

# Team Plan Review Process for Superior Performers

4/12/2010

## Customer

- Customer indicates they would like to participate in the Team Plan Review program upon submitting their project into the Electronic Plans Management system(EPM). This information must be in the scope of work section of the application.

## OnSchedule Coordinator

- Verify plans examiners are available.
- Set up a preliminary review meeting for the project. This is done through EPM and the date/time will be sent to the A/E dashboard.
- Notify Inspections by Appointment(IBA) Coordinator the project wants to utilize Team Plan Review and the date/time of the scheduled preliminary review meeting.

## IBA Coordinator

- Research the address to determine the applicable inspectors required to attend the preliminary review meeting.
- Contact inspectors to determine availability of inspectors and inform them of the preliminary review.
- Verify there is an account established for the owner for all applicable charges.
- Notify OnSchedule Coordinator the inspectors will attend.
- Create an estimate of fees/services that may be required based on the different level of services. This will need to be presented to the customer at the preliminary review so they may choose which level they would prefer. This estimate should include 2 hour minimum per inspector (per IBA guidelines) and 1 hour minimum per plans examiner for the preliminary review. The estimate for levels 2 and 3 will depend on the number of hours needed for the review. This information will be available from the OnSchedule Coordinator.

## AT TIME OF PRELIMINARY REVIEW

### Customer

- Attend preliminary review meeting with sealholders
- Provide preliminary construction drawings that have enough information to adequately define the scope of work being performed. The drawings must provide enough information for the sealholders, plans examiners, and inspectors to be able to discuss the main code interpretation issues in detail.
- Provide an agenda
- Take minutes of the meeting that will be distributed to all meeting participants within 5 business days of the preliminary meeting

- Make decision on which level of Team Plan Review will be performed on this project
  - Level 1
    - Inspectors involved in preliminary review meeting only
  - Level 2
    - Inspectors involved in preliminary review and in 1<sup>st</sup> cycle of plan review
  - Level 3
    - Inspectors involved in preliminary review and all cycles of plan review until permit issuance

Note: All levels of Team Plan Review will have an exit meeting at the conclusion of the plan review process. The exit meeting will be attended by inspector(s) and design team.

### **Inspectors**

- Attend the preliminary review
- Keep notes of major code issues discussed for future reference

### **Plans Examiners**

- Attend preliminary review
- Keep notes of major code issues discussed for future reference

### **IBA Coordinator**

- Present the rough estimate of services to the customer.
- Charge the time for the preliminary review per the IBA program guidelines

### **OnSchedule Coordinator**

- Charge for the preliminary review per the Mega guidelines

## **SCHEDULING**

### **OnSchedule Coordinator**

- Schedule project for plan review
- Notify IBA Coordinator when plan review is scheduled, if Level 2 or 3 is selected

## **AT TIME OF PLAN REVIEW**

### **Plans Examiner**

- Perform the plan review on the project
- Discuss any major code issues that arise
- Keep notes for future reference

### **Inspector**

- Meet with the plans examiner to discuss any major code issues that were discovered during the plan review.
- Keep notes for future reference

### **IBA Coordinator**

- Coordinate getting the inspector in the office for the collaboration on the plan review.
- Charge the time for the plan review per the IBA program guidelines

### **OnSchedule Coordinator**

- If the plan is approved, permit will be issued after the exit meeting has been held.
- If the plan is disapproved, repeat the steps for Scheduling and At Time of Plan Review

### **AT THE END OF THE REVIEW**

All Levels of Team Plan Review will have an exit meeting between the inspector and design team.

### **IBA Coordinator**

- Schedule exit meeting with inspectors and design team.
- Charge the time for the plan review per the IBA program guidelines
- Notify OnSchedule Coordinator the date of the exit meeting and when the exit meeting has been held, so the permit may be issued.

### **CANCELLATION**

#### **Customer**

- The customer can choose to end participation in Team Plan Review with proper notification at any point in the process
- Proper notification entails giving written notice to the OnSchedule Coordinator and the IBA
- Coordinator no later than 5 business days prior to the preliminary review or the scheduled plan review
- If notification is given outside of the cancellation time line, the customer will be charged the time for the review under the guidelines of the IBA program and the OnSchedule program guidelines.

## PROGRAM DETAILS

### Availability

### Service Streams

- OnSchedule, including Rehabilitation Code
- Express Review
- Mega

### Performers

- Superior
  - at start of program, available to Superior only
- Average
- Poor

### Technology Needs

- Radio button in EPM for Team Plan Review