ELECTRONIC SUBMITTAL TRAINING

Editing a Project Application
NOTES:

⇒ This process is only available to a project manager as their application is going through ESTIMATION and before the gating and plan review processes have begun. Once submitted, Mecklenburg County Code Enforcement staff will review the information provided on a project application to estimate the amount of review time and trades involved for scheduling purposes. If during this process, they have questions or requests for additional information, they will place the application in PENDING status until the project manager resolves the issue. This process applies the same for Preliminary, OnSchedule and RTAP project applications in EPM.

⇒ Once a project application has gone through ESTIMATION and the process has begun, the project manager will no longer have the ability to make EDIT APPLICATION requests through EPM (that option will be grayed out at your TOOL BOX). If changes need to be made at that point, requests should be made in writing (email) directly to their project coordinator. In most cases, a minimal administrative fee may be added to the project fees to cover that service. It is important that your project applications remain complete and accurate throughout all processes.
Editing a Project Application...

If an application is put into **PENDING** status, the EPM system will generate an email to the project manager as well as record the request for information on the project dashboard’s HISTORY.

There are two places this notice can be viewed on the dashboard.

1. By hovering your mouse over any of the blue arrows in the **DETAILS** column, next to an entry of “Estimation Pending”, a note on the specific request for additional information will pop up.  
   -or-
2. By selecting **VIEW NOTES** under your **TOOL BOX**: 

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**Project Details**

**Project Name:**

**Address:**

**Review Type:**

**Team Score:**

**Project Notes:**

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**Reasons**

**Information required:**

**Pending Notes**

Application is incomplete, building area (sq. ft.) is a required field

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**View Notes**

**Estimation Notes**

**By**

**Type**

**Notes**

Tom Smith

**9/20/2017 11:40 PM**

**Customer Notes**

Application is incomplete, building area (sq. ft.) is a required field

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**History**

**Action**

**Performed By**

**Performed On**

**Details**

Application Submitted

Tom Smith

**9/20/2017 11:34 PM**
Immediately the action will be recorded on the project dashboard’s HISTORY and sent to Code Enforcement staff. Once Code Enforcement staff have all information corrected, the ESTIMATION phase will end and the project will move to its project coordinator for scheduling.

Often the estimator will request that this clarification or additional information be sent directly to them via email, especially when it involves a document or supplemental data. Make note of the directive from the estimator.
You have successfully completed the training module on how to edit a project application for commercial, Onschedule Plan Review.

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