



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 <u>Citizen Access Portal</u>, 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.

	uccessfully submitted. it has been approved and you can begin work I retain a copy for your records.
Thank you for using our online services. Your Permit Number is 202001000	20
Tour Permit Number is 202001000	
You will need this number to check the post it in the work area.	status of your application or to schedule/check results of inspections. Please print a copy of your application and
Print/View Record	Print/View Receipt
To upload your digital plans, specific	ations, or other supporting documents for review, please click below:
Upload Plans and Documents	

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

Digital Plan Roor Record: 2020010							Need help
Record Details	Summary	Uploads	Issues	Conditions	Approved Plan	S	
1 Information		2 File Processing		3 Sheet Versioning		4 Review	
Step 1: Informa	ation						

Review packages are a set of plans and documents submitted for a review cycle.

General	
Review Plan Cycle # 1	
Description: ⑦ Enter a description of the plans or documents you are uploading	
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.

	1			
	Drag and dr		äles here	
	-	opi or	lies liele	
	Bro	wse		
HL NOA - Product Approval.pdf	Building Plans	•	Product Approval	
HL LOT 61-Building Plans.pdf	Building Plans	•	Building Plans	
HL LOT 61-ECalcs.pdf	Building Plans	•	Description	2
HL LOT 61-Sewer Disposal & Water Affid	Affidavit - No Cnty or Pub Ut	il 🔻	Description	3
HL LOT 61-SP ES.pdf	Building Plans	•	Description	

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 "?"

\otimes	An error has occurred. One or more files have been rejected. You cannot continue with the review package if there are rejected files. Please delete all rejected files and upload them again when the problems are resolved. Once the status of all the files is not rejected, you can continue with the preparation of your review package.
	HL NOA - Product Approval.pdf was rejected. File is not signed. HL LOT 61-ECalcs.pdf was rejected. File is not signed. HL LOT 61-Sewer Disposal & Water Affidavit.pdf was rejected. File is not signed.

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

Files							
Name	Description	Туре	Status	Uploaded By	Uploaded Date	Signature	
HL NOA - Product Approval.pdf	Product Approval	Building Plans	REJECTED	Tina Jones	1/28/2020		圓
HL LOT 61-Building Plans.pdf	Building Plans	Building Plans	VALIDATED	Tina Jones	1/28/2020	\bigcirc	圓
HL LOT 61-ECalcs.pdf		Building Plans	REJECTED	Tina Jones	Document is not signed	ed 🚺	匬
HL LOT 61-Sewer Disposal & Water Affidavit.pdf		Affidavit - No Cnty or Pub Util	REJECTED	Tina Jones	1/28/2020	0	圓
HL LOT 61-SP ES.pdf		Building Plans	VALIDATED	Tina Jones	1/28/2020	\oslash	Û

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

Description	Туре	Status	Uploaded By	Uploaded Date	Signature	
Product Approval	Building Plans	REJECTED	Tina Jones	1/28/2020		匬
Building Plans	Building Plans	VALIDATED	Tina Jones	1/28/2020	\oslash	Ŵ
	Building Plans	REJECTED	Tina Jones	1/28/2020		Ŵ
	Affidavit - No Cnty or Pub Util	REJECTED	Tina Jones	1/28/2020	0	匬
	Building Plans	VALIDATED	Tina Jones	1/28/2020	\oslash	圓
	Product Approval	Product Approval Building Plans Building Plans Building Plans Building Plans Building Plans Affidavit - No Cnty or Pub Util Duilding Plans	Product Approval Building Plans REJECTED Building Plans Building Plans VALIDATED Building Plans Building Plans REJECTED Affidavit - No Cnty or Pub Util REJECTED	Product Approval Building Plans REJECTED Tina Jones Building Plans VALIDATED Tina Jones Building Plans REJECTED Tina Jones Affidavit - No Cnty or Pub Util REJECTED Tina Jones	Description Type Status Uploaded By Date Product Approval Building Plans REJECTED Tina Jones 1/28/2020 Building Plans VALIDATED Tina Jones 1/28/2020 Building Plans REJECTED Tina Jones 1/28/2020 Affidavit - No Cnty or Pub Util REJECTED Tina Jones 1/28/2020	Description Type Status Optoaded By Date Signature Product Approval Building Plans REJECTED Tina Jones 1/28/2020 () Building Plans VALIDATED Tina Jones 1/28/2020 () Building Plans REJECTED Tina Jones 1/28/2020 () Affidavit - No Cnty or Pub Util REJECTED Tina Jones 1/28/2020 ()

 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	Туре	Status	Uploaded By	Uploaded Date	Signature	
HL LOT 61-Building Plans.pdf	Building Plans	Building Plans	VALIDATED	Tina Jones	1/28/2020	\oslash	前
HL LOT 61-SP ES.pdf		Building Plans	VALIDATED	Tina Jones	1/28/2020	\oslash	圃
Lot 794 - NOC.pdf		Notice of Commencement	VALIDATED	Tina Jones	1/28/2020		匬
Lot 794 - Sub List.pdf		Authorized Agent	VALIDATED	Tina Jones	1/28/2020		匬

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

File Processing

 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 severa minutes to complete. You can navigate away from this page and return if desired. We will notify you via <i>email</i> when the process is completed and provide a link for you to return and complete the	al
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.

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	
NOC.pdf Commencement PROCESSED Tina Jones 2/4/2020	Ŵ
SAFETY ACT add	Ŵ
Processed This Johes 2/4/2020	匬
CONSTRUCTION PLANS - STRUCTURAL AND Building Plans PROCESSED Tina Jones 2/4/2020	匬

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.



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 <u>Citizen Access Portal</u> 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.

Record Details	Summary	Uploads	Issues	Conditions	Approved Pla	ans			
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 E Filter -									
Discipline	Title		Status	Attached To	Created By	Last Updated	Updated By		

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

Digital Plan Roor Record: 2019123				
Record Details	Summary	Uploads	Issues	Cc
Below you will see a co associated mark-ups ar ISSUES	d respond before up		ase note that all o	pen issues w
Discipline	Title		Status	Attached
BUILDING	Parameters	are Different	IN REVIEW	S1
HEALTH DEPT	Septic Perm	it Needed	ACCEPTED	S1
TREE	Completed	Site Plan Needed	ACCEPTED	
BUILDING	Old code re	ference	IN REVIEW	
ZONING	Need tree p	aperwork	ANSWERED	
NATURAL RESOURC	S Need Sea Tu	Irtle Paperwork	ANSWERED	S21
BUILDING	New Issue w	vith Building	OPEN	
TREE	Need new tr	ree permit	OPEN	S1

6. The plan sheet will open with the mark-up and issue displayed. Click on the magnifying glass to automatically zoom into the markup.

S1 V2 - 20191230784		S1 V2 -	20191230784	
ISSUE	:	ISSUE	<	
▲ All Issues		All issues		
Need new tree permit	L I	Need new tree per	rmit Q	
TREE Created by: Tina Jones on 2/5/2020, 9:54:29 AM		Created by: Tina Jones	on 2/5/2020, 9:54:29 AM	1000
Description:		Description:		
OPEN Applicants Response:	Del FUES AT B'	OPEN		Libro Tan Congression Congress
ruppicants response.	North State	Applicants Response	: ⁄⁄	PATER AND
Tina Jones 2/5/2020, 9:54:43 AM Changed issue to OPEN status.	ENERUAL NTA 200	Tina Jones Changed issue to OPE	2/5/2020, 9:54:43 AM	AND AND ADDRESS AN

- 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.

	hensive list of issues for this project. pond before uploading new plans. Pl					
lssues						🔒 Filter 🔹
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.

Job Ad	dress: 231	20191230784 93 MCCANDLESS AVE PORT CHARLOTTE, FL 33980 FEST CASE #ACA_0 (Third Test)			₽
Discipline	Status	Denils	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.			

A	pplicants I	Response:	
	Please b respons	e as detailed as possible in your e.	
	Save	Cancel	
	•		ł

OPEN

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.

Digital Plan Record: 202	ı Room 200200048					(🕐 Need help
Record Deta	ails Summary	Uploads	Issues	Condition	ns Approve	ed Plans	
						status. You can click on an oper prior to uploading a revised pla	
sociated mark	-ups and respond before up		ease note that all ope	en issues will requi	ire a brief response	prior to uploading a revised pla	an set.
sociated mark							an set.
sociated mark	-ups and respond before up	oloading new plans. Ple	ease note that all ope	en issues will requi	ire a brief response	prior to uploading a revised pla	an set.

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.)