(980) 314-CODE www.meckpermit.com

OnSchedule Commercial Plan Review – FAQ's

All information can be found, beginning at the ARCHITECTS & ENGINEER'S TOOL BOX of the LUESA/Code Enforcement website. The following is a compilation of some of the most frequent ones. Please call 980-314-CODE if you need additional direction.

Q: What is OnSchedule Commercial Plan Review?

A: "OnSchedule" is this jurisdiction's plan review option for most commercial projects. In this process, all plan review submittals and reviews are done electronically and remotely. OnSchedule means plan review time is reserved, putting a project manager in control of their deadlines and review schedules. No trips to county offices for submittals or reviews – no waiting in line – no uncertainties about timelines. Mecklenburg County Code Enforcement has always been a leader in technology and streamlining our processes with direct collaboration from industry leaders in our community.

Q: What about small scope commercial projects, is OnSchedule the only option?

A: Code Enforcement does offer a modified process for very limited scope projects. To see if your project qualifies, visit - CTAC Plan Review.

Q: Will Mecklenburg County Code Enforcement accept paper plans and project files for plan review?

A: No. Since the onset of electronic plan management, Mecklenburg County Code Enforcement has suspended paper submittals for all OnSchedule projects. Projects not qualifying for the CTAC Plan Review process must submit only through our EPM system.

Q: What is EPM?

A: The Electronic Plan Management System (EPM) is an online work flow tool that allows 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 EPM site can be found at: http://epm.mecklenburgcountync.gov/.

Q: How do I receive instruction/training on the EPM software?

A: There are training modules and one-page "customer guides" published toward the bottom of the webpage: OnSchedule Plan Review with step-by-step instructions on our most common processes and procedures used in EPM. New users, in particular, will be helped by starting with training modules: "Creating an EPM Account-Managing Users" and the "New to OnSchedule Commercial Plan Review" and "Navigating EPM Dashboard – Toolbox" customer guides.

Q: Are there system or software restrictions when using EPM?

A: Yes. BROWSER: Internet Explorer 9 or higher (Web portal and EPM submittals). Other browsers may appear to function but can often result in unpredictable errors or results.

PDF EDITOR: Adobe Acrobat Reader 9 or higher (editing/completing all fillable forms and applications). Other editors may appear to function but will generate errors, either internally or not allow applications to be accepted through EPM.

PDF COMPILER: Most should work but it should be noted that the EPM system certifies BlueBeam as their industry standard for design and construction workflows and this is what Mecklenburg County staff use to review projects. Sometimes there are unpredictable errors found from other PDF compilers when viewed in BlueBeam.

Q: Are there file format parameters in EPM?

A: Yes. All documents, except for the county's Sheet Index form, must be in PDF format. The Sheet Index must remain in the XLSX format provided.

Q: What is the county's Sheet Index?

A: EPM requires an index database of all construction plan documents. Mecklenburg County provides a Sheet Index template for this purpose. This template is downloaded once a user logs into EPM, on the DOWNLOAD APPLICATION FORMS page. It is a critical component of the electronic tracking during plan review. This form must always remain in XLSX format and be maintained to reflect each sheet's most current revision number and issue or revised date. This database will become a part of the stamped approved package that goes out to the field as it is where "Approved as Noted" comments are recorded. A training module on how to Complete the Sheet Index is on the Code Enforcement website as well as a link provided in EPM.

Q: Code Enforcement information refers to the "EPM dashboard", what is it?

A: "Dashboard" is the common term for the web-based portal EPM uses to store and manage a project. Project managers will be able to direct who on their design or development team can access project files and submittals. The dashboard is where a project "lives". It is submitted, reviewed and ultimately approved here with real-time status updates and history records of all events and comments. The customer guides to "Navigating EPM Dashboard" or "Navigating EPM Dashboard to Review Results and Project Status" are helpful in optimizing its use.

Q: Can only the project manager have access to the EPM dashboard?

A: No. When creating a company account, its client administrator sets up all EPM users. The company's client administrator can grant several staff members and even their consultants and owners access – controlling their rights to act as "Administrator", Regular User" or just "Read Only" in all or just a specific project(s). Reviewing the training module, "Creating an EPM Account-Managing Users" will help with this.

Q: Is there also a public portal into the county's plan review projects?

A: Yes. As a public regulatory agency Code Enforcement's work is a part of the public domain. Real-time, up-to date information on any plan review project can be reviewed by the public using the STATMAP portal. The customer guide to "Public Access to Plan Review Status" is provided to instruct on how to do that. Note, project files will not be able to be uploaded or viewed from this site, but anyone will be able to follow the history and view any commentary or status updates on the plan review or permit.

Q: I have code related questions, who can I reach out to?

A: Code Enforcement's Commercial Technical Assistance Center (CTAC) is available during business hours. Customers can stop by our Customer Service Center at 2145 Suttle Ave. or call 980-314-CODE and ask to be directed to CTAC, multi-trade plans examiners are on the standby to address your questions.

Q: I have process related questions, who can I reach out to?

A: Project Controllers or Coordinators are highly skilled staff who can guide you through any questions you might have with any of our processes. Call 980-314-CODE and follow the phone tree to either of these groups. Customers are also welcome to visit the Customer Service Center in person for assistance.

Q: My project requires approvals from Land Development or City/Town Engineering, do I need to wait for those approvals before I can submit to County Code Enforcement?

A: No. While all new construction, additions, exterior work and some "change of use" projects do require Code Enforcement approval, in addition to Land Development or Engineering approval, these processes can be concurrent. It should be noted that Code Enforcement will not be able to approve their review until such outside agency approval is received, but a project can still be reviewed simultaneously. Typically Land Development projects are "parent" projects to the subsequent "child" project set up with Code Enforcement.

Q: Do I have to wait until a project has been awarded to a General Contractor before submitting for a plan review?

A: No. Although a permit application will be a required document when submitting a project for plan review, it is not always complete at that juncture. Submit the permit application with at least the project name and address matching all other documents and we will proceed with plan review. Once approved, a permit will not be able to be issued until someone from the project side provides a fully executed and complete permit application to the project's coordinator.

Q: I am unsure about my project's address or need to add a suite or unit number to the address, who do I reach out to?

A: Confirming a project address and making sure that all documentation reflect that accurately is a vital component to plan review and permitting. If a project's known address is an active address in Mecklenburg County, you will be able to verify it through Mecklenburg County's Web Address Verification search portal. If your project has a new address or creates a new suite/unit, or is showing as "inactive", you will need to reach out to the GIS Department (704-336-6357) to have the address(es) activated. An Address Verification Form is required supporting documentation (for each address/suite/unit) on any commercial plan review project.

Q: Why do the design team members need to be identified when applying for a plan review project? Often these change as the development of the design evolves and before construction documents are final.

A: There are two reasons for this. One, when applying for plan review, the licensee information is electronically verified directly with the associated professional boards – ensuring that all licenses are active. Second, the design team is assigned a rating through Mecklenburg County's A/E Pass Rate Incentives Program, categorizing them not only for past performance but beginning a history with this project's performance as well.

Q: I am, or someone on my design team is, not a licensed professional. The OnSchedule project application requires that I list all designers, how do we list non-licensed professionals?

A: At the KEY CONTACTS section of the form (toward the bottom), it is asking if trade drawings will be sealed. In the occasion of non-licensed designers, the answer to that would be NO. Cells will then open on the form to enter the designer's Meck ID number and other information.

Q: How do I get a Meck ID number?

A: Through the EPM portal, one can select MY PROFILE/MECK ID. A guide for "Creating a Meck-ID Number" is provided on our website. This is a straightforward process where a Meck ID number will be generated quickly for your use. Note: Professional licensees should not get Meck ID numbers as they must always use their license information on their work product.

Q: When I try to submit my application, I get an error message that says one or more of my designers is not valid. I have checked with their licensing boards and they tell me their licenses are "active" and valid.

A: This problem can surface when a license has expired but are still within their board's grace period. Annually, in NC, most professional licenses need to be renewed. If a seal holder does not renew their license before the expiration date, their board may give them a "grace" period (usually 30 days after it expires) where their license is still considered "active", but with our system, it is validating the license against that expiration date. That is most likely the reason why you are getting the error message. To resolve, 1st – reach out to your designer with the expired license and notify them (it takes just a few minutes with their board to resolve). Then 2nd, reach out to your project coordinator or controller. They will work with their manager to get the seal holder released from the hold so that an application can be accepted in the interim.

NC Arch licenses must be renewed by June 30th
NC PE licenses must be renewed by December 31st
NC LA licenses must be renewed by June 30th

Q: My project application (Preliminary.PDF, OnSchedule.PDF or RTAP.PDF) is being rejected by the EPM system, what do I do?

A: Trouble shoot your application by confirming you have filled it out using the system and software parameters defined above. Check that all required fields (marked by a red asterisk) are completed with some kind of value in them. Shaded (gray) cells should not have information in them – they will be auto-populated once submitted. Review all error messages that the system provides when rejecting the application and make needed corrections. If application is still not accepted, contact a Project Controller or Coordinator. An instructional guide and training module on submitting project applications is provided on our web site.

Q: My project's design team member(s) has changed since submitting the project application, how do I communicate this?

A: In an effort to make sure only active licensees are used and to be sure the correct project team is identified in the A/E Pass Rate Incentives Program for this project, changes in designers/licensees will need to be reflected on a project's application. Contact your project coordinator and they will make these edits on your behalf. If a project is submitted whose designers listed on the Appendix B and on the drawings do not match the OnSchedule application, the project controller will make these edits on your behalf.

Q: Why can't I make edits to a project application once it is submitted myself?

A: Because this application electronically sets up many areas of a project, the accuracy of its information is critical, and customers will not be able to independently make changes once it is accepted into the EPM system. If changes do need to be made once there is an ACTIVE project, a minimal administrative fee may be charged against the project so that we can make needed corrections on your behalf. There is a training module on "Editing a Project Application" that explains more about why and how an application is processed.

Q: Are there fees that need to be paid for plan review and when do they get paid?

A: When submitted, a project application will ping the Mecklenburg County Fee Ordinance using the estimate total project cost provided on the application to calculate and estimated plan review fee. This fee will need to be receipted or surety provided as directed by the Plan Submittal Requirements (2 business days prior to the start of your review schedule, by noon). Final permit costs are calculated at the time of issuance and any balance, will be charged to the General Contractors bond account.

Q: What are the packaging requirements for project files with electronic plan submittal?

A: Mecklenburg County provides a comprehensive document, "Project Formatting & Submittal Packaging Requirements" as well as "Quick Start Guides" and "Gating Protocols" customized for all processes and stages of your plan review. These requirements can be referenced on the web page: Customer Guide To Gating. Additionally, review the customer guides and training manuals on "Uploading- "or "Packaging- project files".

Q: Can I get an idea of the current lead time for scheduling projects?

A: Sure, on our website, each Monday, our division's Lead Time Chart is updated. Keep in mind that this is just a snapshot in time, not a guarantee of performance. Projecting when your plans will be ready and submitting your project application as soon as possible will get you the best answer to that question.

Q: I've submitted my project application, now what?

A: Immediately your project application goes on to the work plates of senior Code Enforcement staff for estimation. When possible, they will compare the information provided on your application to past performance on projects similar in size and scope. All code enforcement trades and agencies will make evaluations on what trades/agencies need to review the project and estimate the review time needed. A project coordinator will be assigned to your project. Once the estimation process is completed, they will use that information, along with your "Plans Ready On" date to create the best possible tentative schedule. Processing your application should take 1-2 business days. You will be able to see all the entries and commentary applied throughout this process on the HISTORY page of your project's dashboard.

Q: How will I be notified of my project's review schedule?

A: Within 1-2 business days of submitting a project application, the designated project manager will get a system generated email notifying them that a tentative schedule has been entered onto the dashboard and that they need to review the terms and ACCEPT them within 48 hours or the reserved blocks will be cancelled. To view the terms of the tentative schedule (estimated upfront fees, schedule change deadline, submittal deadline and review start/end dates as well as packaging instructions), look on the dashboard's HISTORY page for the Schedule.PDF link.

Q: My project status is "Plans Ready Date Not Known". What is this?

A: Either, the project was tentatively scheduled based on a previous "Plans Ready Date" set and the project manager did not ACCEPT the tentative schedule within 2 business days – at which point the reserved block of time will be released and a new "Plans Ready Date" will need to be entered so that the project can receive a new tentative schedule. Or, the plan review cycle has been closed (disapproved) and your coordinator is waiting for you to submit a new "Plans Ready Date" on the dashboard so that they can begin to reserve your review time for the subsequent review cycle.

Q: A Plans Examiner has sent me an email offering to put my project into Interactive Review. What does this mean?

A: Interactive Review (IR), is a discretionary process a plans examiner can use to give a designer the ability to resolve very minor code defects or requests for information within the same review cycle. Participating in this option is completely voluntary on the part of the designer but could potentially avoid a subsequent review cycle. Details on IR's parameters and how to submit during this time can be found in the training module, "The Interactive Review – The Process and File Management".

Q: During my review, the plumbing and mechanical trades disapproved the project, but I haven't heard back from the other trades. I'm ready to address the corrections needed on the plumbing and mechanical files but can't seem to reload the revisions into the project.

A: That is by design. A project's submittal portal (the GATE) will remain closed during a review cycle until ALL trades have completed their review. You will need to wait until the project has moved into a subsequent plan review cycle before resubmitting revisions for all trades.

Q: Once approved, how long will it take to get a permit(s) issued?

A: Once a plan review project is approved by all trades and agencies, your coordinator will be notified, and they will begin the process of preparing your approved package and issuing the permit(s). If they have completed permit applications, they are fully executed, and the contractor and sub-contractor licenses can be verified, permits will be issued within 24 hours.

Q: The plan review has been approved but we have not brought on the contractors yet. How long can I wait to get the permit issued?

A: 120 calendar days from date of approval. If after that time, a permit has not been issued, it is considered to be ABANDONED and will be cancelled = it would be as if the project had not been reviewed/approved. Any prepaid fees would be forfeited. This same policy pertains to plan review projects that have been disapproved and remain inactive for a period longer than 120 calendar days. More details can be found on our website: Abandoned Plans Policy.