



ePlan User Guide 2023

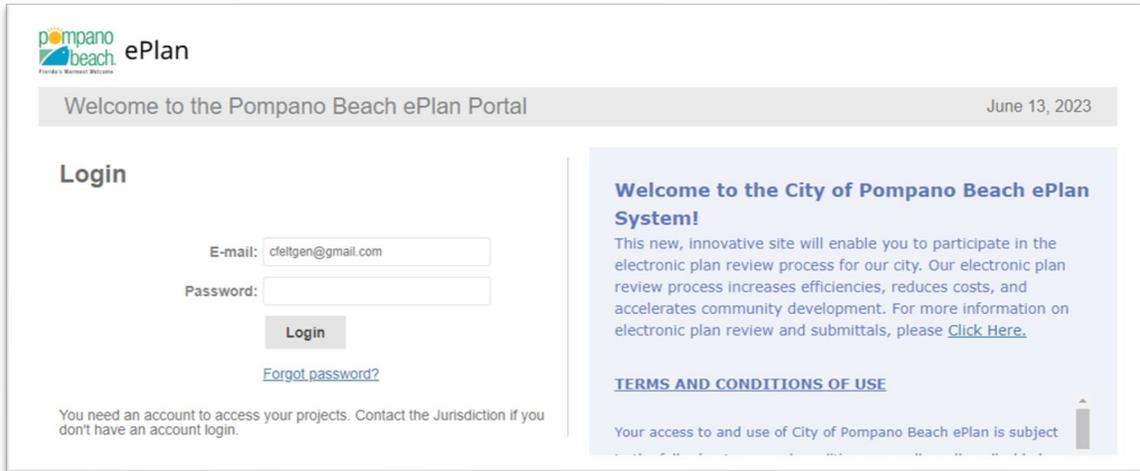
ProjectFlow Review System

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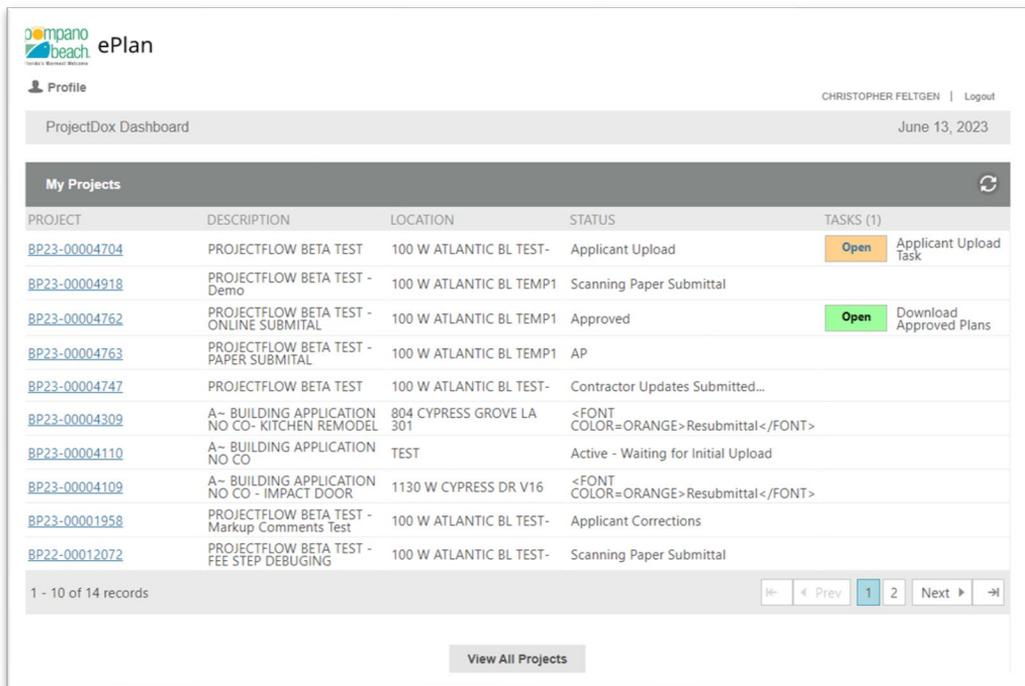
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Logging into ePlan & Navigation

The login page for ePlan can be found at <https://epr.pompanobeachfl.gov>. You will need an invitation email from ePlan in order to gain access to project, as you cannot create your own account from here.



After you login (and setup your account if this is your first time using ePlan), you will be taken to your ProjectDox Dashboard, which will list every project you have access to, along with any tasks that may be needed from you:



From here, you can click on the **Project** number on the left to open that Project, or click the **'Open'** button next to any Task to immediately start working on that Projects tasks.

You can also click on **View all Projects** at the bottom to be taken to the full ePlan site.

Clicking the **View all Projects** will take you to the homepage for ePlan, which has 3 main tabs at the top-left:

1. **Legacy Task List:** List of older permits started under our legacy *'Standard Workflow'* system. These projects will continue to be reviewed under this system until convert to the new ProjectFlow system in the future. (These older projects are not covered in this guide.)

Project Name	Task	Attached To	Status	Revision	Due Date	Created On	Updated On	Updated By	Description
BP23-00001861	BatchStamps	Review Coordinator	Pending		5/30/2023	6/13/2023 1:35:41 PM	6/13/2023 1:35:41 PM		A~ BUILDING APPLICATION NO CO - KITCHEN AND BATH
BP23-00003032	ReviewQA	Review Coordinator	Pending		4/12/2023	6/13/2023 1:32:05 PM	6/13/2023 1:32:05 PM		A~ BUILDING APPLICATION NO CO - PORCH COLUMN RI
BP20-00007797	ReviewQA	Review Coordinator	Pending	1		6/13/2023 1:31:31 PM	6/13/2023 1:31:31 PM		A~ BUILDING APPLICATION WITH CO RESIDENTIAL - ENC
BP23-00003031	ReviewQA	Review Coordinator	Pending		4/12/2023	6/13/2023 1:26:48 PM	6/13/2023 1:26:48 PM		A~ BUILDING APPLICATION NO CO - PORCH COLUMN RI

2. **Tasks (ProjectFlow Review):** This tab contains Tasks for any newer project that currently needs your attention. Clicking *Accept* or the name of the task next to the *Accept* button will let you begin working on that task immediately. Clicking the Project name will take you inside the project instead.

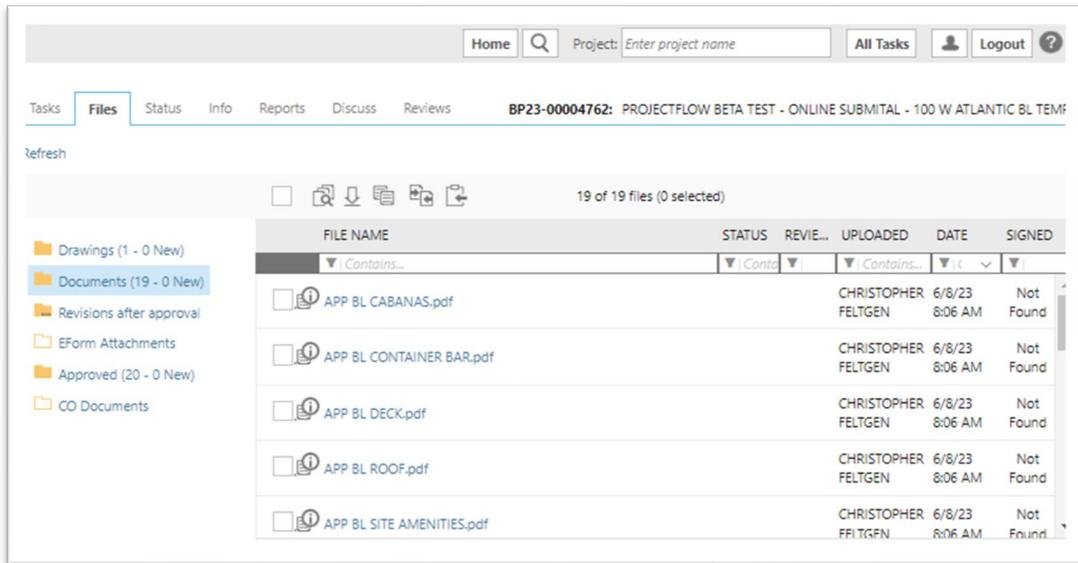
ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIPTION	STATUS	PLAN EXPEDITER	LOCATION
<input type="button" value="Accept"/>	Scanning Paper Submittal	BP23-00004918	Submissions	Pending		6/14/23 12:02 PM	6/13/23 12:02 PM	PROJECTFLOW BETA TEST - Demo	Scanning Paper Submittal	Waiting to be Assigned...	100 W ATLANTIC BL TEMP1

3. **Projects:** Lets you browse and search every project you have access to.
 *Please note the **All Projects** and **Recently Entered Projects** buttons on the right side. If the list is set to **Recently Entered Projects**, you may not see a newer project you just applied for. Change to **All Projects** to see everything.

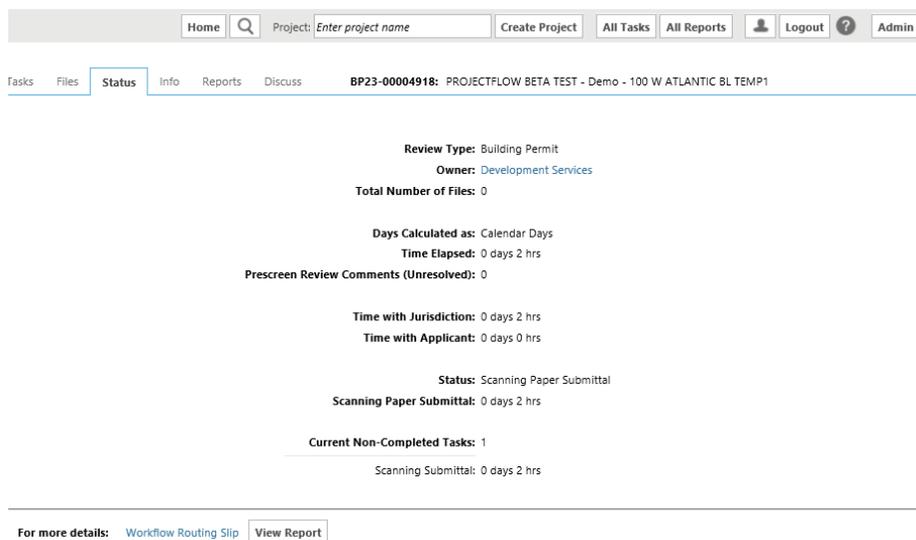
ACTION	PROJECT	LOCATION	DESCRIPTION	OWNER	STATUS	CREATE DATE
	BP23-00004918	100 W ATLANTIC BL TEMP1	PROJECTFLOW BETA TEST - Demo	Development Services	Scanning Paper Submittal	6/13/23 12:02 PM
	BP23-00004762	100 W ATLANTIC BL TEMP1	PROJECTFLOW BETA TEST - ONLINE SUBMITAL	Development Services	Approved	6/8/23 7:56 AM
	BP23-00004763	100 W ATLANTIC BL TEMP1	PROJECTFLOW BETA TEST - PAPER SUBMITAL	Development Services	AP	6/8/23 7:56 AM
	BP23-00004747	100 W ATLANTIC BL TEST-	PROJECTFLOW BETA TEST	Development Services	Contractor Updates Submitted...	6/7/23 5:14 PM
	BP23-00004704	100 W ATLANTIC BL TEST-	PROJECTFLOW BETA TEST	Christopher Feltgen	Applicant Upload	6/7/23 8:26 AM

Navigating Inside a Project

When inside a project, you will see a number of Tabs that you can switch between:



1. **Tasks** – Contains any tasks for this project that need your currently attention.
(Applicant Upload / Prescreen Corrections / Applicant Resubmit / Fee Payments)
2. **Files** – Folders containing all of the submitted Drawings and Documents in review. From here you can upload files when given permission to do so.
3. **Status** – Gives a brief summary of how long the project has been in review, who the project is currently waiting on, and the number of unresolved comments generated in review.



4. **Info** – Shows information regarding the application, including the assigned Plan Expeditor.

- 5. Reports** – On demands reports that can give a complete list of all comments and the routing slip for the project’s history. See the Report Description below for an explanation of each report:

The screenshot shows the 'Reports' tab selected in the navigation menu. The page title is 'BP23-00004763: PROJECTFLOW BETA TEST - PAPER SUBMITAL - 100 W ATLANTIC BL TEMP1'. Below the navigation are links for 'Refresh' and 'Save Settings'. The main content is a table with the following columns: ACTION, REPORT NAME, REPORT TYPE, and REPORT DESCRIPTION. The table lists five reports related to plan reviews.

ACTION	REPORT NAME	REPORT TYPE	REPORT DESCRIPTION
	Current Project - All Uploaded Files with Sheet Sizes	Project	All uploaded files with sheet sizes within this project
	Plan Review - Department Review Status	ProjectFlow	Status of departmental reviews for a specified workflow
	Plan Review - Review Comments	ProjectFlow	Lists the review comments, checklist and changemark details for a workflow instance review cycles.
	Plan Review - Review Details	ProjectFlow	Displays the Workflow Routing Slip with a list of review comments
	Plan Review - Workflow Routing Slip	ProjectFlow	Displays the sequential routing and times for completed or current plan review tasks

1 - 5 of 5 records

- 6. Discuss** – Discussion Board where staff and applicants can communicate back and forth regarding this project.

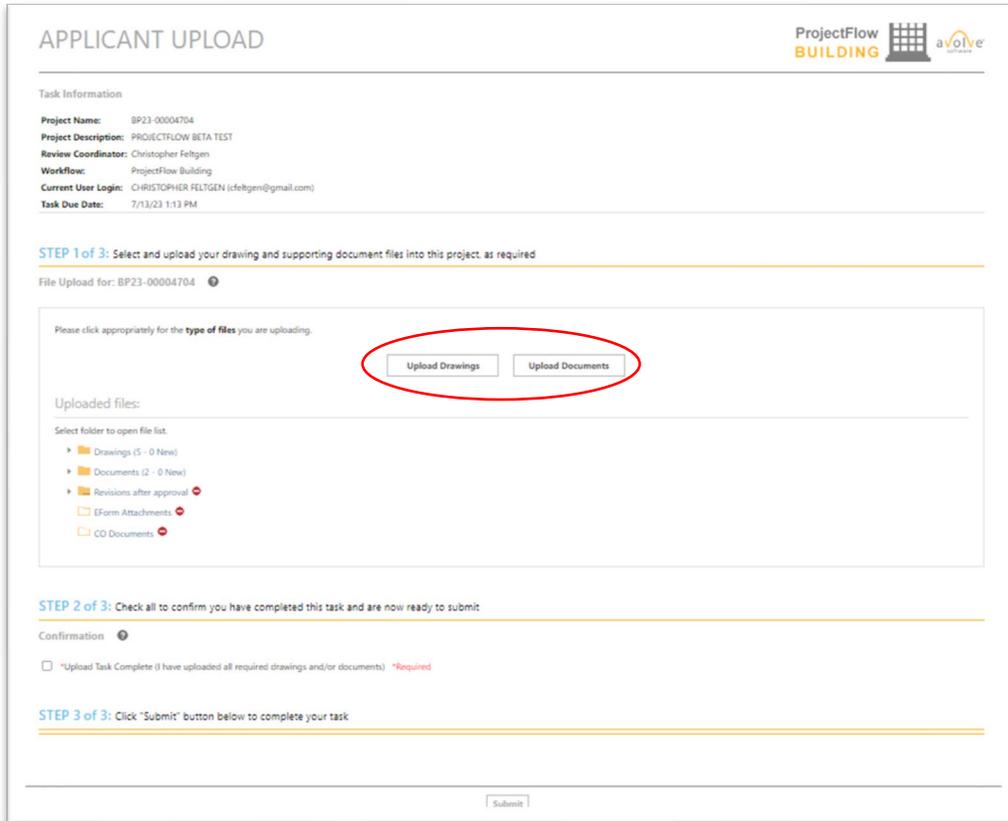
- 7. Reviews** – When comments become available, the Reviews Tab will appear and list all comments for your application. (Covered in detail later in this guide.)

The screenshot shows the 'Reviews' tab selected in the navigation menu. The page title is 'BP23-00004763: PROJECTFLOW BETA TEST - PAPER SUBMITAL - 100 W ATLANTIC BL TEMP1'. Below the navigation are filter controls for Dept, Status, Response, Search, Type, Cycle, and Time. A 'Refresh' link is present. The main content is a table with columns for selection, Ref.#, Review Coordinator, Name, Reviewer, and Date. Two reviews are listed, both marked as 'Resolved'. A yellow banner on the right says 'Please enter your responses'.

	Ref.#	Review Coordinator	Name	Reviewer	Date
<input type="checkbox"/>	Ref.# 1	Review Coordinator	Need Plumbing Application	Christopher Feltgen	6/8/23 10:27 AM
			Comment		
			Responded by: CHRISTOPHER FELTGEN - 6/8/23 10:34 AM OK		
<input type="checkbox"/>	Ref.# 2	Review Coordinator	Pay Submittal Fee	Christopher Feltgen	6/8/23 10:28 AM
			Comment		

Applicant Upload Task

When you submit a new permit applicant online, you will be invited to ePlan with an *Applicant Upload* Task assigned to you. When you open this Task, you will see an **Upload Drawings** and **Upload Documents** button under Step 1 of 3.



Clicking either Upload button will open the upload tool, where you can browse and select which files you want to upload from your computer. Once the files are selected, click **Start Upload** to upload all files.

For help with naming files for your submission, see the REFERENCE page at the end of this guide for Naming Standards.



Once you have uploaded everything for review, you will need to check the Upload Task Complete box under Step 2, and then click the **Submit** button at the bottom of the page to officially submit your application into review.

Prescreen Corrections / Applicant Resubmit Tasks

When a review is completed and corrections are needed from the Applicant, an email notice will be sent for either a **Prescreen Corrections Task**, or an **Applicant Resubmit Task** for a full review.

Both tasks are relatively the same, with the main difference being the **Applicant Resubmit Tasks** shows the results of each Division who reviewed your project first.

Prescreen Corrections

PRESCREEN CORRECTIONS

Task Information

Project Name: BP23-00004918
Project Description: PROJECTFLOW BETA TEST - Demo
Review Coordinator: Christopher Feltgen
Workflow: ProjectFlow Building
Current User Login: CHRISTOPHER FELTGEN (cfeltgen@gmail.com)
Task Due Date: 8/12/23 4:20 PM

STEP 1 of 4: Respond to any comments, as needed

Resolve Review Comments ?

Unresolved Comments: 2
 Info Only Comments: 1
 Files with Markups: 0

Plan Review:

STEP 2 of 4: Upload any new or updated files into this project

Applicant Resubmit

APPLICANT RESUBMIT

Task Information

Project Name: BP23-00004918
Project Description: PROJECTFLOW BETA TEST - Demo
Review Coordinator: Christopher Feltgen
Review Cycle: 1
Workflow: ProjectFlow Building
Current User Login: CHRISTOPHER FELTGEN (cfeltgen@gmail.com)
Task Due Date: 8/13/23 7:48 AM

Task Instructions

Below is a summary of your results. Please review comments, to review all issues that need to be addressed.

STEP 1 of 5: Review Results

Department Review Results ?

DEPARTMENT	REVIEWED BY	STATUS
BUILDING DIVISION	Christopher Feltgen - christopher.feltgen@copbf.com	Corrections Required
ELECTRICAL DIVISION	Christopher Feltgen - christopher.feltgen@copbf.com	Approved

STEP 2 of 5: Respond to all comments, as requested

To see why your permit application wasn't accepted, click the **Review Comments** button to see a list of all comments, markups, and issues that need to be addressed. You can also get to this page by clicking the **Reviews** tab inside your project:

Home
Project:
Create Project
All Tasks
All Reports
Logout
Admin

Tasks
Files
Status
Info
Reports
Discuss
Reviews
BP23-00004918: PROJECTFLOW BETA TEST - Demo - 100 W ATLANTIC BL TEMP1

Dept:

Type:

Status:

Cycle:

Response:

Time:

Search:

refresh

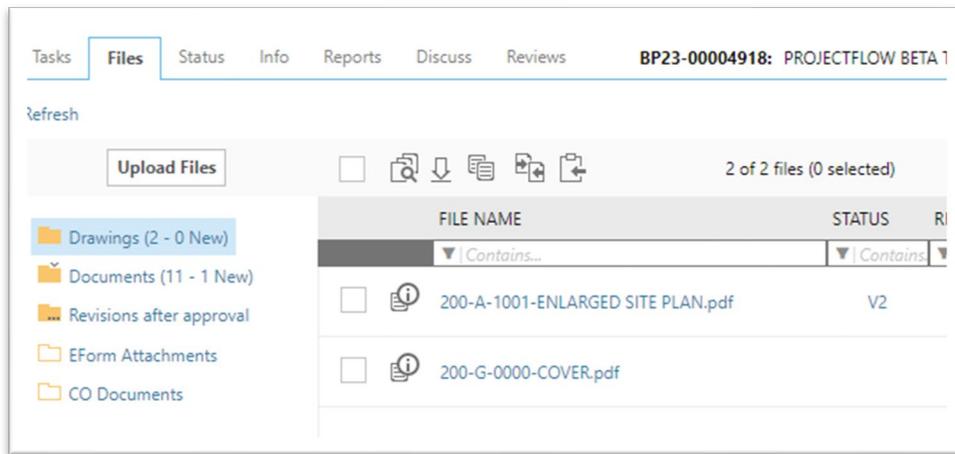
(0 selected)

Please enter your responses ?

<input type="checkbox"/>	Ref.# 1	Review Coordinator: Christopher Feltgen 6/13/23 3:28 PM Unresolved Comment: The following items must be uploaded before review can begin: 1. Building Permit Application. 2. Zoning Compliance Application. 3. Fire Prevention Application.	Type your response here.
<input type="checkbox"/>	Ref.# 2	Review Coordinator: Christopher Feltgen 6/13/23 3:28 PM Unresolved Comment: Drawings must be uploaded as Single Sheet PDF files.	Type your response here.
<input type="checkbox"/>	Ref.# 3	Review Coordinator: Christopher Feltgen 6/13/23 3:29 PM Info Only Comment: Contractor updates will be required prior to final permit approval for the following Contractors: 1. Example 1 2. Example 2 3. Example 3	No response required.

Uploading Corrections

Corrections can be uploaded in two locations: from within the Prescreen Correction Task/Applicant Upload Task, or on the Project File Tab.



The Upload Files button appears at the top of the Folder list inside your Project Files when you have permission to upload new items.

Uploading new files is disabled when a project is in the middle of a review cycle.

If you need to replace an old file with a new one, called 'Versioning', you will need to upload your new file with the SAME exact name as the old one. Do not add 'V2', 'Revised', or the date to the end of the file, or it will not replace the old file.

We recommend using the new Upload tool found inside the **Prescreen Corrections Task** and **Applicant Resubmit Task** page. Using this tool will let you replace any file inside the project without you having to rename the file yourself.

The Upload Tool inside your task will let you upload both Versioned Files and New Files. If you select 'No' to the same name question, you'll be taken to the version upload tool (see next page).

The screenshot shows a dialog box titled 'STEP 3 of 5: Upload any new or updated files into this project'. It includes the text 'Version Upload for: BP23-00004918' and instructions: 'Select "Versioned Files" to upload files as new version updates for files previously submitted and received. Select "New Files" to upload any additional new file into this project as requested.' There are two tabs: 'Versioned Files' (selected) and 'New Files'. A question asks: 'Are your updated files named exactly the same* as the prior versions?' with 'Yes' and 'No' buttons. A red note states: '* "name-v2.pdf" is not an "exact" file name match to "name.pdf"'. Below, it says 'Uploaded files:' and 'Select folder to open file list.' with a list of folders: 'Drawings (2 - 0 New)' and 'Documents (11 - 1 New)'.

This tool will let you Select any file you want to replace with a new one on your computer to upload. The names do not need to match with this tool.

If there are files with Markups, only those files will be listed as they are assumed to be the mostly likely to need replacing. You can however switch to All Project files using the dropdown menu at the top to see everything in your project.

Electronic Plan Review Close Window

Upload File Versions

Project: BP23-00004918

Select: All Project Files All project files that may require new versions Start Upload

Drawings\200-A-1001-ENLARGED SITE PLAN.pdf V2	Select File
Drawings\200-G-0000-COVER.pdf	Select File
Documents\APP ASPHALT.pdf	Select File
Documents\APP CONCRETE TARGETS.pdf	Select File
Documents\APP CONCRETE.pdf New V2	Select File
Documents\APP CONST FENCE.pdf	Select File
Documents\APP DEWATERING.pdf	Select File

Orange files are new uploads
Blue files are new version uploads
Red files appear to be same as previously uploaded (will likely be discarded)

Contractor Updates Task

Prior to being issue your permit, you may receive a Task requesting Contractor updates be submitted to our Business Tax Division.

Updates can be submitted online here: https://app.oncamino.com/pompanobeach_fl/dashboard/new

Please wait for confirmation from the BTR Division that updates are complete before completing your Contractor Update Task.

Details as to which contractors need updates can be found on the **Review Comments** page.

CONTRACTOR UPDATES



Task Information

Project Name: BP23-00004918
Project Description: PROJECTFLOW BETA TEST - Demo
Review Coordinator: Christopher Feltgen
Review Cycle: 3
Workflow: ProjectFlow Building
Current User Login: CHRISTOPHER FELTGEN (cfeltgen@gmail.com)
Task Due Date: 7/14/23 2:54 PM

STEP 1 of 2: Please review the information below and submit all required Contractor updates to BusinessTaxReceipt@copbfl.com.

Resolve Review Comments ⓘ

Unresolved Comments: 1
Info Only Comments: 0
Files with Markups: 0
Plan Review:

STEP 2 of 2: Once you receive confirmation back from the BTR Division that your updates have been accepted, please complete this task for final checks by staff.

Fee Payment Task

Once your permit has been approved by all divisions, you will receive an email notifying you to submit payment for permit fees. Payment can be made online using Click2Gov:

[Click2Gov Building Permit \(pompanobeachfl.gov\)](http://pompanobeachfl.gov)

Once payment is made and the balance due is \$0.00, you can open and complete the **Fee Payment Task** for your permit in order to release the permit for download right away. You no longer need to wait for staff to process the payment, or contact Customer Service to release the permit.

Please note that this task cannot be completed until the Amount due is \$0.00.

FEE PAYMENT TASK



Task Information

Project Name: BP23-00004918
Project Description: PROJECTFLOW BETA TEST - Demo
Review Coordinator: Christopher Feltgen
Review Cycle: 3
Workflow: ProjectFlow Building
Current User Login: Christopher Feltgen (christopher.feltgen@copbfl.com)
Task Due Date: 8/13/23 2:59 PM

Task Instructions

Your permit has been approved and is ready for final payment.
[Click here to pay your Permit Fees online via Click2Gov.](#)
Once done, you can return here to release the permit for download once the Amount Due below shows \$0.00.

Amount due

\$71.00

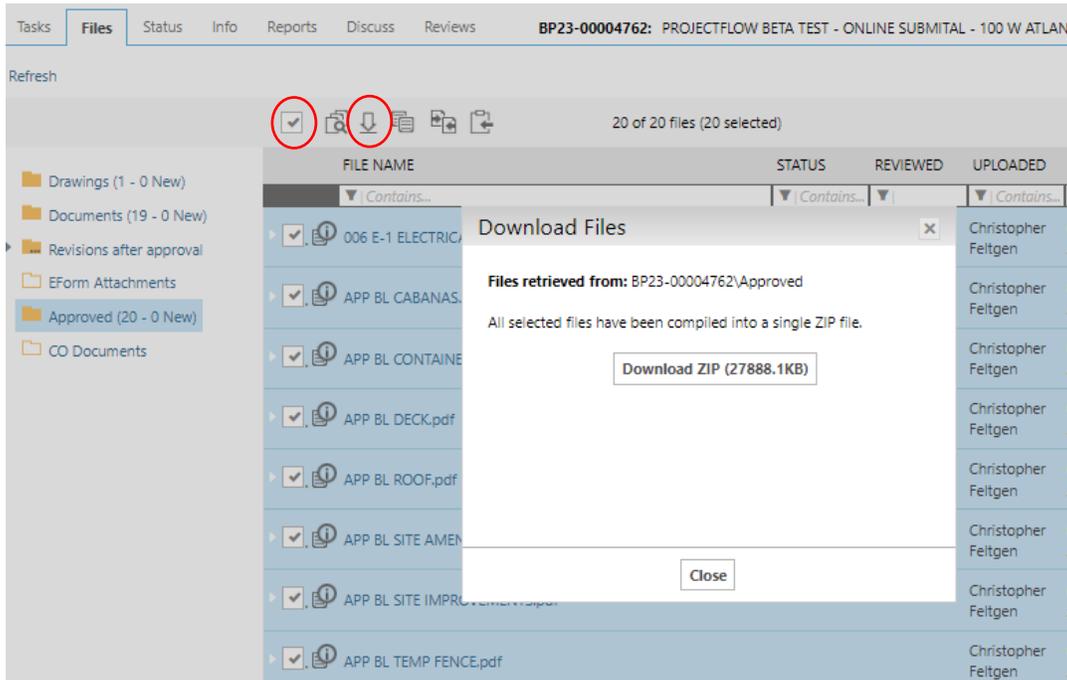
Payment Confirmation ⓘ

*All fees have been paid and the Amount Due is \$0.00. *Required

Downloading Approved Permit Files

To download your approved permit, open your project and head to the Files tab. Then, click on the [Approved](#) folder to see your approved permit set.

Once inside the Approved Folder, you click the checkbox at the top of the file list to select all files in the folder, and then click the Download button  to download all of the checked files in a single ZIP package:



REFERENCE: File Naming Standards

When preparing to upload your drawings / plan pages to the ePlan system, please follow the file naming structure shown below:

All drawing file names will begin with an ePlan three digit number that flows in sequence. Example: 001, 002, 003 etc. **IMPORTANT NOTE:** The plan Cover Sheet must always begin with 001 and the Index Sheet must always begin with 002 (unless combined with the cover sheet).

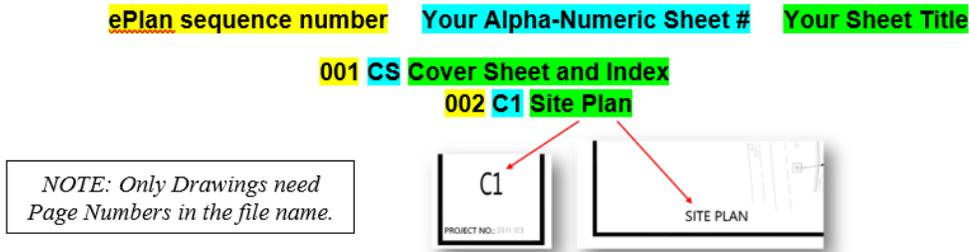
The second part of the file name will be any alpha-numeric number you have assigned to each page. Example: L1 Landscaping, E1 Electrical, etc.

The third part of the file name will be the title that you have given each sheet. Example: Building Elevation Detail, Electrical Riser, Site Lighting, Foundation, etc.

See below for a sample of sheet names using the requested ePlan numerical sequence with your individual alpha-numeric sheet # and sheet titles:

TIP!
Use a decimal to insert a plan page into the existing plans in the order you wish it to appear.

Example:
001 CS Cover Sheet and Index
001.5 C.5 Inserted Page



Documents should be named as so:

APPLICATIONS: EACH APPLICATION MUST BE SAVED AS MULTIPAGE PDF

Building Application	APP BL	Irrigation	APP PL IRR
Roof	APP BL ROOF	Fire Sprinkler	APP PL FS
Fence	APP BL FENCE	Gas	APP PL GAS
Electrical Application	APP EL	Site drainage	APP PL SITE DR
Low Voltage Phone	APP EL PHONE	Mechanical	APP MECH
Security	APP EL SEC	Hood	APP MECH HOOD
Data	APP EL DATA	Fire Plan	APP FIRE
Engineering App.	APP ENG	Review	
Plumbing Application	APP PL		

DOCUMENTS:

Capitol Recovery Fee	CRF	Notice of Commencement-	NOC
Fire Sprinkler Calcs	FS CALCS	Survey	SURVEY
Product Approvals	NOA Shutters	Fire Alarm	FA CUT SHEETS
	NOA Doors	cut sheets	
	NOA Windows		
Truss Drawings	TRUSS		
Energy Calculations	EN CALCS		