



OnSCHEDULE COMMERCIAL PLAN REVIEW

Gate Screening Protocol:

SUBSEQUENT REVIEW CYCLE

*This expanded checklist supplements the [Project Formatting & Submittal Packaging Requirements](#) (PF&S) document by providing broader insight into what, and how, Code Enforcement Controllers screen (GATE) each submittal element for minimal formatting and packaging prior to accepting a project for PLAN REVIEW. While it may not include all scenarios for every type of project or possible review process, it does strive for consistency for applicants as well as plan review and inspections staff to best serve our community. Refer to the Mecklenburg County's [Plans Submittal Requirements for Commercial Projects](#) for more details on information needed to determine code compliance and permitting requirements specific to your project type. This list is not intended to dictate, nor limit the information a designer needs to document code compliance – it is solely the responsibility of the project manager to ensure information is complete, sufficient and submitted per accepted deadlines.

★ *An applicant's failure to carefully check project files for formatting and alignment will cause a return from the gate without review, leading to delays and potential cancellation of your reserved review date(s).* ★
This document is a helpful tool to avoid such costs.

In a typical SUBSEQUENT or RE-REVIEW CYCLE SUBMITTAL, the GATE will screen for ...

ALL FILES/DOCUMENTS (Required or Optional) WILL BE OPENED AND CHECKED TO TEST FOR "LOCK": All users need to make sure locked files (set to block MARK-UPS) are not uploaded into the project's dashboard at any point in the plan review process (gating, Interactive Review uploads, etc.).

- ❑ **Response to Comments Letter:** *The Gate will only check to see that a letter has been uploaded (will not check that all trades have been addressed. This is the project manager's responsibility).*
 - Letter should be an accounting of all changes made since the last review cycle closed – either in responding directly to reviewer comments or any other changes. This tool is most useful when prepared in a meaningful and direct way – leading the review team to your resolutions and intended as a check for the lead design professional or project manager to make sure all defects have been addressed before resubmitting.
 - Most often prepared by designers and compiled by the project manager.
- ❑ **Construction Document Drawing Packaging:** *The GATE will be checking for ...*
 - REVISIONS: All revisions must be clouded and denoted. That delta (change denotation) should be recorded accurately on the sheet revision block and then onto the Sheet Index as the latest REVISION NUMBER/SHEET DATE.
 - PACKAGING: Revised sheets must replace the original sheet and then re-bound into the applicable trade file – checking that bookmarks are still working before resubmitting. Where there are revised sheets – the WHOLE file needs to be removed and reloaded. DO NOT remove/reload files that have no revisions.
 - CERTIFICATIONS UPDATED: Only sheets sealed by Professional Engineers will be checked to be sure seals/signatures are re-applied and re-signed each time a sheet is modified. PE's signature dates cannot pre-date last sheet date. This is a requirement of their board.

- ❑ Sheet Index: *The GATE will be checking that...*
 - Must be updated to accurately reflect the latest revision numbers and revised sheet dates—only for the sheets that have been revised. If a sheet has not changed, it should not receive a new sheet date on the title block or the Sheet Index; doing so will cause re-review of already approved sheets, delays and potential review cost increases.
 - When uploading a modified Sheet Index, you will not be able to first remove the existing file. Simply add the new one as you reload and resubmit. The system will over-write the existing XLSX file.

- ❑ **Approved/Reference ONLY Files requested by reviewer (most typically, Zoning/Civil):** *The GATE will be checking...*
 - Often Code Enforcement’s plan review is concurrent with an outside agency having a different lead time—most notably, municipal engineering or zoning jurisdictions. Pay close attention to zoning reviewer’s comments; they have most likely requested that the approved plans from City/Town Engineering, UMUD, MUDD, Town Zoning, etc. be uploaded AS REFERENCE ONLY—NOT TO BE INCLUDED ON THE SHEET INDEX. In these cases, do NOT replace the Code Enforcement Civil/Site file that is already in the package with this approved set as Code Enforcement will not be able to apply its approval stamp and/or comments to the already approved set. Reviewers will only use the approved to check for consistency.

