

ePlan Submission Portal

Submission Guide

IMPORTANT: The **Portal user** (i.e. Submitter, Applicant) that creates and submits the permit or project through the **ePlan Submission Portal** is responsible for following the instructions and requirements provided in this guide.

You must click or for a Coordinator to be notified of your submission. (**Note:** Only the **Portal user** that created the permit has access to these actions)

Step 1, 2, 3...



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This guide is **not** intended for print as it may be updated regularly.

→ To view the **newest** version, visit the Planning & Development Department's [Forms and Applications website](#)

GENERAL REQUIREMENTS & INFO

Before using the Portal, save time and avoid common problems by doing the following:

- Check that the project is located within the Westerville city limits by using the following [map viewer](#).
- Ensure you have a valid address and suite number, especially if this is for a new building or business.
- Keep your web browser (e.g. Chrome, Firefox, Edge) updated.
- Review this entire guide to understand the complete requirements and process.

Eligible Applications & Review Types

Review Type: Application Type:

BUILDING

- Change of Occupancy
- Commercial Building
- Commercial Electric Standalone (requiring plan review; EV Stations)
- Commercial HVAC/Refrigeration Standalone (requiring plan review)
- Commercial Plumbing Standalone (requiring plan review)
- Fire Alarm
- Fire Suppression
- Low Voltage Access Control (requiring plan review)
- Sign Permit
- Temporary Outdoor Dining (Valid until Nov. 1, 2020)
- Temporary Tent
- Uptown Outdoor Dining (Permanent)

ENGINEERING

- Engineering Plan Review (Private Development)

PLANNING/ ZONING

- Planning Commission
- Uptown Review Board
- Board of Zoning Appeals

- **Submissions for applications not listed above and not submitted under the appropriate review type will be returned to the Submitter.**
 - “Over-the-counter” trade permits are not accepted through the *ePlan Plan Submission Portal* because they do not require plan review.

Important Process Notes

- **Start electronic, continue electronic** (alternatively, start with paper, continue with paper)
 - Applies to an individual permit (e.g. building permit can be a paper submission and the child fire suppression permit can be an electronic submission, and vice versa)
 - 1st submission & review done electronically cannot have subsequent submissions that are by paper (and vice versa)
- **Changes cannot be uploaded/submitted until after the review is complete**
 - At the CBO's discretion, applicant can request that the permit be pulled from the review queue and returned to the applicant for them to upload changes and re-submit
- **Submissions after 5 PM and/or on a weekend** will be considered "received" the next business day

Email Communication

- Email is the **primary form of communication** (from a Coordinator or other City Staff)
- **Emails are only sent to the email address of the Portal user that creates and submits the permit**
 - Email address can be changed within the **Profile** tab after logging in
- Email notifications occur when:
 - Submission is received and/or deficient
 - Plans are reviewed and comments posted to the Portal
 - Plans are approved and payment is requested
 - Approved plans and documents are posted to the Portal
- Additional email notifications including automatic ones to the property owner and contractor may be sent when the permit status changes

Payment Info

- **Check and cash are currently the only accepted forms of payments** (by mail or drop off)
- **When payment required with submission:** application and plans will not be considered accepted and review will not begin until payment received
- **When payment required after review:** approved plans will not be posted to the Portal until payment received

Printing Paper Copies

Review Type: ***Paper Requirements:***

BUILDING

→ **TIME OF SUBMISSION:**

Paper plans and documents not required

→ **TIME OF APPROVAL:**

Approved paper plans & documents **required onsite** for inspections. Applicant must always download and print the **newest*** approved plan set (*will include all submitted documents showing an approval stamp on the cover sheet and corner stamp on each sheet/document*) and any other posted approval documents (*i.e. Approval Letters, Zoning Certificate, Certificate of Plan Approval, etc.*)

To ensure effective inspections, particularly for large projects, the Chief Building Official may request an office copy of the approved paper plan & document set.

ENGINEERING

→ **TIME OF SUBMISSION & APPROVAL:**

Paper plans and documents may be requested by Staff.

**PLANNING/
ZONING**

→ **TIME OF SUBMISSION:**

Paper plans and documents may be requested by Staff.

Miscellaneous Requirements

Any additional and miscellaneous requirements relating to the review of the project not described in this guide will be communicated to the **Portal user** (e.g. Submitter, Applicant) by the **Plans Coordinator** or a **Division Coordinator**, where applicable.

DOCUMENT REQUIREMENTS CHECKLIST

Documents that do not meet these requirements will not be accepted for review.

- **PDF files that are flattened & unsecured no larger than 100 MB in size** (see important notes to the right →)

→ **Other file types** (e.g. CAD, Word, Excel): permissible when specifically requested by Staff or instructions

- **Appropriate document size / scale**

→ **Example:** If document is to scale at 11 inches by 17 inches, must be submitted as such

→ **Note:** Engineering Plan Submissions must be 22 inches by 34 inches

- **Minimum $\frac{7}{16}$ inch (0.4375") white space at the bottom of each document**

→ Necessary for the CORNER APPROVAL stamp, which is applied to each page of the approved plan set

- **Plan documents: combined into multipage plan sets (if applicable)**

→ **Building Plan Submissions:** create and organize plan sets by trade/discipline (e.g. architectural, electrical, etc.). **Exception:** if less than ~25 sheets, all plans can be together in one plan set.

→ **Engineering Plan Submissions:** all plans should always be together in one plan set document

- **Stamped & signed by the appropriate Ohio registered design professional(s)**

- **Oriented and rotated properly**

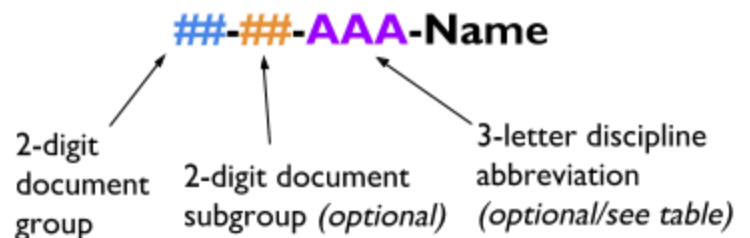
- **Accurate color (if applicable)**

- **Named using the following format:**

→ See next page for naming examples and Discipline Abbreviation Table

Important Notes on PDF Files

- If created in AutoCAD, **remove all SHX text!** (SHX text is converted to "comments" in a PDF, which slows load speeds in ePlan review)
- **Flattening prevents missing content** (such as embedded images and added annotations like stamps, markups, text boxes)
 - ◆ **Flattened:** interactive elements removed, AutoCAD SHX text removed, all layers combined into one
 - ◆ **Steps to flatten documents:** vary by the PDF editing program used (e.g. Bluebeam, Adobe Acrobat, etc.). One method is to "Print to PDF" (make sure to include any added annotations/markup drawings in your selection, as desired).
 - ◆ **Scanning documents** results in a "flattened" file however, if this method is used, make sure the file size is compressed and image quality high.
- **Unsecured files:** files that are "locked" or encrypted cannot be used to create approved/marked plan sets
- **Tips for decreasing file size:** change gradients to solid hatches; use symbols with less detail; check for dense hatch patterns and replace with a solid pattern or increase the scale of the hatches
- **Bookmarks:** if used, must be less than 255 characters in length (these will be removed an approved plan set is created)



Building permit example #1:

- 01-ARC-Architectural Plans
- 02-ELE-Electrical Plans
- 03-PMB-Plumbing Plans
- 04-GEN-Report
- 05-01-GEN-Response Letter #1
- 05-02-GEN-Response Letter #2
- 99-GEN-Application

Engineering example #1:

- 01-CVL-Civil Plan Set
- 02-GEN-Fire Truck Exhibits
- 03-CVL-SWM Report
- 04-01-CVL-Cost Estimate
- 04-02-GEN-DWG Base File
- 99-GEN-Application

Building permit example #2:

- 01-Architectural Plans
- 02-Electrical Plans
- 03-Plumbing Plans
- 04-Report
- 05-01-Response Letter #1
- 05-02-Response Letter #2
- 99-Application

Engineering example #2:

- 01-Civil Plan Set
- 02-Fire Truck Exhibits
- 03-SWM Report
- 04-01-Cost Estimate
- 04-02-DWG Base File
- 99-Application

Naming Notes

- Always use **2-digit numbers**.
- **First in the list:** Plan document with the cover sheet.
- **Non-plan documents** should come ***after*** all of the plan documents.

Discipline Abbreviation Table

Architectural	ARC
Board of Zoning Appeals	BZA
Civil	CVL
Contractor/Shop Drawings	CSD
Electrical	ELE
Equipment	EQU
Fire Protection	FPR
General	GEN
Geotechnical	GEO
Hazardous Materials	HAZ
Interiors	INT
Landscape	LND
Lighting	LHT
Mechanical	MCH
Planning Commission	PLC
Plumbing	PMB
Report	RPT
Signage	SGN
Structural	STR
Survey/Mapping	SVM
Telecommunication	TEL
Uptown Review Board	URB
Planning/Zoning Administrative	ZNA

SUBMISSION STEPS

1. Verify your project is **eligible** for online ePlan submission (see pg. 3)
2. Prepare your documents to make sure they follow the [Document Requirements Checklist](#)
3. **Mail** or **deliver** any submission fees by check or in person (if applicable)
4. **Submit** paper plans and documents (if applicable)
5. **Register** an account (if the first time)
(Important: the account that creates a project is the account that “owns” the project and only account that has the ability to submit it for review)

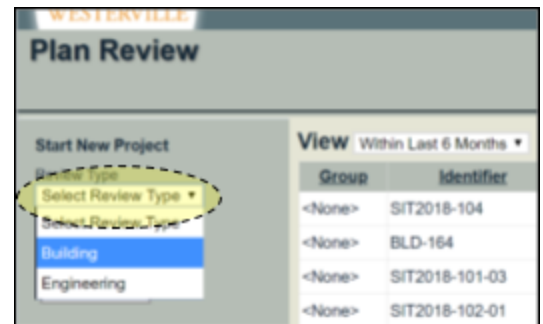
→ **Username** cannot include spaces

→ **Email address** used for the account will be the only one receiving primary email notifications

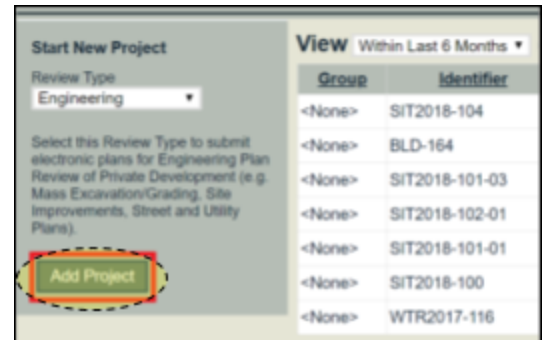


6. **Sign in** to the Portal (<https://onbaseweb.westerville.org/PlanReview/>)

7. Select a **Review Type** (refer to [Eligible Applications & Review Types](#) for help in selecting the appropriate review type)



8. Click **Add Project**



9. Fill in the required fields (indicated with a red asterisk) on the **Project Information** page



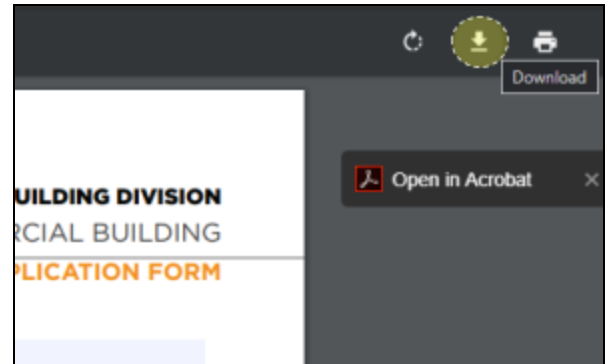
10. If you have not already downloaded and filled out the corresponding application form, you may download it from the **Additional Information** section (click on the link to download it to your computer)

(if the application type you are looking for is not listed, it is either not eligible or is part of a different review type)

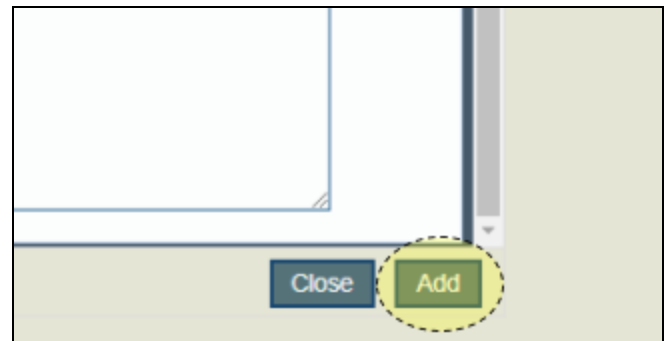
→ **Open** the downloaded application on your computer and then **fill out, sign,** and **save** it. Note: you need to open it with a PDF Reader (e.g. [Adobe Acrobat](#)) to sign it electronically.

(If necessary, you may print out the application to fill out and scan it back in)

→ You will upload your completed application form with the other plan documents at a later step

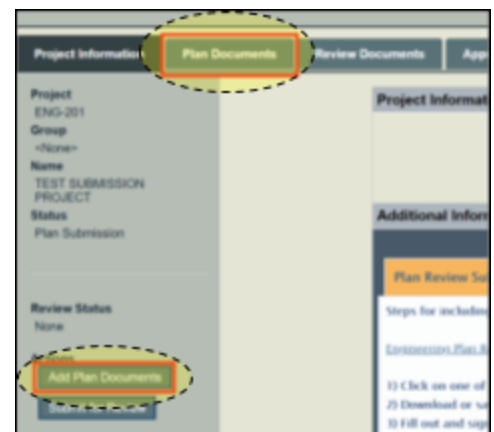


11. After filling out the required fields on the **Project Information** page, click **Add** (at the bottom right) to create your project submission



Your project is now created! Now you must add your documents and then submit it for review.

12. Click the **Add Plan Documents** button or the **Plan Documents** tab



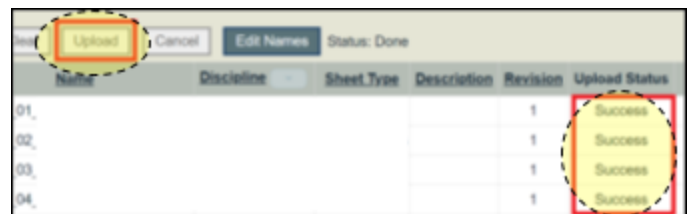
1st version documents vs. Revisions: “Revisions” are updates to documents that were previously submitted and reviewed. “1st version” documents are submitted for the first time and not a “new/updated” version of a document that was previously submitted and reviewed. *Check with the Plans Coordinator if you have any questions!*

13. Add revisions / updates to previously submitted & reviewed documents:

→ Click the **Green Up Arrow** button under the **Actions** column, in the row of the document being updated/revised (*will automatically change the document name if the new file name is different*)

→ Click **Upload** to save the documents to your project (**Upload Status** will change from “Pending Upload” to “Success”)

→ The # in the **Revision** column will increase

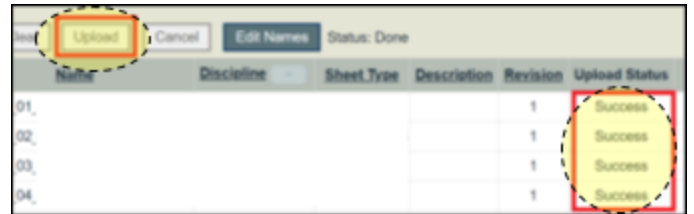
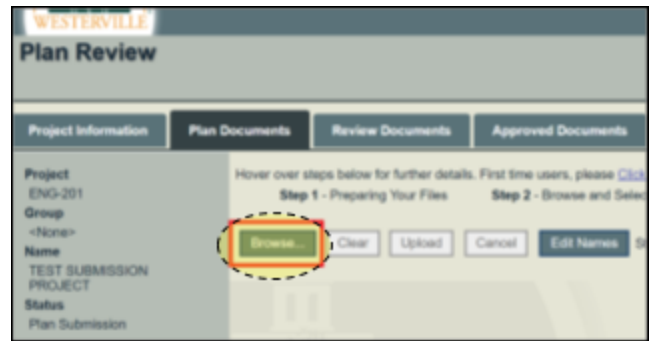


Important Notes for Adding Revisions

- Only use the **Green Up Arrow** to add revisions/update a document
- Be careful to properly select and replace the **correct** document(s)
- Do **not** delete the document from the list and then add the updated version
- Do **not** simply add the revised document(s) to the list of documents using the project’s **Browse** button (which will result in duplicates in the list -- old and new versions)
- Treat the document list like you would a paper submission -- everything in the list will be reviewed (and anything **not** in the list will not be reviewed)
- **If revising a multipage document (e.g. plan set, report):** completely replace it with the **full/complete** and **latest** version since we can only see what is last uploaded.
- Contact the **Plans Coordinator** if you have any questions.

14. Add 1st version documents:

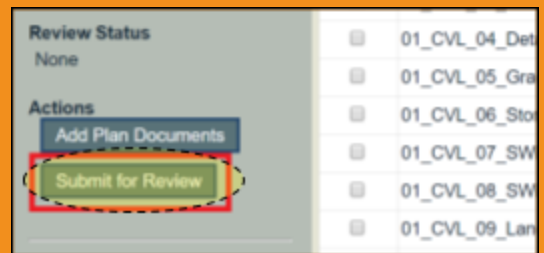
- Click the **Browse** button to select the files from your computer (**Important: do not use this to add revisions -- see step #13**)
- Click **Upload** to save the documents to your project (**Upload Status** will change from “Pending Upload” to “Success”)



15. In the case a document is no longer “relevant” to the project (*not to be confused with a revision*), remove it from the document list:

- Click the **red X** button under the **Actions** column, in the row of the document

16. SUBMIT FOR REVIEW: when all documents are **uploaded** (i.e. ‘saved’ to the project), click **Submit for Review** to notify a Coordinator of your submission—if you do not do this, the project will sit in the *Pending Submission* state.

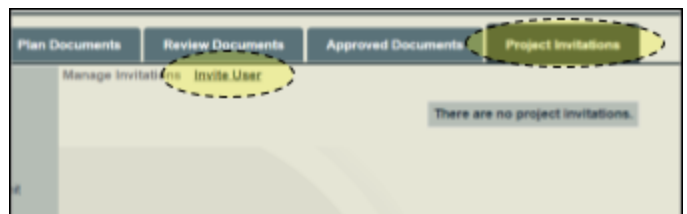


Note: The Status will change from **Pending Submission** to **Awaiting Coordinator Review or Payment** once you’ve done this. **Only the Portal user** that created the project can click “Submit for Review”.



17. (Optional) Invite other users (e.g. general contractor, tenant, etc.) to the project for them to download and/or upload documents:

- Click the **Project Invitations** tab
- Click **Invite User**, type in their email address, and then click **Invite**



18. Await any responses by email from a Coordinator

(**Important:** Coordinator responses will be primarily through email)

→ To **download & view submitted documents**, click the **green down arrow** button in the row of the document

→ **Note:** Uploads are disabled while the submission is under review

19. When notified of review completion, **download** review documents from the **Review Documents** tab:

→ Click the **green down arrow** button in the row of the document(s) to download it

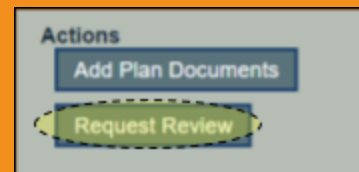
→ Review documents may include but are not limited to review comments, marked plan sets, reference documents, etc.

20. If additional submissions are necessary, for example: re-submission to a **disapproval/review comments**, updates/revisions **after approval**, or submission of engineering **as-builts**:

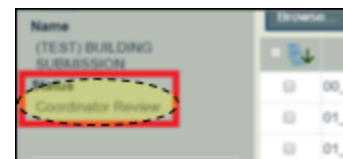
→ Upload documents (*refer to step #13 and #14 for adding revisions/updates and 1st versions*)

→ Upload **As-Builts** for engineering plans as a separate and new document (*if applicable*)

→ Click **REQUEST REVIEW** to notify a Coordinator of your submission—if you do not do this, the project will sit in the *Review Complete (Awaiting Closeout)* state.



Note: The Status will change from **Review Complete (Awaiting Closeout)** to **Awaiting Coordinator Review or Payment** once you've done this. **Only the Portal user that created the project can click "Request Review"**.



21. Once notified that approval documents are published to the Portal, **download and print** all documents from the **Approved Documents** tab:

→ Click the **green down arrow** button in the row of the document(s) to download.

→ Make sure to download **all** documents posted to the **Approved Documents** tab.

→ **Print** all documents to scale, on the appropriate page size to have onsite for any necessary inspections and for your records.

- **Approved revisions** will result in **new approved plan sets**, which must be re-downloaded and printed to have onsite for inspections.
- Remember that you are responsible for any conditions or outstanding comments identified on the plans and supporting documents.
- Contact the reviewer(s) listed in the comment or approval letters with any questions.

22. Once a project is **closed**, you cannot upload or remove documents from the project. You will still have access to the project and may still download documents from each tab.

- If your project does not appear in your project list, you may need to change the **“View”** date as it defaults to “within last 6 months”



If you have any further questions, please contact Planning & Development at (614) 901-6650. You may select the department that corresponds to the following types of submissions:

- *Building Permits → Building Division*
- *Engineering Projects (Private Development, CIP) → Engineering Division*
- *Planning Commission, Board of Zoning Appeals, Uptown Review Board → Planning & Zoning Division*