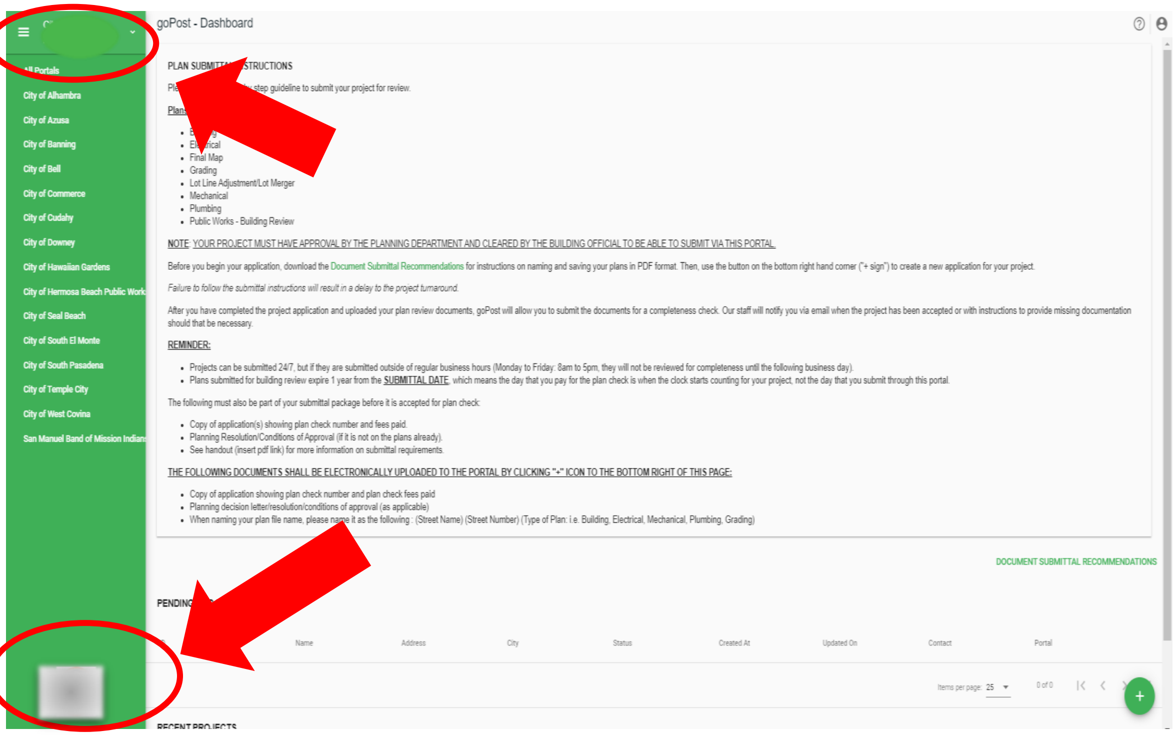
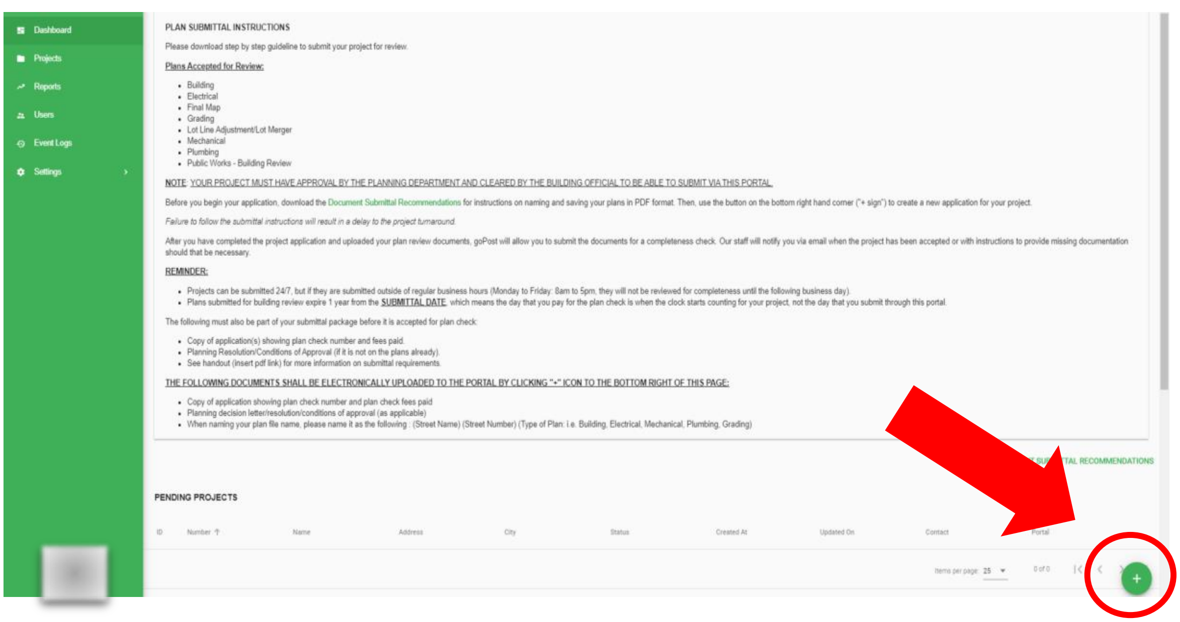
Electronic Plan Submittal Step-By-Step Instructions

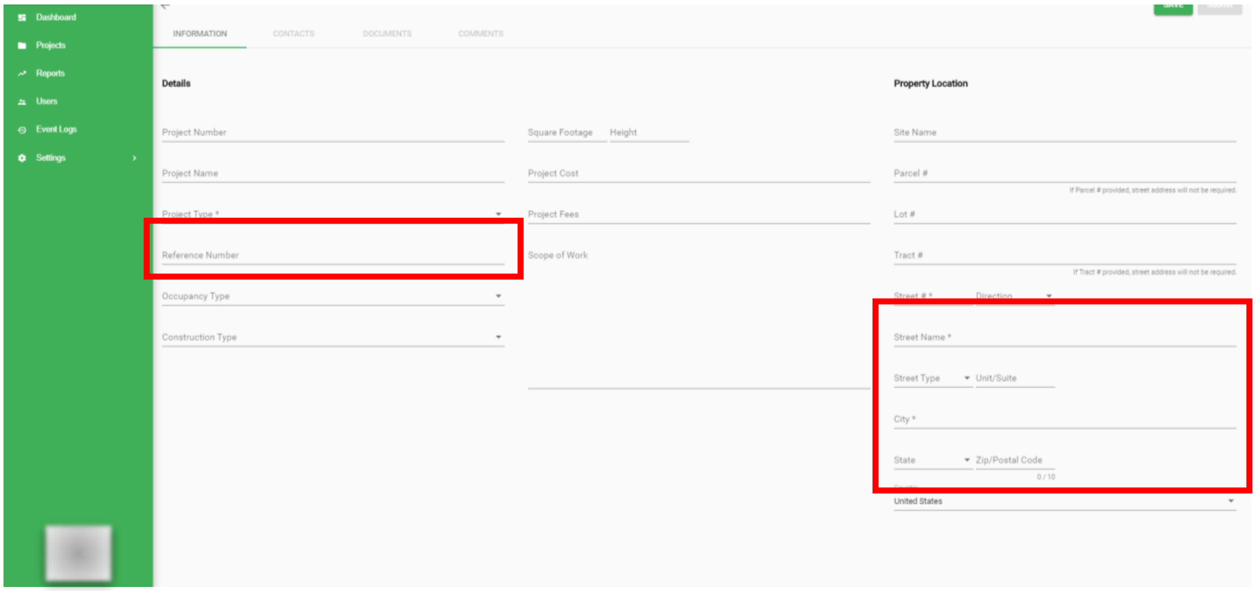
1. Before you start to create your profile for your project, if you already have eplansoft account for multiple jurisdictions, make sure that you are in the correct city portal. To check, you can always look at the bottom left hand corner for the city's logo, or from the top left corner of that city. To change city portals, click on the dropdown menu and select the appropriate city.

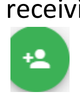


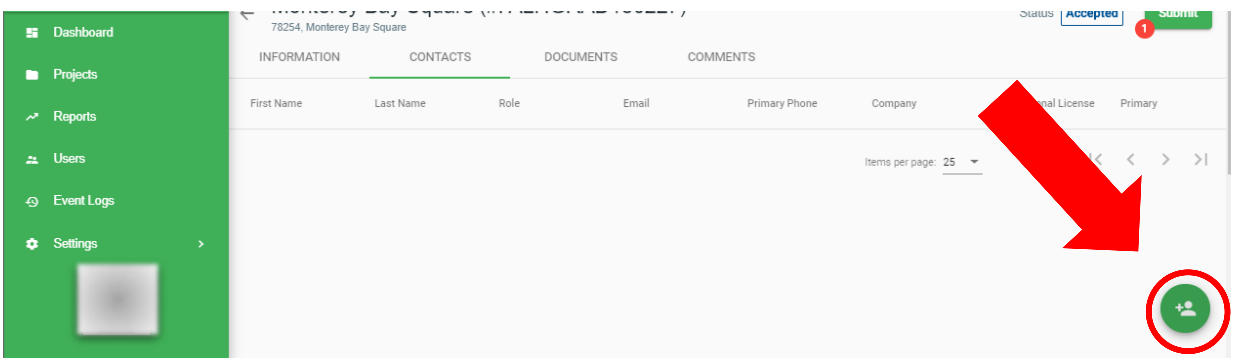
2. To start the process for your project, start by hitting the button on the bottom right hand corner of the screen.
   This will take you to the project page that you will input the project information.



3. You will be brought to the **INFORMATION** page. This is where you will input the information for your project. All items with an asterisk (*) <u>MUST</u> be filled out. If these boxes are not filled out, you will not be able to proceed to the next page. All other information that is not labeled with an asterisk (*) is recommended to be filled out but not required. Push SAVE and it will take you to the next page.



4. The **CONTACTS** tab will allow you to put the person (s) who will be receiving notifications for this project. This can be the owner, designer, or contractor. Press the  button to have the pop-up window show up.
   You may add multiple contacts to be notified when corrections or approval is provided.

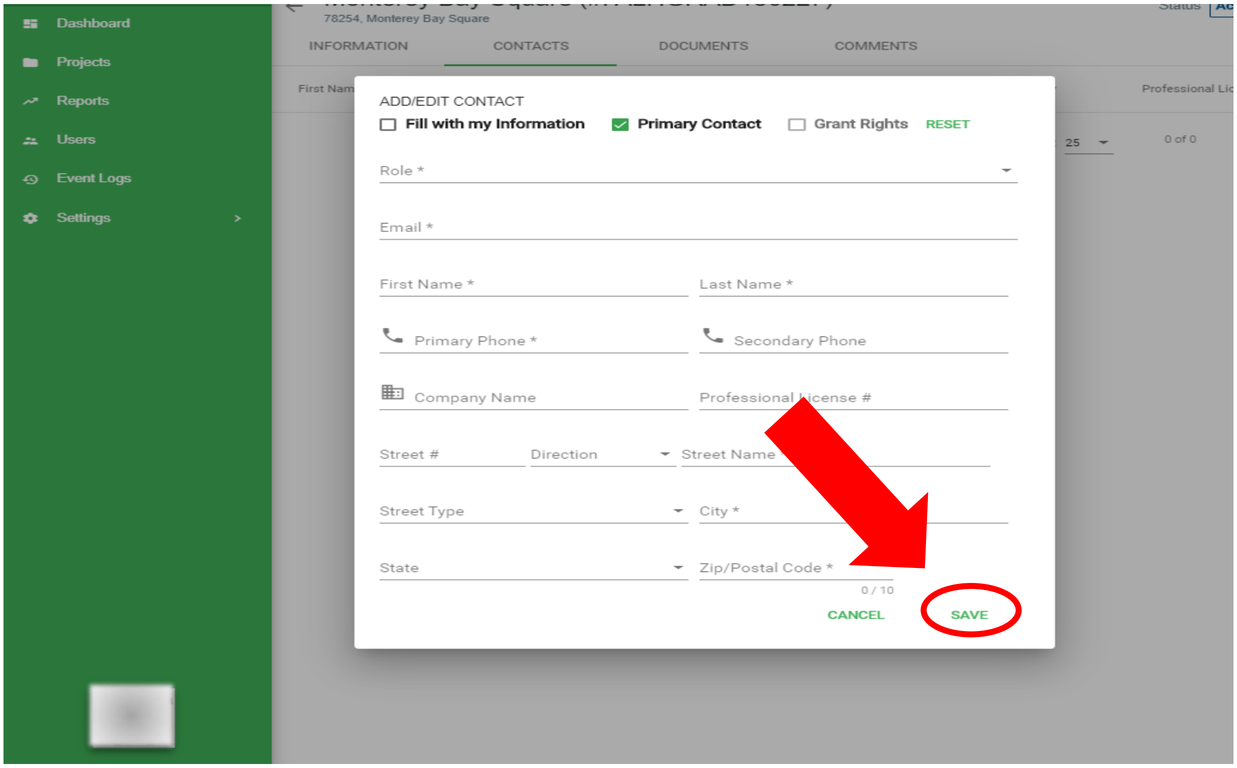


5. Everything with an asterisk (*) must be filled out. The roles indicated can be all persons associated to the project, but it is only required for the person who will be the main point of contact for the project.

   The different roles are as follows: Engineer/Architect, Designer, Contractor, and Owner

   You may use the OWNER role for all other roles not listed, i.e. Project Manager, Permit Runner.

   Once you have listed all contacts, hit the save button.



6. Now that you have saved your contacts, you will be taken to the **DOCUMENTS** Tab

To add a document, click  located at the bottom right hand corner of your screen

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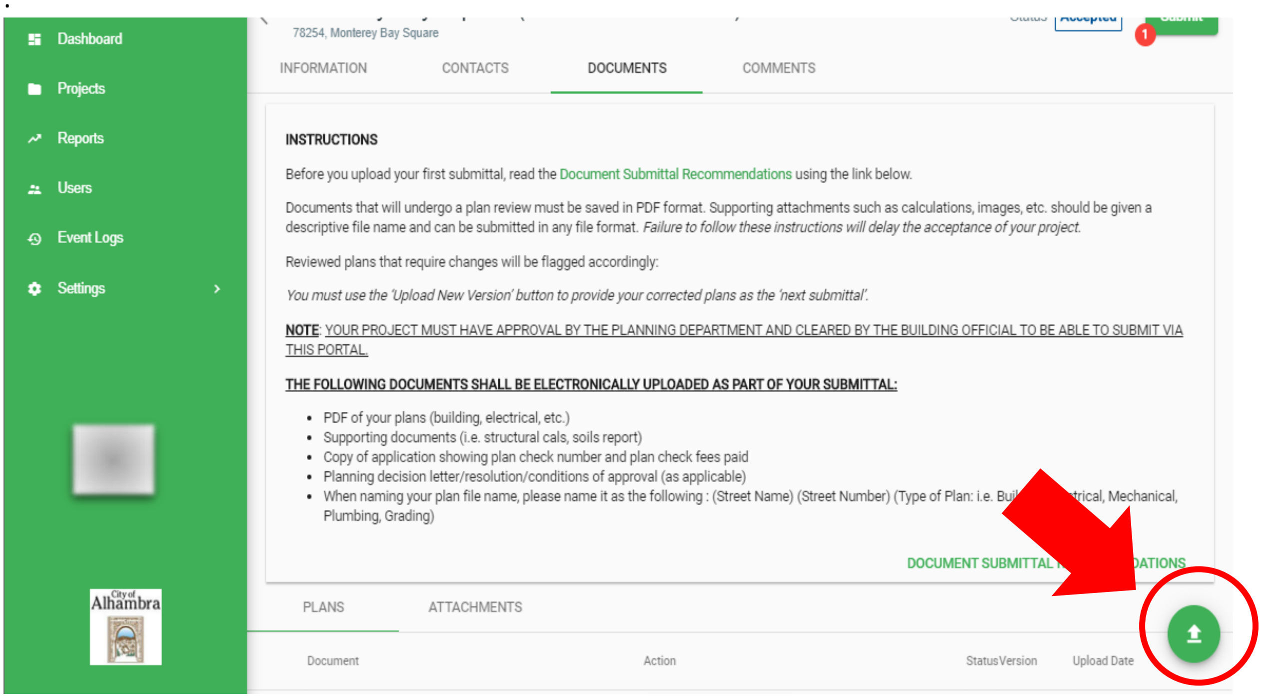
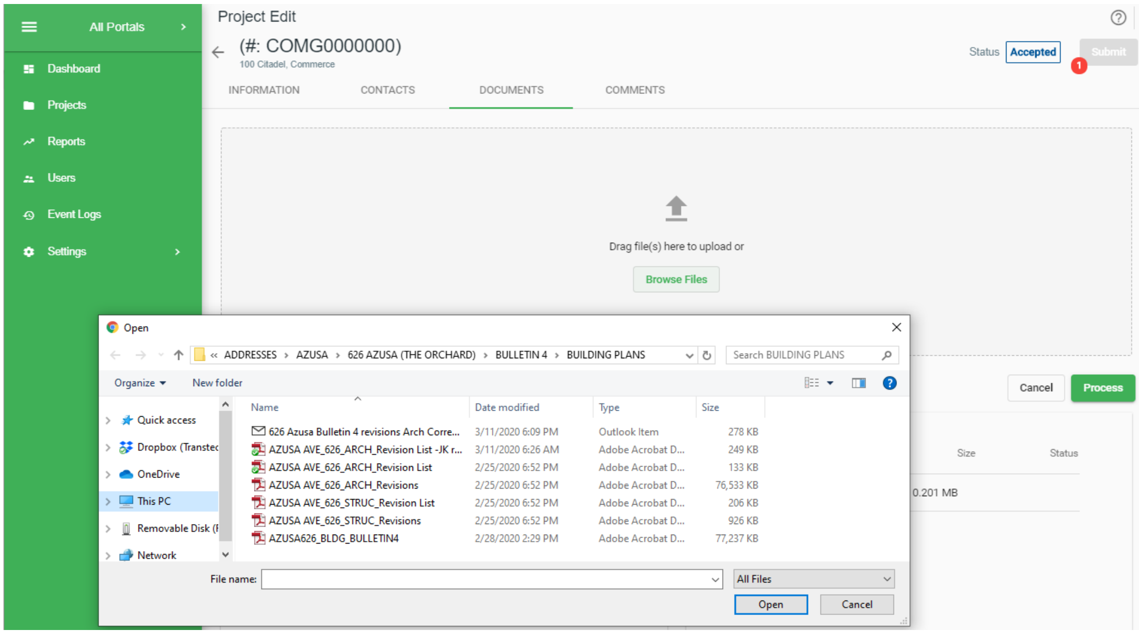


7. To upload a document, hit the “BROWSE FILES” button and add the files you need.

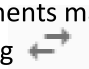
This will bring up a pop-up window to allow you to add the different files that you need for your project.

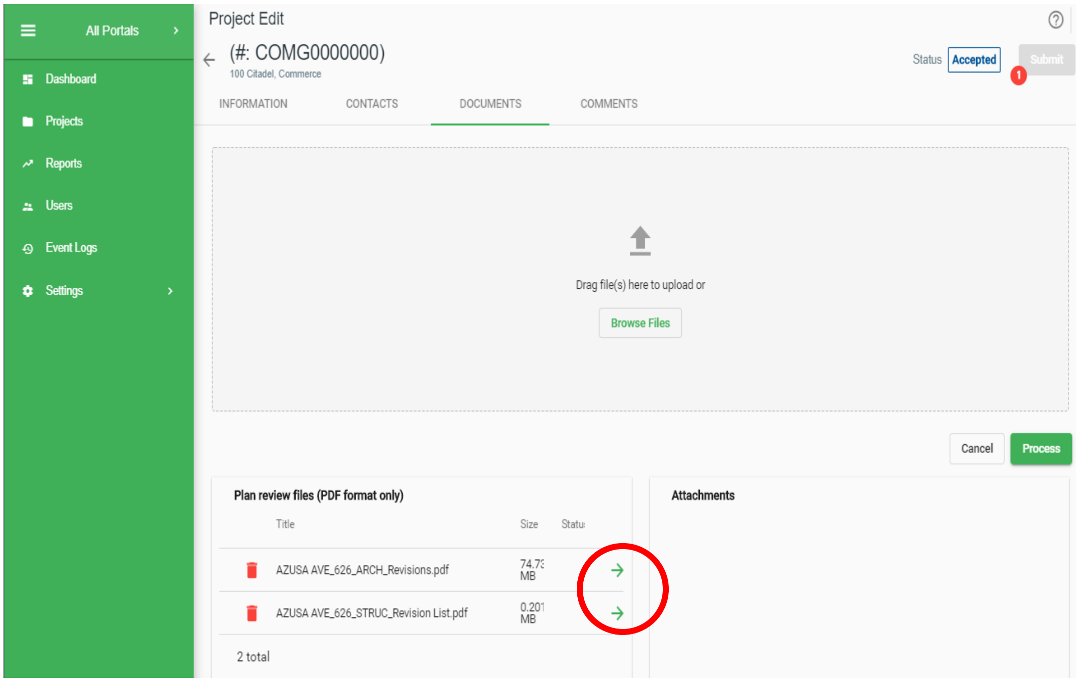
Hit “OPEN” to upload these files.



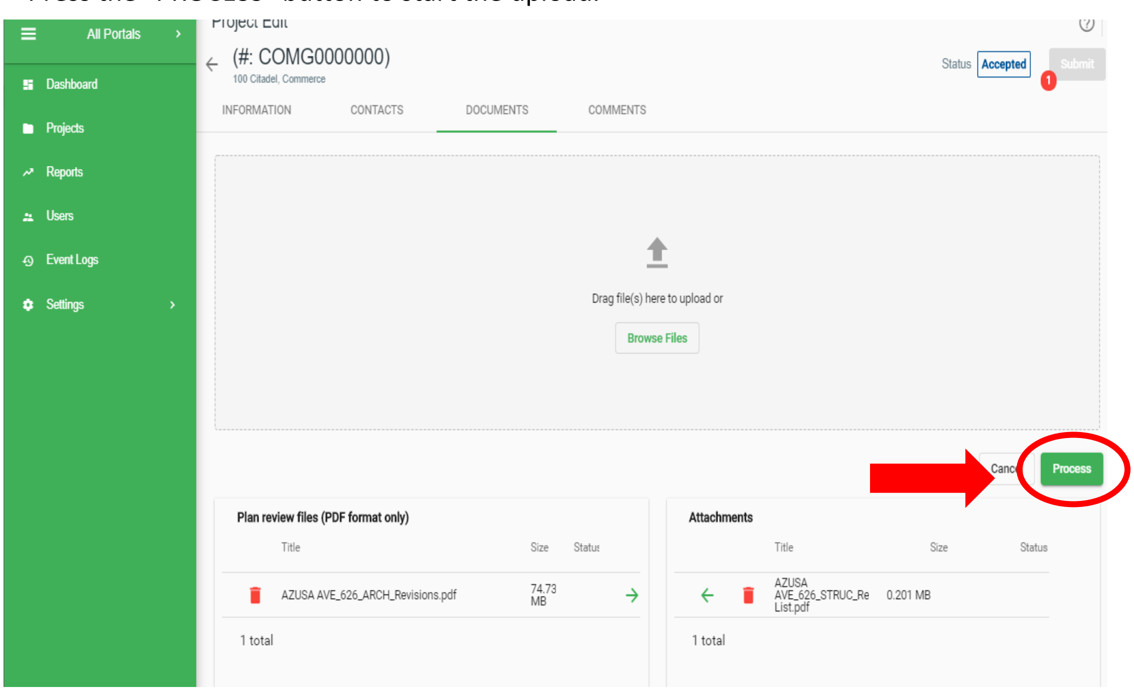
8- Once you have uploaded the documents make sure to verify the following:

- ➢ Only the Plans are in the plan review file section and supporting documents are moved to the attachment section.
- ➢ Plan sheets should not be submitted individually. Each Plan type shall be in a separate file and submitted as separate projects as follows:
  - ✓ **Building Plans**
    Title Sheet
    Architectural sheets
    Structural Sheets
    Energy compliance forms (Title 24)
  - ✓ **Electrical Plans**
  - ✓ **Mechanical Plans**
  - ✓ **Plumbing Plans**

- ➢ Supporting documents may be moved from the plan review file section to the attachments section by pressing  under actions.



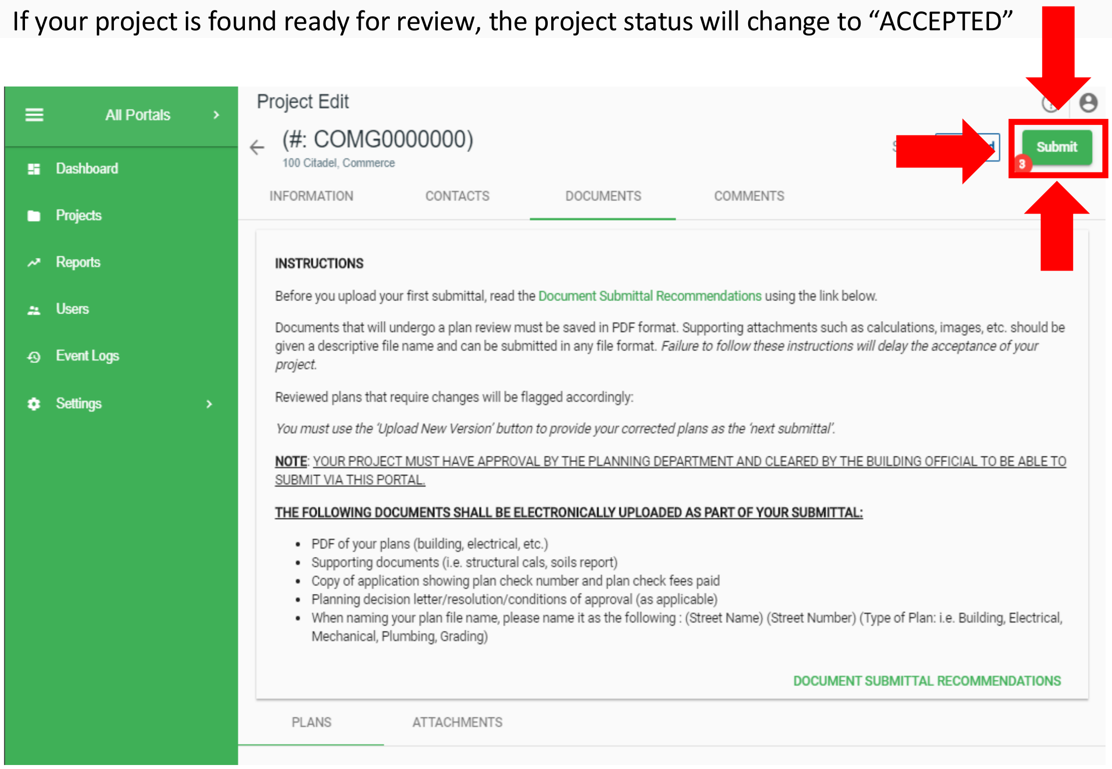
- On the left-hand side, plans should only be in the PLAN REVIEW FILES. This should only contain the plans itself. No applications, calculations, or reports should be on this side.
- Attachments consist of all supporting documents relevant to the project. This can include but not limited to the Application, T24 Calculations, Structural Calculations, Soils Reports, etc.
- Submittals will not be accepted unless only plans are submitted in the plan section and all supporting documents are in the attachment section.
- Press the “PROCESS” button to start the upload.



9- Once all documents have been processed, hit the “SUBMIT” button.

Once submitted, your project status will indicate “PENDING”.

- ✓ Projects can be submitted 24/7, however they will not be reviewed for completeness until the following business day.
- ✓ Please allow 24 hrs. to process prior to placing any inquiries and to avoid causing delays.
- ✓ If your project is missing any necessary documents, you will be notified of the missing items via email.
- ✓ If your project is found ready for review, the project status will change to “ACCEPTED”

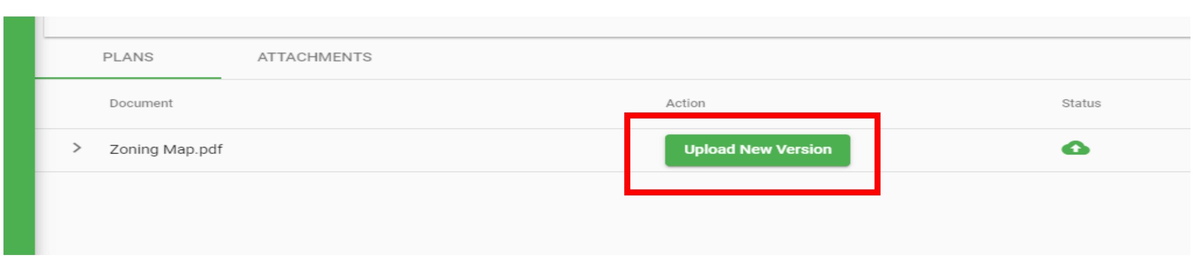


- ➢ Follow up the status of your project on your Dashboard. The most effective way to check the status of your plan check is through this Dashboard
- ➢ Plan Check status inquiries can be made through the comment tab by clicking on 

- ➢ Contact City Permit Counter for all your permitting questions

Resubmitting Plans

When you are ready to resubmit your drawings, **by uploading a new version,** the system will automatically recognize it as a resubmittal. Follow the same directions as you did for uploading the plans and include all necessary documents required and hit submit. In the documents tab select the green box labeled as upload new version. Please note, the revised version of your plans shall have equal or more pages than the previous submittal.



- To upload supporting documents, click to the bottom right arrow “upload new documents”
- Please push the supporting documents to the attachments side by using the arrows next to the document.

Remember to include

- ✓ Correction list with your replies
- ✓ Revised plans
- ✓ Any requested documents during plan check

Error Messages

If you received an error (red triangle) on the plan file, your files may not have met the document submittal requirements.

Please look at our **ELECTRONIC SUBMITTAL UPLOAD REQUIREMENTS** to ensure that your files have met all the necessary requirements and then try again.

If you are still having issues, you will want to submit a support ticket and indicate the issue that you are encountering. Someone from the system’s IT department will contact you. To start a support ticket, click on the question mark at the top righthand corner and fill out the form as to what the issue you are having is.