E-Plan User Guide

Electronic Plan Review System for Building Permit Applications
E-PLAN APPLICANT USER GUIDE

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E-Plan Applicant User Guide

1. Introduction

Mayor Emanuel has made streamlining the building permit process a priority for homeowners, businesses and design professionals. The Mayor knows that building permits are more than just ensuring that buildings are built safe and sound. Behind every building permit is a homeowner’s dream, a new or expanded business, an enhancement to the community and the economy, and the creation of jobs. Therefore, reducing the time to obtain a building permit is paramount. A key element in reducing the time to permit is replacing the old paper-based sequential plan review process with an electronic-based simultaneous plan review system (E-Plan).

We are pleased to offer a premier electronic plan review system – Avolve’s ProjectDox® - at the City. ProjectDox® is the most widely utilized electronic plan review system and is currently in use in over 60 municipalities, large and small, throughout the United States.

E-Plan allows for several cost and time saving efficiencies including:

• Submission of plans electronically from the convenience of your office, 24 hours 7 days a week
• Simultaneous review of the plans by all professional and trade disciplines
• City reviewer mark-ups are made directly on the plans to provide direction and clarity as to any items which require correction
• Re-submission of corrected plans electronically from the convenience of your office or home
• Real-time return of your approved stamped plans once the fees are paid

Reading and following these instructions will make the electronic plan distribution and review process more efficient for every participant using this permit process. You will find this User Guide, as well as other written materials and video links available on our website at www.cityofchicago.org/city/en/depts/bldgs.html, to be beneficial as you learn to navigate our E-Plan system. As always the Department of Buildings welcomes and values your feedback on the system and our service performance.

2. E-Plan Basics

What is E-Plan?

E-Plan is a web-based electronic plan and document workflow solution that allows citizens and city staff to initiate and complete the building permit plan submission, the plan review and the plan approval process online as opposed to a manual in-person and paper-based process.
How Does E-Plan Work?

For a building permit application that requires drawings, the applicant (architect, engineer, or owner's agent) starts the permit application via the dynamic web portal at cityofchicago.org/buildings (click “Getting Started Online” button). E-Plan will then invite the applicant’s architect and/or agent by email to upload the electronic drawings and all relevant schedules and documents. City plan review staff will now have simultaneous access to review the plans and note any markups/corrections directly on the plans to afford absolute clarity. The applicant is then notified of the markup/correction and is granted access to submit the updated plans electronically to the City. Once the plans are compliant with the Building Code, all permit fees are paid, the applicant can download the approved stamped plans.

What Technology Do I Need to Use E-Plan?

As a web-based system, all that E-Plan requires is an Internet Explorer Version 11 running on a Windows operating system. While other browsers and operating systems can be used for working many features in E-Plan, users working with all other browsers can view and make limited markups using the HTML viewer. Internet Explorer browsers are the best way to view markups in the E-Plan system. E-Plan also utilizes the same browser security best practices deployed by on-line banking sites. (Please refer to E-Plan – Frequently Asked Questions on the DOB website for additional E-Plan Technical Support Information).

3. Drawing Submittal

All permit related documents are uploaded into the E-Plan system. This allows the DOB plan review team and the customer team to have access to all documents simultaneously. DOB has developed a specific process (and file formats) for uploading documents into E-Plan Review which is outlined below.

The applicant begins by applying for a permit via the dynamic web portal on the Department of Buildings website. A permit application number is issued to the customer through our Hansen system at the time of application. Once the applicant completes the permit application, the “add to cart” button will appear prompting the applicant to pay the $75.00 zoning fee and the $300.00 permit fee deposit. The City reviews the applicant’s submission (generally within 1-2 business days) and send an email to the Architect of Record or Authorized Agent (applicant) with instructions for opening the E-Plan Review website and establishing a User Login (email address) as indicated in charts on the following page.
Welcome to the City of Chicago electronic plan review system. This project invitation has been sent to you in response to your recent project request. A project has been created to allow you to electronically upload your CAD drawings for plan check review. To access your new project, follow these instructions below:

1. Click the Project Access link below
2. Enter your User Login and Temporary Password
3. Click on the Project link on the "My Projects" page
4. Click to expand the "Drawing Submit" folder
5. Click the correct sub-folder to upload the desired drawings/documents
6. Click the "Upload Files" button and follow the instructions to upload your CAD drawings
7. Your drawings have now been submitted for plan check review

Click here for additional instruction on uploading and file specification

CAD Drawing files supported are: PDF, DWF

<table>
<thead>
<tr>
<th>User Login</th>
<th>EBC0IFS</th>
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<tbody>
<tr>
<td>Temporary Password</td>
<td>EBC0IFS</td>
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<tr>
<td>Project Permit #</td>
<td>Developer Services</td>
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<td>Project Administrator</td>
<td><a href="mailto:DevServices@cityofchicago.org">DevServices@cityofchicago.org</a></td>
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<td>Project Administrator Email</td>
<td><a href="mailto:DevServices@cityofchicago.org">DevServices@cityofchicago.org</a></td>
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</table>

Contact the Project Administrator if you have questions regarding this project. Please do not reply to this email.
Applicants shall assemble all necessary permit documents related to their project, including drawing files, and upload individual files into their appropriate discipline folder.

**Upload Files**

The E-Plan file structure for file submissions is shown below (for Developer Services project reviews and Standard Plan Review). Please upload the applications and drawings into their appropriate discipline subfolder(s).

**Select the appropriate folder to upload your files.** Please note that Folders must be expanded at the (+) to access the subfolders contained within.

Click the Upload Files button (next to View Folders). You may need to grant permission to install the ActiveX Upload Control. The best practice is to have administrative rights to the machine you are working on. Consult your IT support if you are not sure. If you have proper permissions, E-Plan will install the ActiveX controls automatically on your machine. (Please refer to E-Plan – Frequently Asked Questions on the DOB website for additional E-Plan Technical Support Information).

In the Select Files for Uploading dialog, browse and select the files you want to upload to the current folder. You can select multiple files using your Shift or Ctrl keys.

**PLEASE NOTE:** The maximum size FILE NAME is limited to 65 CHARACTERS.

Files can be uploaded into E-Plan by selecting the Projects button on the main page, and then selecting the Folder in the left-most column. Once a Folder is selected, you can select the “Upload Files” button, and Browse to identify the target files on your computer you wish to upload.

1. When you click on a folder, there will be an “Upload Files” button to select.
2. Browse your directory to select drawing files to upload. Select file and click “Open”.
3. After you have selected your files, click “Upload Now” button.
File Type Standards

Only searchable PDF files are accepted for calculations, reports and other supporting documentation (non-drawing files and reference drawings only).

Design Web Format (DWF) and Portable Document Format (PDF) files are the only acceptable drawing file form for the E-Plan.

ProjectDox®: Permit Drawings - Naming Conventions & File Formats

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<tr>
<th>Sheet No.</th>
<th>File Submission Reference Folder</th>
<th>File Format</th>
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<td>Test DWF Drawings</td>
<td>DWF</td>
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<td>1</td>
<td>Reference Drawings</td>
<td>DWF</td>
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<td>2</td>
<td>Part II Drawings</td>
<td>DWF</td>
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<td>3</td>
<td>OUC Drawings</td>
<td>DWF</td>
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<td>4</td>
<td>Cover Sheet</td>
<td>PDF</td>
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<td>A</td>
<td>Architectural</td>
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<td>B</td>
<td>Geotechnical</td>
<td>DWF</td>
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<tr>
<td>C</td>
<td>Civil</td>
<td>DWF</td>
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<td>Civil - Stormwater Management</td>
<td>DWF or PDF</td>
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<td>Electrical</td>
<td>DWF</td>
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<td>Fire Prevention</td>
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<td>M</td>
<td>Mechanical</td>
<td>DWF</td>
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<td>MS</td>
<td>Mechanical - Mechanical Schedules</td>
<td>DWF or PDF</td>
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<td>MR</td>
<td>Mechanical - Refrigeration Schedules</td>
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<td>Plumbing</td>
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<td>Plumbing Equipment Schedules</td>
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<td>SC</td>
<td>Structural Calculations</td>
<td>DWF or PDF</td>
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<td>SU</td>
<td>Surveys</td>
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<td>Telecommunications</td>
<td>DWF</td>
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<td>Z</td>
<td>Contractor Shop Drawings</td>
<td>DWF</td>
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DWF Files must be 2D DWF file print ready, i.e. setup properly for printing with title block, no extra data outside the print page area, etc. The DWF must be saved as Auto CAD version 10 or lower format. ProjectDox does not support 3D DWF files.

Border Standards

A 3” X 3” area must be reserved at the top right corner of ALL drawings for the DOB APPROVAL STAMPS. Please leave the top right corner completely blank on all drawings (with exception of the border). This is applicable to all sheet sizes.

Graphic Scale

- Each sheet must have a typical graphic scale as shown in the image to the right.
- When more than one scale is used on a sheet, an independent graphic scale must accompany the applicable detail.
- All plans must be drawn to scale.
Drawing Format

DOB requires that Applicants provide their drawing files in the **DWF or PDF file format**. AutoCAD users may create DWFs using the DWF6 ePlot.pc3 Plot Settings Configuration file. Users of other design software may use the free Autodesk DWF Writer available from [www.autodesk.com](http://www.autodesk.com).

**NOTE:** Any drawing files that are submitted in alternative formats (e.g., DWGs, etc.) will be returned to the customer. The review process cannot begin until the drawing files are submitted in the requested (DWF or PDF) format.

All drawing files must meet the following standards:

- **Single sheet per file.**
- **File Name:**
  - Alphabetic and non-numerical character, including but not limited to the following cannot be used:
    - ! @ # $ % ^ & * () _ \[ ] { } \| = + : ; " ' < , > ? /
  - Some exceptions:
    - Developer Services file names allow hyphens (-)
      - *Example:* A.1-1 First Floor Plan D12345-01.dwf
    - Any file name allows “periods” (.)
      - *Example:* A.1-1 First Floor Plan 10012345.pdf
  - Do not use underline or underscore in the file name.
  - File name = Sheet Number, Sheet Name, DOB Project Number or Application Number
    - *Example:* A.1-1 First Floor Plan 10012345.pdf
    - *Example:* A.1-1 First Floor Plan D12345-01.pdf
  - Use “reference” in the file name if drawing is not for permit
    - *Example:* A.1-1 First Floor Plan 10012345 REFERENCE.pdf
    - *Example:* A.1-1 First Floor Plan D12345-01 REFERENCE.pdf
  - Files must be monochrome with white background (print-ready)
  - Units and scale must be properly set (and included on every drawing sheet)
  - Professional of record electronic stamp must be on every drawing (if not for reference)
  - **DO NOT** submit rendering for code review.
  - **DO NOT** submit drawings in portrait page orientation. All drawings must be submitted in LANDSCAPE PAGE ORIENTATION.
  - Use EXACT SAME FILE NAME as original file when uploading revised drawings to avoid creating duplicate drawing files. If duplicate is created, please contact your Project Manager or Project Administrator for assistance.

Please note that improperly named files may result in the submissions being rejected and being returned to the applicant for proper renaming.
**Permit Application Files**

The “Naming Conventions” table below describes DOB file naming procedures for both permit application documents and drawings. The Permit document formats should be PDF files with names that correspond to the application document itself. For example, if there is a MOPD application, it should be completed with the applicable information, scanned into a PDF file that references the MOPD application.

- Building Permit Application (DXXXX-XX or 100XXXXX).pdf
- Commercial Compliance Form (DXXXX-XX or 100XXXXX).pdf
- MOPD Project Data form (DXXXX-XX or 100XXXXX).pdf

**Folder Structure**

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**Developer Services Folder Structure**

- **Main Contact:**
- **D15129-01 8 E HURON STREET**
  - **Applicant Working Folder**
  - **Green Review**
  - **Plan Review Bids**
  - **Current Applications** (9 files - 0 New)
  - **Drawing Submittal**
    - B-Test DWFs
    - 1-Reference Drawings (04 files - 1 New)
    - 2-Part II Drawings
    - 3-QUC Drawings
    - 4-Cover Sheet (1 file - 0 New)
    - A-Architectural (2 files - 0 New)
    - B-Geotechnical
    - C-Civil (11 files - 0 New)
    - E-Electrical (2 files - 0 New)
    - F-Fire Prevention
    - L-Landscape (7 files - 0 New)
    - M-Mechanical (8 files - 0 New)
    - P-Plumbing (4 files - 0 New)
    - Q-Equipment
    - S-Structural (10 files - 0 New)
    - S-Surveys (1 file - 0 New)
    - T-Telecommunication
    - Z-Contractor Shop Drawings
  - **Plan Reviewer Documents** (2 files - 2 New)
  - **Released Drawings and Documents**

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**Standard Plan Folder Structure**

- **Main Contact:**
- **100630495 253 W CERMAK RD**
  - **Applicant Working Folder**
  - **Drawing Submittals**
    - **Architectural** (1 file - 1 New)
    - **Civil**
    - **Electrical** (1 file - 1 New)
    - **Fire Prevention**
    - **Food Service**
    - **Geotech**
    - **Landscape**
    - **Mechanical** (1 file - 1 New)
    - **Part II Drawings**
    - **Plumbing** (1 file - 1 New)
    - **Reference Drawings**
    - **Structural**
    - **Surveys**
    - **Document Submittals** (9 files - 9 New)
    - **Supplemental Plan Reviewer Documents**
    - **Certified Correction Documents**
    - **Released Drawings and Documents**
Applicant Working folder – Permit drawings and documents are not to be uploaded to this folder for permit submission. It should only be used to upload missing documents as directed by your PM or PA. Drawings submitted for review in this folder will not be reviewed.

Green Review folder (Green Permit Program Participants ONLY) - Preliminary Green Permit Program review files shall be uploaded to the Green Review Folder for initial review of eligibility requirements.

Plan Review Bid folder (Developer Service Projects ONLY) – Preliminary drawings (75% complete) shall be uploaded to this folder for BID purposes only. Drawings uploaded to this folder are not reviewed for plan review.

Drawings Submittal folder - All drawing files (dwf or pdf) for permit plan review shall be uploaded to the Drawing Submittal folder within the applicable sub-folder (i.e. 1-Reference - reference drawings, A-Architectural - architectural drawing sheets, S-Structural - structural drawing sheets, etc.) for each project. All permit application PDF forms and documents (any non-drawing PDF files, i.e. building permit applications, electrical permit applications, MOPD forms, etc.) must be uploaded into the Document Submittals folder within the applicable subfolders for each project.

Plan Reviewer Documents - This folder is utilized for additional comments issued by the plan reviewers.

Certified Correction Documents - (Eligible Projects Only) – Certified Correction documents addressing comments issued by the plan examiners shall be uploaded to the Certified Correction Documents folder.

Released Drawing folder - contains the City of Chicago Department of Buildings stamped and approved permit drawings. This folder will not become visible to the applicant until permit fees have been paid by the applicant.

Upload Verification

Once files are uploaded to the folder(s), the folder list is replaced by thumbnail images of each file contained in the folder. Under each thumbnail, the file name, author, date and any relevant file icons display.

Note: All thumbnails must publish and be visible prior to submittal to DOB. Please do not submit your project with thumbnails that do not display properly, show a caution sign, or continue to display processing, as these are not visible to DOB plan review staff. Try uploading the file again, and if the problem continues, you may eplan@cityofchicago.org for additional assistance.

All Applicants will receive an Upload Confirmation Task. Select the “Upload Confirmation” hyperlink. A new window E-form (as shown below) will open.
Upload Confirmation Task

Requested Review Type - You must select the review types that are required for your permit review. The types are found under the drop down menu. The default is Zoning and Building. However, there is **zoning only** if the project is not ready for building submittal and **building only** if zoning approval has already been obtained.

Self-Certification - Yes must be selected to use this process. If the project is self-cert and yes is not selected, the project will be routed through the standard plan review process.

Invite Additional – This option is available if you would like to allow view access by your customers and your review team. You must enter the first name, last name, and email address, select **INVITE**. This step must be repeated for each person that you would like to have view access.

Milestone Notifications – You must select the check box to turn on the Applicant to Subscription to receive email notifications at each major milestone. Upon selection the button will display green to show that this option has been enabled. This feature is optional and available on a per project basis.

To formally submit your application and drawings to DOB, “Upload Complete” must be selected. An email confirmation stating “Thank you for your submittal” is sent immediately and serves as confirmation that your submission has been accepted.
4. Prescreen Review

Prescreen Review is a cursory review of your uploaded documents in preparation for formal review. This may be performed by the Project Manager or Project Administrator. The Project Manager or Project Administrator will begin the formal review stage of the permit application process after confirming the submittal documents have met DOB standards. Failure to meet DOB submittal requirements will result in a denial of your application. Upon denial, you will receive a “Correction Complete” Task invitation email. Accept the Task and address all comments issued regarding incomplete documentation. After you have addressed the comments you must “Complete” the Task for resubmittal to DOB. Formal plan reviews will NOT begin until a complete submittal is verified by the Project Manager or Project Administrator.

5. Security Timeout

Due to security concerns, you will be automatically logged out of the system after 90 minutes of inactivity. To resume your work in E-Plan, click any button on the screen and your ProjectDox© login page will automatically load.

6. Drawing Resubmittal

If corrections are requested for your drawings, follow the steps below:

You will receive an e-mail notification from the Project Administrator or Project Manager requesting corrected/revised documents.

Click the task link “Applicant Resubmit” in the e-mail to access the corrections requested information (see illustration).
Your Corrections Package will consist of the following:

- Applicant Resubmit E-form
- Changemark(s) with markup(s) on the plan drawing file
- Corrections Report, which is a summary of all markups and requested corrections

Log in to E-Plan. The “Permit Resubmit Request” e-form will open. You may accept the task, save and close, but do not complete the task until all revised drawings and documents have been uploaded.

The e-form has four sections that provide you with correction package information:

1. Review Information
2. Changemarks (markups issued by the reviewers, select blue hyperlink to access changemarks/markups)
3. Department Review (status and notes)
4. Task Instructions
In the Department Review section, the department requesting the corrections is displayed. If there are markups attached, you will see the markup links in the comments/markup section as shown below.

Click on the “Save and Close” button to exit the e-form.
How to View Markups/Changemarks

There are two ways to view markups in E-Plan.

1. Prior to clicking the “Save and Close” button as directive above, markups can be accessed by the hyperlink under the “Changemarks” section (2) of the e-form.

2. After clicking the “Save and Close” button, the e-form will close and the projects page in E-Plan will be viewable (illustration below).

3. There are two sections on the projects page. The top section (1) displays the list of active projects accessible under your username. The bottom section (2), displays all active task assignments. To access the project, select the project name hyperlink. Upon selection, you will be directed to the project (illustration below).
Drawings with markups issued by the reviewer will display the changemark symbol (identified by red pen with exclamation point). To access the markup click the changemark symbol.

A changemark window will open (illustrated on the left). Check the View box and select the “View/Edit” button to view the selected markup.

The text associated with each changemark will display in the panel’s right-hand portion of the page and the markups (illustrated by a cloud and/or notepad icon) will automatically appear in the viewer at the author’s original magnification level. You can progress sequentially through the changemarks by using the “” (Previous) and “” (Next) buttons.
Upload Corrections

Log-in to E-Plan to upload corrected drawings. Verify a new version number is created when you upload your corrected drawings. If a version number is not created, confirm the drawing was revised. Version number will not be created if there have been no changes to the file. Please communicate this information to your entire project team.

For example, if you make a correction to “A1 - 5th Floor Plan D10003-00.dwf” and reload the corrected file with the same name, E-Plan will tag file with the latest version number.

E-Plan will track document (drawing) versions, but ONLY if you upload a revised version of the file with the EXACT SAME NAME as the original file.

Failure to upload revised drawings with the original file name will result in duplicate sheets. Verify plans and documents containing markups are revised. The resubmittal will be rejected by your Projects Administrator or Project Manager if markups are not addressed and duplicates found. The rejection of your submittal may result in a delay of your review.

After you have successfully uploaded your corrected drawings, click on the “Applicant Resubmit” task located at the bottom section of the projects page (as shown below). The task E-form window will open. Go to the Department Review section and do the following:

- Add your comments in the “Review Information Comments” section
- Confirm you have completed Step 1, 2 and 3 by checking each box
- To formally resubmit revised documents click the “Complete” button
7. Approval

An e-mail notification is sent to the applicant upon verification of code compliance and completion of required documentation. Final assessed permit fees are due prior to the release of approved permit drawings. Fees can be paid online using the applicant’s account through the dynamic web portal OR in person at cashier window located in the Permit Center, 121 N. LaSalle Street, Room 900. Upon confirmation of payment, drawings will be available for print in the Project’s “Released Drawings and Documents” folder.

Congratulations you have completed the E-Plan permit process!