

# Collaborative Review Process For Superior Performers

4-12-10

## Customer

- Submits project through Electronic Plan Management (EPM) preliminary review request (this is to be able to start the process. The initial meeting is not a preliminary review but rather an initial project design meeting).
  - At this submission, the customer shall attach an agenda for the initial project design meeting
  - The customer should request which trade(s)/plans examiner(s) they wish to meet with.

## Scheduler

- Verifies this is a Superior Performing team
- Reviews agenda to determine if customer has requested all appropriate trade(s)
  - Will request assistance from Senior Plans Examiner when needed
  - If additional trades are needed, customer will be notified
- Puts a note in the internal notes to the coordinator that the project is requesting to use collaborative review.

## Coordinator

- Verifies the customer has an account to charge.
- Schedules an initial project design meeting with the customer to discuss expectations and number of issues that will be incorporated into collaborative review.

## AT TIME OF INITIAL PROJECT DESIGN MEETING

### Key Points

- This meeting will have a fee of \$145.00 per hour per reviewer
- It may utilize video conferencing

## Customer

- Attend initial project design meeting with seal-holders
- Provide an agenda and memorandum of expectations with minimum defined issues that will be discussed in collaborative review.
- The designer or their designee will take minutes of the meeting that will be distributed to all meeting participants within 5 business days of the initial project design meeting

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## Plans Examiners

- Attend initial project design meeting
- Keep notes of major code issues discussed for future reference
- Distribute disclaimer

## SCHEDULING

### Customer

- Submit project through EPM
  - Attach meeting notes from initial project design meeting

### Scheduler/Coordinator

- Link projects in EPM

### Plans Examiner

- Review meeting notes submitted by customer. Notify customer of any changes that should be made.

## AT TIME OF COLLABORATION

### Customer

- Contacts plans examiner and coordinator as soon as possible but no later than 2 days in advance to notify them of upcoming collaboration
  - If self-scheduling tool is in place, customers may utilize this to schedule the time
- Give plans examiner
  - The ftp site the plans are located
    - Plans/issues may also be present by email, walk in, or pdf
  - The issue(s) to be addressed

### Key Notes

- Email dialogue may be utilized in order to address an issue(s) if the plans examiners schedule is not fully scheduled, or if he/she has availability
- If the customer wishes to have an immediate review, an additional fee of \$500.00 will be charged
- For normal scheduling, the fee will be \$145.00 per hour per trade

### Plans Examiner

- Participates in the collaborative review initial project design meeting
- Communicates any issues to the seal-holder
- Participates in Ongoing discussions, initiated by A/E on code compliance details
- Keep notes for future reference
- Enters time into the system in half hour (1/2) increments

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## PROCESS REPEATS UNTIL ALL COLLABORATION IS FINISHED

### TO SUBMIT DRAWINGS

#### Customer

- Enters plans ready on date in EPM

#### Plans Examiners

- Gives coordinator number of hours needed to complete the review.

#### Coordinator

- Schedules project based on hours needed

#### Customer

- Submits drawings as normally required.

### PROGRAM DETAILS

#### Availability

#### Service Streams

- On-Schedule
- Mega

#### Performers

- Superior
- Successful
- Technology Needs
- When project is stubbed into Posse from EPM, have Posse allow notes to be added even though the project has not been gated.
- Make the project identifiable that it is Collaborative review in EPM and Posse for plans examiners
- Add initial project design meeting to EPM
- EPS/EPR (Electronic Plan Submittal/Electronic Plan Review) should be in place prior to program start date.

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