Clarington

Electronic Document Submittal Recommendations

Please use the following instructions to prepare your documents for electronic plan submittal. Note that *plan review files ("plans")* have different submittal recommendations than supporting documents.

A. PREPARING PLAN REVIEW FILES ("PLANS") FOR SUBMITTAL

1. **File Drawing Style:** Plans should be plotted/drawn using a *black and white plot style with minimal grayscaling* to ensure documents are read properly. Colored pens are not encouraged because plan review markups will be drawn using colored sketches (and reduces the file size), though they are not prohibited.

2. **File Scale:** Plans must be drawn and saved "To Scale" to ensure proper measuring of lines and areas electronically. *Include a scale on each sheet or include the measurements for each object.*

3. **File Type:** Files intended for plan review must be saved in **PDF 1.3** format or greater.

4. **File Sizes:** The maximum upload size is **400 MB** at a time. If your document is larger, email it to BuildingPermits@Clarington.net.

5. **File Orientation:** Properly oriented pages are encouraged. Although EPR provides a tool for rotating page view, it does not alter the page orientation within the PDF itself and may affect resulting deliverables.

6. **File Content:** Files should be *flattened and/or optimized* PDFs.
   - Do not submit files that Adobe reports as damaged or that Adobe cannot open.
   - Either flatten drawing layers when creating PDFs from CAD, or flatten them after-the-fact by using the "Save As/Flattened" or "Optimize PDF" option within a PDF editor. (Adobe Pro is recommended.)

7. **File Encryption:** Do not submit password protected or encrypted (locked) documents, they will be rejected.

8. **File Scanning:** Scanned files are acceptable, but must meet all other submittal requirements listed above. When scanning, be sure to properly align page edges on scanning bed so the pages are not skewed.

9. **Preparing File Sets:** Grouping and submitting plans in logical sub-sets, such as separating plans by discipline, is encouraged because plans are typically distributed to reviewers by discipline.

10. **File Name Characters:** Filenames should *not exceed 140 characters* in length.
    o Do not include any of these characters in the filename: pound (#), plus (+), ampersand (&), backslash (), forwardslash (/), colon (:), asterisk (*), question mark (?), double quote ("), less than (<), greater than (>), or the pipe symbol (|).

11. **File Name Format:** If required, name each PDF using the appropriate filename prefix from the table below, followed by an underscore character (_) and a description. *For example:* ELEC_Wiring Diagrams.pdf

For Permitting

Label	Filename Prefix
Building Plans Examiner	BPE
Building HVAC	BHVC
Building Fire Review	BFIR
Building Plumbing	BPLB
Building Grading	BGR
Building Zoning	BZO
Building Heritage	BHER
Post Approval Revision	PAR

For Design Review

Label	Filename Prefix
Accessibility	ACCS
Architectural	ARCH
Civil Plans	CIVL
Grading	GRAD
HVAC	HVAC
Mechanical	MECH
Structural	STRX

B. PREPARING SUPPORTING DOCUMENT FILES ("ATTACHMENTS")

Supporting documents ("attachments") include application documents, calculations, soils reports, etc. in any format. Attachment files do not require special naming, except as noted below.

1. **File Types:** PDF, XLS, DOC, TXT, JPG, etc.

2. **File Sizes:** The maximum upload size is 400 MB at a time.

3. **File Orientation:** Properly oriented pages are encouraged. Although EPR provides a tool for rotating page view, it does not alter the page orientation within the PDF itself and may affect resulting deliverables.

4. **File Content:** Do not submit PDFs that Adobe reports as damaged or that Adobe cannot open.

5. **File Encryption:** Do not submit password protected or encrypted (locked) documents.

6. **File Scanning:** Scanned files are acceptable but must meet all other submittal requirements. When scanning, be sure to properly align page edges on scanning bed.

7. **File Naming:** Provide a unique descriptive filename, *not to exceed 140 characters* in length.
   o Do not include any of these characters in the filename: pound (#), plus (+), ampersand (&), back slash (), forwardslash (/), colon (:), asterisk (*), question mark (?), double quote ("), greater than (<), less than (>), or the pipe symbol (|).

C. SUBMITTING CORRECTED PLANS AND REVISIONS - WITHOUT SLIPSHEET (LEGACY PROCESS)

Revised files are typically one of two types: (A) *required resubmittals*, or (B) *revisions* to previously approved documents. Each has different file naming recommendations, as noted below.

A. *For required resubmittals:* Use the EXACT same filename as the original submittal cycle. Do not modify the filename when submitting a new 'version' of plans or supporting documents – the system will manage versioning automatically. See chart below.

Cycle	Filename	Pages
1st Submittal	FIRE_Sprinkler Diagrams.pdf	**10**
2nd Submittal	FIRE_Sprinkler Diagrams.pdf	**10**
3rd Submittal	FIRE_Sprinkler Diagrams.pdf	**10**

B. *For revisions to previously approved documents:* **Provide a revised file name** instead of reusing the original filename. If resubmittals are required for revisions, continue to use this revised file name for subsequent resubmittal cycles. See chart below.

Cycle	Filename	Pages
3rd Submittal	FIRE_Sprinkler Diagrams.pdf	3
1st Revision	FIRE_Sprinkler Diagrams **REV**.pdf	3
2nd Revision	FIRE_Sprinkler Diagrams **REV**.pdf	3

If you have been asked to resubmit corrected plans and slipsheeting is not allowed, do not reorder, extract or insert pages in the middle of your corrected plan sets.

- Place **new** pages 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.
- When removing a page, 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 for completing your plan review.

Why is page order important for agencies that do not use slipsheeting?

Resubmitting plans with pages in the <u>original order</u> ensures that the plan review comments and sketches are properly carried forward to the newer submittal/version by the electronic plan review software. This allows for more accurate, expedited reviews.

D. SUBMITTING CORRECTED PLANS AND REVISIONS - WITH SLIPSHEET (NEW METHOD)

Revised files are typically one of two types: (A) *required resubmittals*, or (B) *revisions* to previously approved documents. Each has different file naming recommendations, as noted below.

A. *For required resubmittals:* <u>Use the EXACT same filename as the original submittal cycle.</u> Do not modify the filename when submitting a new 'version' of plans or supporting documents – the system will manage versioning automatically. See chart below.

Cycle	Filename	Pages
1st Submittal	FIRE_Sprinkler Diagrams.pdf	**10**
2nd Submittal	FIRE_Sprinkler Diagrams.pdf	**7**

Cycle	Filename	Pages
3rd Submittal	FIRE_Sprinkler Diagrams.pdf	**3**

B. *For revisions to previously approved documents:* **Provide a revised file name** instead of reusing the original filename. If resubmittals are required for revisions, continue to use this revised file name for subsequent resubmittal cycles. See chart below.

Cycle	Filename	Pages
3rd Submittal	FIRE_Sprinkler Diagrams.pdf	3
1st Revision	FIRE_Sprinkler Diagrams **REV**.pdf	3
2nd Revision	FIRE_Sprinkler Diagrams **REV**.pdf	2

If you have been asked to resubmit corrected plans, and slipsheeting is allowed, <u>submit a plan set including only changed and/or new pages</u>.

- Page order can be different than in the previous submittal, but pages should include sheet numbers whenever possible.