



# City of Fort Myers ePlan

## Users Guide

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### 1 GENERAL PROGRAM INFORMATION

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- The general screen of each project in the City of Fort Myers ePlan provides information relating to the case (i.e. contact information, job description, etc.)
- The Project Number in ePlan is equivalent to the City-issued Permit Number.
- The Default View in the projects screen is of the Most Recently Viewed Projects. There is also a list of pending tasks at the bottom of the project screen. Only a few tasks may appear in this window, so be sure to scroll if indicated that there are multiple pages.
- Double clicking on a column header in the project screen will sort the columns by ascending or descending.
- Entering search criteria in the field titled “Press Enter to Search” will filter your project list according to the information entered. You may enter any information / words found on the project screen to reduce the number of projects displayed. For example, the project number, a word from the description of the project (BLD), a certain status, or a portion of a project number (BLD2016). To return to the complete project list, click the “All Projects” button.
- Use the binocular tool to perform a more advanced search of your projects, including file names and file text.
- Within folders, files can be sorted in ascending or descending order by file name, by author, or by upload date. Sorting can be helpful while searching, printing, or downloading documents.
- City Review Stamps will be in color. Keep this in mind when printing approved drawings. You may wish to print the files on a color printer so that the stamps “stand out” on the drawings.

### 2 REQUIRED FILE STANDARDS/ACCEPTED FORMATS FOR ALL PLANS & DOCUMENTS

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- Black and white documents are strongly recommended due to reproduction costs.
- All files must be submitted in the correct orientation so that the top of the page appears at the top of the computer screen when the file is opened. The page(s) should not need to be rotated in order to be read.
- If the plans are required to be signed and sealed by a design professional, the agent/contractor and design professional will need to coordinate efforts to comply with governing laws regarding electronic signatures.



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- A dimension **and** graphic scale are required on all site plans and construction drawings.
- A two-inch margin is required along the right hand side of all site plans and construction drawings to allow room for the City of Fort Myers Review/Approval stamps.
- **Most** file types are accepted in ePlan (i.e. PDF, TIF, DWG, BMP, JPG, DOCX, etc.)
- **APPLICATIONS:** Each application shall be submitted as a separate file and shall be named “Application”
- **FORMS:** Forms and supporting documents (i.e. Debris Affidavit, Subcontractor Worksheets, etc.) may be combined or left as separate files. If combined, the file shall be named “Documents”. If left separate, each file shall be named to match what they are. For example:
  - NOC = NOC
  - Wetland Notification = Wetland Notification
  - Contractor Asbestos = Contractor Asbestos
  - Etc.
- **RESIDENTIAL BUILDING PLANS:** Shall be submitted as a multipage file and shall be named “Building Plans”.
- **COMMERCIAL PLANS:** Shall be submitted as multipage files by discipline and shall be named to match what they are. For example:
  - Structural Plans = Structural Plans
  - Architectural Plans = Architectural Plans
  - Electrical Plans = Electrical Plans
  - Calculations = Calculations
  - Etc.

### 3 GETTING STARTED

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Permit Applications and Resubmit/Revision Applications shall be submitted to the City of Fort Myers Permitting Office prior to accessing ePlan to Upload Plans for review. All applications shall be submitted by email to [e-permits@cityftmyers.com](mailto:e-permits@cityftmyers.com), fax to (239) 344-5928, mail or deliver to 1825 Hendry Street, Suite 101, Fort Myers, FL 33901.

#### **Initial Submittal**

- Submit a Permit Application to the City of Fort Myers Permitting Office
- The Applicant will be contacted by the Permitting Office with a Permit Number and a link to satisfy the submittal fees to cover the plan review services.
- Upon verification that the fees were satisfied, the Permit Representative will create a case in ePlan, and the Applicant will be notified to Upload their plans into the appropriate folder(s) of their project.

#### **Revision Submittals (After Permit Issuance)**

- Submit a Resubmit/Revision Application to the City of Fort Myers Permitting Office
- The Permit Representative will start the review workflow in ePlan, and the Applicant will be notified to Upload their revised plans into the appropriate folder(s) of their project.



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### 4 HOW TO UPLOAD FILES

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Upload files to the appropriate folder of your project. The name of the folder should indicate what should be uploaded into the folder.

**NOTE: FILES MUST BE CLOSED ON YOUR COMPUTER BEFORE YOU UPLOAD THEM. IF YOU ATTEMPT TO UPLOAD A FILE WHILE IT IS STILL OPEN ON YOUR COMPUTER, YOU WILL RECEIVE AN ERROR MESSAGE. CONTACT [e-permits@cityftmyers.com](mailto:e-permits@cityftmyers.com) IF YOU RECEIVE AN ERROR MESSAGE WHILE UPLOADING FILES.**

1. From the desired project and folder, click the “Upload Files” button
2. In the Browse for Files screen, click the “Browse For Files” button to select the files you want to upload from your computer. You can select multiple files by holding down the *Shift* or *Ctrl* keys. Click **Open** after selecting the files.
3. To delete a selected file, click the X to the right of the file name.
4. After selecting all the desired files, click the “Upload Files” button.
5. Once completed, you **MUST** click the “Workflow Portals” button and select the assigned task “Applicant Upload” which will open the eForm. Complete the checklist and select the “Upload Complete – Notify Jurisdiction” button.

There is an option in the eForm to invite additional people. This is necessary if you want multiple people to have Applicant rights/access to the project in ePlan.

### 5 REVISIONS

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A Resubmit/Revision Form must be submitted to the Permitting Office prior in order for the Applicant to be given Upload permissions.

Once completed, the Permit Representative will initiate the workflow process, and the Applicant will be notified by ePlan to Upload the revised plans into the appropriate folders. The original File format and uploading guidelines apply, except that the **Revision file names must be different from the original “approved” file names.** The Applicant shall add “Revision” to the end of the original file name.

Once all selected files are uploaded, you **MUST** click the “Workflow Portals” button and select the assigned task “Applicant Upload” which will open the eForm. Complete the checklist and select the “Complete” button.

### 6 HOW TO RESUBMIT PLAN CORRECTIONS AFTER REJECTION

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If corrections are needed to the submitted plans, they should be made by the originator of the document and resubmitted using the **original file name and file extension** as previously submitted. **The file name cannot be changed** and the order in which the plans were originally submitted in a file cannot be changed. This is required for proper versioning and processing of the file in our system.

Upload the Resubmit/Revision Form into the Documents Folder, and corrected plans/files into the **same folder** as the original file. If additional files need to be uploaded to address rejection comments, upload



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files to the appropriate folder of your project. The name of the folder should indicate what should be uploaded into the folder.

Upon upload of your final document, you **MUST** click the “Workflow Portals” button and select the assigned task “Applicant Resubmit” which will open the eForm. Complete the checklist and select the “Complete” button.

### Rejected Revisions:

Upload the Resubmit/Revision Form in the Documents Folder, and the corrected files into the original folders with the **revision file name and file extension** to ensure proper versioning in our system.

## 7 PRINTING

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**Note:** When viewing and printing approved drawings/Final Documents, the approval stamps and informational stamps will be in color. You may wish to print the documents in color as well. **Printing options depend on the type of printer the document is being printed to.**

When printing building permit job site copies, the plans **MUST** be legible. For documents which were originally 24” by 36”, the minimum print size is 11” by 17”.

Open the file you wish to print, and click the printer icon in the upper left hand corner. A print prompt window will appear. Notice that the actual size of the document can be found in the upper right hand corner. Use the “Printer Setup” and “Scale feature to format the printer settings for your printer and the paper size you wish to use.

## 8 DOWNLOADING

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**Due to customer security levels in the City of Fort Myers ePlan; downloading is only available for “Approved Plans” and “Final Documents”.**

1. **To download one file, click the download icon beneath the file name.** You will be asked if you want to Open or Save the file. Select “Save”.
2. **To download multiple files from the same project:**
  - a. Place a check in the box in front of all the files you wish to download
  - b. Click the download button on the toolbar at the top of the file list.