

Master Plan Review Process

Master plan reviews are often used by homebuilders that build several model homes – for example, floorplan #1, floorplan #2, and floorplan #3. Potential buyers come and tour these model homes, then make a purchase of a given floorplan. This common business case is the best for understanding how the Master Plan process works and what fees are indicated.

In this example, the builder brings in the first/original plan submittal for floorplan #1 to build that actual model home and they declare it a Master Plan (*which means they intend on repeated building of this floorplan exactly as submitted*).

When designating this plan as a Master Plan, you will treat this submittal the same as any new home submittal, charging Structural Plan Review fees, etc. But because the Applicant declared it as a Master Plan, you will also charge the Master Plan setup fee. This fee is for staff time to store, track, and care for this plan in an exceptional way as a retained Master Plan (*this fee is administrative*).

The screenshot displays the Accela Civic Platform interface for a record titled "995-22-000049-STR". The record is identified as "Allman Homes Floorplan #1" and "Master Plan - Floorplan #1". The status is "App Submitted" on 09/08/2022 by Krista Allman. The location is "910 KAILUA ST, SALEM, OR 97317". The contact is Heidi SHAMBERGER. The workflow shows 13 total tasks, with 0 completed.

A notice is added to the record on 2022-03-30, with the condition: "Severity: Notice. Total conditions: 1 (Notice: 1)".

The record includes a menu with options: Add, Delete, Void, Invoice, ReCalc, and Help.


The fee calculation shows a factor of "Job Value(Contractor)\$24,000.00" and a total fee of \$508.51. The table below shows the details of the fees:

Fee Item	Qty	Unit	Fees	Status	Balance Due	Invoice #	Assessed	Fee Code	Notes
Structural plan review fee	213.85	Ea	\$139.00	INVOICED	\$139.00	1217	09/08/2022	B_STR_500	
Master plan - setup fee	1	Ea	\$130.00	INVOICED	\$130.00	1217	09/08/2022	B_STR_535	
Structural building permit fee	1	Ea	\$213.85	INVOICED	\$213.85	1217	09/08/2022	B_STR_560	
State of Oregon Surcharge - Bldg (12% of applicable fees)	213.85	Ea	\$25.66	INVOICED	\$25.66	1217	09/08/2022	B_ST_SR...	

The table shows 4 items, with the first 4 items displayed. The page is 1 of 1.

Master Plan Review Process

The next time the builder is going to build floorplan #1 from a Master Plan (*again, repeatedly building additional homes exactly as submitted originally*), they will still submit a plan for floorplan #1, but this time your Plans Examiner will pull the Master Plan (*previously reviewed, approved, and stamped plan*) and only compare it to the plan they just submitted. These two plans should be exactly the same, given it's set to be built from a Master Plan.


995-22-000051-STR 


Allman Homes Floorplan #1

Brown Family Build


The plan review time and effort spent is much less and the process much less involved, as a result of the Master Plan having been approved previously - the Plans Examiner is only doing a comparison to verify it's exactly the same. So on the second and subsequent submittal(s), you will not charge standard Structural Plan Review, instead you will delete that fee item and charge the 'Master Plan review - second and subsequent reviews' fee. The second and subsequent review fee is recommended as a percentage and will ask you to enter the original plan review fee (*from when the Master Plan was originally reviewed*) – effectively reducing the plan review fee for this submittal.


In the example below, the plan review fee is reduced by half (*at 50% or original*) given that the plan review time spent is much less.

995-22-000051-STR STATUS > App Submitted
09/08/2022 by Krista AllmanLOCATION > 123 SE MAIN ST
SALEM, OR 97303CONTACT > TIM HOUSERWORK > 13

 A notice was added to this record on 2018-11-05.
Condition: DK test condition : Condition comments - Accela6Test Severity: Notice
Total conditions: 2 (Notice: 2)

[View notice](#)

Menu  [Add](#) [Delete](#) [Void](#) [Invoice](#) [ReCalc](#) [Help](#)

Fee Calc. Factor: Job Value(Contractor)\$2,500.00  Fee Total \$149.90

Showing 1-4 of 4

<input type="checkbox"/>	Fee Item	Qty	Unit	Fees	Status	Balance Due	Invoice #	Assessed	Fee Code	Notes
<input type="checkbox"/>	Master plan review - second and subsequent reviews	130	Amount	\$65.00	NEW	\$65.00		09/08/2022	B_STR_536	
<input type="checkbox"/>	Structural building permit fee	1	Ea	\$50.05	NEW	\$50.05		09/08/2022	B_STR_560	
<input type="checkbox"/>	Balance of minimum permit fees - structural	25.75	Automatic	\$25.75	NEW	\$25.75		09/08/2022	B_STR_780	
<input type="checkbox"/>	State of Oregon Surcharge - Bldg (12% of applicable fees)	75.8	Ea	\$9.10	NEW	\$9.10		09/08/2022	B_ST_SR...	