Plan Review

Welcome, EPR! [my account](#)

home | new | submissions | search | administration

HOME / MY ACCOUNT

[Account Details - EPR User](#) | [edit account](#) | [change password](#)

This account was created on February 26, 2020 at 10:28:33 AM

User Name	epr-user	Last Login Date	
Email Address	[epr].user@[epr].ca	Last Modified Date	February 26, 2020 at 10:28:33 AM
Phone Number		TOS Acceptance Date	January 1, 2020
Role Name	User		

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After clicking "change password", the "Change Password" screen, as shown below, will pop-up advising of the security criteria:

Change Password

For security reasons, passwords must have:

- 8 or more characters
- Upper and lowercase letters
- At least one number
- At least one special character (!#\$%&* etc)

Current Password *

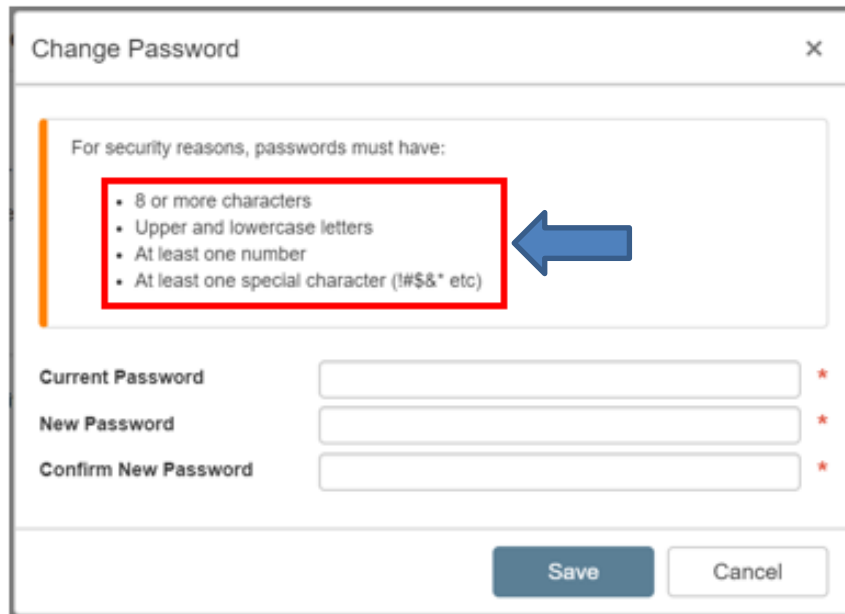
New Password *

Confirm New Password *

Save Cancel

I am creating my own password, and I cannot get it to work. It keeps telling me that it is not a good password.

When creating a password, you must follow the security criteria. The rules for creating a password are listed on the popup screen where you create your password. Ensure you are meeting the specified password creation criteria.



The screenshot shows a 'Change Password' dialog box with a close button (X) in the top right corner. Below the title bar, there is a section titled 'For security reasons, passwords must have:' followed by a list of requirements: '8 or more characters', 'Upper and lowercase letters', 'At least one number', and 'At least one special character (!#\$%* etc)'. A red rectangular box highlights this list, and a blue arrow points to it from the right. Below the requirements, there are three input fields labeled 'Current Password', 'New Password', and 'Confirm New Password', each with a red asterisk to its right. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

What do I do if my login doesn't work?

When typing in your "User Name / Email" and/or "Password", ensure there are no spaces at the end of what is being typed. Even one space will cause an error. Passwords are case sensitive. If you are still unable to login, request a password reset from your online account Administrator.

3 – Navigating the Portal

Where do I go to login to the Portal?

You must first be set up as an online account Administrator or User to access the Portal. Please review the "Online account, Administrator and User Management" section of this FAQ to ensure you are set up to login. Once you are set up, you may access the Portal via the link provided with your temporary password or by visiting the ESA website and logging in at epr.esasafe.com.

Where can I find the required submittal forms?

From the Home page, you can download, complete, save and then upload the required submittal forms to your draft submission.

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More information on the Plan Review process and required documents may be found in the ESA website at the following links:

[Plan Review](#)

[FAQs](#)

Downloads Available

[Plan Review Submittal Form](#)

[Grounding Study Submittal Form](#)



How do I create an online submission?

Step 1:

New submissions are created as “Drafts” by clicking “new” from the top navigation panel of the Homepage.



Welcome to the Electronic Plan Review Portal

Step 2:

After clicking “new” on the Homepage you will see the screen for creating a draft submission.

As seen below, all fields that are greyed out are automatically populated by the system with your ESA customer account information. You do not need to do anything with the fields that are grey as they cannot be altered. The fields that are white are editable. Fields that are marked with a red asterisk are required information. You may add a PO/Job # and/or secondary contact information. There is also a “Details” field that allows you to fill in more specific information on the work location such as building, room or unit number.

New

Company Name: EPR ELECTRICAL CONTRACTING INC

Company Address: [input field]

Submitter Name: EPR User

Submitter Phone: [input field]

Submitter Email: [epri.user@epri.ca]

Customer: [input field]

PO / Job#: [input field]

Primary: [input field]

Secondary: [input field]



show shared user(s) add user

Site Name: [input field]

Site Address: [input field]

search for address

Details: [input field]



Step 3

After you have entered any relevant job number and details, you must enter a site name and assign a valid site address. To assign an address, click “search for address”.

Site Name: [input field]

Site Address: [input field]

Details: [input field]

search for address



Step 4:

On the “Find Address” screen start typing the address and click the correct address from the auto-populated drop down menu that appears.

Find Address

Please enter the site address below; then select the best match from the list of search results: ?


400 sheldon [input field]

- 400 Sheldon Lane, Hastings Highlands, ON (Bancroft)
- 400 Sheldon Drive, Cambridge, ON
- 400 Sheldon Dr, Cambridge, ON
- 400 Sheldon Dr, Goderich, ON



Step 5:

Enter any additional information in the Intersection and/or Driving directions field. If your address is difficult to find, parking is an issue or the street is one way, for example, this should be entered into either Intersection or Driving fields. Once you have entered all applicable information click “Select” to continue.

Please move the map marker (if required) to pinpoint the precise work location, then review and complete the following information. Click Select to save the address and close the map. 

Street *

City *

Postal Code

Intersection

Driving Directions

Step 6:


If you wish to expedite your review, click the “I request a rush...” box and include a reason for your request. A reason must be provided with all rush requests.

Rush Request I request a rush review recognizing additional administrative costs

Reason(s) for request

Step 7:

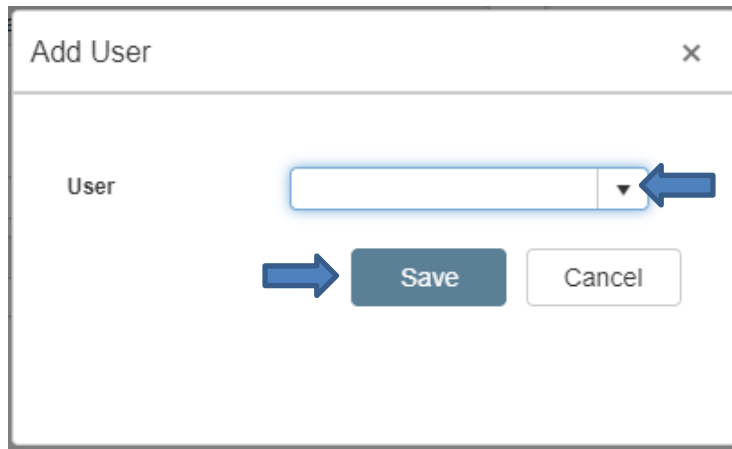
If you would like to add other Users to your submission, you can add other registered Users who will be able to view, add documents and receive communications related to your submission. Your online account Administrator is automatically shared to each submission. To add a new User click “add user”.

Shared Users 

User	Admin	Created	By	Actions
				<input type="button" value="add user"/>

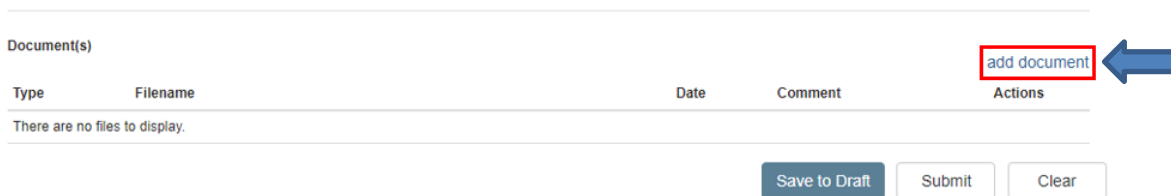
Step 8:

After clicking the “add user” button, you will be brought to the “Add User” window. Click the drop down and select the User you would like to share your submission with and then click save.

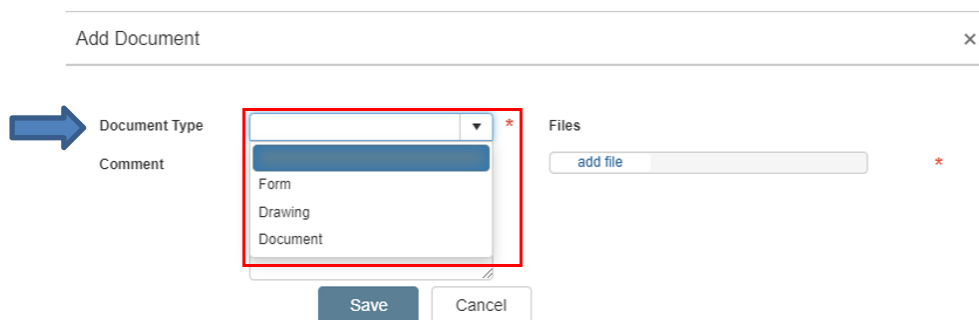


Step 9:

The last step is to add any related documents. Documents can be added by clicking “add document”.



From the “Add Document” window click the “Document Type” drop down menu. Select “Form” if adding the Plan Review Submittal Form or Grounding Study Submittal Form. Select “Drawing” when adding drawings and “Document” for other supporting documents such as job specifications or equipment cut sheets. Please ensure your files are in a format that is accepted by the system. Note: Any files containing drawings must be in unprotected .pdf file format.



Now that you have selected the document type, you may add the desired document. In the example below, a “Form” is selected so you would attach the Plan Review Submittal Form by clicking “add file”. A window will open which will allow you to select the related file on your computer. Click “Ok” to add the form for upload. Should you wish to include a comment with this document, you may do so in the “Comment” field. Click “Save” to upload to your draft submission.

Please note, although you may have multiple uploads for your draft submission, there are limitations to the number of files that can be uploaded at one time. If you add more than the maximum noted below, you will receive an error. The limits are as follows:

- Form – 1 file
- Drawing – 5 files
- Document – 10 files

As a solution to uploading multiple files for each “Document Type” you may wish to save multiple files as a single file or zip multiple files into one zipped file for each document type.

Once you have completed these steps, your draft is complete. If you do not wish to submit to ESA immediately, you have the choice to save your submission as a draft by clicking “Save to Draft”. Drafts are saved for 90 days and can be updated at any time by you or a shared User.

Or you can choose to send your submission to the Plan Review department by clicking “Submit”. This will change the status of your submission to “Submitted”.

Documents [add document](#)

Type	Filename	Date	Comment	Actions
Form	DownloadPlanReviewSubmittalForm (1).pdf			delete

Save to Draft Submit

Where do I find the name of the Reviewer that will be reviewing my submitted drawings?

Open the related submission and the Reviewer’s name is displayed in the “Reviewer” field. Until the submission is assigned, this field will display “Not Assigned”.

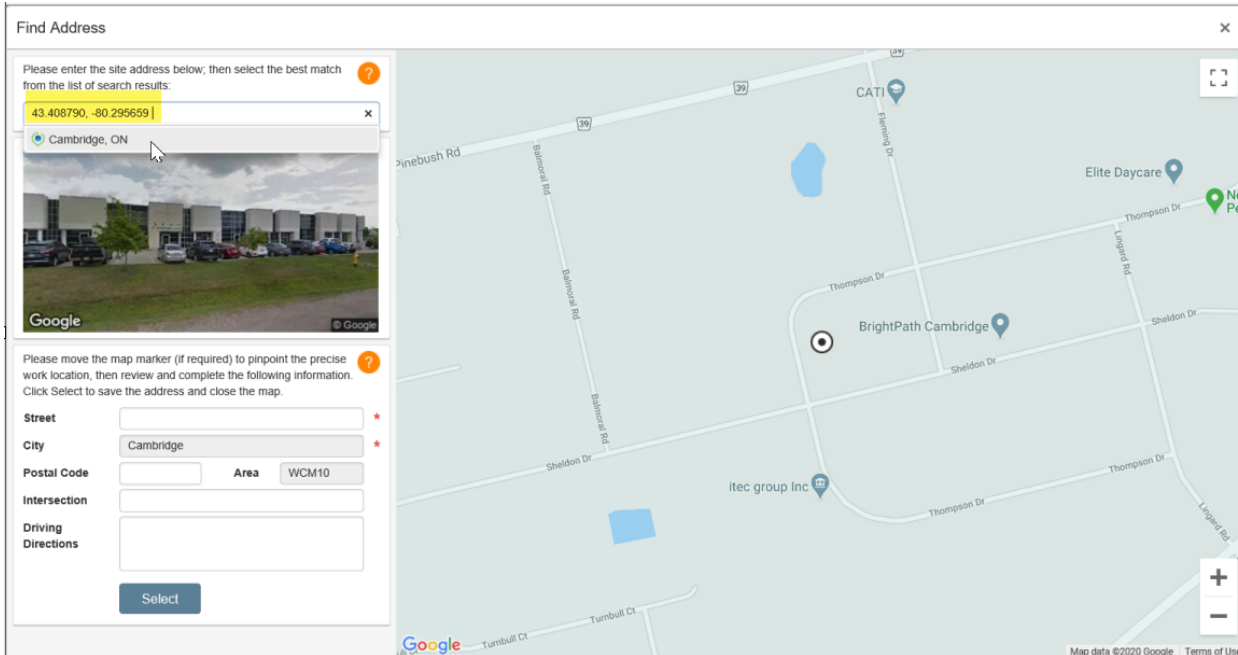
TEST - SHARE - One

Status	Review	Notification	n/a	Reviewer	Not Assigned
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General Information
Documents
Requests

When setting the address for my new submission, how do I input GPS coordinates?

From the “new” submission creation page, click “search for address”. From the “Find Address” enter the geo-coordinates in the format as highlighted below. This will typically result in the city/town/township presenting in the picklist. Select the option from the picklist, the marker plants on the map and then manually enter the civic address (street # city name) in the Street field to finish it off (i.e. 400 Sheldon Dr). The system will require a main intersection since it's an 'unrecognized' address.



I tried to upload a file to my submission and I received a message indicating file type is not supported. What do I do?

If your file type is not supported, please resave your document to one of the following supported file types:

- .pdf
- .jpg
- .html
- Word document
- Excel workbook
- Outlook message format (.msg)
- .zip

Can I upload more than one file at a time?

Yes, however there are limitations to the number of files that can be uploaded at a time based on the document type chosen. More information on uploading files may be found in the “Navigating the Portal” section of these FAQs.

- Form – 1 file
- Drawing – 5 files
- Document – 10 files

If my submission is “Rejected” or “MoreInfo” is requested, where do I find the reason(s) for this request and how do I send the information to ESA?

If additional information is required to accept or continue with the review of your submission, you will have received an email notifying you to log into the EPR portal for details. Once you have opened the related submission, click the “Requests” tab. The reason(s) for this request will be listed in the “Reasons” column. Each listed bullet represents a different piece of information required. In the example below, 2 additional pieces of information are required.

General Information Documents **Requests**

Requests

Status	Last Updated	Actions
MoreInfo	2020-09-29 10:49:10 ...	Download All

Reasons

- After further review we require GFP schematic
- Single line Diagram

Documents

- 2-11-24.pdf

Displaying Item 1 of 1

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To submit the requested information, open the submission, click the “Documents” tab, then “document” and from the popup click “Add”

TEST - AI's House

Status Rejected Notification n/a

document Add

General Information **Documents** Requests

Type	File(s)	Total File(s)	Upload Date	Upload By
There are no documents to display.				

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From the “Add Document” window, follow the guidelines noted on the lower left of the window. With the Document Type selected click “add file” to upload documents. Click Save.

Add Document

Document Type * Files

Comment

add file *

Save Cancel

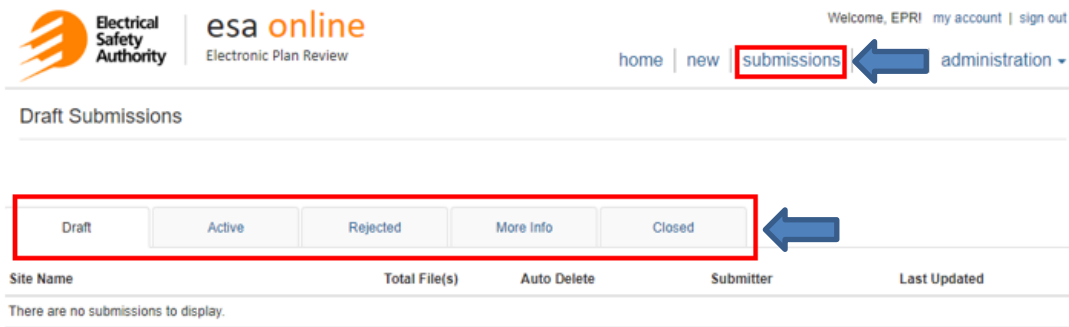
Select a "Document Type" from the drop down window that matches the uploaded file(s). Files of the same "Document Type" may be uploaded together.

Accepted file upload types: PDF, JPEG, HTML, Word, Excel and Outlook Message Format.

Take note: Drawings must be uploaded in "pdf" format and select "Document Type" as "Drawings".

IMPORTANT - Once the document(s) have been saved, click on the “General Information” tab and then click “Submit” in the bottom left of screen. Clicking “Submit” changes the status back to “Submitted” or “Review” which signals the Reviewer new information is available for their review.

When I click “submissions” on the top menu, what do the different tabs mean?



As your submission moves through the different stages of the submission process, it is assigned a status that represents where it is in the timeline. This feature is meant to help you track your submission from the time you create a draft through to completion of our review. These tabs organize all your submissions based on their current status. In addition, certain statuses trigger emailed communications to update you and shared users.

“Draft” tab contains all submissions in the “Draft” status:

Draft: This status is assigned when you create a new submission, but opt to “save” it rather than “submit” it. This status remains until you either delete or submit. Inactive drafts are saved for 90 days at which time it will be auto-deleted. You will be reminded 30 days prior to auto-deletion.

“Active” tab contains all submissions in the “Submitted”, “Evaluate”, “Accepted” and “Review” status:

Submitted: Your submission has been received but not yet evaluated by a Plan Reviewer to ensure the minimum information has been provided. You are able to add documents you may have missed adding previously.

Evaluate: A Plan Reviewer has started evaluating your submission to ensure the minimum information has been provided, but has not yet Accepted or Rejected it. This does not mean your submission is under review. You cannot add documents if your submission is in this status.

Accepted: Your submission had the minimum information required and a Plan Review notification will be issued. It now resides in the queue for review. You are able to add documents you may have missed adding previously.

Review: A Plan Reviewer has started reviewing your submission. They will contact you should they require more information. **You cannot add documents if your submission is in this status.**

“Rejected” tab contains all submissions in the “Rejected” status:

Rejected: Your submission did not contain the minimum information required to be accepted. Please log into the Portal to see details on what additional information is required.

“More info” tab contains all submissions in the “More Info” status:

More Info: During the course of their review, the Plan Reviewer has found they require more information. Please log into the Portal to see details on what additional information is required.

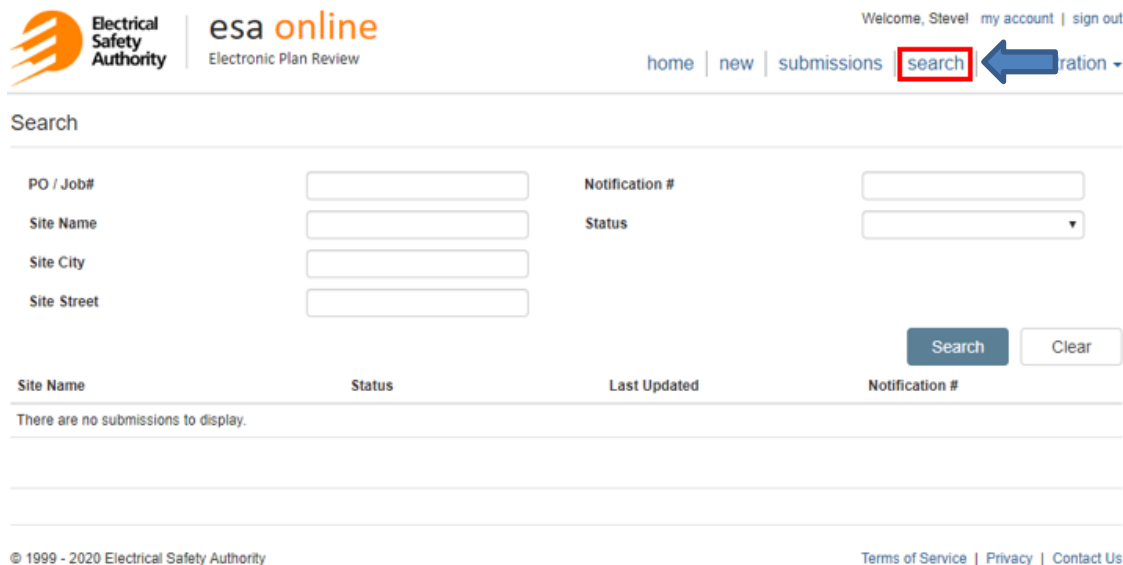
“Closed” tab contains all submissions in the “Completed” and “Cancelled” status:

Completed: The review of your submission is complete. A copy of the Plan Reviewer’s report will be or has been issued. You cannot add documents if your submission is in this status.

Cancelled: A review of your submission was not completed as you requested to cancel the Plan Review notification. You cannot add documents if your submission is in this status.

How do I find previous submissions?

Click “search” from the top menu. From this screen you are able to search for submissions by entering different types of information related to your submission. You can search by entering the site name, Notification number or click the status drop down to search for all submissions that have a current status. Note: Only submissions sent using the Portal are available when using this search function.



I am having issues with the Portal, who do I call?

Please review our FAQs and if an answer is not available, call the Plan Review department at 1-800-746-6480 or email us at plan.review@electricalsafety.on.ca.