

# Electronic Plans Management Training

Accept/Reject a  
Review Date



# EPM — Accept/Reject a Review Date



The Electronic Plan Management system (EPM) is an online tool designed to allow 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 the dashboard, with real time updates. The web address is:

<http://epm.mecklenburgcountync.gov>

# EPM — Accept/Reject a Review Date



The screenshot shows the EPM Dashboard in Microsoft Internet Explorer. The browser window title is "A/E Dashboard - Microsoft Internet Explorer". The address bar shows the URL: <http://cpm.mecklenburgcountync.gov/ArchDash.aspx>. The page header includes "Mecklenburg County, NC" and "Code Enforcement". The user is logged in as "Grady Smith" from "Smith Design Firm". The dashboard has tabs for "Home", "Open Actions", "Active Projects", "Permits Not Issued", and "Search". The "Open Actions" tab is selected. A table displays project information:

Project #	Project Name	Address	Project Manager	Open Action	Project Coordinator
<a href="#">297888</a>	Hot Dog Heaven	700 N TRYON ST, CHARLOTTE	Grady Smith	Review is tentatively scheduled. Please confirm date.	<a href="#">Cheryl Scott-Parker</a> (704) 336-3637

A red arrow points to the project number [297888](#) in the table.

Once an application has been submitted, Mecklenburg County Code Enforcement will process the information, estimate time for the project and schedule a date for the review.

Once the project has been scheduled, it will appear on the Open Actions tab.

Click on the Project Number.

# EPM — Accept/Reject a Review Date



The screenshot shows the Electronic Plan Management (EPM) web application interface. The browser window title is "Electronic Plan Management - Microsoft Internet Explorer". The address bar shows the URL: <http://epm.mecklenburgcountync.gov/ProjDetails.aspx?ProjNum=297888&TabNum=1>. The page header includes "Mecklenburg County, NC" and "CodeEnforcement". The user is logged in as "Grady Smith | Smith Design Firm | Sign Out". The page title is "Electronic Plan Management".

The main content area is titled "Project Details" and includes a "Dashboard" link. The project information is as follows:

- Project Name: Hnt Dng Heaven (#297888)
- Address: 700 N TRYON ST, CHARLOTTE
- Review Type: OnSchedule review, Commercial; 2009 NC Bldg Code

A "Tool Box" on the left side contains the following links:

- History
- Graphical View
- Request Application Edit
- Change Project Manager
- Cancel Project
- Performance Scores
- Plans Ready On
- Accept/Reject Review Date
- Cancel Review
- List of Meetings

The "History" section displays a table of actions performed on the project:

Action	Performed By	Performed On	Details	Report
Submit Application	Grady Smith	Jul 02, 2009 @ 08:26 AM		<a href="#">PDF</a>
Health Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Back Flow Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Fire Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Zoning Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Plans Review Fee Entered	Melanie Sellers	Jul 02, 2009 @ 09:08 AM	<a href="#">▶</a>	
Assign Project Coordinator	Melanie Sellers	Jul 02, 2009 @ 09:08 AM	<a href="#">▶</a>	
Building Estimation Completed	Melanie Sellers	Jul 02, 2009 @ 09:08 AM	<a href="#">▶</a>	
Electrical Estimation Completed	Melanie Sellers	Jul 02, 2009 @ 09:09 AM	<a href="#">▶</a>	
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Plumbing Estimation Completed	Melanie Sellers	Jul 02, 2009 @ 09:09 AM	<a href="#">▶</a>	
All Estimation Done	SYSTEM	Jul 02, 2009 @ 09:09 AM	<a href="#">▶</a>	
Schedule Review Tentative	Melanie Sellers	Jul 16, 2009 @ 09:03 AM	<a href="#">▶</a>	<a href="#">PDF</a>

A red arrow points to the "PDF" link in the "Report" column of the "Schedule Review Tentative" row.

By clicking on the project number, the system goes into the History of the project. At the bottom is Schedule Review Tentative. Click on the PDF to see the details on the Scheduled Review date.

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A screenshot of the Adobe Acrobat Professional interface. The window title is "PDF[1].pdf - Adobe Acrobat Professional". The document content is titled "Hot Dog Heaven: Schedule Details" and includes a table of project information and a "Notes" section. A green arrow points to the close button (X) in the top right corner of the window.

Project Number	297888
Type of Review	OnSchedule
Plan Review Start Date	Monday, July 20, 2009
Estimated Plan Review End Date	Monday, July 20, 2009
Estimated Plan Review / Permit Fee	\$2,109.71
Plan Submittal Date	The plan can be submitted between Thursday, July 16, 2009 till noon of Friday, July 17, 2009
	If you are not able to make the Friday, July 17, 2009 plan review date, you must cancel your review no later than 4 pm on Monday, July 13, 2009. If you fail to do so, you will be charged a cancellation fee of \$500.00 (4.00 hours @ \$125 per hour)
Number of Sets	6
Project Coordinator	Cheryl Scott-Parker
Project Coordinator Phone	(704) 336-3837
Project Coordinator Email	cheryl.scott@mecklenburgcountync.gov
Report Generated On	7/16/2009 9:26:50 AM

**Notes**

City of Charlotte plan submittal guidelines are available at:  
<http://www.charmeck.org/Departments/City+Engineering/Use+Our+Services/Land+Development/Permitting+Services.htm>

For additional information on the AE Pass Rate, please visit:  
<http://www.charmeck.org/Departments/LUESA/CodeEnforcement/Plan+Review/AE+Pass+Fail+Rate.htm>

Projects may be submitted between the hours of 8:00am to 4:30pm to your assigned coordinator.

The estimated plan review/permit fee shown above must be paid prior to project submission. Please contact the Mecklenburg County project coordinator assigned to this project for instructions.

The Plan Submittal Guidelines are available at: <http://ntplanweb.co.mecklenburg.nc.us/psr/>

The Schedule PDF gives details such as the date of the review, the estimated cost, the submittal date and the cancellation date.

When finished viewing the document, close the screen using the x at the top of the page.

# EPM — Accept/Reject a Review Date



In order to Accept/Reject the review date, click on Accept/Reject Review Date in the tree view on the left side of the screen.



The screenshot shows the Electronic Plan Management (EPM) web application interface. The browser window title is "Electronic Plan Management - Microsoft Internet Explorer". The address bar shows the URL: <http://epm.mecklenburgcountync.gov/ProjDetails.aspx?ProjNum=297888&TabNum=1>. The page header includes "Mecklenburg County, NC Code Enforcement" and "Electronic Plan Management". The user is logged in as "Grady Smith | Smith Design Firm".

**Project Details**

Project Name: Hut Dug Heaven (#297888)  
Address: 700 N TRYON ST, CHARLOTTE  
Review Type: OnSchedule review, Commercial, 2009 NC Bldg Code

**Tool Box**

- [History](#)
- [Graphical View](#)
- [Request Application Edit](#)
- [Change Project Manager](#)
- [Cancel Project](#)
- [Performance Scores](#)
- [Plans Ready On](#)
- [Accept/Reject Review Date](#)
- [Cancel Review](#)
- [List of Meetings](#)

**History**

Action	Performed By	Performed On	Details	Report
Submit Application	Grady Smith	Jul 02, 2009 @ 08:26 AM		<a href="#">PDF</a>
Health Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Back Flow Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
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Zoning Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Plans Review Fee Entered	Melanie Sellers	Jul 02, 2009 @ 09:08 AM	<a href="#">▶</a>	
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Mechanical Estimation Completed	Melanie Sellers	Jul 02, 2009 @ 09:09 AM	<a href="#">▶</a>	
Plumbing Estimation Completed	Melanie Sellers	Jul 02, 2009 @ 09:09 AM	<a href="#">▶</a>	
All Estimation Done	SYSTEM	Jul 02, 2009 @ 09:09 AM	<a href="#">▶</a>	
Schedule Review Tentative	Melanie Sellers	Jul 16, 2009 @ 09:03 AM	<a href="#">▶</a>	<a href="#">PDF</a>

# EPM — Accept/Reject a Review Date



The screenshot shows the EPM web application in a Microsoft Internet Explorer browser window. The page title is "Electronic Plan Management - Microsoft Internet Explorer". The address bar shows the URL: <http://epm.mecklenburgcountync.gov/ProjDetails.aspx?Action=AccOrRejRevDate>. The page header includes "Mecklenburg County, NC CodeEnforcement" and "Electronic Plan Management". A welcome message for "Grady Smith | Smith Design Firm" is visible. The main content area is titled "Accept / Reject Review Date" and contains the following text: "This review has been tentatively scheduled on Monday, July 20, 2009". Below this, there is a section for "Accept / Reject Review Date" with two radio button options: "Accept Review Start Date" (which is selected) and "Decline Review Start Date". Under the "Decline Review Start Date" option, there are two sub-options: "The plans will be ready for review on:" followed by a text input field, and "Don't know when the plans will be ready for review.". A "Submit" button is located at the bottom right of the form. A "Tool Box" on the left side of the page lists various actions like "History", "Graphical View", "Request Application Edit", "Change Project Manager", "Cancel Project", "Performance Scores", "Plans Ready On", "Accept / Reject Review Date", "Cancel Review", and "List of Meetings". A "Dashboard" link is also present in the top right of the main content area. At the bottom of the page, there are links for "Legal Notices" and "Privacy Notice".

If the date is acceptable, click Accept Review State Date and click Submit.

# EPM — Accept/Reject a Review Date



Electronic Plan Management - Microsoft Internet Explorer

Address: http://epm.mecklenburgcountync.gov/ProjDetails.aspx?Action=AccOrRejRevDate

Mecklenburg County, NC  
CodeEnforcement

Welcome Grady Smith | Smith Design Firm | Sign Out  
Electronic Plan Management

Project Details [Dashboard](#)

Project Name: Hot Dog Heaven (#297888)  
Address: 700 N TRYON ST, CHARLOTTE  
Review Type: OnSchedule review, Commercial, 2009 NC Bldg Code

Tool Box

- History
- Graphical View
- Request Application Edit
- Change Project Manager
- Cancel Project
- Performance Scores
- Plans Ready On
- Accept / Reject Review Date
- Cancel Review
- List of Meetings

**Accept / Reject Review Date**

**This review has been tentatively scheduled on Monday, July 20, 2009**

Please review the latest gate instructions on the [History](#) page before accepting the review start date.

Accept Review Start Date

Decline Review Start Date

The plans will be ready for review on:

Don't know when the plans will be ready for review.

[Legal Notices](#) | [Privacy Notice](#)

If the date is not acceptable, click Decline Review Start Date. Then, it is necessary to choose either: The plans will be ready for review on: and indicate a date or Don't know when the plans will be ready for review. Then click submit. This will send the information to MCCE so the coordinator can schedule a new date for review.



# EPM — Accept/Reject a Review Date



The screenshot shows the Electronic Plan Management (EPM) web application interface. The browser window title is "Electronic Plan Management - Microsoft Internet Explorer". The address bar shows the URL: <http://epm.mecklenburgcountync.gov/ProjDetails.aspx?ProjNum=297888&TabNum=1>. The page header includes "Mecklenburg County, NC" and "CodeEnforcement". The main content area is titled "Electronic Plan Management" and displays "Project Details" for "Hot Dog Heaven (#297888)". The project address is "700 N TRYON ST, CHARLOTTE" and the review type is "OnSchedule review, Commercial; 2009 NC Bldg Code". A "Tool Box" on the left contains links for "History", "Graphical View", "Request Application Edit", "Change Project Manager", "Cancel Project", "Performance Scores", "Plans Ready On", "Accept / Reject Review Date", "Cancel Review", and "List of Meetings". The "History" section displays a table of actions performed on the project.

Action	Performed By	Performed On	Details	Report
Submit Application	Grady Smith	Jul 02, 2009 @ 08:26 AM		<a href="#">PDF</a>
Health Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Back Flow Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Fire Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
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Plans Review Fee Entered	Melanie Sellers	Jul 02, 2009 @ 09:08 AM	<a href="#">▶</a>	
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All Estimation Done	SYSTEM	Jul 02, 2009 @ 09:09 AM	<a href="#">▶</a>	
Schedule Review Tentative	Melanie Sellers	Jul 16, 2009 @ 09:03 AM	<a href="#">▶</a>	<a href="#">PDF</a>
Reject Review Date	Grady Smith	Jul 16, 2009 @ 10:27 AM	<a href="#">▶</a>	
Schedule Review Tentative	Melanie Sellers	Jul 16, 2009 @ 10:30 AM	<a href="#">▶</a>	<a href="#">PDF</a>

If the date is rejected, the coordinator will re-schedule the project and the new date will appear on the History page. Repeat the previous steps to Accept or Reject the date.

# EPM — Accept/Reject a Review Date



When the review date is accepted, it appears on the History page.

The screenshot shows the Electronic Plan Management (EPM) web application interface. The browser window title is "Electronic Plan Management - Microsoft Internet Explorer". The address bar shows the URL: <http://epm.mecklenburgcountync.gov/ProjDetails.aspx>. The page header includes "Mecklenburg County, NC Code Enforcement" and "Electronic Plan Management". A welcome message for Grady Smith is visible. The main content area is titled "Project Details" and shows information for project "Hot Dog Heaven (#297888)" at "700 N TRYON ST, CHARLOTTE". A yellow banner indicates "Review Date Accepted". A "Tool Box" on the left contains links for "History", "Graphical View", "Request Application Edit", "Change Project Manager", "Cancel Project", "Performance Scores", "Plans Ready On", "Accept / Reject Review Date", "Cancel Review", and "List of Meetings". The "History" section displays a table of actions performed.

Action	Performed By	Performed On	Details	Report
Submit Application	Grady Smith	Jul 02, 2009 @ 08:26 AM		PDE
Health Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Back Flow Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
Fire Estimation Not Required	Melanie Sellers	Jul 02, 2009 @ 08:33 AM		
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All Estimation Done	SYSTEM	Jul 02, 2009 @ 09:09 AM	▶	
Schedule Review Tentative	Melanie Sellers	Jul 16, 2009 @ 09:03 AM	▶	PDE
Reject Review Date	Grady Smith	Jul 16, 2009 @ 10:27 AM	▶	
Schedule Review Tentative	Melanie Sellers	Jul 16, 2009 @ 10:30 AM	▶	PDE
Accept Review Date	Grady Smith	Jul 16, 2009 @ 10:31 AM	▶	

# EPM — Accept/Reject a Review Date



On the Open Actions tab, it indicates the Gate is open. This means the plans are ready to be submitted to Mecklenburg County Code Enforcement.

A screenshot of a web browser window showing the EPM Dashboard. The browser title is "A/E Dashboard - Microsoft Internet Explorer". The address bar shows "http://epm.mecklenburgcountync.gov/ArchDash.aspx". The page header includes "Mecklenburg County, NC" and "Code Enforcement". The main content area is titled "EPM Dashboard" and has a navigation menu with tabs: "Home", "Open Actions", "Active Projects", "Permits Not Issued", and "Search". The "Open Actions" tab is selected. Below the navigation menu is a table with columns: "Project #", "Project Name", "Address", "Project Manager", "Open Action", and "Project Coordinator". The table contains one row of data for project "Hot Dog Heaven" with project number "297888". The "Open Action" column for this project states "Gate is open. Waiting for plan to be submitted." There are also "Excel" and "Refresh" buttons above the table. At the bottom of the page, there are links for "Legal Notice" and "Privacy Notice".

# EPM — Accept/Reject a Review Date



Thank you for using this training demonstration. If you have additional questions on Accept/Reject a Review Date, please contact:

OnSchedule Coordinators 704-336-3837 x 1