Plan Review Document Format Requirements

In order for projects to be successfully reviewed in Electronic Plan Review (ePR), the following ***plan review document format requirements must be followed***. ***Documents that do not comply with these requirements will be rejected*** and returned to the applicant for adjusting to conform with these requirements.

- ***File Drawing Style:*** Draw plans must use a black/white plot style.

- ***Paper Size:*** Plan size must be *between* 18x24 and 36x48 inches.

- ***Scale:***
  - Plans must be drawn and saved "To Scale" to ensure proper measuring of lines and areas.
  - All measurements must be provided in the English scale. If items on the sheet are provided in a metric scale (e.g., tools), conversion of the metric measurement to the English measurement needs to be provided on the sheet.
  - Include a graphic scale on each sheet or include the measurements for each object.

- ***File Type:*** Plan review documents must be saved in ***PDF 1.4 format or greater***. Zipped files will be rejected.

- ***Maximum File Size:*** The maximum file size is ***100 MB per file***. Documents that exceed 100 MB will need to be separated into multiple documents.

- ***File Orientation:*** All pages must be properly oriented, meaning upright, and not sideways or upside down. A mix of portrait and landscape-oriented plans is acceptable as long as the pages are all upright. Pages that are turned sideways or upside down will be rejected.

- ***File Content:***
  - Files need to be flattened/optimized PDFs.
    - Either flatten drawing layers when creating PDFs from CAD; or
    - Flatten them after the fact by using the "Save As/Flattened" option; or
    - Use the "Optimize PDF" option within a PDF editor (Adobe Pro is recommended).
  - Ensure that ***no comments, stamps, or other "editable content"*** appear in the "Comment" panel of the PDF tool.
  - ***Files with editable content will be rejected***.

- ***File Encryption:*** Files cannot be password protected or encrypted/locked.

- *Scanned Files:*

    o Scanned documents are acceptable and *must*:

        ▪ Meet all other submittal requirements listed above.

        ▪ Have properly aligned page edges so they are not skewed.

   ▪ Use at least 150 DPI or higher and be without significant compression artifacts.

- *Preparing File Sets:* For files larger than 100 MB, grouping and submitting plans in logical sub-sets, such as separating plans by discipline, is required.

- *Cover Sheet:* For designer's use; needs to include a sheet index.

- *Title Border/Block:*

    o Title Border/Block needs to be along the right side of the sheet and applied to every plan sheet (see Figure 1).

    o Page number needs to be in the bottom right corner of the sheet within the Title Border/Block and applied to every plan sheet (see Figure 1 and Page Numbering requirements on the next page). No other images can be in the page number area.

Figure 1: Title & Page Number Area
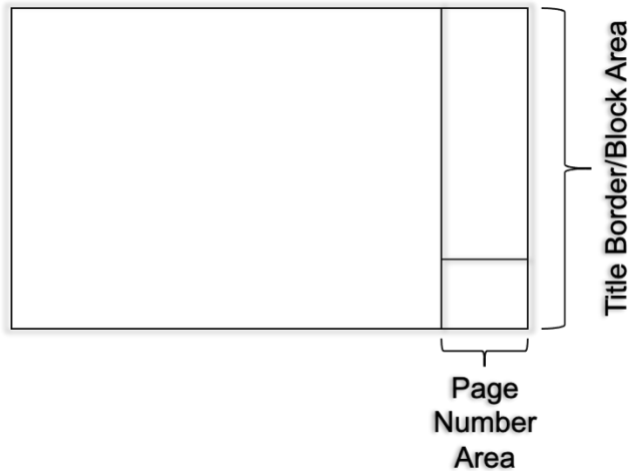
- *Second (2nd) Page:* The second page following the cover sheet must be a blank page and labeled "City Notes and Approval Stamps" (see Figure 2).

Figure 2: Second (2nd) Page

- ***Third (3rd) Page:*** The third page following the cover sheet must be a blank page and labeled "Clean Bay Blueprint Requirements" (see Figure 3).

Figure 3: Third (3rd) Page

- ***Page Numbering:*** Page numbering must be positioned at the lower, right-hand corner of the sheet and comply with the following:

  o Use a large, easy to read font.

  o Use a standard **True Type** font with continuous, filled-in characters that are easy to read (e.g., Arial, Calibri, Courier, Helvetica).

  o Provide adequate white space between each character. Touching/overlapping fonts will be rejected.

  o Provide a high-quality image with at least 150 DPI or higher and without significant compression artifacts.

  o Ensure the Z coordinate value of the text is zero.

  o ***Do not use the following font effects:***

    ▪ ***Italics,*** or

    ▪ ***Unfilled outlined fonts,*** or

    ▪ *Overlapping text that replicates handwriting.*

- ***File Naming:***

  o Filenames must be less than 140 characters in length.

  o Do **not** include any of the following special characters in the filename:

    ! * ; : @ & = + $, / ? % # [ ] " < > |

  o Name each PDF plan set "Plans" followed by an underscore (_) and a brief description of the plans. Name each PDF document (non-plans) "Doc" followed by an underscore (_) and a brief description of the document. Examples of PDF naming:

    ▪ Plans_All

    ▪ Plans_Set 1 of 2

    ▪ Plans_Joint Trench

    ▪ Doc_Hazmat Disclosure

    ▪ Doc_Structural Calcs

- ***Plan Review Comment Letter:***

  o *Email sent to applicant:* If the project is not approved at the conclusion of the Cycle 1 plan review, an email will be sent to the project applicant directing them to log in to their Citizen Access account to retrieve the comment letter and marked-up plan set from the record number listed under "My Records" in their account.

  o *Citizen Access account required:* Each applicant needs a Citizen Access account that is linked to the record to enable accessing the comment letter and marked up plans via the "My Documents" tab.

- ***Resubmittals for Projects Under Review:***

  o *Resubmit in Citizen Access:* Resubmittals can be uploaded to the record via Citizen Access. Log in to Citizen Access and select the record listed under "My Records."

  o *Changed plan sets only:* Resubmit only PLAN SETS that have changed. If plans are marked for corrections but changes were not made, upload the most recent version of those plans. If plans have staff comments on them but did not require any modifications, upload the most recent version of those plans. A duplicate of the version does not need to be uploaded if changes were not made.

  o *File naming:* **Use the EXACT same filename as the original submittal.** Do not modify the filename when submitting a new "version" of the plans or supporting documents. The plan review software will automatically manage document versioning.

  o ***Do not reorder, extract, or insert pages*** in the middle of the corrected plan sets.

    ▪ New pages must be placed ***at the end*** of the corrected plan set document**.**

    ▪ ***Do not insert new pages in the middle or beginning*** of the document.

    ▪ ***Do not reorder pages*** within the document.

    ▪ If a page needs to be removed, "X" it out or replace it with a blank page and indicate that the page was deleted or moved.

    ▪ ***Rearranging, extracting, or inserting pages out of order will result in delays in completing the plan review***.

- ***Approved Plans:*** When the plans are approved, the applicant will receive an email notifying them of the approval and directing them to log in to their Citizen Access account to retrieve the approved plans. The applicant will then download

the approved plans in PDF format and have a full-sized, 36x48 inch, black/white plan set that can be printed legibly for inspection field use.

- ***Issued/Approved Permits Requiring Revisions/Deferred Submittals:***
  Revisions/deferred submittals are modifications to an existing, issued/approved permit.

  - Submit only the sheet(s) showing the proposed revisions, as follows:

    - A PDF of the revised plan sheets, combining all trades into one plan set. Sheets in the PDF must be the same size/dimension (e.g., 24x36 inches).

    - Any additional documentation pertaining to the revision/deferred submittal, such as structural calculations or tool specifications, must also be submitted in a PDF format.

    - On the first submittal of a revision, name the file with a short description of the revision and assign the next sequential number in the revision for the same project (e.g., "REV1_new_windows.pdf" or "REV1_Spec_Sheet.pdf")

  - When resubmitting a revision that has corrections, use the ***EXACT*** same file name for the subsequent resubmittal.

  - Multiple revisions must be submitted on separate files, including initial submittals and resubmittals.