ELECTRONIC SUBMITTAL TRAINING

Uploading Project Files for OnSchedule Commercial Plan Review
OnSchedule Plan Review

The Electronic Plan Management System (EPM) is an online work flow tool that allows project managers, architects, engineers, and designers the ability to oversee their projects as they go through the plan review and permitting process. All pertinent information related to the project is visible on a web-based “dashboard” – with real time updates. Users can watch and manage their project as it progresses from estimation, scheduling, gating, plan review and on to approvals and permitting.

The Mecklenburg County, NC EPM site can be found at: [http://epm.mecklenburgcountync.gov/](http://epm.mecklenburgcountync.gov/)

OnSchedule Plan Review is this jurisdiction’s plan review option when a commercial project is too large or complex for a CTAC Review. In this process, a project will electronically apply, schedule, submit documents, hold all reviews, and be issued its approval package and permit(s) through the EPM portal, or “dashboard”. This system efficiently puts the project manager in charge of their schedule, and their project’s progress. Mecklenburg County designed OnSchedule Plan Review in a response to stakeholder desire to be able to reserve and control their review time. A project manager, when making application, provides us with a projected PLANS READY date = when they can commit to all documents being final, formatted to meet minimal submittal requirements and ready for review for code compliance. With proper lead time planning, a reserved review team is scheduled - ready and waiting on your project instead of it waiting on Mecklenburg County Code Enforcement.
NOTES:

- All files will be uploaded into the project’s dashboard through the EPM (Electronic Plan Management) site.

- With all Onschedule commercial plan review processes: All project files, supporting documents and upfront fees must be received no later than NOON – 2 BUSINESS DAYS prior to the scheduled review start date.

- Project files may be uploaded along with the project application BUT THEY DON’T HAVE TO BE. In fact, our “OnSchedule” process is really designed to have the project application uploaded ahead of the project being ready so that we are reserving that time for the project review WHILE your design team is working on compiling the construction documents and supporting forms.

- This training module assumes you have already created a Customer Account in EPM, uploaded a Project Application and so, have an active project number/dashboard for this project. Refer to those specific training modules if needed.
Before submitting project files, it is important that you understand the minimal submittal requirements for formatting and packaging an electronic submittal plan review project with Mecklenburg County Code Enforcement. The basics are listed on the SCHEDULE DETAILS note but we have developed a page on our website to help as well. These requirements are designed to guide applicants toward a successful and timely plan review. Be sure you have reviewed these requirements for your particular stage or process:

**CUSTOMER GUIDE TO GATING**

1. Start with the **PROJECT FORMATTING & SUBMITTAL PACKAGING REQUIREMENTS** – comprehensive criteria to optimize the construction documents and supporting information using the parameters of our electronic plan management system for all processes.

2. For more specifics to your particular stage of a process (First Cycle, Second or Subsequent Review Cycle, Interactive, RTAP, etc.), select the relevant **QUICK START GUIDES** or **GATE PROTOCOLS**.

A project manager’s failure to carefully check project files for formatting and alignment will cause a return from the gate without review, leading to delays and potential cancellation of your reserved review date(s).
Uploading Project Files for Plan Review...

Software Requirements:

- **BROWSER**: Internet Explorer 9 or higher (Web portal and EPM submittals)
  **The EPM system is optimized to be used in this browser. Other browsers 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.**
Uploading Project Files for Plan Review...

On the EPM website, sign in to your account.

NOTE: If you want to give consultants or other members of the design team access to the project’s dashboard (to view and monitor), your Company Account’s Client Administrator (the one who created the company account or who has access to that administrator username/password) will be the only one who can make that change specific to each project. Refer to the module on CREATING AN EPM ACCOUNT-MANAGING USERS.

If you need help with any of the steps, you can generally find links to helpful training modules on this login page or at the bottom of our website’s ELECTRONIC PLAN MANAGEMENT SYSTEM (EPM) ELECTRONIC PLAN SUBMITTAL AND ELECTRONIC PLAN REVIEW (EPS/EPR) page.

☑️ Project Manager has collected, formatted and properly checked construction document plan sheets against the Sheet Index for the design team and is ready to upload project files into the dashboard....
Uploading Project Files for Plan Review...

On this HOME page, you will find updates and announcements. Scrolling through to find links to important planning information like Lead Time Charts and Project Formatting & Submittal Packaging Requirements as well as other plan review processes and usage guides.

Select the project from your ACTIVE PROJECTS tab:

Your project’s dashboard will open and you will select FINISH SUBMITTING PACKAGE under your TOOLBOX to open the SUBMIT PACKAGE page:
Uploading Project Files for Plan Review...

Directions on this page will guide user as to where and how to ADD FILES.

As files are uploading, be sure all functions have completed (nothing pending, loading or spinning) and that the **UPLOADED DRAWING/PROJECT FILES** box contains all the files you intended no duplicates and nothing missing), including your SheetIndex.XLSX file.

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<table>
<thead>
<tr>
<th>File Type</th>
<th>File Name</th>
<th>File Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>SheetIndex</td>
<td>SheetIndex.xlsx</td>
<td>25 KB</td>
</tr>
<tr>
<td>ProjectFile</td>
<td>Address Verification.pdf</td>
<td>30 KB</td>
</tr>
<tr>
<td>ProjectFile</td>
<td>Architectural_INT2.pdf</td>
<td>28.14 MB</td>
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<tr>
<td>ProjectFile</td>
<td>Building Permit Application.pdf</td>
<td>1.07 MB</td>
</tr>
<tr>
<td>ProjectFile</td>
<td>BUILDINGPERMIT.pdf</td>
<td>279 KB</td>
</tr>
</tbody>
</table>

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Uploading Project Files for Plan Review...

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.

If not familiar with this form, please review the training module, COMPLETING THE SHEET INDEX.

When modifying an already loaded Sheet Index, you will not be able to first remove the existing file. (Notice, no red ‘X’ 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.
Uploading Project Files for Plan Review...

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 OnSchedule Coordinator for assistance.

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

Only after confirming the upload is complete ... hit **SUBMIT**.

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

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

⚠️ Sheet index does not contain any valid data.
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*If files upload **successfully**, EPM will go back to the project’s dashboard home page and you should see an entry for **PACKAGE SUBMITTED** under the **HISTORY** section ...

<table>
<thead>
<tr>
<th>Action</th>
<th>Performed By</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Submitted</td>
<td>Grady Smith</td>
<td>Sep 02, 2016 @ 12:09 PM</td>
</tr>
<tr>
<td>Plan Review Fee Added</td>
<td>Posse</td>
<td>Sep 02, 2016 @ 12:14 PM</td>
</tr>
<tr>
<td>Package Submitted</td>
<td>Grady Smith</td>
<td>Sep 02, 2016 @ 12:31 PM</td>
</tr>
</tbody>
</table>
Uploading Project Files for Plan Review...

... 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 – at the same time they see it.

*If you realize you need to make a change to the SUBMITTED FILES after you have clicked “SUBMIT”, please contact your Project Coordinator or a Controller for assistance as soon as possible. Once the project files have passed the GATE, no further changes to the SUBMITTED FILES will be possible during this review cycle.

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). This is a deliberate design component of electronic plan review, designed to protect the integrity of the information during plan review.
You have successfully completed the training module designed to guide users through the process of uploading project files to the EPM dashboard for OnSchedule Commercial Plan Review.

If you have additional questions, please contact any Project Coordinator or Controller at 980-314-CODE 📞