

Plans Overview

This section covers the basic functions and features available to the user when viewing their plans.

My Plans



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1. Attention – By clicking on the category, the user will be given a list of all plans that that have been applied for and are currently marked as needing attention. If there are plans in this category, a list sorted further by plan type will appear below the number. You may click one of these options to narrow down the results further.
2. Pending – By clicking on the category, the user will be given a list of all plans that have been applied for and are currently marked with a status of pending. If there are plans in this category, a list sorted further by plan type will appear below the number. You may click one of these options to narrow down the results further.
3. Active – By clicking on the category, the user will be given a list of all plans that have been applied for and are currently marked with a status of active. If there are plans in this category, a list sorted further by plan type will appear below the number. You may click one of these options to narrow down the results further.
4. Draft – By clicking on the category, the user will be given a list of all plans that have been saved but not submitted yet and are thus marked with a draft status. If there are plans in this category, a list sorted further by plan type will appear below the number. You may click one of these options to narrow down the results further.
5. Recent – By clicking on the category, the user will be given a list of the most recently viewed plans. If there are plans in this category, a list sorted further by plan type will appear below the number. You may click one of these options to narrow down the results further.
6. View My Plans – Clicking on this link will take the user to a list of all their saved plans.

My Plans

The screenshot shows the 'My Plans' interface. At the top left is the title 'My Plans'. Below it are four numbered callouts: 1. A 'Display' dropdown menu with 'All' selected. 2. A 'Select Case Type' search input field. 3. A 'Sort' dropdown menu with 'Plan Number' selected. 4. A search input field with the placeholder text 'Search for plan number, project, or address', a search icon, and an 'Exact Match' checkbox. Below these filters is a table with columns: Plan Number, Project, Address, Plan Type, Status, and Attention Reason. The table body is empty, showing 'No records to display.'

1. Display – This drop-down menu allows the user to show a list of all their plans by the selected status. Simply select the status of the plan(s) you would like to view, and the page will automatically show only those plans.
2. Select Case Type – This search menu allows the user to search by a type of plan. Begin typing in the name of a plan type and select from the list.
3. Sort – This drop-down menu allows the user to sort the list of plans by either relevance, plan number, project, or address.
4. Search – This box allows the user to search for a plan by either plan number, project name, or address. The information does not necessarily need to be complete as the search will return partial matches. If the *Exact Match* box is checked, then the information does need to be exactly correct as it will only return results that exactly match the search criteria.