Electronic Document Review (EDR)

Submittal Requirements

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Introduction

In the City Fort Worth's ongoing efforts to improve our service and be more accessible to our customers, The Planning and Development Department is proud to introduce Electronic Document Review as part of our online permitting system. This new functionality allows citizens and customers to apply for permits, pay most fees, upload documents for review, and receive/answer comments online for the most common building permits and zoning/platting functions. Most applications can be completed without ever coming to City Hall.

Each permit application will have specific required submittals. There are six main types of submittals though not every permit requires every submittal. Below is a table that shows what should be included in each type of submittals.

Please note: EDR submittal is not an expedited review. The same review process and time lines apply to both EDR and hard copy submittals.

Information You Will Need:

In order to make an application online you will need the following information available:

- Plan documents as outlined in the section below
- Property Address
- Contact information for the registered contractor associated with the project, or their registration number
- Site Contact Information – The person the building inspectors will contact
- Plans Exam Contact information – the person who will work with Plans Exam staff
- Your TDLR number for accessibility review if your project is over $50,000
- Total Job Value – construction cost
- Square footage of the project
- Estimated Cost – the construction cost excluding mechanical, electrical, and plumbing work
- Plan documents as outlined in the section below

Electronic Document Review Submittals:

EDR submittals should include the following content. All files should be PDF format and be named according to the naming convention found in the "naming" section

EDR Submittals	
Document description:	Included in which submittal type:
Site, Architectural, Mechanical, Electrical, Plumbing, Structural, Civil, Landscape, and Urban Forestry plans. All plans should be combined into a single document (include Page Bookmarks in PDF Version 11) and be less than 256 MB.	Plans
Legible Certified Copy of the legally recorded plat	Plat
COMcheck, RESNET, IC3, Energy Star, or ASHRAE 90.1 Reports. A separate report is necessary even if included in building plans.	Energy Code Documents
City of Fort Worth Permit Application, Zoning Use Verification Form, Monotony Diagram, and similar City of Fort Worth Forms	Forms
Design professional letters, requested product information, and similar informational documents	Correspondence
Revised plans in response to plan review comments in the same format as originally submitted	Plan Revisions

Plans

Every application will require some sort of plan. The more complicated the project, the more involved the required plan submittal will be. All building plans shall be contained within a single PDF file. Each section of the application shall be bookmarked (see bookmark section for more info.) for easy referencing during the plan review process. Please visit the City of Fort Worth website for a detailed list of what's required for your individual permit type. http://fortworthtexas.gov/planninganddevelopment/permits/

Plat

A scanned certified copy of the property's legally recorded plat is required for any new structure or expansion of an existing structure. The scan must be legible and include all portions of the plat.

Energy Code Documents

The energy code report is compared against the provided plans to determine if the proposed construction complies with the adopted International Energy Conservation Code. The City of Fort Worth accepts "Energy Star", "REM/*rate*", and "IC3 Reports" for residential construction. More information about each report is available on the internet by searching for the product name. The most common option for commercial buildings is COMcheck, for approval of another program please contact the Building Code Administrator at 817-392-7843.

Forms

The detailed project submittal documents will include the forms that various departments use to gather information not available on the plans. Individual forms are available from the City of Fort Worth's website at

Correspondence

This submittal type is optional and should be used for letters or other written communications beyond the plans.

Plan Revisions

Plan Revisions are distinct and different from the resubmission process that happens during the initial review process. Plan Revisions are typically for required field changes or modifications during the course of construction. Plan Revisions should only be uploaded after the plans have been reviewed and approved.

Submittal Standards:

All digital files shall comply with the following standards. Deviation from the standards could cause delays in the application process:

File format:

1. All digital document files must be MS-Windows (i.e. not Apple OS) compatible. This does not mean that you cannot create the files on a MAC platform and convert them.

2. All digital documents shall be in Portable Document Format (PDF) and compatible with Adobe Acrobat XI (11) Professional. Older versions of Acrobat may be used, but staff will provide corrections in Acrobat 11 format only due to security restrictions. PDF's shall be a first generation vector based file (direct conversion from AutoCAD, ArchiCAD, MS Word, etc.). Scanned plans (i.e. plans, elevations, sections, details) will not be accepted. However, scanned plats, correspondence, energy code documents, and forms will fine.

Security:

Document security must allow city staff to mark up plans, create comments, and add or remove sheets as necessary.

Scale:

Plans must be generated at a defined scale (i.e. ¼"= 1', ½"= 1', etc…) to allow staff to verify dimensions and areas using the Adobe Acrobat measurement tools. Graphic scales may also be include but are not required.

Page Orientation:

All plans must be set to landscape orientation with the top of the page at the top of the monitor. A north arrow shall be included on all plans. Other submittal types may be set to either landscape or portrait orientation with the top of the page at the top of the monitor.

Naming:

The files should be named based on street address, the submittal, and the type of submittal. For initial submittals it would look like this:

> 123 Example Way – SUB 1 – Plans
> 123 Example Way – SUB 1 – Plat
> 123 Example Way – SUB 1 – Energy Code Documents
> 123 Example Way – SUB 1 – Forms

Subsequent resubmittals should follow the same protocol with the next higher submittal number:

> 123 Example Way – SUB 2 – Plans
> 123 Example Way – SUB 2 – Plat
> 123 Example Way – SUB 2 – Energy Code Documents
> 123 Example Way – SUB 2 – Forms

Bookmarks:

All plan sheets shall be contained in a single PDF File. To facilitate references during the plan review and intake process each sheet should be bookmarked with the sheet number and title (see example). Please ensure that the complete pages show prior to bookmarking by selecting. This can be done by selecting this icon from the tool bar:
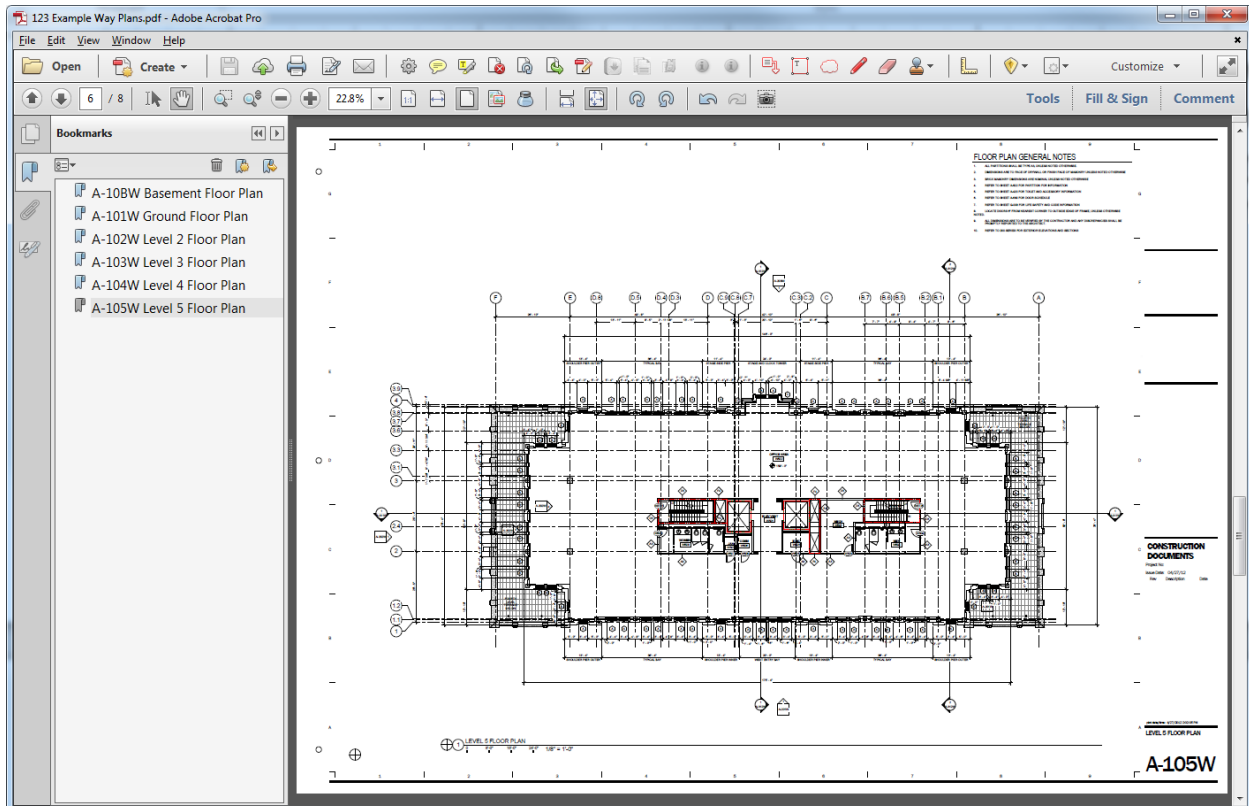

File Size:

All files to be uploaded must be less than 256 MB. Files should be reduced to the smallest size possible to provide quick access to the files. To reduce file sizes within Acrobat 11 Pro, select "Save As Other" then "Optimized PDF…", settings "Mobile" with a "Make compatible with:" <u>Acrobat 10.0 or later.</u> If any of your files are larger, please contact the Planning and Development Department's IT staff (817.392.2303) or the Building Code Administrator (817.392.7843) for assistance prior to submittal or resubmittal.

Compatibility:

The process described above under *File Size* must be followed to insure that the PDF files are as small as possible, but also to ensure compatibility with the City's process. To verify that your files are saved in the appropriate compatibility, with the file open in Acrobat 10 (also called Acrobat X) or Acrobat 11 select *File*, and then *Properties.*
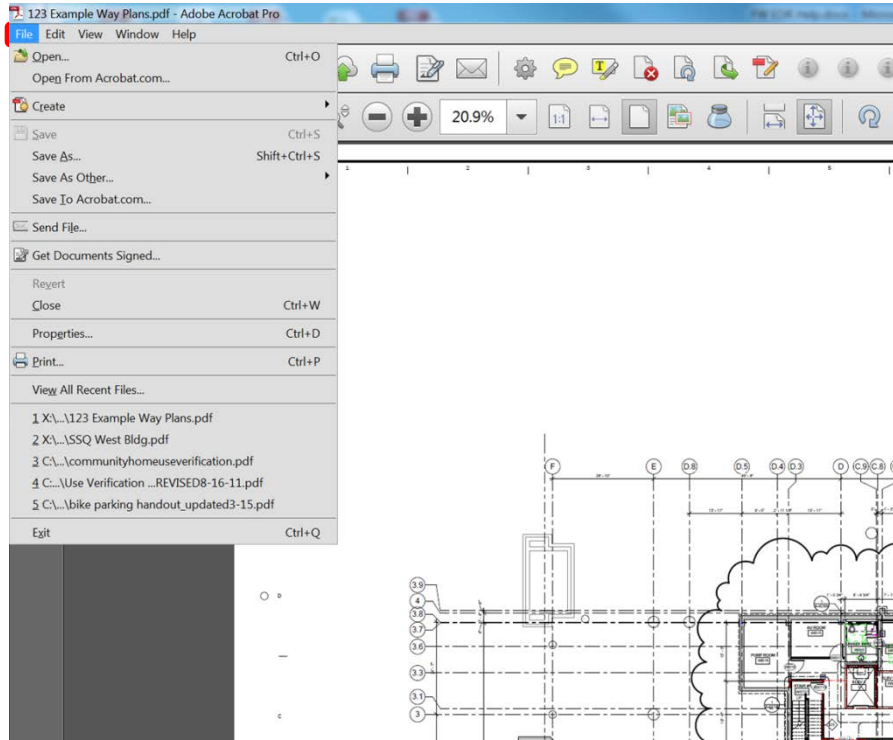
This will open the *Document Properties* window. Within this window select the Description tab. In the lower portion of this window in the advanced box will be displayed the *PDF Version* which the file is currently compatible with. Acrobat X is equivalent to Acrobat 10. This is the minimum. Anything older will not work.
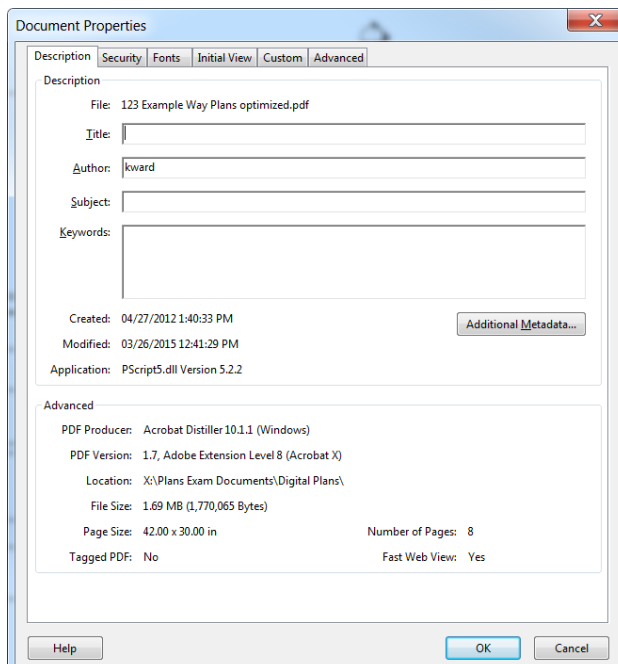
Guide to Forms Found on the City of Fort Worth Website:

The necessary forms to complete the Electronic Document Review Process are available on the City of Fort Worth website at: http://fortworthtexas.gov/planninganddevelopment/dev.aspx?id=22224

	Building Permit Applications and Other Forms	
A	Application For Permit	Uploaded at time of application.
B	Required Plans and Documents	Explanation of what plans and documents are required for each permit type
C	Required Zoning forms	Forms with additional information necessary for complete zoning review

Plans Review Process:

The outline below represents the typical process for and EDR application. The number of review cycles will vary for each project depending on the corrections requested.

Online Application:

The customer provides all the necessary information and uploads the required plans to the City of Fort Worth's online permitting site through Accela Citizen Access (ACA). The same website can also be used to track the progress of the application.

https://accela.fortworthtexas.gov/citizenaccess/.

Application Review:

City of Fort Worth customer service staff will review the permit information and the submitted documents for completeness. An email notification will be sent informing customers that their application has been accepted for processing or additional information is required to proceed.

Plan Review:

The number of required reviews depends on the location of the project and the scope of work. All reviews take place simultaneously and plan comments will be compiled at the end of each review cycle. When each plan review cycle is complete, customers will be notified via email that their application is approved or required revisions. Plan Review comments will provided as a combination of markup's

directly on the submitted plans and a report that can be downloaded by clicking the [Print/View Conditions/Comments] button in the permit record. Separate hold notes from each plan review discipline may be available prior to the official notification. This allows the design team to begin working on corrections as soon as possible. However, customers must coordinate the design team's response and resubmit a **complete** set of drawings to responding to all review comments and begin a new review cycle.

The progress of the reviews can be tracked anytime on ACA. Incomplete required reviews are indicated by an hourglass icon ⏳ and completed reviews are indicated by a check mark ✔.

Correction Notices, Customer Responses and Resubmittal of Revised Plans:

To address plan review deficiencies, applicants must resubmit a **complete** set of plans through the ACA portal. Once the plans have been processed the "Resubmit" action becomes available in the Attachments section of the ACA permit record. Plan sets addressing correction requests must be resubmitted though the "Resubmit" link associated with the plans in order to avoid processing delays.

A partial submittal of individual sheets is *not permitted* and will delay the review process. A complete set is required to ensure that both the field drawing set and the City's record set remain current and identical throughout the process. Resubmittals, if necessary, must be submitted in the same format and scale as the original submission. All revisions shall be clouded and delta'd with an explanation from the professional in a response letter which addresses all holds identified by the plans examiner.

Mid-plan review scope revisions which are voluntarily made by the applicant or the design team, and which do not directly relate to plan review correction comments must be brought to the attention of the plan review staff and detailed in the response to plan review correction comments letter. Mid-plan review scope revisions can require significant process and handling changes and will impact the service delivery timeline .

Issue Permit

When all plan review disciplines have approved the project the applicant will receive an email notifying them that their permit is approved. Once all fees have been paid the permit will be issued by Planning and Development Customer Service.

Field Inspections

After the permit is issued, the contractor must have a complete set of officially approved plans, with all City of Fort Worth stamps, available for the inspector. The official plans will be the most recent approved plans submitted to ACA and accepted by the City of Fort Worth.