Digital Plan Room Guide

The Charlotte County Community Development Department partnered with ePermitHub to launch the Digital Plan Room. It is a new electronic document review solution that is seamlessly integrated into the Citizen Access Portal, the county's online permits portal. This solution introduces many new features to optimize the plan review process.

What is the Digital Plan Room?

The Digital Plan Room includes:

- ✓ Strong digital signatory assurance.
- ✓ Simple file uploads and automated versioning at the sheet level.
- ✓ Collaborative issue/condition communication for plan review comments.
- ✓ Seamless user experience within the Citizen Access Portal.
- ✓ Immediate digital signature validation checks upon upload.

Other highlights include:

- ✓ Clients will now receive instant feedback when uploading their documentation whether their documents and plans meet digital signature guidelines.
- ✓ Interactive access to review color coded comment mark-ups (by discipline), issues, and conditions from within the Citizen Access Portal.
- ✓ Submission of any corrections will only require revised sheets to be submitted.
- ✓ Submission of revisions and amendments will only require affected sheets to be submitted.

Uploading Documents for an Initial Submission

The Digital Plan Room begins when a registered user of the Citizen Access Portal completes the application process and pays for a permit.

For permit records requiring a plan submission, the Electronic Documents page in the Citizen Access Portal has been replaced with a Document Acknowledgement section. Plans and supporting documents will now be uploaded after payment has been submitted.

Please check the box acknowledging that plans and all supporting documents will be uploaded after payment and click on "Continue Application".

Review the application and pay the permit fee.

Tip! The Digital Plan Room is designed to function using Chrome. Some features may not work properly using Internet Explorer.

PLAN ROOM ACKNOWLEDGEMENT

* I acknowledge ☑ that I will upload plans, supporting documentation, and attachments after paying for my application.:

Continue Application »

Uploading and Validating Files

1. Upon successful payment, the Receipt/Record Issuance page will display. Click on "Upload Plans and Documents" to upload your plans and supporting documents.

2. Enter a description of the entire package in the Description text box and click "Continue".

3. Drag and drop files or browse to add your files. Select the document type and enter a brief description of the file. Click on Upload and Validate.
Note: Correct document type selection is critical for a successful submission. See "Electronic Submittal Requirements Checklist" for details.

Step 2: Add & Process Files

Browse or drag and drop the desired files to upload. Once all files are added, the **Upload and Validate** button is displayed. Click on it to validate the files and add them to your review package. When all of the desired files are uploaded and validated, click the **Process Files** button to prepare your files for review.

> Note: Please do not combine plans and documents of various types into a single PDF document.

4. If there is an error after uploading the file, please review the error message. A message will appear at the top of the screen and additional information can be found by hovering over the blue "?"

5. Additional details can be found by hovering over the "X" next to the recycle bin icon.

Files

Name	Description	Type	Status	Uploaded By	Uploaded Date	Signature	
HL NOA – Product Approval.pdf	Product Approval	Building Plans	REJECTED	Tina Jones	1/28/2020	⚠	🗑
HL LOT 61-Building Plans.pdf	Building Plans	Building Plans	VALIDATED	Tina Jones	1/28/2020	✓	🗑
HL LOT 61-ECalcs.pdf		Building Plans	REJECTED	Tina Jones	⚠ Document is not signed	⚠	🗑
HL LOT 61-Sewer Disposal & Water Affidavit.pdf		Affidavit – No Cnty or Pub Util	REJECTED	Tina Jones	1/28/2020	⚠	🗑
HL LOT 61-SP ES.pdf		Building Plans	VALIDATED	Tina Jones	1/28/2020	✓	🗑

6. To re-upload the file once the error has been resolved, remove the file containing the error by clicking on the recycle bin.

Files

Name	Description	Type	Status	Uploaded By	Uploaded Date	Signature	
HL NOA - Product Approval.pdf	Product Approval	Building Plans	REJECTED	Tina Jones	1/28/2020	⚠	🗑 Remove
HL LOT 61-Building Plans.pdf	Building Plans	Building Plans	VALIDATED	Tina Jones	1/28/2020	✓	🗑
HL LOT 61-ECalcs.pdf		Building Plans	REJECTED	Tina Jones	1/28/2020	⚠	🗑
HL LOT 61-Sewer Disposal & Water Affidavit.pdf		Affidavit - No Cnty or Pub Util	REJECTED	Tina Jones	1/28/2020	⚠	🗑
HL LOT 61-SP ES.pdf		Building Plans	VALIDATED	Tina Jones	1/28/2020	✓	🗑

7. After removing the rejected files, repeat step 3 to add the corrected and/or additional files to your review package. When all the desired files are uploaded and successfully validated, click the Process Files button to prepare your files for review.

Files

Name	Description	Type	Status	Uploaded By	Uploaded Date	Signature	
HL LOT 61-Building Plans.pdf	Building Plans	Building Plans	VALIDATED	Tina Jones	1/28/2020	✓	🗑
HL LOT 61-SP ES.pdf		Building Plans	VALIDATED	Tina Jones	1/28/2020	✓	🗑
Lot 794 - NOC.pdf		Notice of Commencement	VALIDATED	Tina Jones	1/28/2020		🗑
Lot 794 - Sub List.pdf		Authorized Agent	VALIDATED	Tina Jones	1/28/2020		🗑

Note: Do not combine plans and documents of various types into a single PDF document.

File Processing

1. The Process files step could take time to complete. The system is separating the plan sheets and optimizing them for review. It is not necessary to wait for the files to finish processing. You can close the screen and come back to it once the processing is complete. You will receive an email with a link alerting you that the processing step has been completed.
Note: Your plans have not yet been submitted. Continue to the next step to complete and submit your plans

File processing ✕

Your files are currently being processed into individual sheets and prepared for web access. This process can take several minutes to complete. You can navigate away from this page and return if desired.

We will notify you via email when the process is completed and provide a link for you to return and complete the remaining steps to finalize your review package.

2. If you choose to wait for the processing to finish, the file processing screen will close once completed. Click on "Continue" to start the Sheet Verification step.

Files

Name	Description	Type	Status	Uploaded By	Uploaded Date	Signature	
SUBSHEET.pdf		Subcontractor Worksheet	PROCESSED	Tina Jones	2/4/2020		🗑
NOC.pdf		Notice of Commencement	PROCESSED	Tina Jones	2/4/2020		🗑
SAFETY ACT.pdf		Pool Safety Act Affidavit	PROCESSED	Tina Jones	2/4/2020		🗑
CONSTRUCTION PLANS - STRUCTURAL AND MEP.pdf		Building Plans	PROCESSED	Tina Jones	2/4/2020		🗑

Your files have been processed, you can proceed now to verify your sheets.

Continue »

Sheet Verification

1. If you opted to receive an email instead of waiting, the link will take you directly to the Sheet Verification page.
2. Review the sheet numbers assigned to each sheet within the plan set.
3. Correct any mislabeled sheets by typing in the sheet label field.
4. You may choose to "Save and resume later" if necessary.
5. Once complete, click on "Continue" and "Finish" to complete the upload.

P002

PLU
SCALE

P-002

Page 10 from CONSTRUCTION PLANS - STRUCTURAL AND MEP.pdf
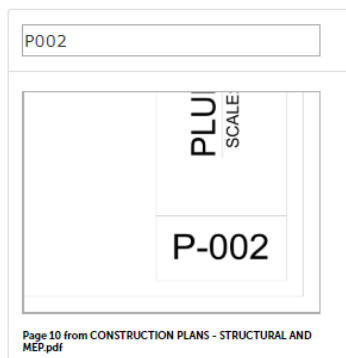
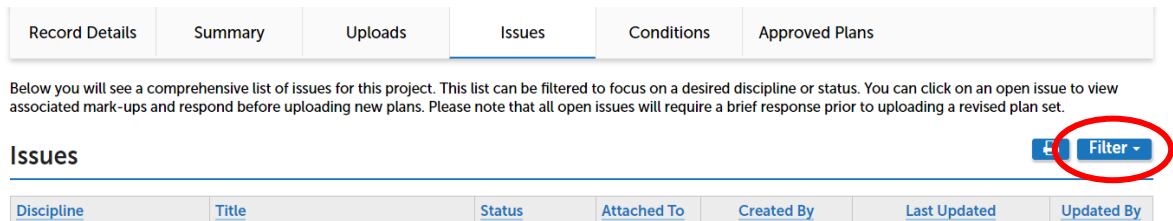Continue   Save and resume later

6. When the package is processed, you will receive a confirmation screen and an email. If you do not receive the email, please check your spam folder.

Viewing and Responding to Issues

Issues are code-related concerns that must be addressed by correcting the appropriate drawings (Revise and Resubmit comments). Please note that Issues will not be viewable until the cycle is completed with all the required reviews done. Upon completion of the cycle, you will receive an email alerting you of the plan review status.

To view the Issues on the plan, please click on the link provided in the corrections required email or follow the steps below:

1. Login to your Citizen Access Portal account.
2. Go to "Search for Permits/Records" and select your permit number.
3. Click on the Plan Room and select the Issues tab. The comprehensive list of issues identified will be listed. Click on an individual issue to view the specific items.
4. Click on the "Filter" box on the the right side and a drop-down list will display with the filter options for both Status and Discipline. You can select more than one option for each drop-down.
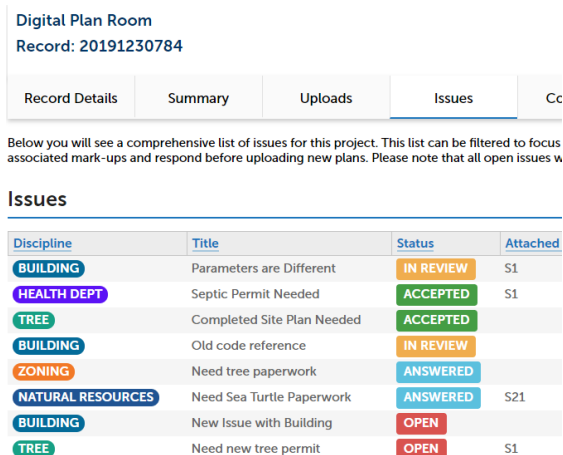

5. Click on the individual issues to view the Issue and respond with the correct action.

6. The plan sheet will open with the mark-up and issue displayed. Click on the magnifying glass to automatically zoom into the markup.
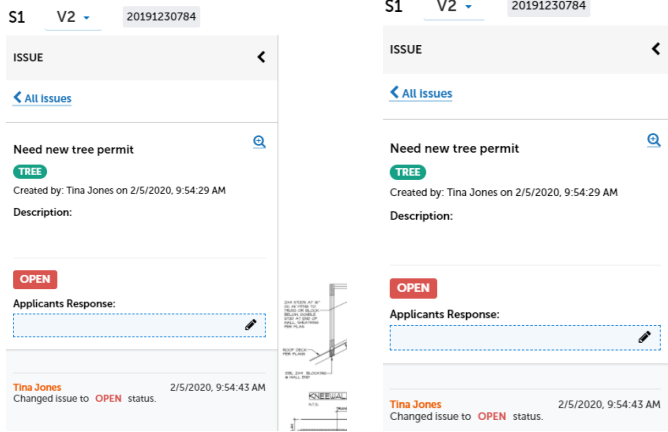
7. To respond to the mark-up, click on the "Applicants Response" text box.

8. Provide a detailed description explaining what corrective measures were taken to resolve the issue.

9. To return to the Plan Room issues list, click on the "X" at the top-right of the plan sheet.
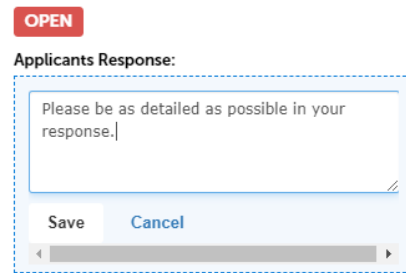
Printing or Saving the Issues List

To save the Issues list in order for email or printing:

1. Click on the Issues tab, then click the printer icon.

Below you will see a comprehensive list of issues for this project. This list can be filtered to focus on a desired discipline or status. You can click on an open issue to view associated mark-ups and respond before uploading new plans. Please note that all open issues will require a brief response prior to uploading a revised plan set.

Issues

Discipline	Title	Status	Attached To	Created By	Last Updated	Updated By
BUILDING	Parameters are Different	IN REVIEW	S1	Michelle Oquendo	12/31/2019, 2:48:58 PM	Tina Jones

2. The Issues list will open and can then be printed or saved for distribution to anyone not having direct access to the Issues on the record.

Issues for record 20191230784
Job Address: 23193 MCCANDLESS AVE PORT CHARLOTTE, FL 33980
Job Description: TEST CASE #ACA_0 (Third Test)

Discipline	Status	Details	Attached To	Created By	Last Updated By
		Parameters are Different			
Building	In Review	The Design Parameters noted on indicate a Design Wind Speed of 150 mph. Other documents, including the Data Summary Sheet and Truss Drawings indicate a Design Wind Speed of 160 mph	S1	Michelle Oquendo	Tina Jones
		Last comment from reviewer: Please send info above.			

Uploading Corrected Sheets

You will **not** be able to upload corrected sheets **until you have responded to all Issues**. The status will show "Answered" once the response has been completed. If your issue resolution only requires a comment, please add the comment to the issue response and re-upload the impacted sheet.

Click on Uploads to upload the corrected sheets. It is not necessary to resubmit the entire plan set. Only the updated or added sheets must be uploaded. Select Resume to upload the sheets.

Note: It is imperative that resubmitted sheets have the exact same naming convention as the original submittal. Example: Sheet A1 must be named A1 on the resubmittal – not A-1, A 1, etc.)