

## Customer Guide: Uploading Project Files - Plan Review (EPM)

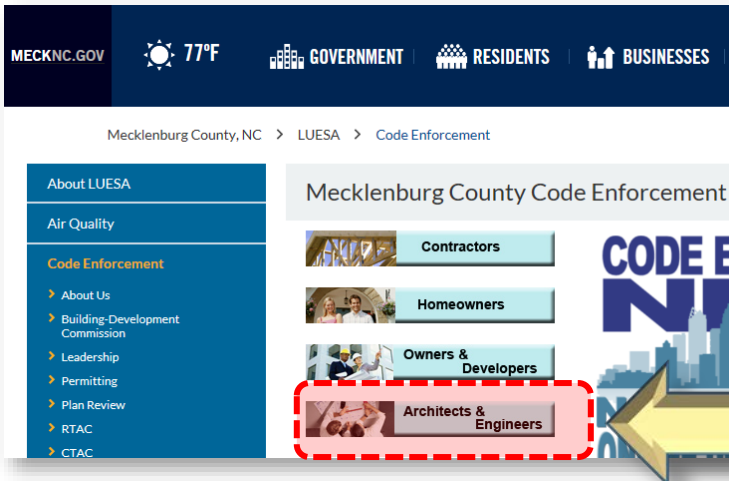
### Software Requirements:



- ❑ **BROWSER: Internet Explorer 9 or higher (Web portal and EPM submittals)**  
 \*The EPM system is optimized to be used in this browser. Others may appear to function but can often result in unpredictable errors or results.
- ❑ **PDF EDITOR: Adobe Acrobat Reader 9 or higher (completing all fillable forms)**  
 Project applications may not be accepted or will generate errors (internally) if filled out using any other PDF editor.

🔌 Using IE 9 or higher ... go to the Code Enforcement website: [www.meckpermit.com](http://www.meckpermit.com). (Experienced users can go directly to the [EPM](#) website.)

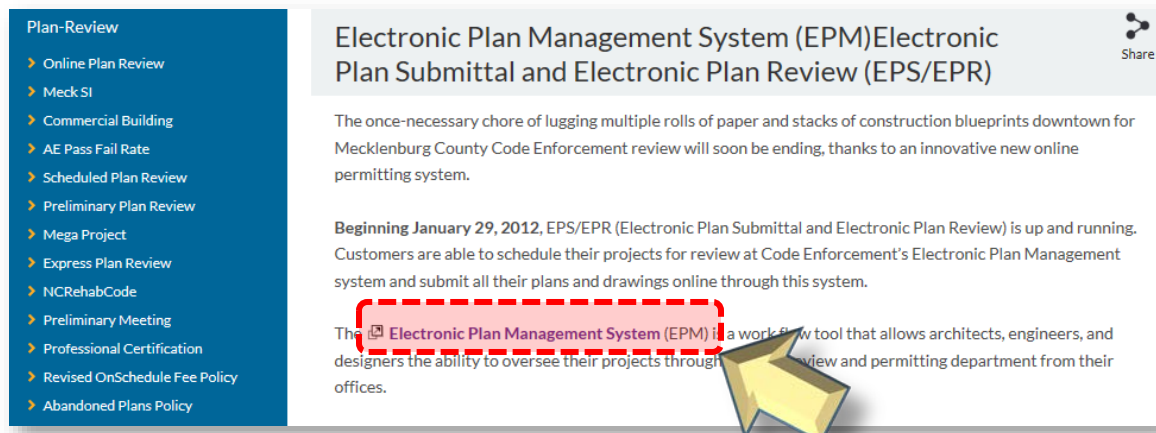
❶ Select Architects & Engineers button.



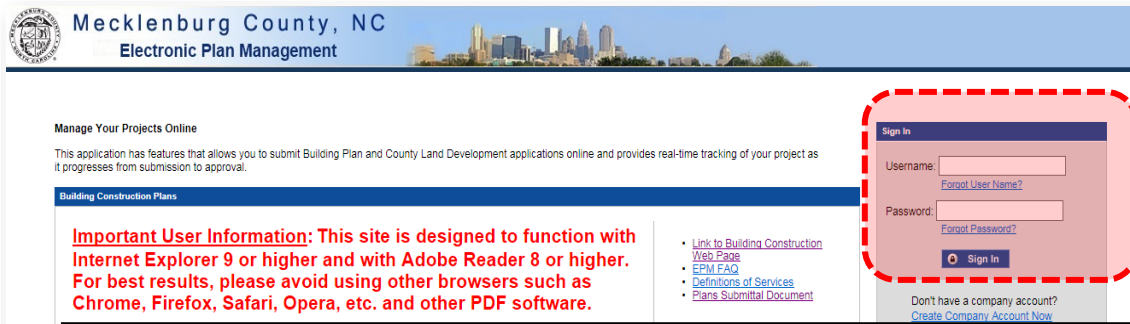
On the [Architect & Engineer Tool Box](#) page, you will see links to [FORMS](#), [EPM](#) (Electronic Plan Management) as well as linkable topics on lots of useful information.



❷ At this page, under “Plan Review Options”, select “Electronic Plan Management” and you will be taken to the [On Schedule Plan Review](#) page. Here you will find essential information on electronic submittal, processes and packaging. Scrolling to the bottom of that page you will find links to FAQ’s as well as several training modules or customer guides on things like “Creating an Account in EPM/Managing Users”, “Submitting an Onschedule Application”, “Accessing Approved Package” and “Customer Guide to Successful Plan Submission/Gating”, etc. When ready to begin the process of applying and submitting for a commercial plan review, select the [Electronic Plan Management System](#) link and you will be directed off the Mecklenburg County website and directly to the EPM website.

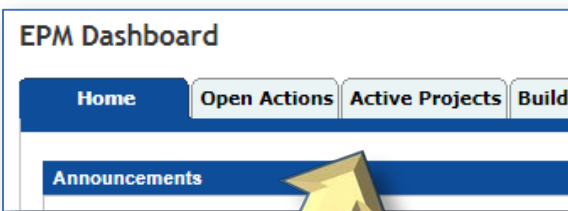


3 At the EPM site, sign into your dashboard ...

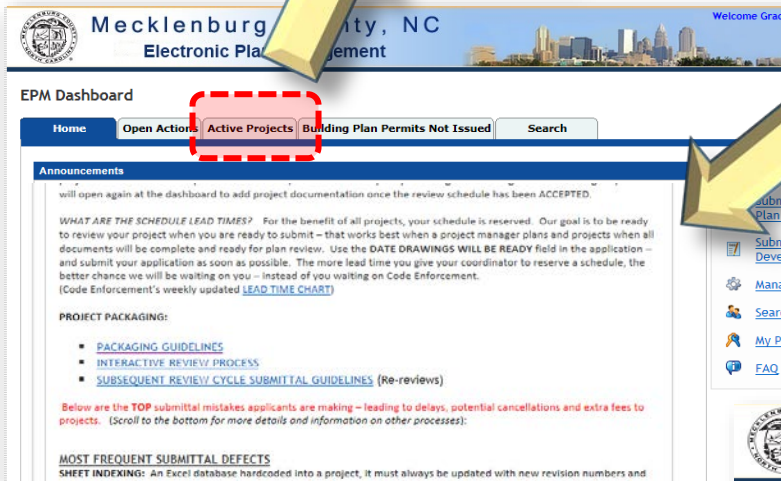


FORGOT USERNAME/PASSWORD? Already have an account but don't have the login information - you must email: [CE-TECH.Triage@mecklenburgcountync.gov](mailto:CE-TECH.Triage@mecklenburgcountync.gov) so a work ticket can be established and your account reset.

4 On your dashboard, if you have already submitted the project application you can go directly to the ACTIVE PROJECTS tab, select the project and skip to next step. Otherwise, you need to upload a project application to get a project number and a portal to upload plan review documents.

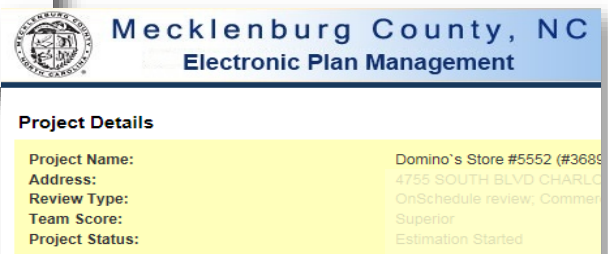


Review [Customer Guide: Submitting a Project Application](#) for guidance on this process.

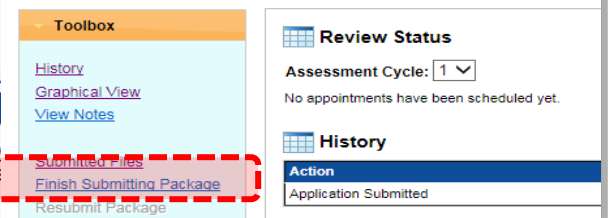
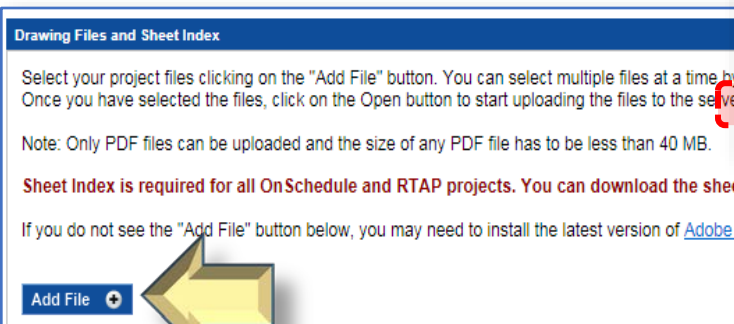


**ANNOUNCEMENTS:** On this HOME PAGE, you will find updates and announcements. Scrolling through will link you to important planning information like [Lead Time Charts](#) and [Project Formatting & Submittal Packaging Requirements](#) as well as other plan review processes and usage guides.

5 At the **ACTIVE PROJECTS** tab, click on the new project number and that project's dashboard will open. Under **TOOLBOX**, open the **FINISH SUBMITTING PACKAGE** page.



6 Directions on this page will guide user as to where and how to **ADD FILES**:



7 As you are adding files, be sure that all uploads have completed (nothing pending or spinning) and that the UPLOADED DRAWING/PROJECT FILE box contains all the files you intended (no duplicates and nothing missing) including your SheetIndex.XLSX file.



File Type	File Name	File Size	
SheetIndex	<a href="#">SheetIndex.xlsx</a>	25 KB	✗
ProjectFile	<a href="#">Address_Verification.pdf</a>	36 KB	✗
ProjectFile	<a href="#">Architectural_Int2.pdf</a>	28.14 MB	✗
ProjectFile	<a href="#">Building_Permit_Application.pdf</a>	1.07 MB	✗
ProjectFile	<a href="#">BUILDINGPERMIT.pdf</a>	279 KB	✗

8 Only after confirming the uploaded files ... hit **SUBMIT**.

Please be sure that you have uploaded all the files necessary for your submission. You will not be able to submit additional drawings after you click Submit. If you realize you need to submit additional files after you have clicked Submit, please contact an On Schedule Coordinator for assistance.

After you have finished uploading your project files click the "Submit" button.

[Submit](#)

NOTE: This action closes the submittal portal (the GATE) to you and then opens it up for Mecklenburg County Staff. The **PROJECT STATUS** will change from **WAITING FOR PACKAGE SUBMISSION** (GATE open to you) to **GATE OPEN** (GATE closed to you and open to Code Enforcement for processing).



\*Pay careful attention to the result of this action because if there is something wrong, the system will provide feedback (example) ...

The sheet index contains following errors. Please correct them and re-upload the updated sheet index.

▲ Sheet index does not contain any valid data.



\*If files upload successfully, EPM will go back to the project's dashboard home page and you should see the PACKAGE SUBMITTED under the **HISTORY** section ...

### History

Action	Performed By	
Application Submitted	Grady Smith	Sep 02, 2016 @ 12:08 PM
Plan Review Fee Added	Posse	Sep 02, 2016 @ 12:14 PM
Package Submitted	Grady Smith	Sep 02, 2016 @ 12:31 PM

... and you will see all the files as you have uploaded them under the **SUBMITTED FILES** page.

☑ EPM dashboards are always real-time information. You see what county staff sees. If the package has not uploaded as intended, contact your coordinator so that they can arrange to open the GATE for you to make corrections/additions.

**Toolbox**

- [History](#)
- [Graphical View](#)
- [View Notes](#)
- [Submitted Files](#)
- [Finish Submitting Package](#)
- [Resubmit Package](#)
- [Request Application Edit](#)
- [Submit Interactive Review Files](#)
- [Change Project Manager](#)
- [Plans Ready On](#)
- [Self Schedule](#)
- [Accept / Reject Review Date](#)
- [Cancel Review](#)
- [Cancel Project](#)

**Submitted Files**

**Application Form**

File Type	File Name	Submitted By	Submitted On	File Size
Application Form	<a href="#">Project_368713.pdf</a>	Grady Smith	Sep 02, 2016	735 KB

**Uploaded Drawing/Project Files**

Assessment Cycle: 1

File Type	File Name	Submitted By	Submitted On	File Size
Project File	<a href="#">Address_Verification.pdf</a>	Grady Smith	Sep 02, 2016	36 KB
Project File	<a href="#">Architectural_Int2.pdf</a>	Grady Smith	Sep 02, 2016	28.14 MB
Project File	<a href="#">Building_Permit_Application.pdf</a>	Grady Smith	Sep 02, 2016	1.07 MB
Project File	<a href="#">BUILDINGPERMIT.pdf</a>	Grady Smith	Sep 02, 2016	279 KB
Sheet Index	<a href="#">Copy of Copy of SheetIndex.xlsx</a>	Grady Smith	Sep 02, 2016	26 KB



**THE SHEET INDEX:** The Sheet Index is a database that is hardcoded into a project - a critical component of tracking during review and the final approved package going to the field. Its information must always reflect each sheet in the construction documentation package accurately. ONLY the drawing names, latest issue/revision dates, and revision numbers of final construction plan documents should be listed.

When modifying an already loaded Sheet Index, you will not be able to first remove the existing file. (Notice, no red ✗ to remove this file as with all the other file types.) Simply ADD the new one as you reload and resubmit. The system will over-write the existing XLSX file.

