

COLORADO SPRINGS FIRE DEPARTMENT

# Electronic Plan Submittal System

Guidance for using and navigating the Electronic Plan Submittal System



Division of the Fire Marshal  
Support Services  
08/14/2020



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# Table of Contents

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Overview.....	2
Approved Projects.....	2
Disapproved Projects .....	2
Create Companies & Users.....	2
Creating a User .....	2
Creating a Company.....	3
DFM Account Review/Approval .....	4
Editing Company Information.....	4
Editing User Information.....	4
Working with Plans .....	4
Submitting a Plan .....	4
The Plan Review Process.....	6
Plan Submittal & Check-In.....	6
Plan Review .....	6
Plan Disapproval .....	6
Plan Approval.....	6
Plan Storage .....	7
ePlan Assistance.....	7
Appendices .....	8
Appendix A: Plan Status .....	8

## Overview

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The electronic plan submittal (ePlan) service allows customers to submit plans NOT related to Regional Building Department (RBD) projects/plans for review by the Colorado Springs Fire Department (CSFD) through the following functions:

- Create user accounts and link accounts to their company's membership
- Perform maintenance of company information and user account memberships
- View existing projects and their plan review statuses for their company
- Electronically upload PDF documents for plan processing
- Be notified by CSFD when the project is approved or disapproved

This process was implemented in the hopes of offering additional convenience to our customers. However, customers who wish to continue to submit hard copies of plans to our office using the already established workflows are welcome to do so.

### Approved Projects

- Customers will be notified of project approval by the Plan Reviewer
- Customers may pay plan review fees online via Credit Card or ACH (bank account withdrawal)
- Once paid, customers may download approved plans with comments

#### NOTES:

- Fees are charged in accordance with CSFD published fee schedules and are non-refundable
- Once paid, approved documents will be available for download for 30 days
- Plans remaining greater than 30 days after approval are subject to deletion

### Disapproved Projects

- If any of the documents for a project are not approved, the entire project will be disapproved
- Customers will be notified of Project disapproval by the Plan Reviewer
- No fees are assigned to disapproved projects and customers may download returned files immediately
- Plans remaining greater than 30 days after disapproval are subject to deletion

## Create Companies & Users

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Customers must create a user account, link that account to a company, and be approved by CSFD's Division of the Fire Marshal (DFM) prior to uploading any documents.

### Creating a User

Each individual within a company wishing to use the ePlan system must create their own user account. If you are the first user associated with the company, you will default to "Administrator" status for the company. This may be changed once additional users are associated with the company.

1. Select “Create User” from the ePlan launch page



2. Complete the following required fields:

- Email address
- Name of the User (the individual, not the company)
- Telephone number
- Password
- Confirm Password

**Password requirements:**

3. Select associated Company

- If the Company already exists, select it from the Company drop down list

**Company**

A white rectangular dropdown menu with a thin grey border. The text "Please select" is centered in a light grey font, and a small downward-pointing chevron icon is on the right side.

- If the Company does not appear in the drop down list, select “Create New Company”



## Creating a Company

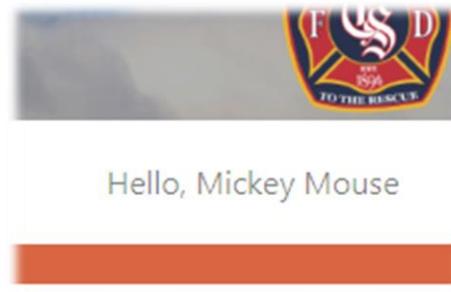
The first user from a company to create a user account must also populate the Company information. Before creating a company, please check the drop down list (shown in Step # 3 above) to ensure the company is not already listed. If not, select “Create New Company” and complete the following required fields:

- Company Name
- Company Address
- City
- State
- Postal/Zip Code
- Name of Primary Contact (“Contact Name”)
- Telephone number for Primary Contact (“Contact Phone”)
- Email address of primary contact (contact email)

After filling in the required company information, select “SAVE”

## DFM Account Review/Approval

After creating a user account and (if applicable) a company, you will be redirected to the ePlan landing page, which now recognizes you as logged in. However, you will not be able to upload documents until review and approval of your account by the Division of the Fire Marshal. Please allow up to one business day for review.



## Editing Company Information

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If you are designated as an Administrator (Admin) for your company, you may edit company and user information via the “Company” link at the top of the ePlan screen. You are able to:

- Edit Company Information
- Edit user information
- Designate or remove Admin privileges for a user
- Inactivate a user

## Editing User Information

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Users may edit their email address, contact name and telephone number via the “User” link at the top of the ePlan screen.

## Working with Plans

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The “Plans” link at the top of the ePlan page will be visible once a user has been reviewed and approved by CSFD. This link will allow the user to see any actively pending plans for their Company as well as any plans that have been approved or disapproved within the last 30 days.

## Submitting a Plan

Users may submit a new plan by selecting the “New Plan” button and completing the following steps:



New Plan

1. Select Plan Type from the drop down list of available options. If you are unsure of which option to select, please reach out to DFM staff via the contact information at the end of this document.
2. Enter a brief plan description
3. Address/location associated with the plan including city, state and postal code
4. RBD reference number if applicable (optional)
5. Development Services Number (DSN) reference number if applicable (optional)
6. Plan group name if applicable (optional)

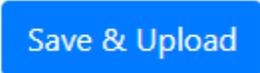
NOTE: Plan Group name is determined by the Company and allows a Plan Reviewer to associate multiple plans with the same project if desired

7. Select “Save & Continue”



Save & Continue

8. The user will be directed to the file upload screen. To select files to add to a plan submittal, click on “Browse” to choose the associated files. All files must be in an unlocked PDF format.
  - a. After file selection, you will be prompted to select a file type and enter a brief text description.
  - b. Select “Save & Upload”



Save & Upload

9. After uploading a file, you will be directed to the Plan Details Page. Select the “Return” button to view all active and recently reviewed plans.



Return

10. To upload additional documents to an existing Plan, select “Edit” for the appropriate plan on the Plans overview screen, and choose “Add/Edit Documents.” Additional documents may be added to the plan via the document upload mechanism. Select “Save” when finished.
11. When all files have been uploaded and you are ready to submit the Plan to CSFD, access the appropriate plan from the plans overview screen using the “View” button, then select “Submit.”

NOTE: When a plan has been submitted to CSFD for review, you will no longer be able to add documents to the plan or edit plan information. On the plans overview screen, the plan status will show as “Submitted” and you will be able to view plan information only.

## The Plan Review Process

### Plan Submittal & Check-In

Plans are typically checked in by CSFD in the order they are received. When your plan has been checked in by administrative staff, your plan status will change to “Checked In”

### Plan Review

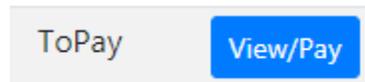
When a plan reviewer has taken ownership of a checked in plan for processing, your plan status will change from “Checked In” to “Assigned”

### Plan Disapproval

If any document within the plan is disapproved, the entire plan will be disapproved. The plan reviewer will update your files with their comments and change the Plan Status back to “In Process” so you may download and review the marked up files with the plan review comments.

### Plan Approval

- If a plan is approved. The plan reviewer will update your files with the approved versions with comments.
- The plan reviewer will assess the associated plan review fees and change the status of the plan to “To Pay.” You will now see a button on your plans overview screen to View/Pay the plan review fees.



- Payment may be made via Credit Card or ACH (direct bank account withdrawal). After selecting your payment method, you will be directed to the State of Colorado’s Official State Web Portal for payment processing.



- Successful payment will result in your plan status being changed to “Paid” and your approved plans being immediately available for download.
- Approved plans will not be available for download until successful payment is provided

## Plan Storage

Both approved and disapproved plans will be available on the ePlan portal for 30 days after the approval/disapproval date. Plans remaining more than 30 days after approval/disapproval are subject to deletion. Deleted plans are no longer accessible - review of a disapproved plan after 30 days will require resubmittal of a new plan.

## ePlan Assistance

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For questions or assistance regarding the ePlan system or processes, please contact the Division of the Fire Marshal Office responsible for reviewing your plans:

### **Construction Services**

(719) 385-5982, ext. 2

### **Technical Services**

(719) 385-5978

## Appendices

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### Appendix A: Plan Status

<b>Plan Status</b>	<b>Description</b>	<b>Plan Owner</b>
<b>Assigned</b>	DFM has taken ownership of plan	CSFD
<b>Canceled</b>	Plan is cancelled and will be removed from system after 30 days	Customer
<b>Checked In</b>	DFM Admin has checked plan in for processing	CSFD
<b>Hold</b>	DFM needs further information from the customer regarding the plan	CSFD
<b>In Process</b>	Customer has created a new plan and may add documents/edit plan information	Customer
<b>Paid</b>	Customer has paid online for the approved plan review and documents are now available for download.	Customer
<b>Paid In Person</b>	Customer has paid in person for the approved plan review and documents are now available for download.	Customer
<b>Submitted</b>	Customer has submitted the plan and supporting documents for DFM review	CSFD
<b>To Pay</b>	DFM has reviewed and approved the plans, assessed the plan review fee, and uploaded final documents. The customer can now review and remit the plan review fees. Approved documents will be available after payment has been successfully completed.	Customer