ePlan

User Guide
04-15-2024

county of santa cruz

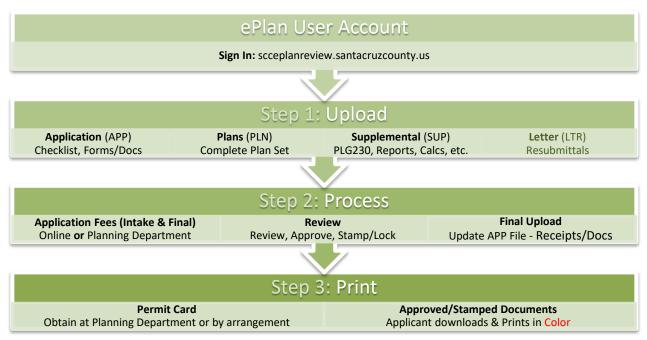# Contents

Part 1: ePlan Overview

Santa Cruz County has **issued over 1,750 building permits** for projects using ePlan. The ePlan process facilitates the online submission of pdf documents for Building and Discretionary permit application review.

The ePlan User Guide explains how to use the ePlan portal for Building permit applications; for standard Building submittal requirements, please see *Planning Department*. For help, visit *SCC ePlan* for the hotline, youtube channel, User Guide, Training & Seminars, etc. Discretionary processes may differ, please see *ePlan*.

Effective 11/1/2020: New Building permits requiring a review must use ePlan. This includes express plan check projects, construction change documents, and deferred submittals. Property owners and applicants can verify application status online and obtain plan review corrections at the *Application Status* website; clicking the application number button (or menu item) in the ePlan portal provides direct access.

Applications and *payments* can be made online or incorporate processing at the Planning Department. All forms and submittals must be uploaded to the ePlan portal *prior to initiating applications.*

Applicants should verify and include any required clearances in the Application (APP) file. Required clearances may include the Water Department, Environmental Health, Zoning, etc.

ePlan User Account			
Sign In: scceplanreview.santacruzcounty.us			

Step 1: Upload			
Application (APP) Checklist, Forms/Docs	**Plans** (PLN) Complete Plan Set	**Supplemental** (SUP) PLG230, Reports, Calcs, etc.	**Letter** (LTR) Resubmittals

Step 2: Process		
Application Fees (Intake & Final) Online **or** Planning Department	**Review** Review, Approve, Stamp/Lock	**Final Upload** Update APP File - Receipts/Docs

Step 3: Print	
Permit Card Obtain at Planning Department or by arrangement	**Approved/Stamped Documents** Applicant downloads & Prints in Color

Upon completion of a review cycle by all departments, the applicant may resubmit revisions, or complete the steps outlined in the approval letter. Applicants can verify status online at the *Application Status* page.

Approval letters will identify any final payment amounts and required *Final Items* (receipts, forms, etc.). *Final items* must be added to the Application (APP) file and uploaded prior to permit issuance. Permit cards are obtained at the Planning Department or by arrangement.

At permit issuance, a download will be available in the applicant's *Project files* folder. This download will be a zip file containing the approved/stamped printable PDF documents that are and locked by the Planning Department. One full size set of these documents must be *printed in color* and available at the construction site. The applicant is responsible for coordination of printed documents.

Part 2: ePlan Accounts & Information

Accounts are registered to a single email address and password; however, accounts can be used simultaneously by multiple people. Each person who Signs In has complete control of the account and projects. Confirmations and notices will only be sent to the email associated with the registered account.

Account Registration & Editing

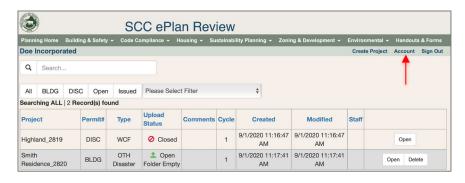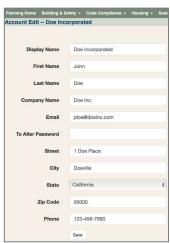To register a new user account, click *Register as a new user* at SCC ePlan Review at the Sign In page.

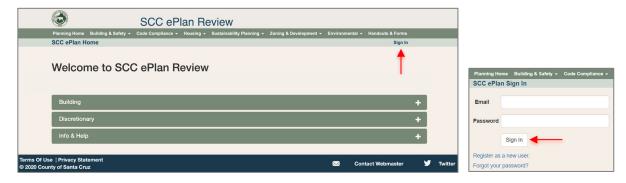To edit an existing account, click *Account*.

Transfer: Account & Project(s)

Accounts and projects can be transferred between existing accounts by County staff. Provide a written transfer request on company letterhead in pdf format to the Building Technicians. Clearly identify both accounts and whether the account or specific projects are to be transferred (fees apply).

When accounts are transferred, all projects/data are transferred; the original account is deleted.

Forgot Your Password?

Click *Forgot your Password?* at SCC ePlan Sign In page enter the account email. The *Please check your email to reset your password* message will display whether you entered the email correctly or incorrectly.

An email will be sent to registered accounts, click the link to open the *Reset Password* page.

Payments

Permit fees may be paid in cash, checks, electronic checks, or credit cards. Once applications are initiated by County staff, payments can be made at the Planning Department or online. To pay online, choose *Fees & Payments* at the Planning Department *website*.

Questions & Contacts

Building Information: 831-454-2260 or email Planning.BuildingInfo@santacruzcountyca.gov.
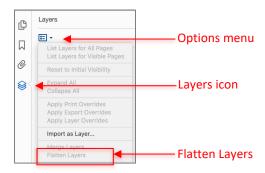
Part 3: ePlan Standards

Upload <u>all</u> required forms and submittal documents to the ePlan portal (emails, usb, etc. are not allowed). Some ePlan standards may require use of pdf editors such as Adobe Acrobat Pro DC, Bluebeam Revu, or similar.
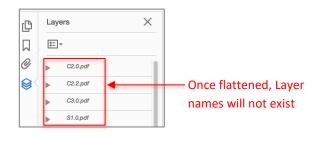
ePlan General Standards

1. **ePlan Submittals:** The color "red" is reserved the County use and stamps. For general County submittal requirements, please the *Planning Department* website.

2. **Unlocked Files:** Submittals <u>cannot</u> be restricted/locked by digital signatures or otherwise.

3. **Professional Stamps & Signatures:** Stamps & signatures of California licensed Architects & Engineers must be embedded using images or other methods. <u>Restrictions imposed by digital signatures are not allowed</u>.

4. **County Stamp/Lock:** Approved documents are electronically stamped and <u>locked with printing enabled</u>. The stamp is 2.5 inches wide & 1.5 inches high; a stamp area in the title block will expedite processing.

5. **PDF Format:** PDFs must be converted from AutoCAD, ArchiCAD, Word, etc. to retain the vector file format as scans are not allowed. However, clean scans of documents *produced by hand* are allowed.

6. **Flatten & Bookmark:** Files must be flattened to remove layers and bookmarked for navigation. See the related sections below for additional information.
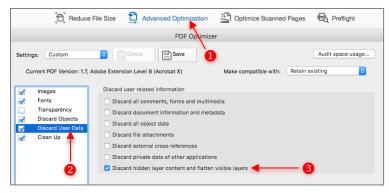
Flattening Layers (Adobe Acrobat DC Pro)

*Note: See Sep 12, 2023 "new Acrobat experience" and switching between interfaces. Methods are similar for both interfaces, but "Optimize PDF" was renamed "Compress a PDF." If layers exist, they must be flattened. Click the *Layers* icon and choose *Flatten Layers…* from the *Options* menu.

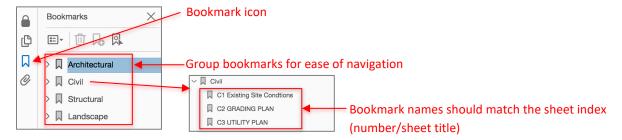

Flatten & Optimize (optional): Open the "*Optimize PDF*" tool and ❶ click *Advanced Optimization*, ❷ click *Discard User Data*, and ❸ checkmark *Discard hidden content and flatten visible layers*, then click *OK* and *Save* the file.
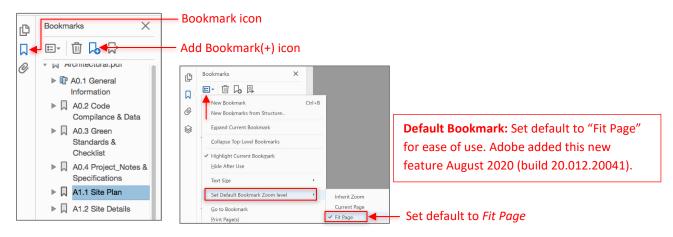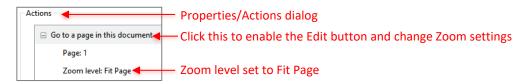
Bookmarking (Adobe Acrobat DC Pro)

*See Sep 12, 2023 note above. Plans require bookmarks for each sheet. Supplemental files require bookmarks for each document and key section. See also the SCC ePlan youtube channel for other tips and techniques.
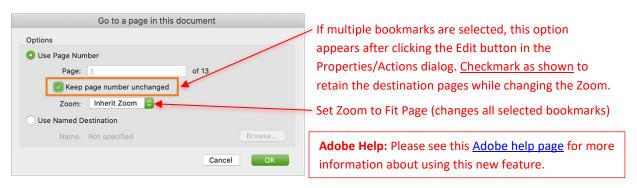
Bookmark icon

Group bookmarks for ease of navigation

Bookmark names should match the sheet index (number/sheet title)

Before adding Bookmarks, verify *Set Default Bookmark Zoom level* is set to *Fit Page*. To add a bookmark, click the *Bookmark(+) icon* and name bookmarks with numbers/titles matching the sheet index.

Bookmark icon

Add Bookmark(+) icon

Default Bookmark: Set default to "Fit Page" for ease of use. Adobe added this new feature August 2020 (build 20.012.20041).

Set default to *Fit Page*

The *Zoom level* setting of each bookmark must be set to "Fit Page" in the Properties/Actions. To see or edit settings, right click a bookmark and choose Properties and click the Actions tab.

Properties/Actions dialog

Click this to enable the Edit button and change Zoom settings

Zoom level set to Fit Page

Adobe added the ability to adjust the Zoom setting for multiple bookmarks and retain the destination pages. This means you can now correct/change the Zoom setting for all selected bookmarks in one step.

If multiple bookmarks are selected, this option appears after clicking the Edit button in the Properties/Actions dialog. Checkmark as shown to retain the destination pages while changing the Zoom.

Set Zoom to Fit Page (changes all selected bookmarks)

Adobe Help: Please see this Adobe help page for more information about using this new feature.
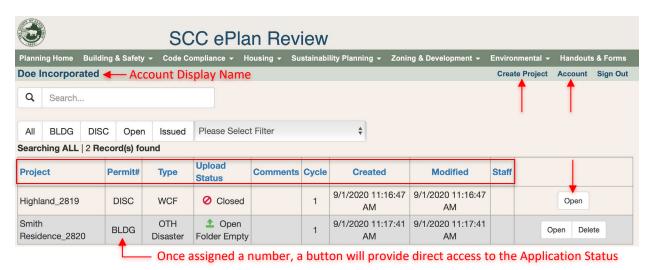
Part 4: ePlan Projects

Accounts are registered to a single email address and password; however, accounts can be used simultaneously by multiple people. Each person who Signs In can perform all tasks for projects and the account. Confirmations and notices will only be sent to the email associated with the registered account.

Projects Page

The *Projects* page displays upon Sign In.

Project: Project name.
Permit#: BLDG/DISC until a permit number is assigned by Staff.
Type: Building Type & if Disaster related.
Upload Status: Project is open or closed for uploads.
Comments: Shows last comment posted.
Cycle: Current review cycle.
Created: Date project was created.

Modified: Date of latest activity.
Staff: Initiated the permit.
Create Project: Create a new project.
Account: Edit Account data.
Open: Opens the Project.
Delete: Deletes the project (permanently). Projects with permit numbers or locked cannot be deleted.
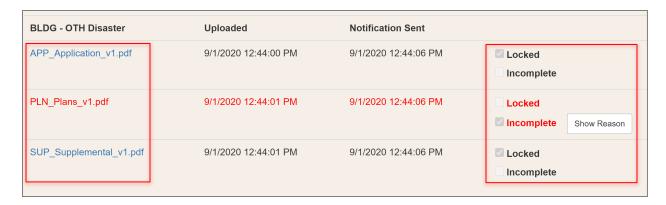
Project File Types

Each uploaded file must be complete and ready for issuance and meet all *County submittal requirements*. A complete file contains all sheets/documents needed for issuance and is ready to be stamped by the County. At resubmittal, upload files if they were revised (revised files must be complete, not just the new/revised portions).

Application (APP)
- ePlan Submittal Checklist – PLG230 (must be 1st page), application form, and other applicable documents

Plans (PLN)
- Plans: architectural, structural, energy, etc.

Supplemental (SUP)
- Supplemental Documents Index – PLG235 (must be 1st page) and all documents required for issuance

Letter (LTR) (required for resubmittals)
- Building Resubmittal Response Form – PLG204 (must be 1st page) and annotated correction comments (see Part 5 Resubmittals & PLG204) (no other content may be included in this file)

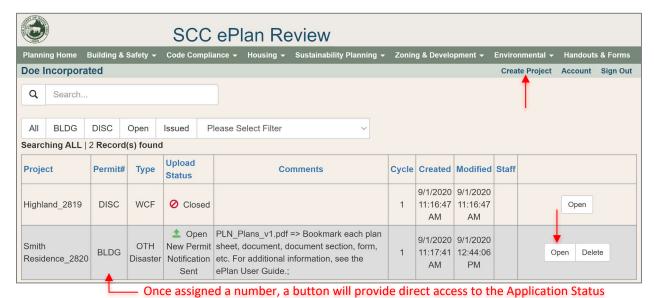| BLDG - OTH Disaster	Uploaded	Notification Sent	
APP_Application_v1.pdf	9/1/2020 12:44:00 PM	9/1/2020 12:44:06 PM	☑ Locked ☐ Incomplete
PLN_Plans_v1.pdf	9/1/2020 12:44:01 PM	9/1/2020 12:44:06 PM	☐ Locked ☑ Incomplete [Show Reason]
SUP_Supplemental_v1.pdf	9/1/2020 12:44:01 PM	9/1/2020 12:44:06 PM	☑ Locked ☐ Incomplete

Uploads are automatically renamed and prepended based on file type (APP, PLN, SUP, LTR), and appended based on the review cycle (v1, v2, etc.). Once assigned, file names match the permit number (e.g. PLN_B-123456_v1).

The *locked* blue (current cycle) & green (previous cycle) files were accepted for review. Files cannot be deleted, to replace files for the current cycle, simply upload a new file(s). Red incomplete files must be replaced before you can notify the County of your submittal.

Project File Uploads

Each new project requires a folder. To add a new project folder, click *Create Project*. You'll be prompted to identify the permit type (Building or Discretionary), the building type (use other for anything not in the list), and if the project is Disaster related.
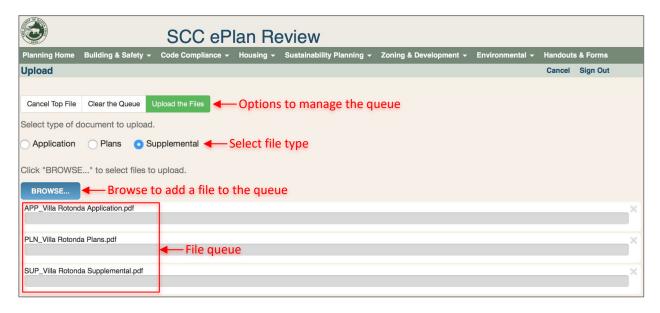(Staff assigns permit numbers; projects with permit numbers cannot be deleted.)

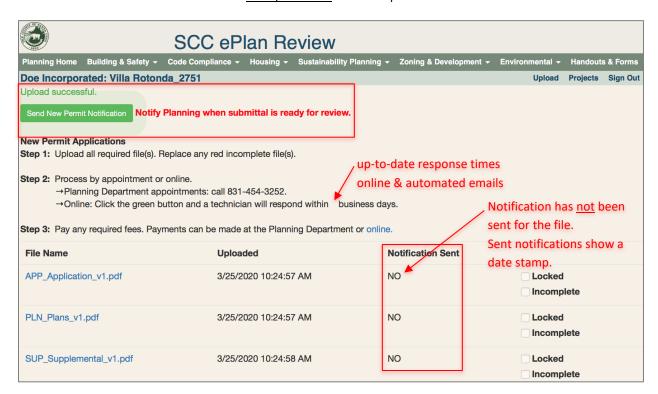Once assigned a number, a button will provide direct access to the Application Status

To upload files to a project, *Open* the project and click *Upload*.

On the Upload page (image below), select a file type and Browse to add it to the queue, then click *Upload*. Progress bars appear until uploading is complete and the project file page displays.

Once files upload, the project's file page displays (image below). <u>You must notify the Planning Department by clicking the green notification button of your submittal.</u> A solid green (or pulsing green) button allow notifications to be sent, if the combination of file "types" uploaded is a "possible" submittal. Please ensure that all "required" submittal files are uploaded before sending a notification, otherwise the submittal will be rejected. Similarly, resubmittals must address corrections for <u>all departments</u> to be accepted for review.

(see image below) Locked blue files were accepted for review. Red incomplete files must be replaced. Files cannot be deleted, simply upload a new file of the same type to replace it. Files not marked locked or incomplete, are waiting for technicians to determine if it can be accepted for review. Gray files are part of the upload history and are not reviewed.
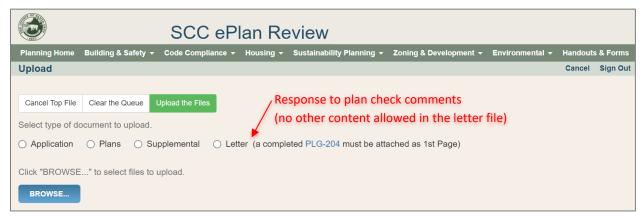

Project Resubmittals

Once all agencies complete their reviews, the Application Status is changed to "resubmittal" and the ePlan portal is unlocked to allow file uploads. An email notification is normally sent within one workday, but if an inconsistency persists, please email staff.

Revisions must fully address all corrections by *all agencies simultaneously*. Partial submittals will not be accepted for review. Revisions must be identified with clouding and delta markers.

A Letter (LTR) file with a completed PLG-204 form *attached as the 1st page must be submitted.* This file must include an annotated copy of all correction comments and explain revision locations with sheet/drawing numbers. This file may not contain any other documents.

In addition to the LTR file, upload **revised** PLN and/or SUP files *(if a file was not revised, it should not be uploaded)*. Each time a file is uploaded, it must be *complete* and ready to be stamped by the county for issuance. **A complete file contains all sheets/documents needed for issuance**, not just the new/revised portions.

You must notify the department of your submittal by clicking the green notification button.

Note: Text can be copied/pasted into text editing programs directly from the Application Status webpage. Simply drag your cursor over the text to select it and then copy/paste into Word or another program.

Project Approval

After all agencies have approved a project, a *printed* approval letter containing instructions will be sent by postal mail to the applicant and the property owner by the Planning Department. If final documents are required, a revised final Application (APP) file must be uploaded by the applicant.

When sending the approval letter, and if final documents are required, the Building Technician sets the portal to allow the upload of the final Application (APP) file while keeping the project in a locked state. If you received an approval letter requiring final documents, and the project does not allow this type of upload, please contact a *Building Permit Technician or Technician Supervisor*.

Approval letters will identify the *Final Items* needed including receipts or forms which must be added to Application (APP) file and then uploaded to the portal prior to permit issuance. Permit cards are obtained at the Planning Department; however, the final payment can be made in online or at the department.

At permit issuance, a download will be available in the applicant's *Project* folder. This download will be a zip file containing printable PDF documents that are stamped and locked by the Planning Department. One full size set of these documents must be *printed in color* and available at the construction site. The applicant is responsible for coordination of printed documents.

Project Construction Change Documents (CCD) & Deferred Submittals (DEF)

These permit types amend the issued permit documentation. Only submit *the revised PLN sheets and/or SUP documents* for review (not the complete documents). If the PLN/SUP file was not revised, do not upload it.

1. Create a *new project* in the ePlan portal.

2. Upload the APP file with a submittal checklist (*PLG230)* and an application form (*PLG205* or *PLG206)*.

3. Cloud all revisions and mark with a delta symbol.

4. Upload a PLN (revised sheets only) and/or SUP (*PLG235* and revised documents only) *only if they contain revisions*. Maintain all unaffected content on the revised sheets.

    a. CCD: Include a description of changes on the cover sheet; coordinate documents (e.g. architectural, structural, electrical, etc.); update the sheet index, consultant list, etc. as applicable; and incorporate any clarification marks added to sheets during permit issuance.

    b. DEF: Typically submit the deferred items only (e.g. PV system, truss package, product reports etc.) and any applicable engineer review letters or *PLG300* forms. See PLG206.

5. Technicians will provide review agencies the issued permit files for reference. Do not upload them.