ELECTRONIC SUBMITTAL TRAINING

Confirming the Review Schedule
NOTES:

- Once a project application has been submitted, Code Enforcement will process its information, estimate time for the review and assign a Project Coordinator. This staff member will help facilitate your plan review from the submittal of the application, through to issuing its permit(s). The Project Coordinator will reserve the time needed based on the BEST SCHEDULE/TEAM AVAILABILITY around your application’s indicated PLANS READY ON date. It is important to know that this schedule is only TENTATIVE until the project manager (applicant) has reviewed the scheduling note – with its information on packaging, minimal submittal requirements, estimated fee payments, and deadlines – and has then ACCEPTED the schedule (thus committing to its terms and deadlines).

- If, once received, the project manager is not able to ACCEPT the terms and deadlines of the tentative schedule, they must REJECT the schedule and enter a new PLANS READY ON date from where the Project Coordinator will propose a new tentative schedule. These steps will continue until an acceptable schedule is proposed and a commitment is made.

A Tentative Review Schedule is reserved for only 48 hours. If it is not accepted within that time, the system will automatically release the reservation and a new PLANS READY DATE will need to be entered by the applicant in order for the Project Coordinator to develop a new tentative schedule.
Confirming a Tentative Review Schedule...

Once scheduled, the designated project manager will receive a system generated email. Additionally, the project will be in the applicant’s OPEN ACTIONS TAB. It is important to note that this schedule is only TENTATIVE, until the project manager has accepted it.

From the OPEN ACTIONS TAB, find and select the project.

At the HISTORY page of the project, you will find the Tentative Review Schedule Note by clicking on the SCHEDULE PDF link (most likely the last entry).

NOTE: do not simply hover over the associated blue arrow, as that will only show the tentative review start date. Project managers must review the complete Review Schedule Note (SCHEDULE PDF) so they can see all of the details they are committing to (minimal submittal requirements, estimated upfront fees, deadlines, etc.) ...
Confirming a Tentative Review Schedule...

Before committing to the tentative schedule, the project manager should thoroughly review all of the details provided in the review SCHEDULE DETAILS note:

1. Review schedule (begin and end date).
2. Upfront fee estimate must be secured (either paid or through a letter of authorization) no later than 2 business days prior to the beginning of the review.
3. SUBMITTAL DEADLINES: EPM will set the gate due dates to be 2 business days prior to the start of the review (takes into account weekends and County holidays). This section will also state the cancellation fee-free deadline as well as the cancellation fee should a project schedule be changed/missed after that deadline.
4. Project coordinator contact information. This staff person has been assigned to this project to help facilitate your plan review from the time you make application to permit issuance. This is your “go-to-person”.
5. Minimal submittal criteria (specific to the project’s current process phase). Sometimes this note is not visible without scrolling down to the bottom of this document but be sure to review prior to making a commitment to the schedule and deadlines!
Confirming a Tentative Review Schedule...

Before committing to a review schedule, 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). So, be sure you understand what you are committing to.
If after considering the schedule details and minimal submittal requirements, the project manager determines that they can commit to the tentative schedule and its deadlines they will need to ACCEPT the schedule in order for it to be finalized and the time slots reserved. To do this, under TOOLBOX, click on ACCEPT/REJECT REVIEW DATE and then the ACCEPT REVIEW START DATE button.

Hit SUBMIT: The review schedule is now final and reserved (note, project status will change to WAITING FOR PACKAGE SUBMISSION, indicating that the portal is available for submitting project documents. If that was done prior to accepting the schedule, the project status will change to GATE OPEN and move immediately to our controllers’ work plates for screening.
Changing a Tentative Review Schedule...

If after considering the schedule details, the project manager determines that the tentative schedule and its deadlines does not work for them, then they will need to **REJECT** the schedule and enter a new **PLANS READY ON** date if known. To do this, under **TOOLBOX**, click on **ACCEPT/REJECT REVIEW DATE** and then the **DECLINE REVIEW START DATE** button.

Hit **SUBMIT**: a new READY date will then go back to your coordinator’s work plate where they will develop a new schedule. That new schedule will then go on the project dashboard and the process will continue until there is an acceptable schedule and the project manager has finalized it (**ACCEPTED** it).
A Tentative Review Schedule is reserved for only **48 hours**. If it is not accepted within that time, the system will automatically release the reservation and a new **PLANS READY DATE** will need to be entered by the applicant in order for the Project Coordinator to develop a new tentative schedule.

You may notice that EPM offers an applicant the ability to self-schedule. This should be done carefully and often needs the guidance of your Project Coordinator as well. If interested in this option, please review the **SELF SCHEDULING** training module before attempting, so that you can fully understand the process and pitfalls.
You have successfully completed the training module on how to confirm the review schedule.

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