City of Cape Girardeau ePlans Applicant User Guide

ePlan Review is a web-based solution allowing building plans to be submitted electronically. Benefits include:

- Saves time and money on printing (due to multiple sets of plans for review and revisions), travel and postage costs;
- more efficient routing of plans;
- allow multiple users to review and comment at the same time;
- allow design professionals to see comments on the plan sheets in addition to in letter form;
- payment of plan review and permit fees online

Applicant User Guide Overview:
The purpose of this guide is to provide construction permit and planning applicants a resource showing the process of Electronic Plan Review (ePlans). This guide specifically applies to the following application types:

- Awning
- CBD Design Standards Approval
- Certificate of Appropriateness
- Commercial Building Permits, including new construction, addition and remodels, and accessory structures
- Development Code Administrative Relief
- Development Code Exception
- Driveway
- Excavation/Right-Of-Way
- Fence
- Generator
- Infrastructure improvements, including water, sanitary sewer and storm sewer main extensions, streets, sidewalks, street lights
- Master Sign Plan
- Photovoltaic System
- Residential Building Permits, including new construction, addition, remodels, decks, pools, and accessory structures
- Retaining Wall
- Rezoning
- Sewer Wye
- Sidewalk
- Sidewalk Café
- Sign
- Site improvements such as expanded parking, landscaping and exterior lighting
- Special Use Permit
- Stormwater
- Subdivision Plat
- Zoning Code Variance

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Electronic Plan Submission Overview

1. Complete the relevant application form found at https://www.cityofcapegirardeau.org/departments/development/forms_and_brochures/
2. Submit the application form to eplans@cityofcape.org
3. You will receive an email directing you to submit the appropriate plan review deposit and/or application fee(s). This fee can be paid by e-check or Mastercard, VISA or Discover debit or credit card by logging in to your Munis Self Service account https://capegirardeaumo.munisselfservice.com/css/citizens/
4. Once the fee is paid, login to Eplans at https://capegirardeau-mo-us.avolvecloud.com/ProjectDox/ to upload plans and other documents. If you do not already have a login, staff will set it up during the application process.
5. Review the Standards Section in this guide for how to name drawing and document files, the required border spacing, acceptable file formats, etc.
6. Staff will Prescreen the information submitted and verify completeness of the submittal. If complete, staff will begin review. If not complete, you will receive a system-generated email with a list of outstanding items. Review will not begin until the submittal is complete.
7. Once you submit outstanding items, staff will review the application and supporting documentation.
8. If staff identifies corrections or revisions needed, system-generated emails will be sent until all corrections or revisions have been submitted.
9. Once all items are addressed, you will be notified to pay any outstanding permit fees (either online or in person).
10. Approved plans will be available for download once fees are paid, except for Planning applications which require Planning & Zoning, Board of Adjustment and/or City Council approval. These will be available for download once approved by the appropriate Board.
11. The Contractor will need to print a hardcopy set of the approved plans to be kept on the jobsite.
12. The Contractor will need to come to Inspection Services to sign the permit and pick up their permit cards for the jobsite. Alternatively, the contractor may digitally sign the permit and print off the permit cards for the jobsite.

Standards

Standards allow for easy identification of drawings by naming convention in order to facilitate the most efficient review, color coding of comments for visual identification of departments, and so on.

Required Files

1. Refer to each application type for required files. Uploaded files are either Drawings or Documents.

File Naming Standards

- **Sheet Number** – Name sheets with a combination of the discipline designation and sheet number. File names may contain dashes and periods. Examples include C1.00, C100 or C1-1.
- We recommend not numbering sheets, such as 001 C1.00, 002 C1.01. The reason for this is if a new sheet is added during plan review, it will cause all sheets to be renumbered. This will slow the process of comparing sheets, which can quickly be accomplished when sheets are identically named.
- When submitting revisions, keep the file name the same and indicate the revision date on the title block. This allows us to quickly see the changes made between the original and revised sheets. **If revised sheets are submitted and are not named the same as the original sheets, the submittal will be rejected.** The system recognizes new submittals and will "version" the new sheets.

- Submit one sheet per drawing file. For example, if your plan set has a demolition site plan, a grading plan and a site utility plan, submit three separate files. **If multiple sheets are submitted in one file, the submittal will be rejected.**
- Submit 8-1/2" x 11 documents such as project manuals and structural calculations as one file for the entire document.
- We recommend naming sheets according to the drawing types and disciplines listed in the table below. These standards are based on the United States National CAD Standard and are typical in the construction industry.

Drawing Type	Discipline	Sheet Number	Example File Names
Architectural	A	000-999	A010
Interiors	I	000-999	I-009
Structural	S	000-999	S.002
Plumbing	P	000-999	P099
Electrical	E	000-999	E1.00
Mechanical	M	000-999	M1-1
Landscape	L	000-999	L011
Civil	C	000-999	C005
Survey	V	000-999	V788
Fire Protection	F	000-999	F799
Telecommunications	T	000-999	T008

Border Standards

With ePlans review, plans are digitally stamped upon approval. Please leave space on all drawings and documents as detailed below for the stamp. **In all instances, the stamp is 2" x 2".** If a blank space is not left on the drawings and documents, the approval stamp will cover information.

Drawings:

- 11"x 17" infrastructure improvement plans: **leave a 2"x 2" space 2" from right edge and 1" from bottom edge on each sheet**
- All other sizes of building plans (all disciplines) and civil/site plans, including plats and infrastructure improvement plans: **leave a 2"x 2" space 3" from the right edge and 1" from the bottom edge on each sheet.**
- Submit plan sheets in landscape orientation.

Supporting Documents:

- Project manuals/specifications books: **leave a 2" x 2" space 1/2" from top edge and 1/2" from right edge on the front cover**
- Submit manuals, specification books and similar documentation in portrait orientation.

File Type Standards

The ePlan review software does not modify plans; it creates a separate layer for the reviewers' comments and markups. Plans and other documents may be submitted in the following formats:

Plan sheets: PDF, DWG, DXF, JPEG, PNG

Supporting documents: DOC, XLS, TXT, PDF, PNG, JPEG

Folder Structure

- All drawings shall be placed in the “Drawings” folder for each project.
- All documentation (non-drawing files such as project manuals, property photos, address lists, truss calculations, geotechnical reports, etc.) shall be placed in the “Documents” folder for each project.

Markup Name and Color Standards

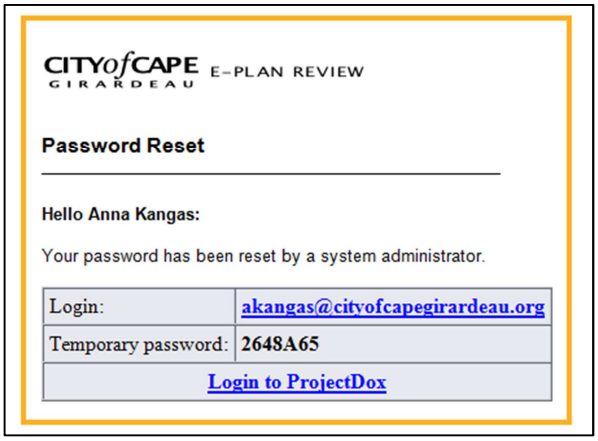
- Standard markup names and colors will be used for each reviewing department for easy identification. A markup can have one or more “changemarks.” Changemarks are created to quickly identify a markup and associated comments.

MARKUP DEPARTMENT	MARKUP COLOR
Engineering	Green
Health Department	Orange
Inspection Services	Blue
Planning	Red
Stormwater	Brown
Public Works	Purple

Login to ePlans

ePlan Review Invitation

Once staff enters your project’s information into the system, an ePlans Review invitation will be sent to your e-mail address. The e-mail will contain your login information and information about your project, including a link to the project.



CITY of CAPE GIRARDEAU E-PLAN REVIEW

Password Reset

Hello Anna Kangas:

Your password has been reset by a system administrator.

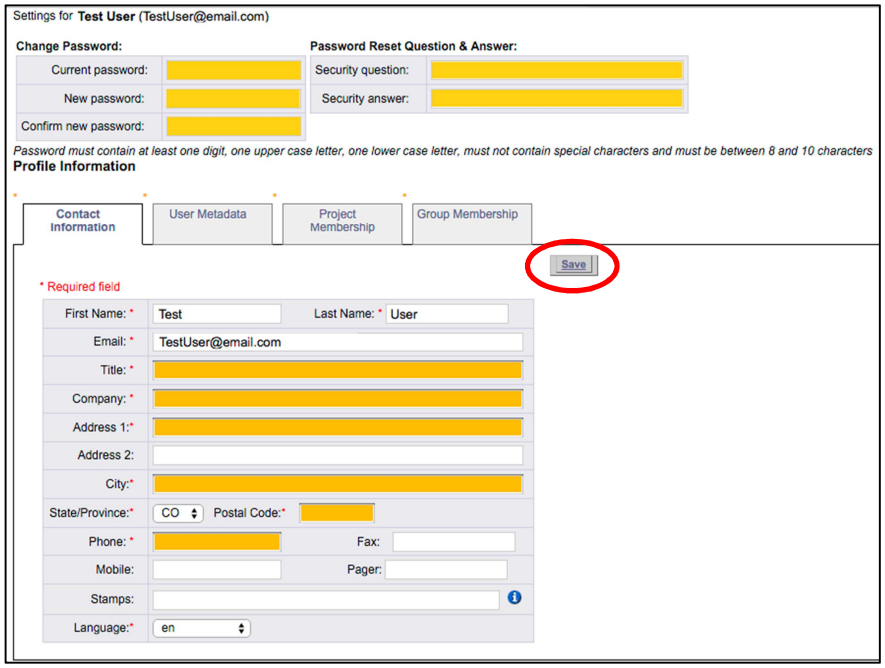
Login:	akangas@cityofcapegirardeau.org
Temporary password:	2648A65
Login to ProjectDox	

New Users

1. Prior to logging into ePlans, the following actions must be completed:
   - Disable pop-up blocking for the ePlans website. If pop-up blocking is not disabled when you type in your login and password, the page will immediately disappear when you hit the Login button. It is not uncommon to have more than one pop-up blocker installed (Internet Explorer, Google Task Bar, etc). Once the ePlans site is allowed, you will be able to utilize the application.
   - The login page has a MSI (Microsoft Silent Install) component required to install all the necessary ePlan ActiveX controls. This installation is required once on each computer used for submittal.

2. To sign in, enter your e-mail address and temporary password and click the Login button, as shown below:

3. Enter a new password, reconfirm the new password, and enter a security question and answer. Complete the Yellow highlighted fields, then click the Save button in the middle of the screen.

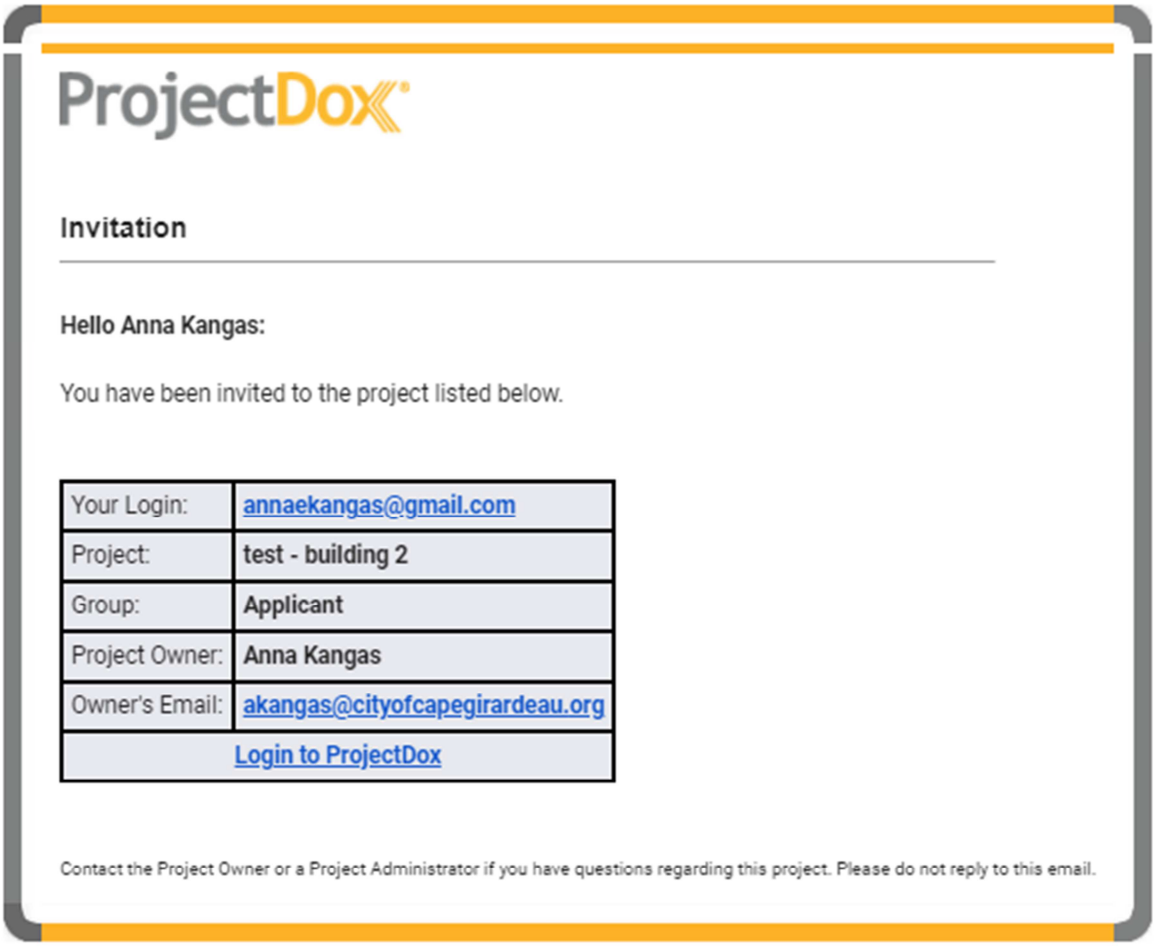


Returning Users

If you are a returning user, login to ePlan Review with your e-mail address and password. If you have forgotten your password, click on the "Forgot Password" button and you will receive a password reset email. This will work only if you have logged in once and added a security question and answer.

Uploading Files

1. After the application information is entered by staff and the appropriate plan review deposit and/or application fees have been paid, you will receive an email indicating you have an Applicant Upload Task Assignment.



ProjectDox

Invitation

Hello Anna Kangas:

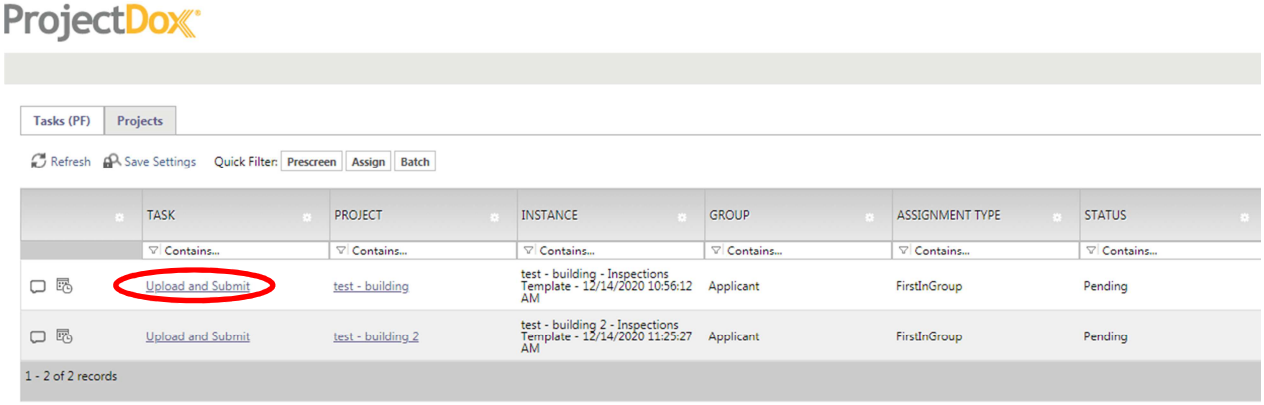
You have been invited to the project listed below.

Your Login:	annaekangas@gmail.com
Project:	**test - building 2**
Group:	**Applicant**
Project Owner:	**Anna Kangas**
Owner's Email:	akangas@cityofcapegirardeau.org
Login to ProjectDox	

Contact the Project Owner or a Project Administrator if you have questions regarding this project. Please do not reply to this email.

2. When you have successfully logged into ePlan, the Tasks screen will display. All projects for which you have an outstanding Task will display in the List. The projects are listed in order by Project number, but can be sorted by clicking on any header field name.

   Click on the "Upload and Submit" task for the applicable project.



ProjectDox

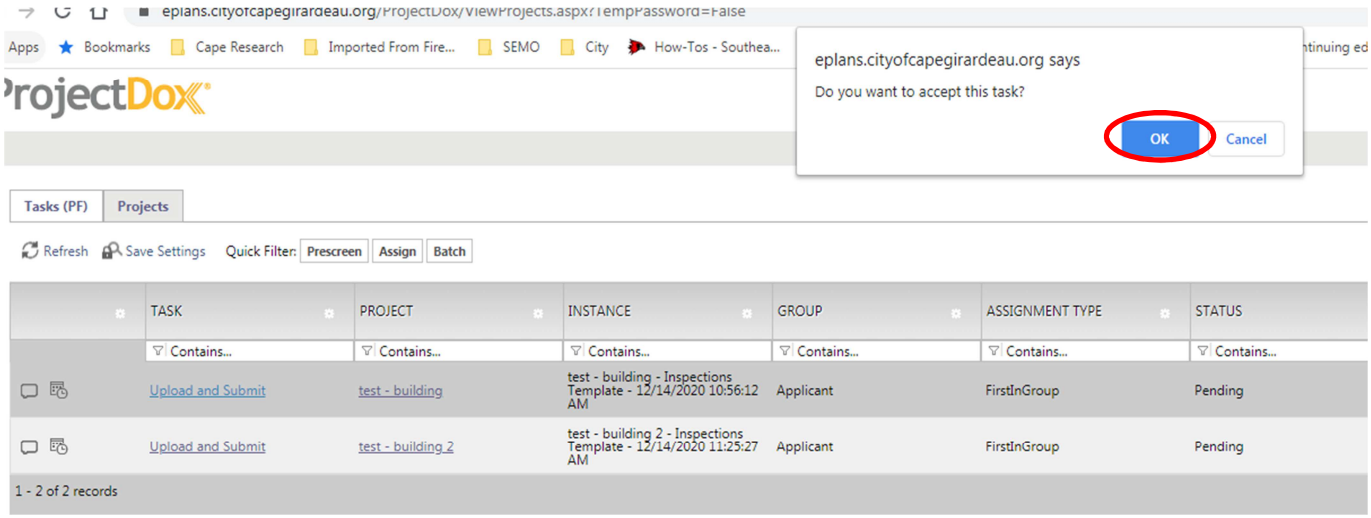
Tasks (PF) | Projects

Refresh | Save Settings | Quick Filter: Prescreen | Assign | Batch

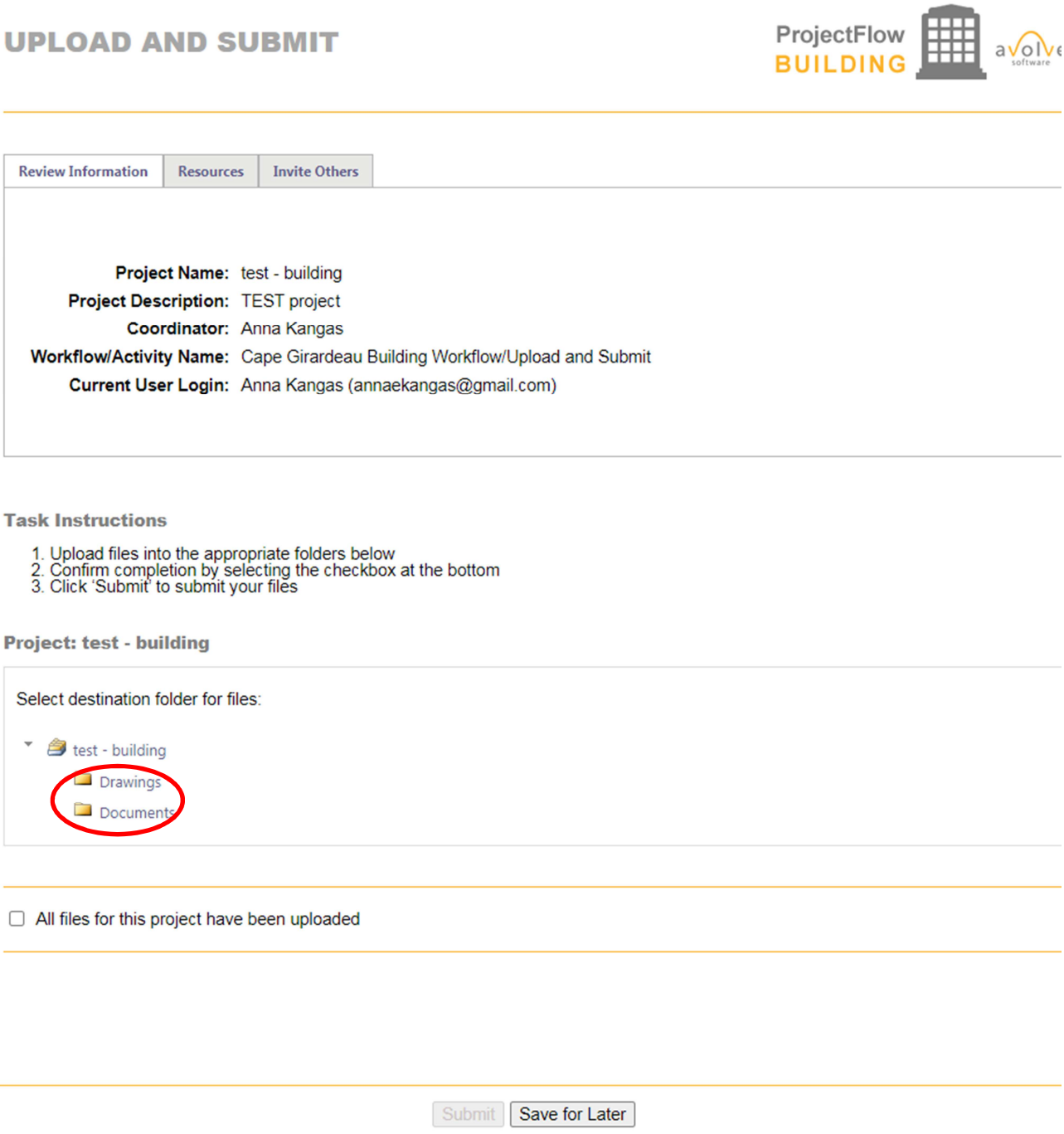
TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS
Contains...	Contains...	Contains...	Contains...	Contains...	Contains...
Upload and Submit	test - building	test - building - Inspections Template - 12/14/2020 10:56:12 AM	Applicant	FirstInGroup	Pending
Upload and Submit	test - building 2	test - building 2 - Inspections Template - 12/14/2020 11:25:27 AM	Applicant	FirstInGroup	Pending

1 - 2 of 2 records

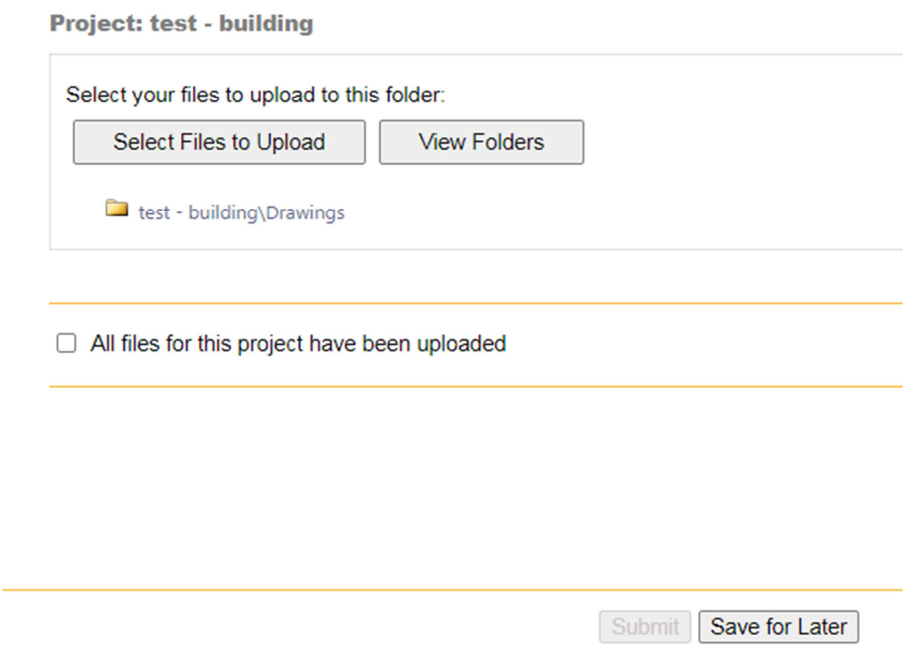
On the pop-up, click OK:



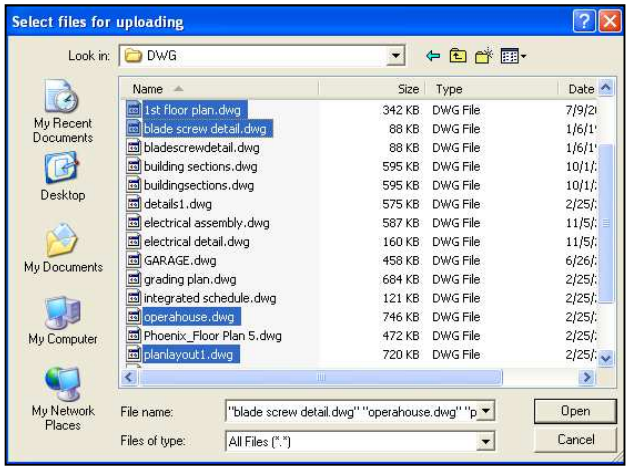
3. Click the “Drawings” folder to upload your plan drawings or the “Documents” folder to upload supporting project documents.



4. After clicking either folder, you will be presented with two buttons, “Select Files to Upload” and “View Folders”.

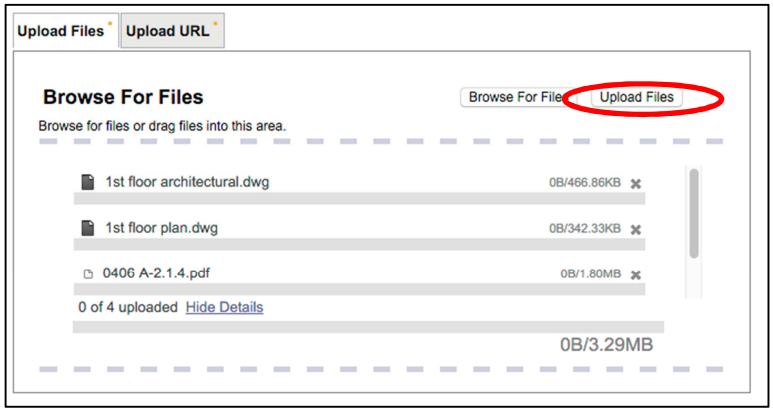


5. Click the “Upload Files” button. You can select individual files by clicking on the “Browse” button, or install the Microsoft Silverlight control (if not already installed on your computer) to allow selection of multiple files or drag-and-drop files into the window. Select the file location on your computer. Select or highlight the files to upload; multiple files can be selected by using your Shift or Ctrl keys. Click the “Open” button. The files will then be copied to the upload window.



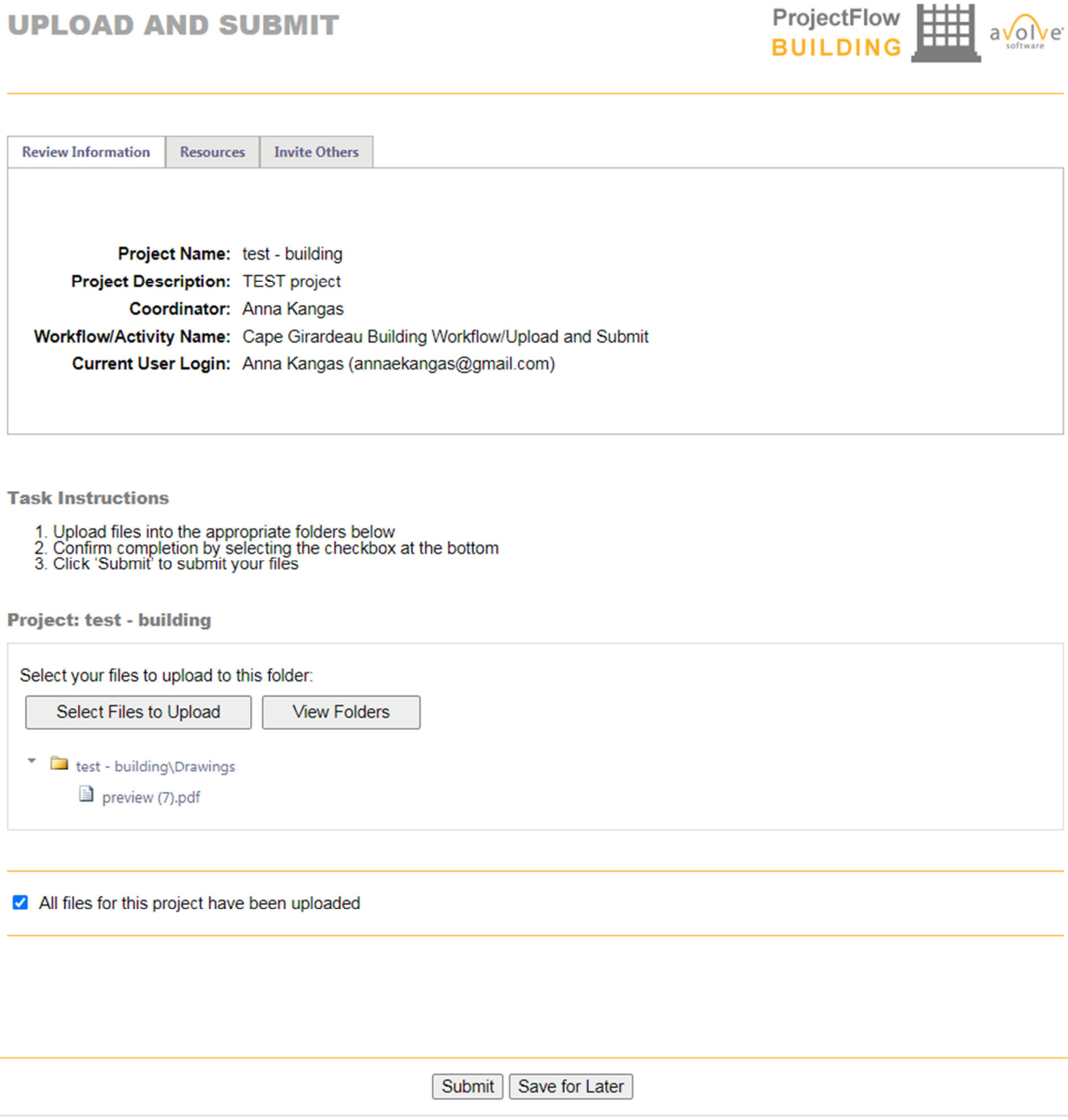
6. When all files you wish to upload are listed in the window, click the “Upload Files” button and the files will be uploaded to ePlans. Click the “Close” button to close out of the file upload complete dialog box. Repeat this process for the Documents file if you have non-drawing files for upload.

If you are uploading a large project, it may be beneficial to upload at the end of the work day when there are fewer users in the system using resources.

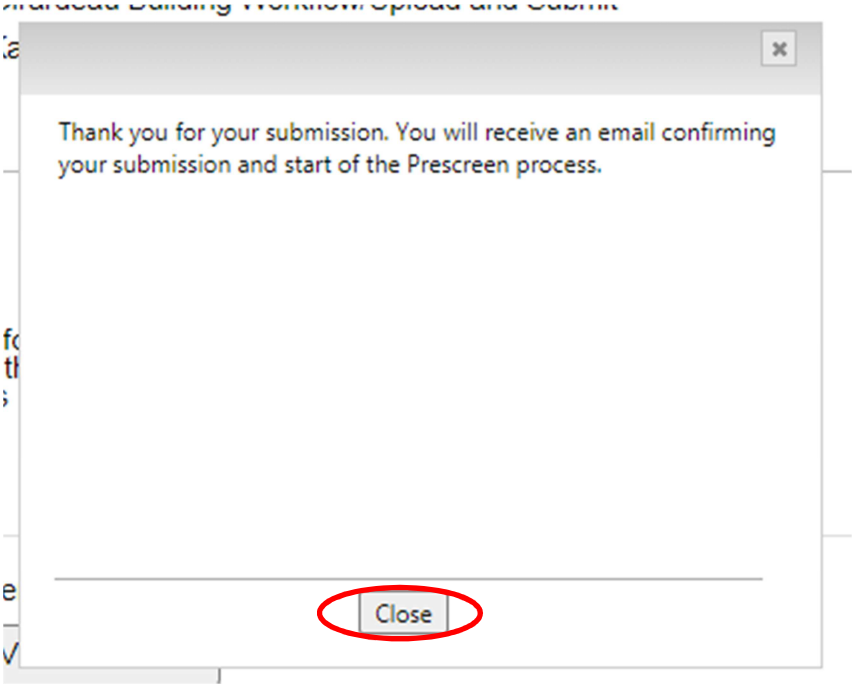


Complete the Applicant Upload task

1. After the files are uploaded, click the box next to “All files for this project have been uploaded” and click the “Submit” button.



2. Click “Close” on the pop-up.



3. Congratulations! You have successfully finished submitting your plans electronically. Please logout after your session is complete. A notification is automatically sent to the Review Coordinator to start the Prescreening process to determine if the submittal requirements have been met.

   Staff will be notified of the submittal once the checkbox is marked, and the Submit button is clicked.

Security Timeout

The system will automatically sign you out after 60 minutes of inactivity. When you are ready to resume working with the system, click any button on the screen. The system automatically loads the login page for you. You can also close the web browser window and reload the login page manually in a new browser window.

Prescreen

Prescreen is a preliminary review of your uploaded documents to verify all required documents have been provided. If there are questions or missing items from your submittal, you will receive a "Prescreen Corrections Task Assignment" e-mail with instructions on the changes requested and how to resubmit. Once all submittal requirements are met, the application will enter into the review queue for formal review.

Returned for Corrections

If your submittal requirements were not complete, you will receive an e-mail notification that corrections are required.

CGI-AVOLVESQL@cityofcapegirardeau.org
to me

ProjectDox

Prescreen Review Task Assignment

Attention Anna:

We received the submittal for TEST project and identified missing information. Review of the application will not begin until additional information or corrections have been submitted. Please review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal please, Login to ProjectDox to begin your task and follow the instructions provided for re-submittal.

Please be advised:

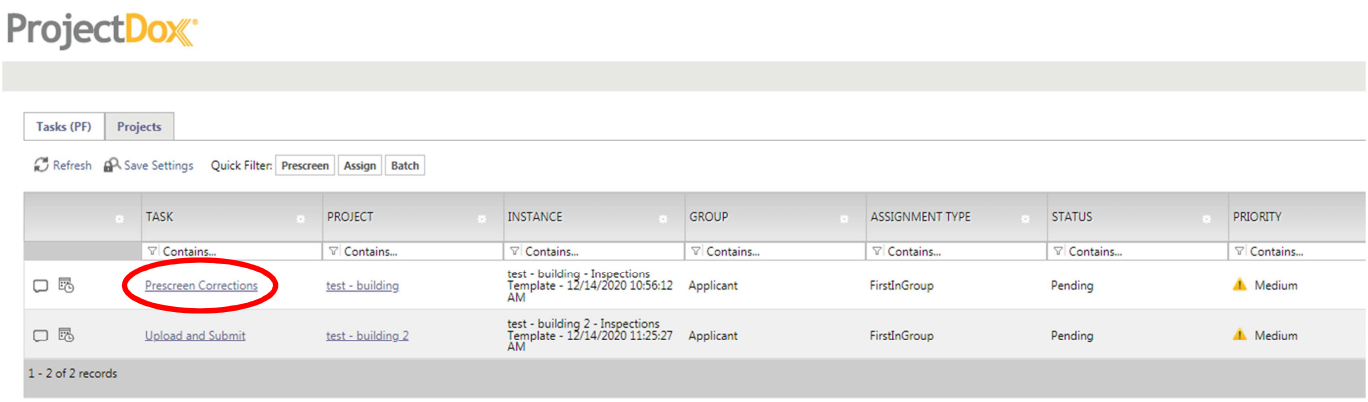
- All corrections must be uploaded using the same file names as the original submittal.
- Once corrections are submitted for review, no additional submissions will be accepted unless requested.
- Please make corrections within 180 days of this notice to prevent your Application from expiring.

Project:	**Anna - test 2**
Description:	**TEST project**
Task:	**Prescreen Corrections**
Assigned by:	**Anna Kangas**
Project Access | Login to ProjectDox	

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

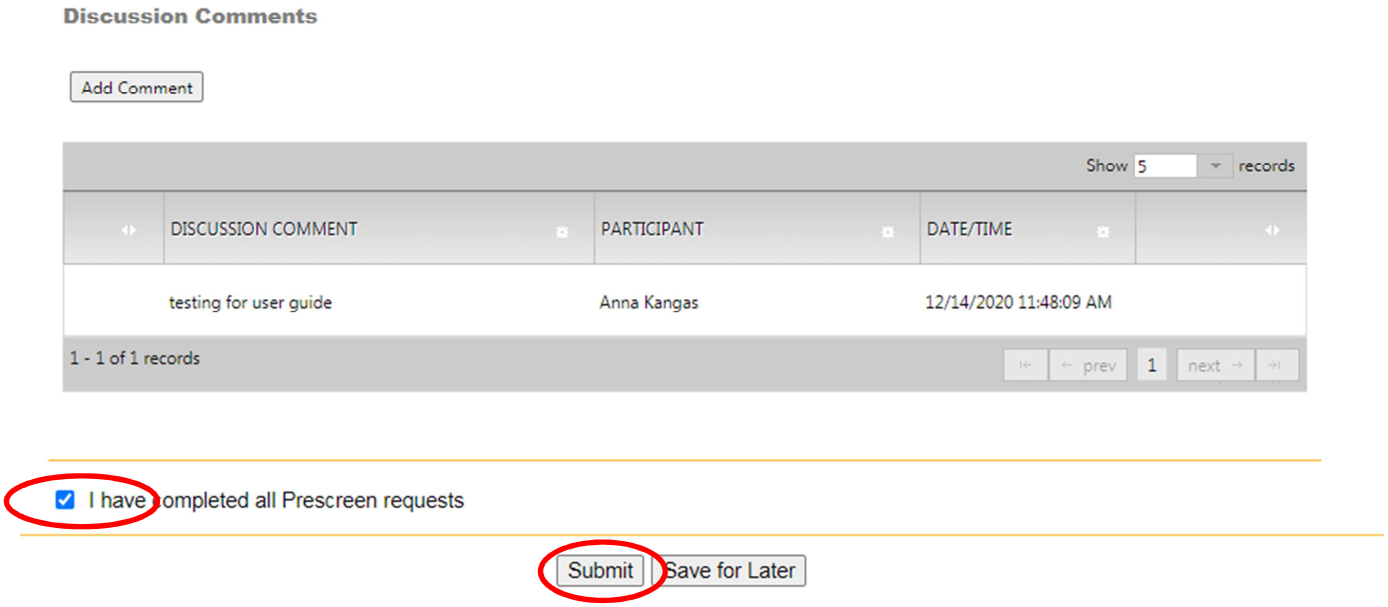
1. Click the link in the e-mail to login to ePlans and access the Prescreening information. Click on the Prescreen Corrections task for the appropriate project. Click “OK” on the pop-up window to accept this task. This will launch an Internet Explorer screen with the corrections form and another screen with the Drawings and Document folders you saw in the original upload request.

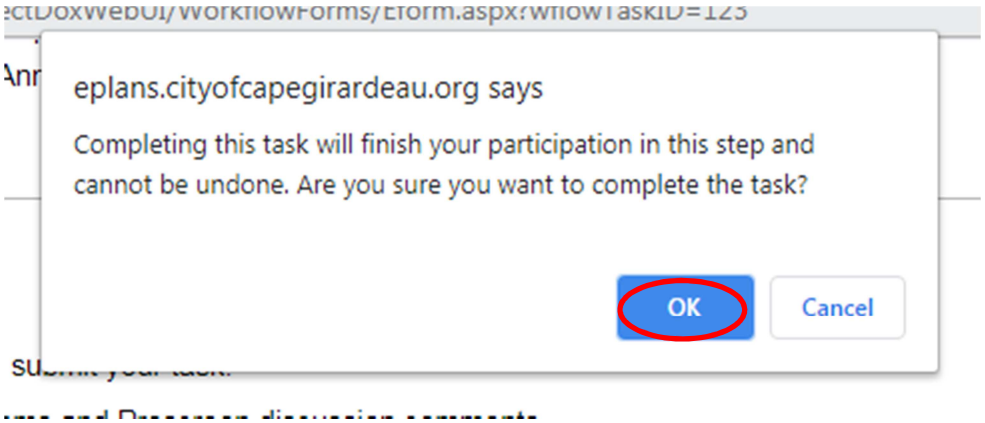


2. Review the Prescreen Comments to identify which requirements were noted as missing. Items may be viewed by clicking on the “View/Edit Checklist Items” button and in the “Discussion Comment” box.

3. After identifying the missing or corrected drawings and/or documents to upload, enter the project and upload the files. (See the “Uploading Your Files” section for instructions).
4. Click back to the eForm with your task assignment as shown above (step 1).

5. When the eForm opens, place a checkmark in the “I have uploaded all Prescreen Requests” and click the “Submit” button. Click “OK” on the pop-up. Upon completion, the City will be notified of the completed task and will continue with the Prescreen process.
   Staff will only be notified of the re-submittal once the “Return to Cape Girardeau” button is clicked.





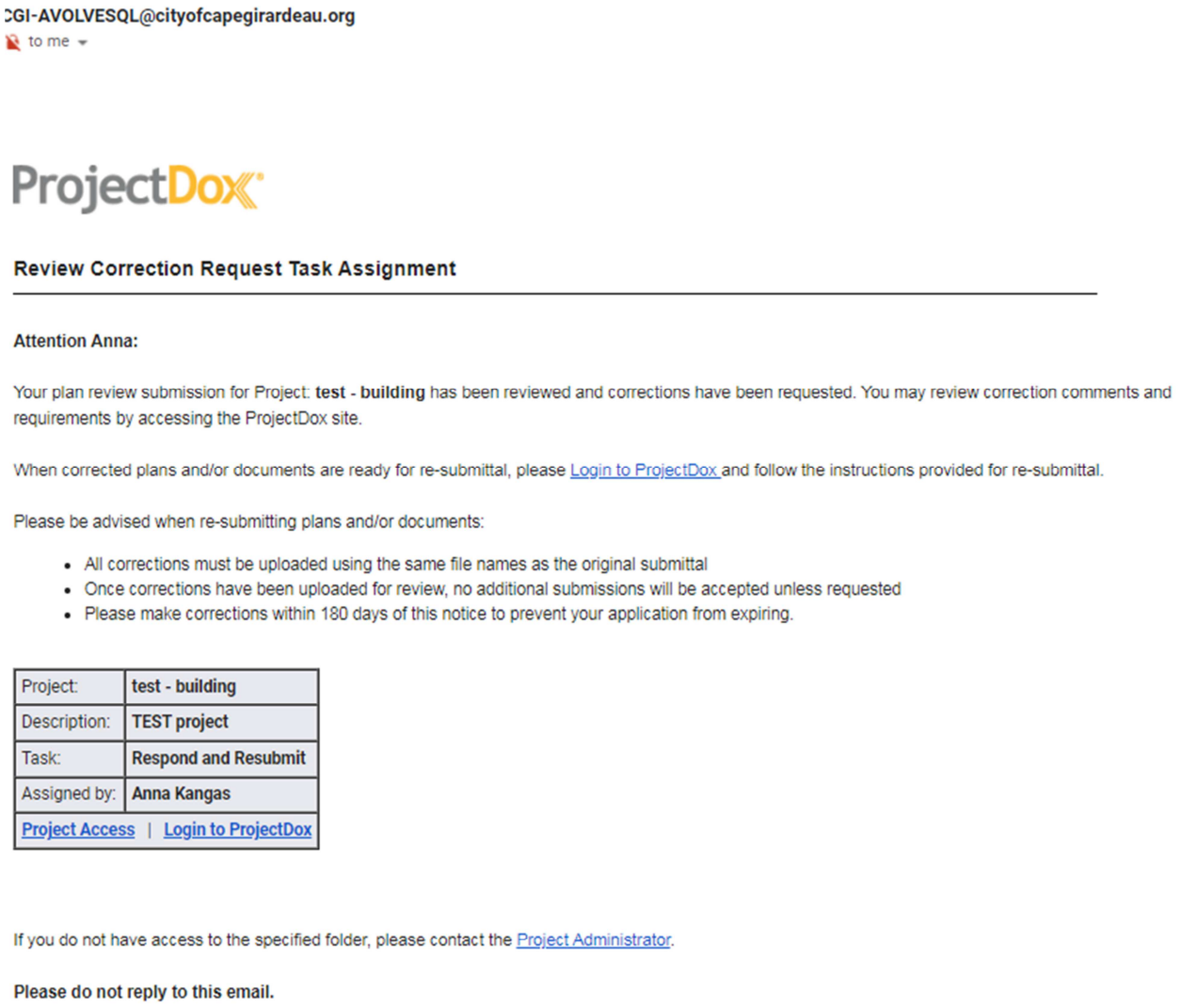
Prescreen Approved

If your submittal is approved, it will move into the review process.

Change Notification and Plan Resubmit

Review Requested Corrections

1. If corrections are requested following the review cycle(s) of your drawings, you will receive an e-mail notification from the Review Coordinator requesting revised documents.



CGI-AVOLVESQL@cityofcapegirardeau.org
to me

ProjectDox

Review Correction Request Task Assignment

Attention Anna:

Your plan review submission for Project: **test - building** has been reviewed and corrections have been requested. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please Login to ProjectDox and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to prevent your application from expiring.

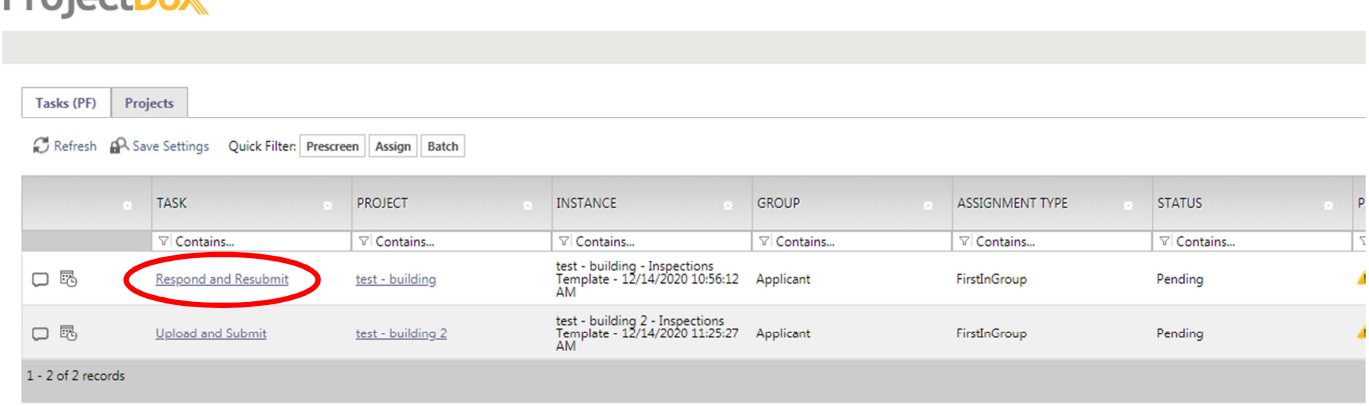
Project:	**test - building**
Description:	**TEST project**
Task:	**Respond and Resubmit**
Assigned by:	**Anna Kangas**
Project Access | Login to ProjectDox	

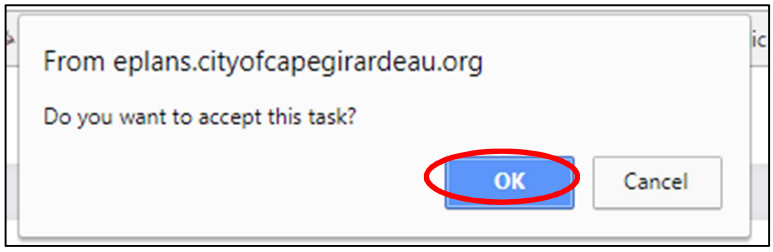
If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

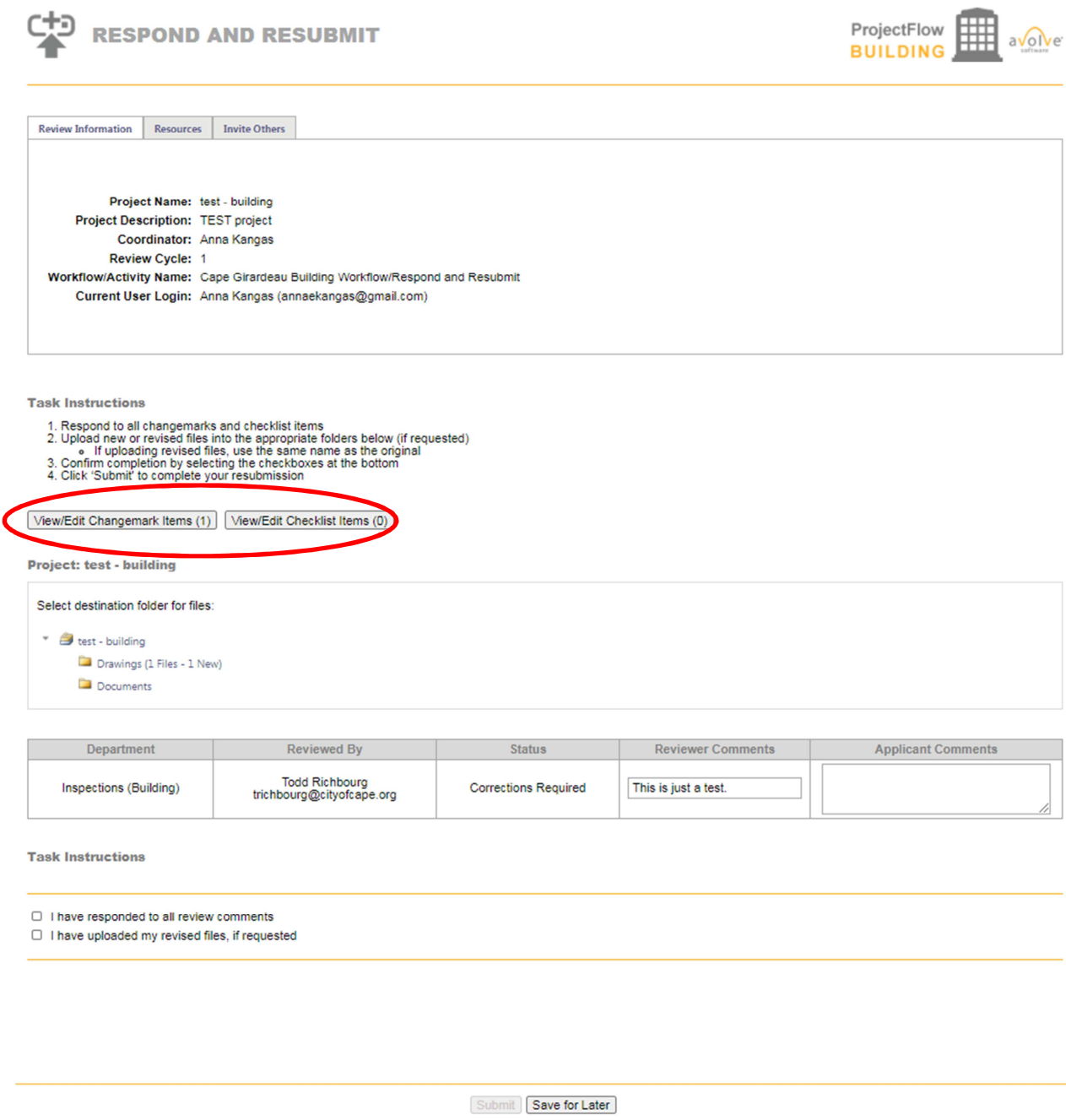
2. Click the “Login to ProjectDox” link in the e-mail to access the corrections requested in ePlans.

Click the “Respond and Resubmit” task. Click “OK” on the pop-up window to accept this task.





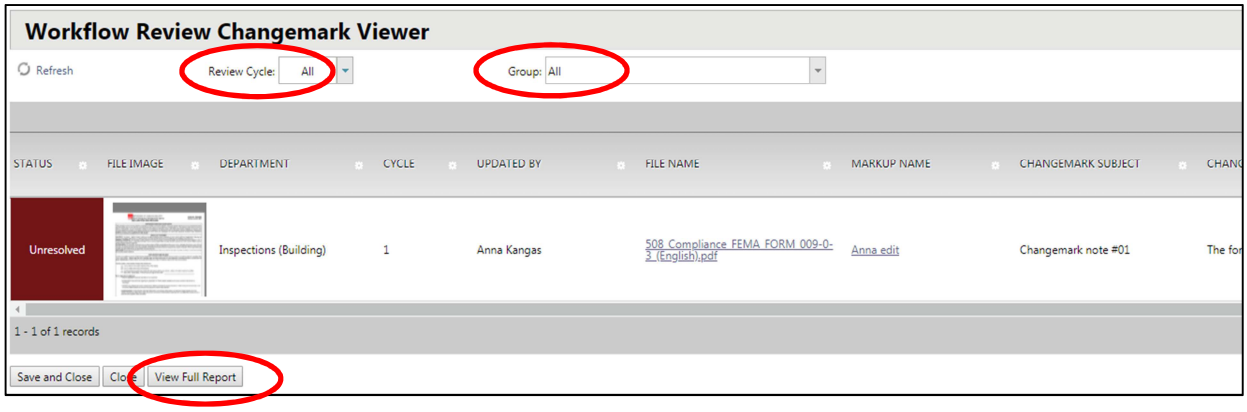
3. The eForm and drawing markups provide a complete correction package from all reviewing departments.



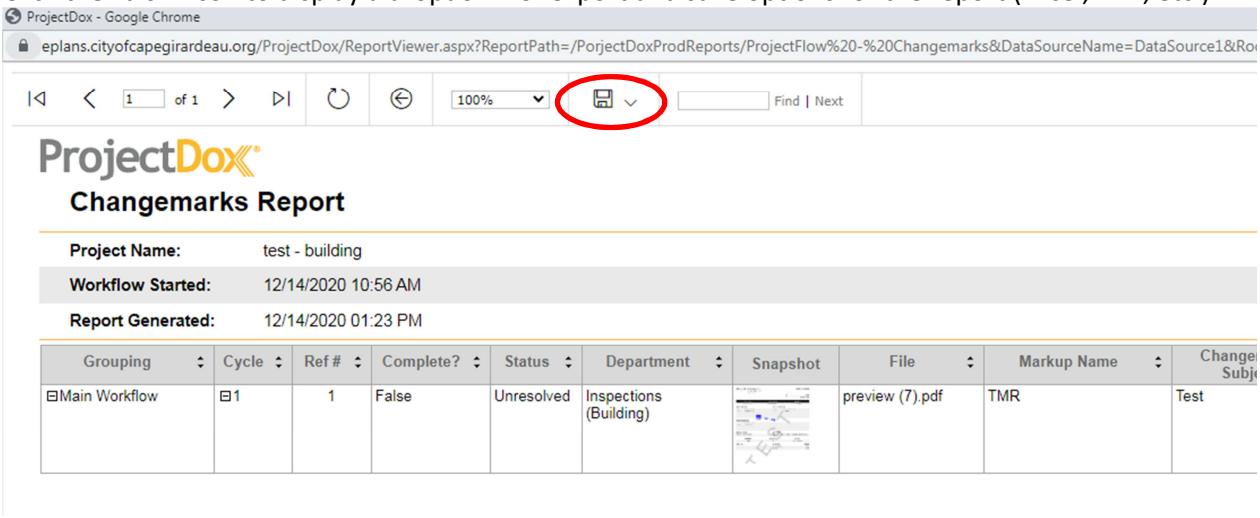
4. Complete the steps below to perform the "Applicant Resubmit" task. These steps are detailed on the following pages.
    1) View Changemark Items.
    2) View/Edit Checklist Items.
    3) Update and upload revised drawings and documents as needed. Remember to keep the file name the same as your original submission and indicate the revision date on the title block.
    4) Verify and Complete the checkboxes under "Task Instructions"
    5) Click the "Submit" button to complete the submission

(1) View Changemarks

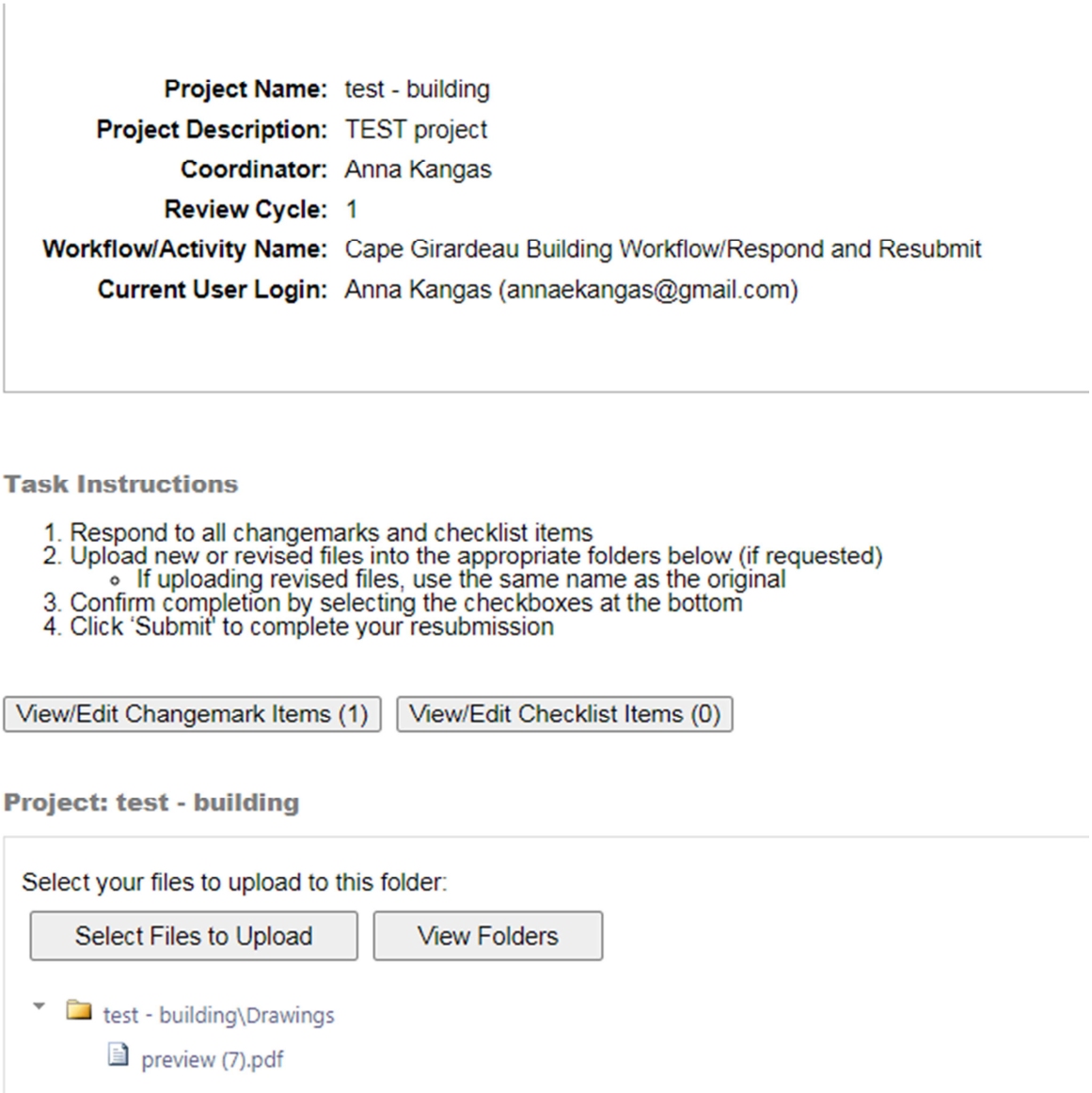
From the “Applicant Resubmit” screen, click on the “View Changemark Items” button. Once the changemark report is launched, you can view changemarks for the current review cycle, previous review cycles, or all review cycles by selecting from the Review Cycle dropdown box. You can filter the comments based on the review group by selecting from the Group dropdown box. You can also click the “View Full Report Button” to launch a full version of the report offering download and export capabilities.

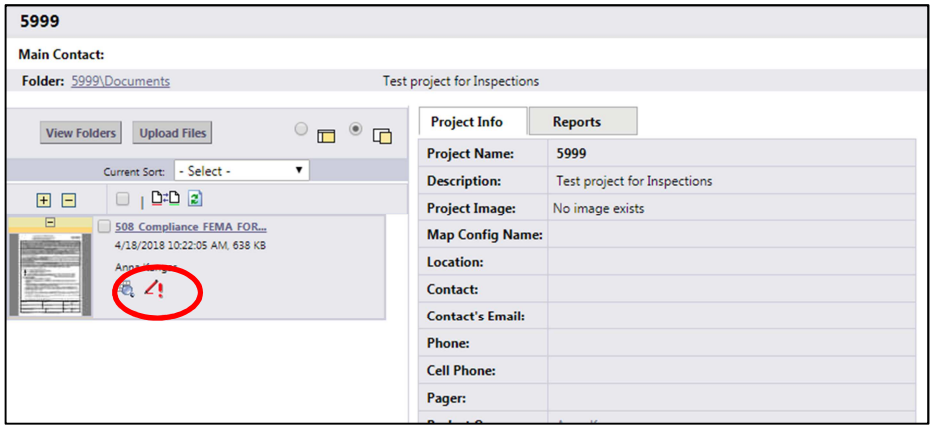


Click the “disk” icon to display a dropdown of export and save options for the report (Excel, PDF, etc.)

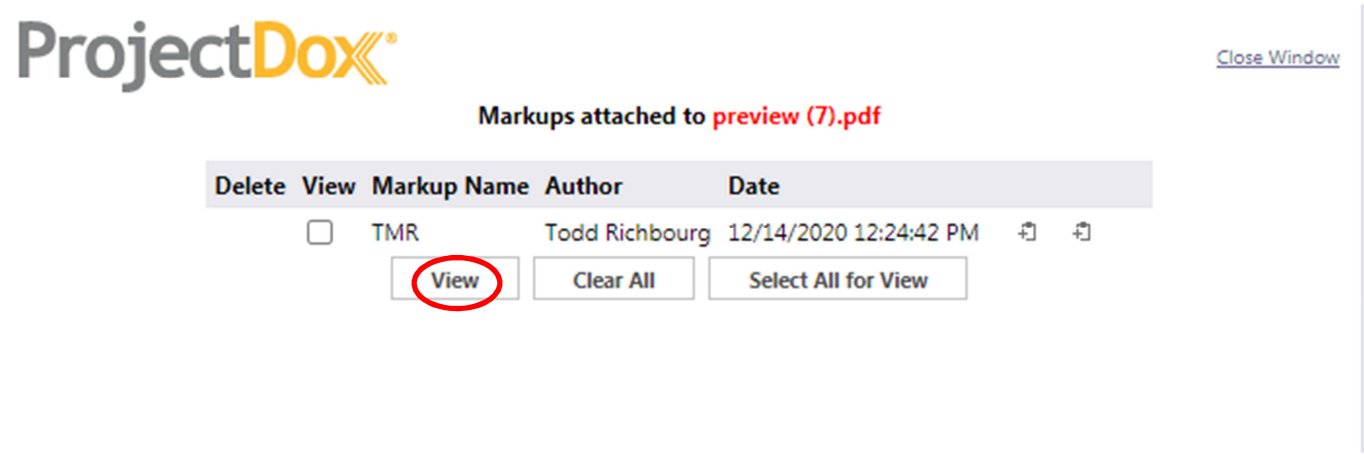


To view markups on a single plan sheet, go into the folder where the drawing is located and click on the pen/exclamation point icon next to the drawing as shown here:

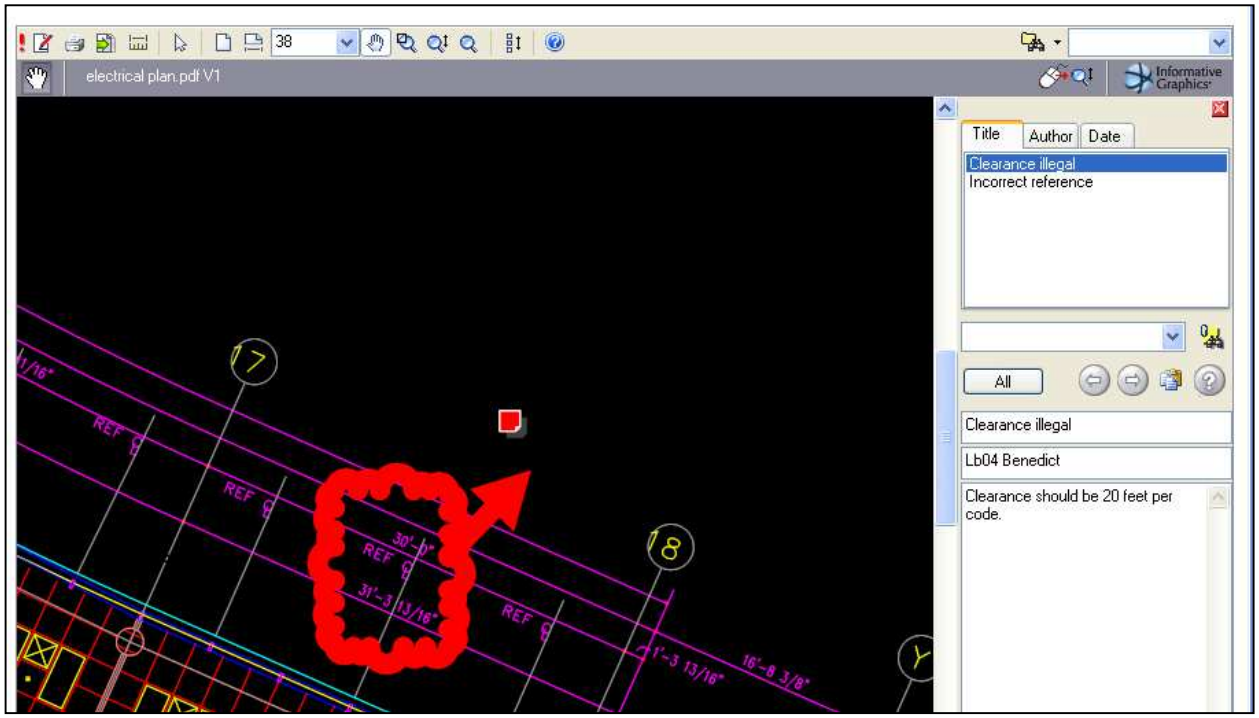




Select from the list of available markups by clicking the "View" checkbox and then clicking the "View" button.

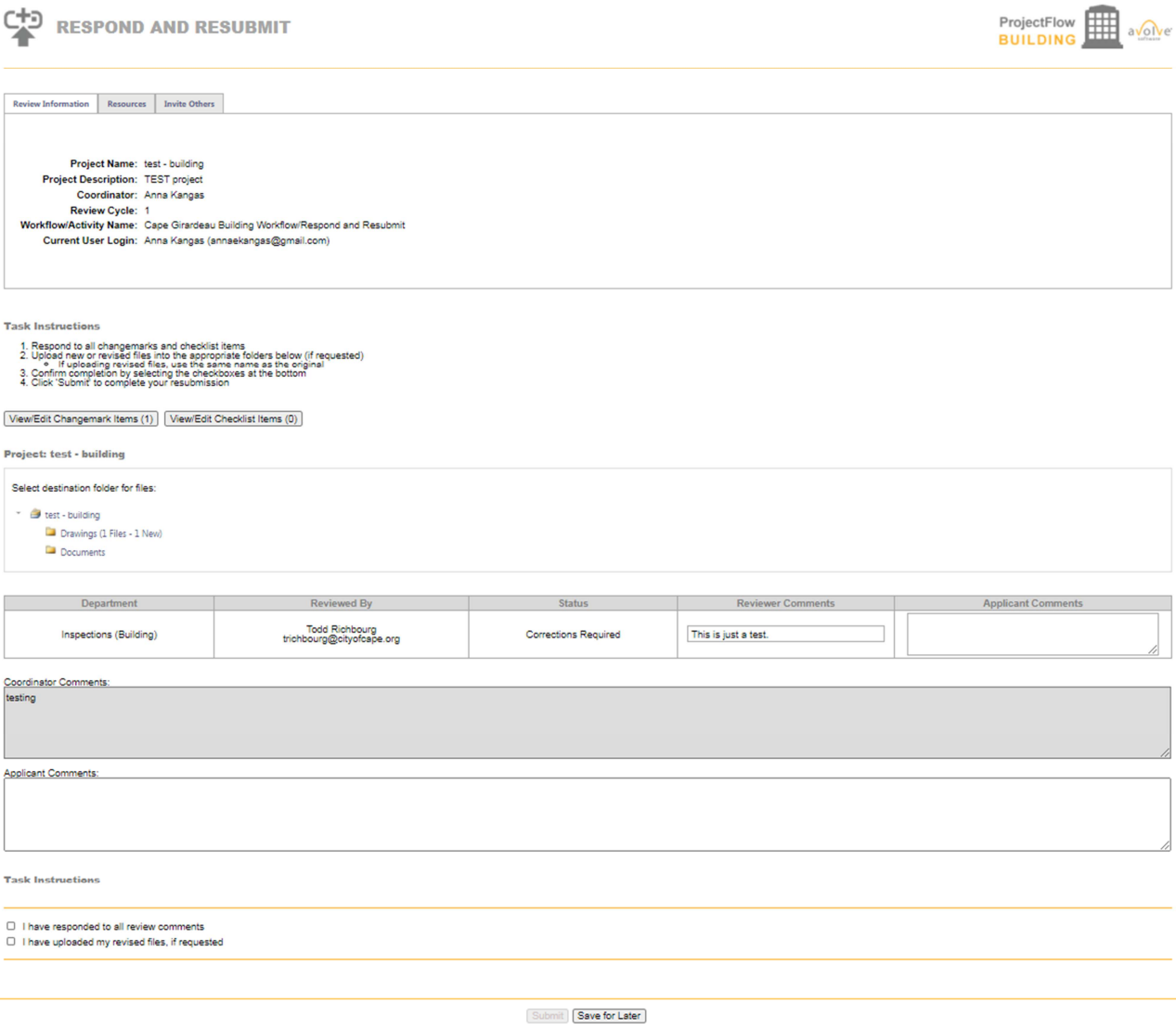


All changemarks for this sheet will display in the right hand pane. As you review, click each changemark to zoom directly to the changemark from the reviewer.



(2) View/Edit Checklist Items

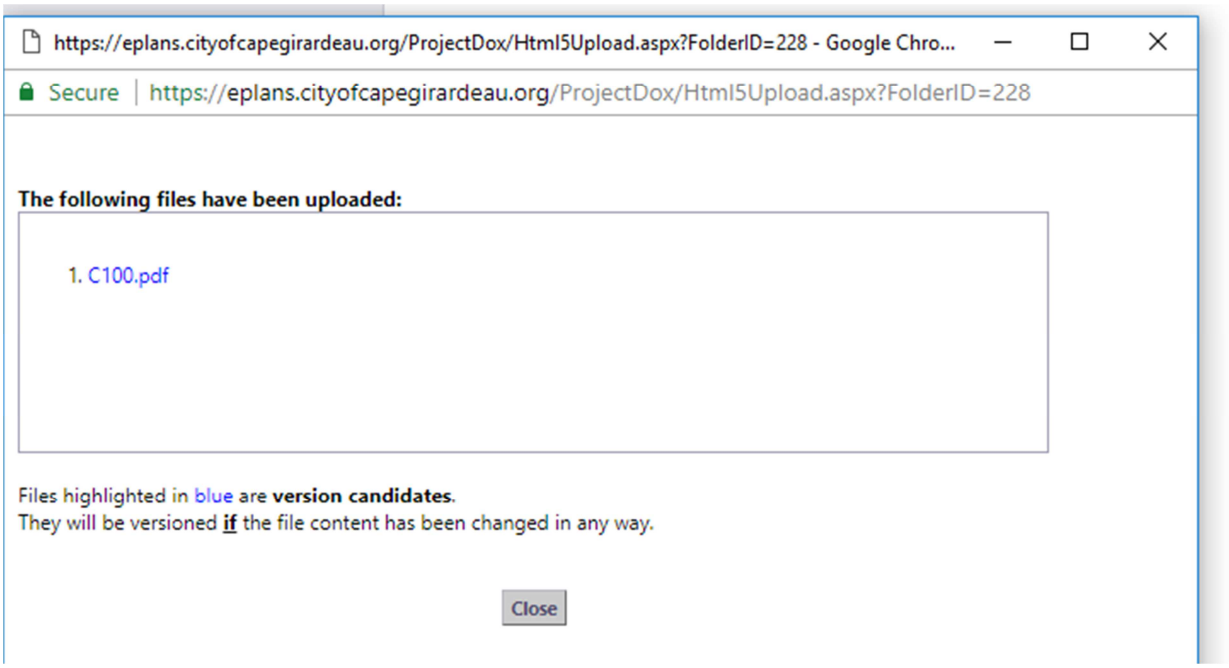
From the "Applicant Resubmit" eForm, click the "View/Edit Correction Items" to view the Correction Items Report. Once open, view the correction items identified by the reviewers. Then capture your responses to review comments in the "Response Text" field. Enter comments in the Applicant Response box for each item as necessary. When finished, click the "Save" button to save your comments, then save / close the report.



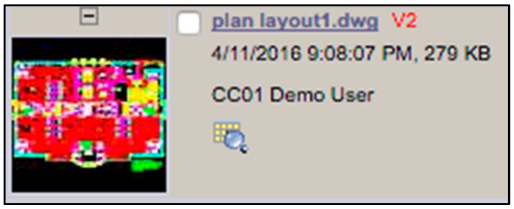
(3) Update Plan Files

After reviewing the Changemark and Checklist Items Reports, upload revised files as required to settle all reviewer comments.

A pop-up window will indicate which files are version candidates. This means the file name is exactly the same between the original and revisions.

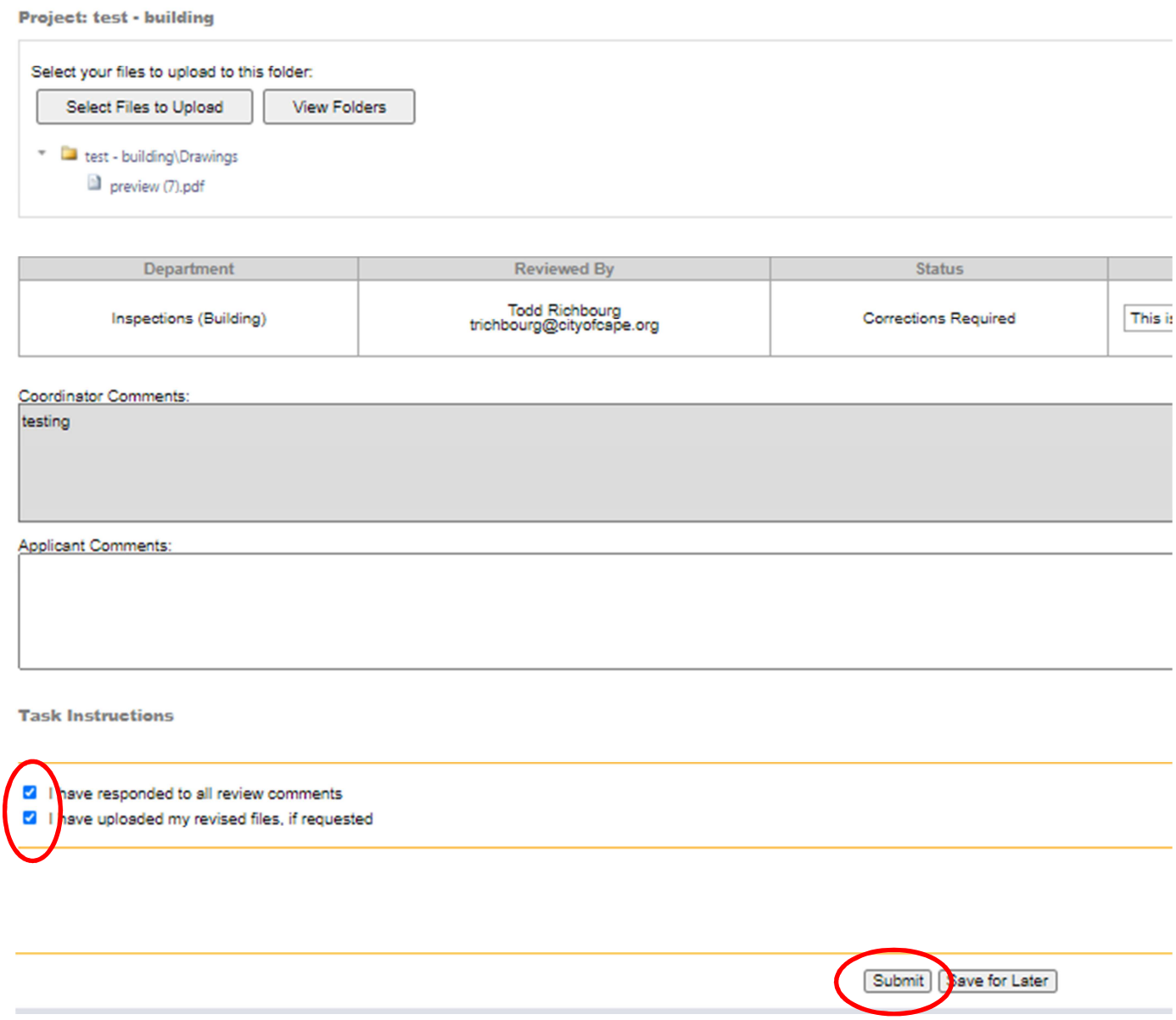


The file will display the version number, V2 for example, if the correction is uploaded with the SAME FILE NAME as the original file. If the version number does not appear, the file name does not match the original submittal exactly and needs to be revised. **If file names do not match between the original submittal and corrections, the resubmittal will be returned for correction.**



(4) Verify and Complete the Checkboxes

Verify the Tasks with checkboxes are completed. Then click Submit.



Staff will not be notified of the resubmittal until the Submit button is clicked.

Plan Approval

When the plan review is approved by all reviewers and appropriate board or commission approval is obtained, if applicable, an approval email will be sent.

Print Approved Plans and Documents

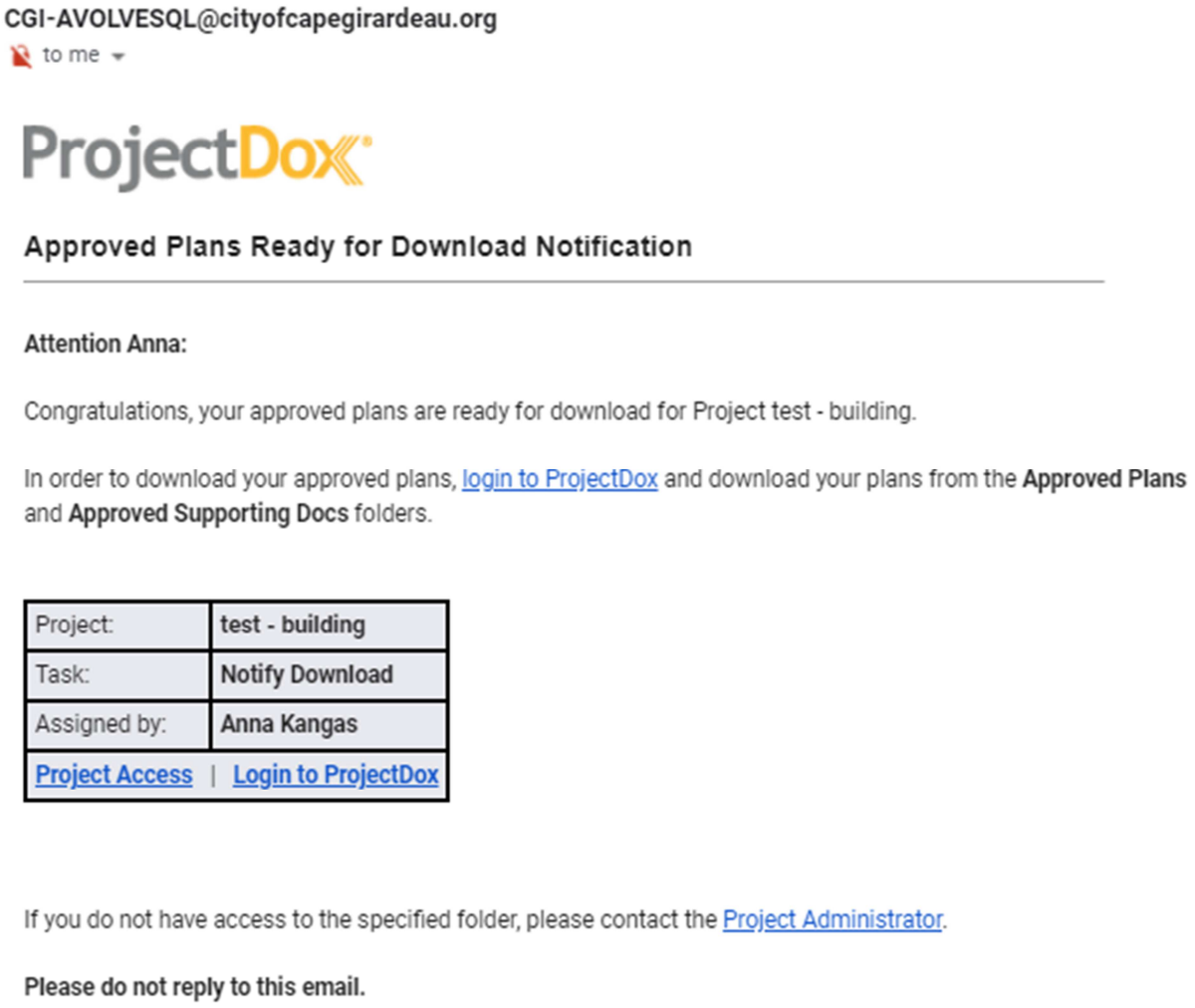
After the application is approved and all applicable fees have been paid, the plans and documents will be electronically stamped by the City. You will receive an e-mail indicating your permit or certificate is ready and instructions on how to download and print your files.

For building permits: a hardcopy of the approved building plans and project manual are required to be kept on the jobsite.

For miscellaneous permits such as fences, signs, retaining walls, generators, solar: a hardcopy of the approved plans are required to be kept on the jobsite.

For stormwater permits: a hardcopy of the plans and SWPPP are required to be kept on the jobsite.

The contractor will need to come to Inspection Services to sign for the permit and pick up their permit cards. Staff is working to digitize this process as well, but it is not ready at this point.



CGI-AVOLVESQL@cityofcapegirardeau.org
to me

ProjectDox

Approved Plans Ready for Download Notification

Attention Anna:

Congratulations, your approved plans are ready for download for Project test - building.

In order to download your approved plans, login to ProjectDox and download your plans from the **Approved Plans** and **Approved Supporting Docs** folders.

Project:	**test - building**
Task:	**Notify Download**
Assigned by:	**Anna Kangas**
Project Access | Login to ProjectDox	

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

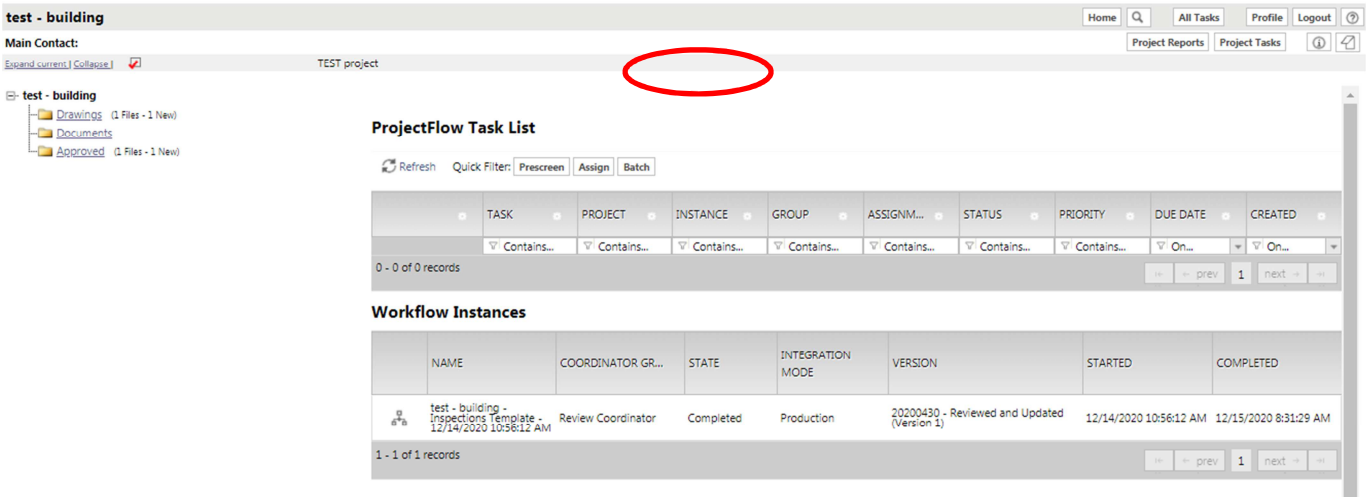
Status of Plan Review

Workflow Routing Slip

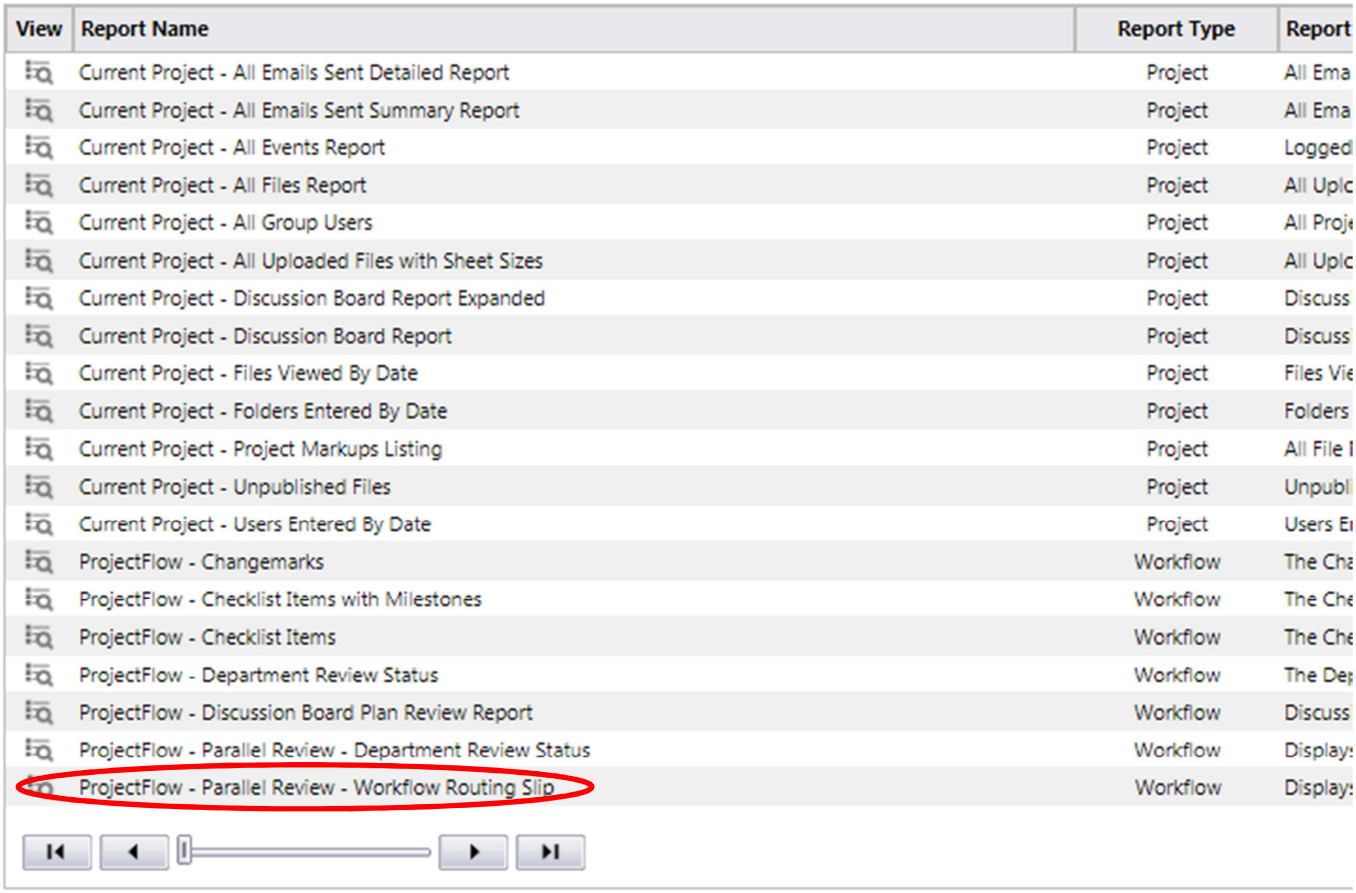
To identify the status of any permit through the plan review process, please follow these instructions:

1. Login to ePlans, if not already logged in.
2. Click on the appropriate project number.

3. Click on the “Project Reports” tab.



4. On the pop-up window, click on the magnifying glass icon next to the report titled “ProjectFlow – Parallel Review - Workflow Routing Slip”.



View	Report Name	Report Type	Report
	Current Project - All Emails Sent Detailed Report	Project	All Ema
	Current Project - All Emails Sent Summary Report	Project	All Ema
	Current Project - All Events Report	Project	Logged
	Current Project - All Files Report	Project	All Uplc
	Current Project - All Group Users	Project	All Proje
	Current Project - All Uploaded Files with Sheet Sizes	Project	All Uplc
	Current Project - Discussion Board Report Expanded	Project	Discuss
	Current Project - Discussion Board Report	Project	Discuss
	Current Project - Files Viewed By Date	Project	Files Vie
	Current Project - Folders Entered By Date	Project	Folders
	Current Project - Project Markups Listing	Project	All File I
	Current Project - Unpublished Files	Project	Unpubli
	Current Project - Users Entered By Date	Project	Users Er
	ProjectFlow - Changemarks	Workflow	The Cha
	ProjectFlow - Checklist Items with Milestones	Workflow	The Che
	ProjectFlow - Checklist Items	Workflow	The Che
	ProjectFlow - Department Review Status	Workflow	The Dep
	ProjectFlow - Discussion Board Plan Review Report	Workflow	Discuss
	ProjectFlow - Parallel Review - Department Review Status	Workflow	Displays
	ProjectFlow - Parallel Review - Workflow Routing Slip	Workflow	Displays

This report will give you information on all tasks that have been completed and those that are still in progress.

ProjectDox

Parallel Review - Workflow Routing Slip Report

Project Name:	test - building
Workflow Started:	12/14/2020 10:56 AM
Report Generated:	12/15/2020 08:42 AM

Grouping	Task Name	Status	Review Status	Cycle	Date Assigned	Date Accepted	Date Completed	Group Name	User
	Upload and Submit	Completed			12/14/2020 10:56 AM	12/14/2020 11:29 AM	12/14/2020 11:34 AM	Applicant	Anna Kangas
	Prescreen Review	Completed			12/14/2020 11:34 AM	12/14/2020 11:47 AM	12/14/2020 11:48 AM	Prescreen	Anna Kangas
	Prescreen Corrections	Completed			12/14/2020 11:48 AM	12/14/2020 11:52 AM	12/14/2020 11:54 AM	Applicant	Anna Kangas
	Prescreen Review	Completed			12/14/2020 11:54 AM	12/14/2020 11:55 AM	12/14/2020 11:55 AM	Prescreen	Anna Kangas
	Assign Reviewers	Completed			12/14/2020 11:55 AM	12/14/2020 11:55 AM	12/14/2020 11:55 AM	Review Coordinator	Anna Kangas
	Inspections (Building) Department Review cycle #1	Completed	Corrections Required	1	12/14/2020 11:55 AM	12/14/2020 12:21 PM	12/14/2020 12:26 PM	Inspections (Building)	Todd Richbourg
	Review Complete	Completed		1	12/14/2020 12:26 PM	12/14/2020 12:57 PM	12/14/2020 12:57 PM	Review Coordinator	Anna Kangas