

# Interactive Review Strategy

August 20, 2008  
May 16, 2012 Revised

## 1. Introduction

The Interactive Review Strategy was developed as part of the 2008 Commercial Plan Review Revisions. The intention is for Interactive Review to reduce the number of review cycles needed during a review by encouraging communication between the reviewer and the designer of record during the first review cycle. The expectation is this communication will clarify questions and allow a response to correct the code issue(s) at hand. Utilization of Interactive Review will reduce the overall time to obtain an approved set of drawings. This initiative will apply to projects that typically take 1 – 8 hours of review.

The items that have been developed in response to this initiative are:

- Checklist with items that can be used during Interactive Review
- Creation of an Interactive Review process

The scheduled begin date of this initiative is September 2, 2008.

## 2. Design Professionals Responsibilities

The design professionals will be available by phone, fax, email or in person to participate in this program. Once contacted regarding a review, the design professional will respond within 48 hours (2 business days) or the review will be disapproved, and the drawings returned. The plans examiners will have the comments to the designers no later than 3:00 pm and the designers will respond with whether they are going to perform interactive review no later than 3:00 pm 1 business day after the initial request and have the correct information to the plans examiner no later than 3:00 pm 2 business days after the initial request. If the information that is submitted does not adequately address the issues, the project will be disapproved, and changes will come in the next cycle.

The lead designer will provide to Mecklenburg County Code Enforcement a list of designers and their contact information (phone, fax, email) and the contact information of their alternatives, as needed, in the plan review application and on the Appendix B.

If the design professional will not be available during the scheduled review time, they will provide an appropriate stand in, similar to the Express Review guidelines.

If the design professional does not agree with an interpretation by the plans examiner, he/she may:

- A. Work with the plans examiner to find an alternative solution
- B. Appeal through the established appeal process
- C. Accept the interpretation but later present their views at the appropriate consistency team meeting

## 3. Internal Process

REV. 11/9/2018

### 3.1 Evaluating the project for Interactive Review

#### Plans Examiner

Determine one of the following:

1. Can the plan be approved? If yes, approve. If no, go to question 2.
2. Can AAN criteria be applied? If yes, apply AAN, If no, go to question 3.
3. Can the issue be resolved with minor changes to the drawings? If yes, contact designer to obtain information. If no, go to question 4.
4. Can issue(s) be resolved by discussing with the design professional and with minor redlines? If yes, contact designer to come in to make changes. If no, disapprove the drawing.

#### Limiting Scope

- A. If the change will take longer than 1 uninterrupted hour for the reviewer to complete the review, it is not eligible for Interactive Review.
- B. If the scope of work expands or changes, the project no longer qualifies for Interactive Review. Do not include owner changes in the response. Those should be brought through as Revisions to Approved Plans.
- C. Ineligible Projects:
  - i. Changes that cause a major redesign in the project
  - ii. Incomplete Appendix B or major inaccuracies
  - iii. Hazardous occupancies
  - iv. Mega Projects
  - v. A-2 occupancies where the changes affect the kitchen or other agencies
  - vi. Changes that will increase or decrease loads on systems and affect multiple trades
  - vii. Changes that will increase or decrease plumbing fixture counts

### 3.2 Contacting the Designer

#### Plans Examiner

- A. Contact the designer to discuss the review items. Discuss the information needed and determine the best means for resolving the issue(s).
- B. Send a confirmation email with the items listed and the time frame for response to the designer of the drawing and to the lead designer. The designer of the drawing is responsible for sending a return email confirming they understand the items, the procedure for uploading drawings, and the time frame for response.
- C. Place a note in the Electronic Plans Management (EPM) system under project notes outlining the requested changes.

### 3.3 Response

#### Plans Examiner

- A. The Plans Examiner places the project to the side, awaiting response. If the designer does not confirm they are using interactive review within 1 day and the drawings are not uploaded within the 2-day timeframe, the project is disapproved, and a note is placed in EPM stating the designer was given the opportunity to utilize Interactive Review and did not.
- B. If the plans examiner will not be available during the response time frame, they will notify their team members of the projects awaiting response.

#### 4. General Notes

- A. Projects will continue to be estimated for the amount of time needed to complete the initial review. The number of review hours will be reduced to 6 hours per day to make the plans examiners available to perform Interactive Review.
- B. Interactive Review is available to high performing and average performing seal holders only through the On-Schedule review stream.
- C. Interactive Review is available to all designers through the Commercial Technical Assistance Center review stream.
- D. Drawings will be sealed as required by board rules.

#### 5. Statistical Information

Reports will need to be developed to track the following information:

- A. Track the number of projects that were offered Interactive Review
- B. Track the number of projects that were offered Interactive Review and did not utilize the opportunity.
- C. Track the designers who do not respond when given the opportunity to utilize Interactive Review.
- D. Track the designers who use Interactive Review as a punch list.

#### 6. Technology

This process can be implemented without significant technology changes. As new software is developed the following items would be necessary:

- A. Place the project in an Interactive Review status.
- B. Generate an automatic email with the comments for Interactive Review.
  - a. This email will be time stamped and inform the designer the response deadline.
- C. Place the project on an Interactive Review work plate that all plans examiners and coordinators can view.
- D. After the allotted response timeframe, if action is not taken, the system will disapprove and close the review checklist, sending an automatic email to the designer.