

# Reviews

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SOP – Reviews

Version 0.3

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## Version Control

<b>Version</b>	<b>Date</b>	<b>Author</b>	<b>Summary of Changes</b>
0.0	October 30, 2024	Susan L Holland	Initial draft
0.1	November 20, 2024	Susan L Holland	Clarified roles and steps
0.2	December 20, 2024	Susan L Holland	Added notes for resubmitting reviews
0.3	January 2, 2024	Susan L Holland	Added version control Updated screenshots Updated summary Added business process diagram Reviewed instructions Verified links

## Reviews

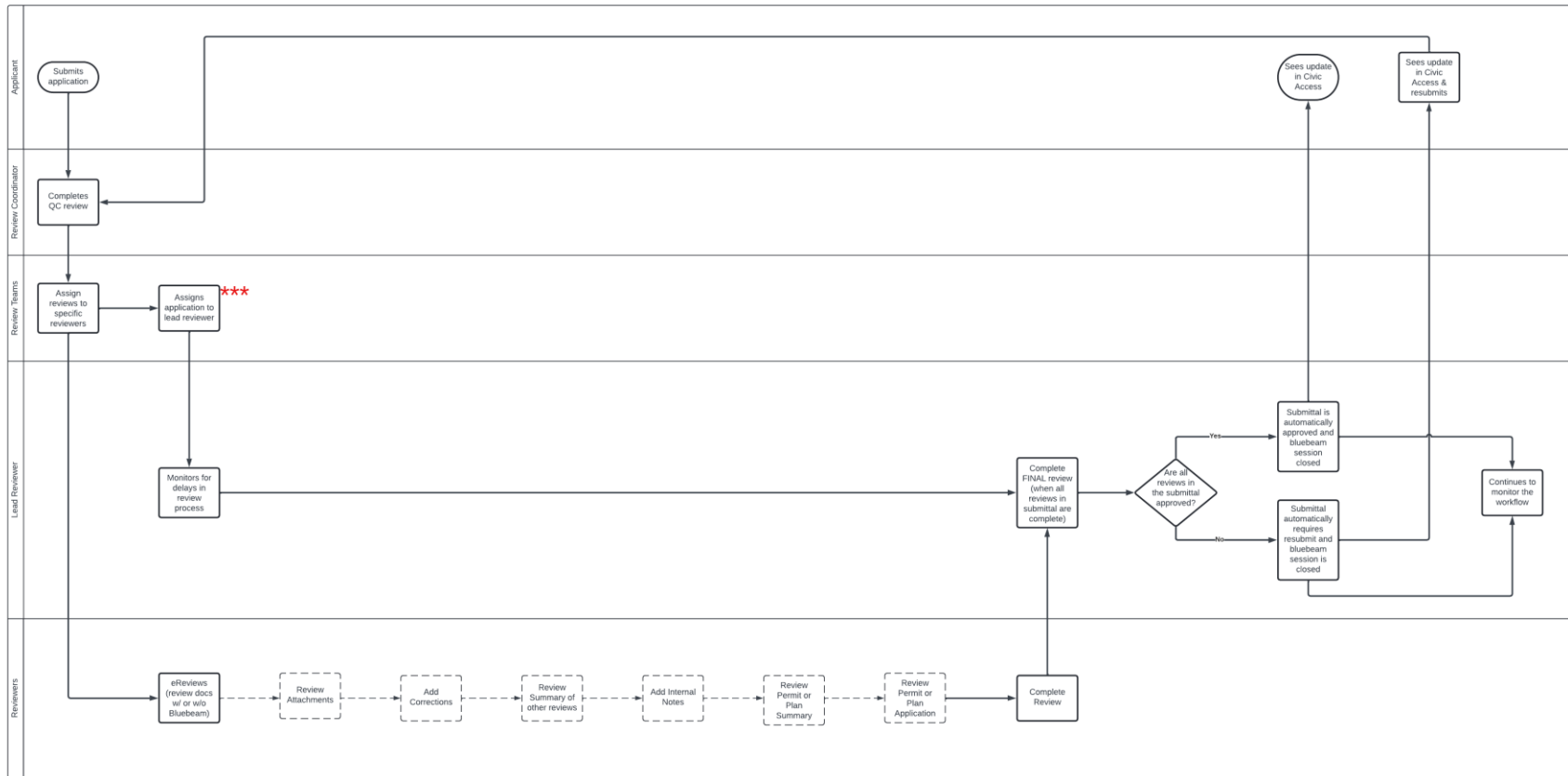
### Summary

In EP&L, each application has a workflow with steps and actions. A **Submittal** is an action in the workflow that collects the **Reviews** appropriate for that application.

When the Review Coordinator has received the **Submittal** during the application QC, the **Reviews** are automatically assigned to teams. (See Review Coordinator SOP for more details.)

Teams assign the **Review(s)** to specific reviewers according to their team process. During this process the application itself is assigned to the appropriate point of contact, also known as the Lead Reviewer. This Lead Reviewer monitors the application and ensures the workflow keeps moving forward.

# Business Process Diagram

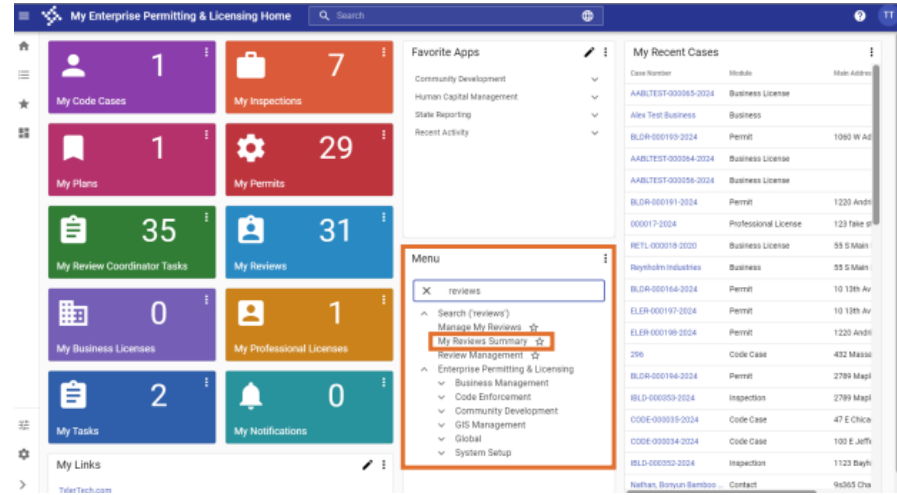


\*\*\* Note: Application Services remains assigned to the application for BUILDING only.

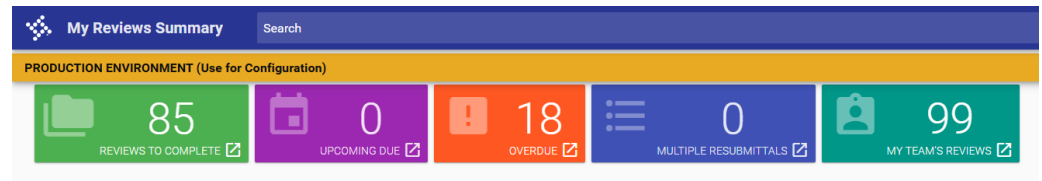
# 0. Navigation & Assignment

## OA: My Reviews Summary app

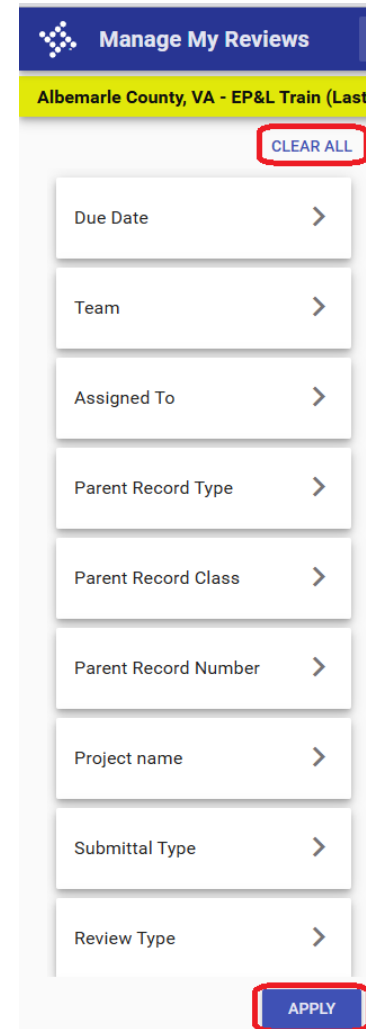
1. **Team** accesses the **My Reviews Summary** app



- 2. Select any of the icons at the top to see reviews:
  - a. **Reviews to Complete** displays all reviews assigned to you
  - b. **Upcoming Due** displays your reviews due today through next 5 business days
  - c. **Overdue** displays your reviews due prior to today
  - d. **Multiple Resubmittals** displays your reviews on version 3 or greater
  - e. **My Team's Reviews** displays
    - i. **Your** incomplete reviews if you are not a team lead
    - ii. **Team's** incomplete reviews if you are a team lead




3. A list of pre-filtered reviews displays
4. Adjust filters on the left as needed
  - a. Select **Clear All** to start with no filters
  - b. Select **Apply** to use selected filters



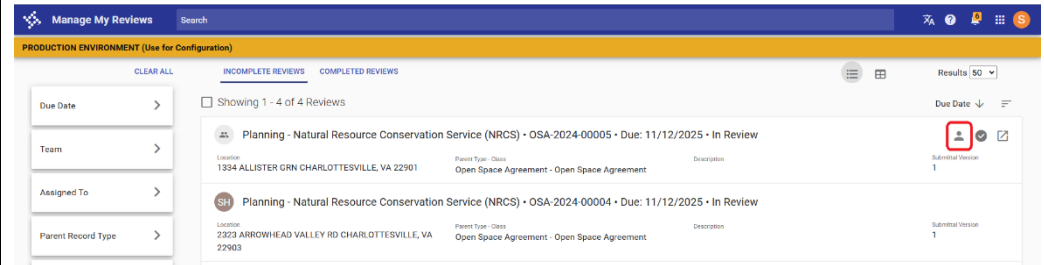
## OB: Assign to a Reviewer

1. To assign the review:

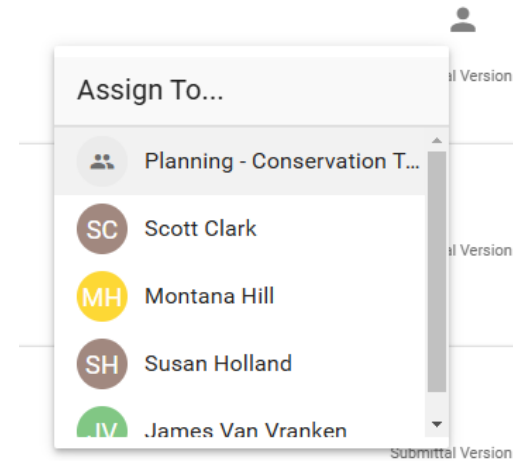
- a. Hover over a card and select 
- b. Select a name from the list to assign this review to a specific person

*Note: Your list may be limited based on your permissions.*

### Select person icon



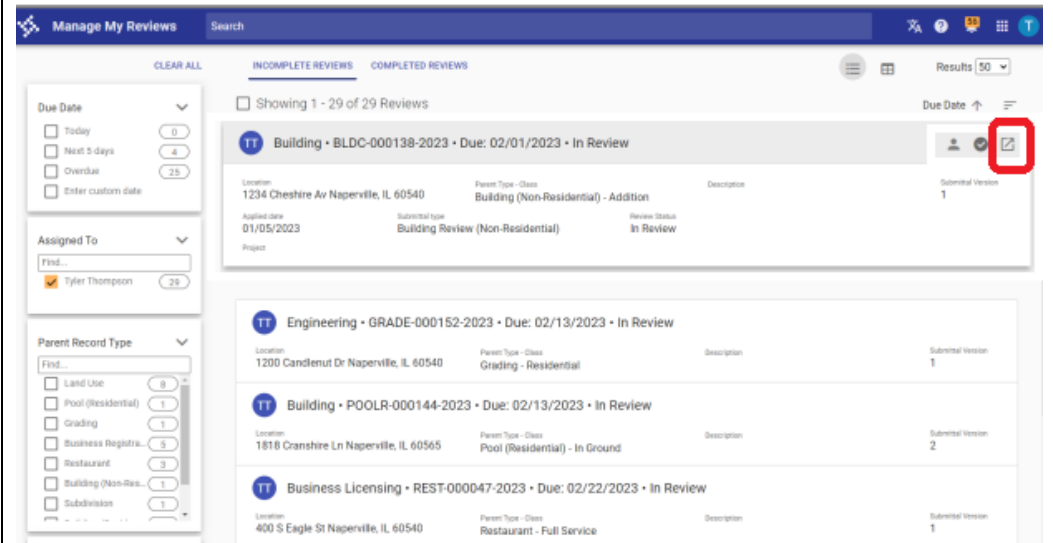
### Select assignee



## OC: Open a Review

1. Assigned reviewer selects  to open the review


*Note: If the review is no longer visible, check the filters.*



The screenshot displays the 'Manage My Reviews' application interface. The top navigation bar includes a search field and a 'Results 50' dropdown. Below the navigation, there are tabs for 'CLEAR ALL', 'INCOMPLETE REVIEWS', and 'COMPLETED REVIEWS'. The main content area shows a list of reviews, with the first one highlighted. The review card for 'Building • BLDC-000138-2023' has a red box around the document icon in its top right corner. The left sidebar contains filters for 'Due Date', 'Assigned To', and 'Parent Record Type'. The 'Assigned To' filter is set to 'Tyler Thompson'.

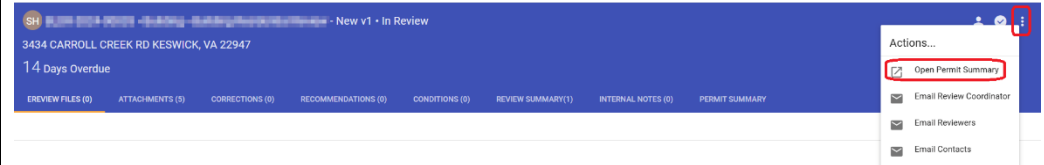
Location	Parent Type - Class	Description	Submitted Version
1234 Cheshire Av Naperville, IL 60540	Building (Non-Residential) - Addition		1
1200 Candlenut Dr Naperville, IL 60540	Grading - Residential		1
1818 Cranshire Ln Naperville, IL 60565	Pool (Residential) - In Ground		2
400 S Eagle St Naperville, IL 60540	Restaurant - Full Service		1

## OD: Assign Application to Lead Reviewer

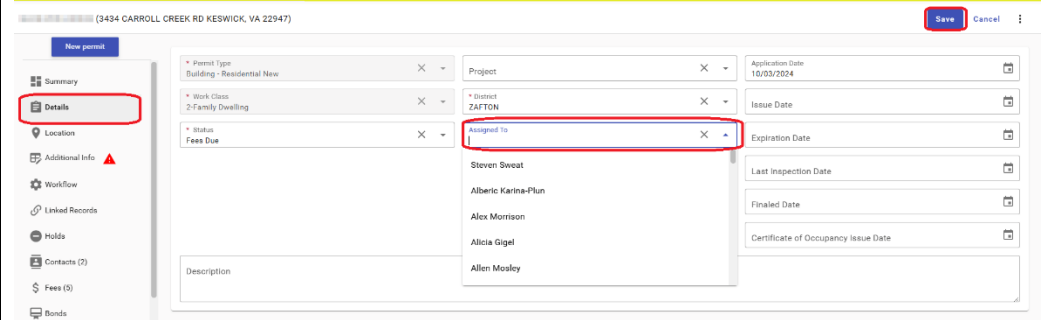
1. In the review, select 
2. Select **Open Permit or Plan Summary**
3. Once in the permit or plan application:
  - a. Select **Details** in the left menu
  - b. Select **Assigned To** dropdown
  - c. Select **Name of Lead Reviewer**
  - d. Select **Save**

*Note: This application will now appear in the assignee's Hub on the "My Permits" or "My Plans" card. It will remain there until the application is completed.*

### Open Permit or Plan Summary



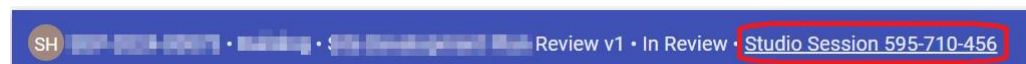
### Assign Lead Reviewer



## 1. Bluebeam Studio Session

1. Select the **Studio Session** link to launch the associated Bluebeam Studio Session. There you can access, review, and markup electronic files.

*Note: If your review does not require or you do not have a Studio Session, proceed to [Step 2: Review Actions](#)*



2. In the **Open Bluebeam Revu** popup:
  - a. Check **Always open these types of links...**
  - b. Select **Open Bluebeam Revu**



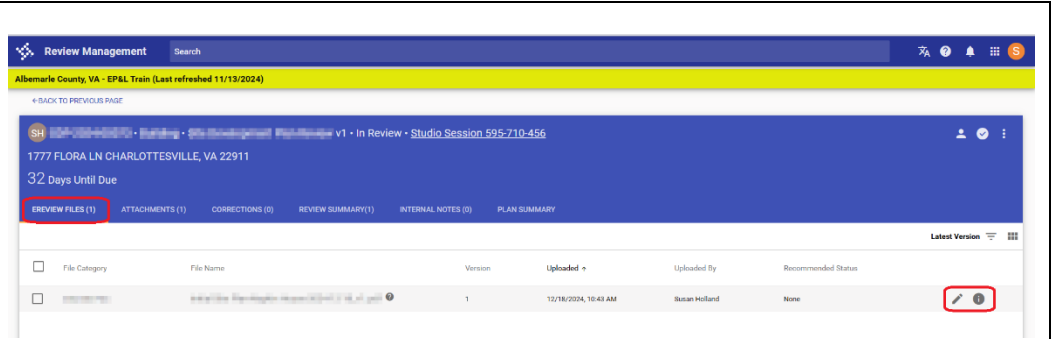
3. Markup the file using the Bluebeam tools
4. When complete, close the session. (Markups are saved automatically.)




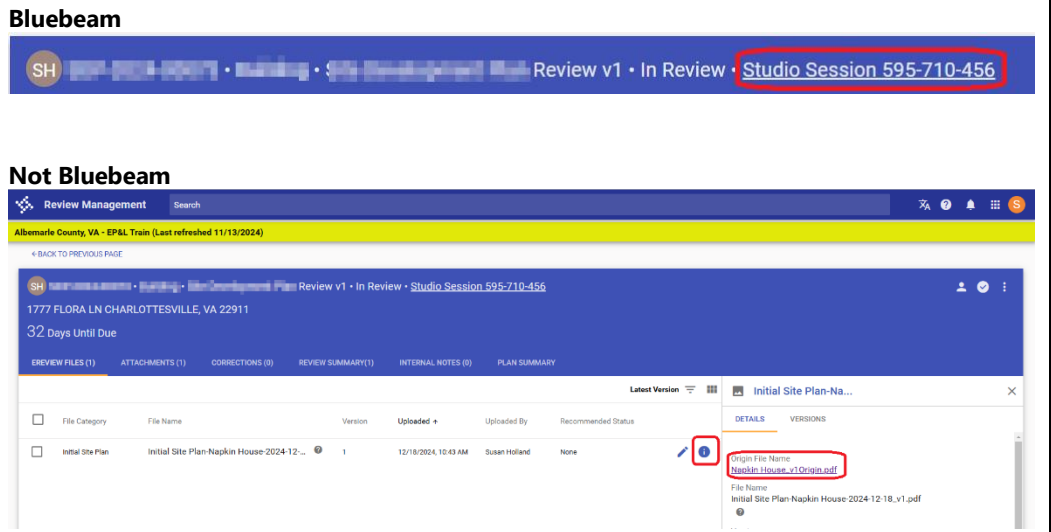
## 2. Review Actions

### 2A. eReview Files


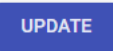
1. On the review, select the tab **eReview Files**



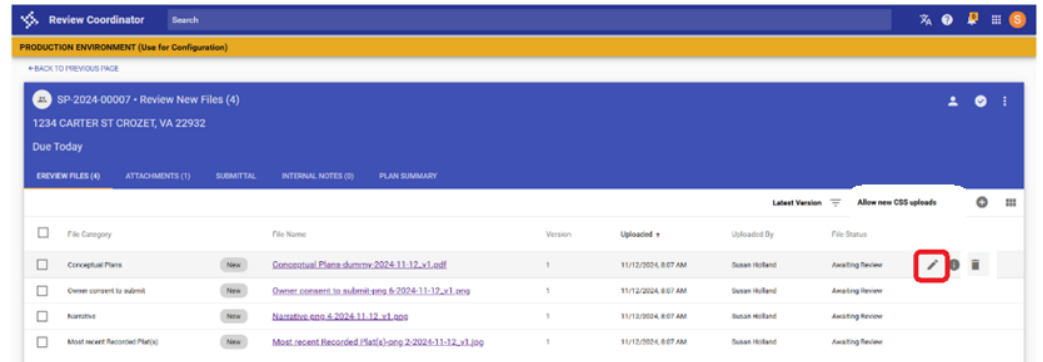
2. **If using Bluebeam:**
  - a. Follow steps in [1: Bluebeam Studio Session](#) to review and mark up the document
3. If **not** using Bluebeam:
  - a. Select the  next to each document
  - b. Select the link to download and view the document
  - c. *Note: This will NOT display markups made in Bluebeam by other users*






4. For **CORRECT** documents:

- a. Select  for that document
- b. Change status to:
  - i. **Approved** or
  - ii. **None** (use only if doc review is NOT needed)
- c. Select 

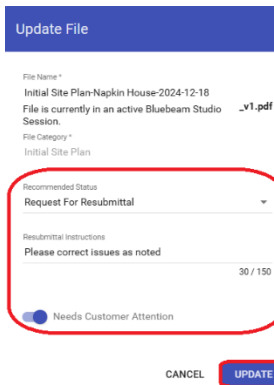
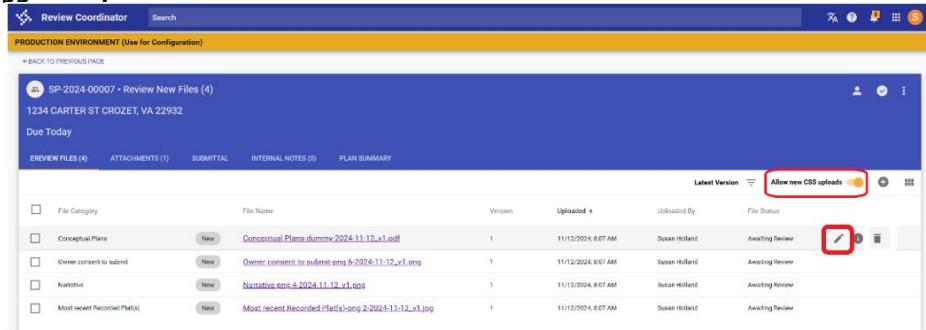
*Note: If ALL documents are marked as Approved or None, proceed to [2B: Attachments](#).*



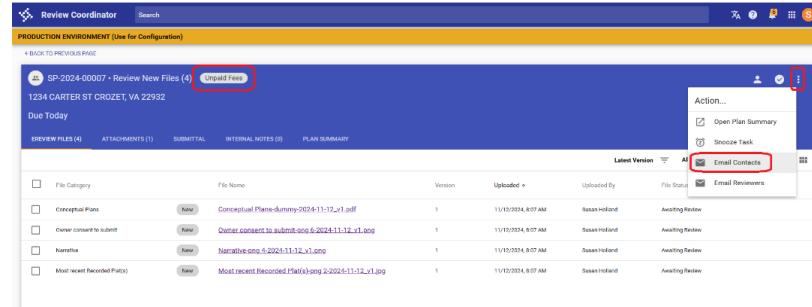
5. For **INCORRECT** documents:

- a. Toggle on **Allow new CSS Uploads**
- b. Select  for incorrect document(s)
  - i. Change status to **Request for Resubmittal**
  - ii. Enter **Resubmittal Instructions**
  - iii. Toggle on **Needs Customer Attention** to alert the applicant in Civic Access
  - iv. Select 
- c. Select 
  - i. Select **Email Contacts** to inform applicant that documents need attention

### Toggle & Update Status



### Email Contacts



## 2B. Attachments

1. Use this tab to review, edit, delete or add non-pdf files that cannot be opened in Bluebeam

The screenshot displays the 'Review Management' interface. At the top, there is a search bar and a navigation menu. Below this, a yellow banner indicates the current project: 'Albemarle County, VA - EP&L Train (Last refreshed 11/13/2024)'. A blue header bar contains the project details: 'SDP-2024-00073 - Building - Site Development Plan Review v1 - In Review - Studio Session 595.710-456', the address '1777 FLORA LN CHARLOTTESVILLE, VA 22911', and a countdown timer '32 Days Until Due'. Below the header, a navigation bar shows several tabs: 'REVIEW FILES (1)', 'ATTACHMENTS (1)', 'CORRECTIONS (0)', 'REVIEW SUMMARY(1)', 'INTERNAL NOTES (0)', and 'PLAN SUMMARY'. The 'ATTACHMENTS (1)' tab is highlighted with a red box. Below the navigation bar, a table lists the attachments. The table has columns for 'File Category', 'File Name', 'Attachment Group', 'Uploaded', 'Uploaded By', and 'Notes'. One attachment is listed: 'Signal\_at\_Susan\_Holland\_12/18/2024.jpg', uploaded on '12/18/2024, 10:43 AM' by 'Susan Holland', with the note 'Uploaded via CBS'. A red box highlights the edit, delete, and add icons for this attachment.

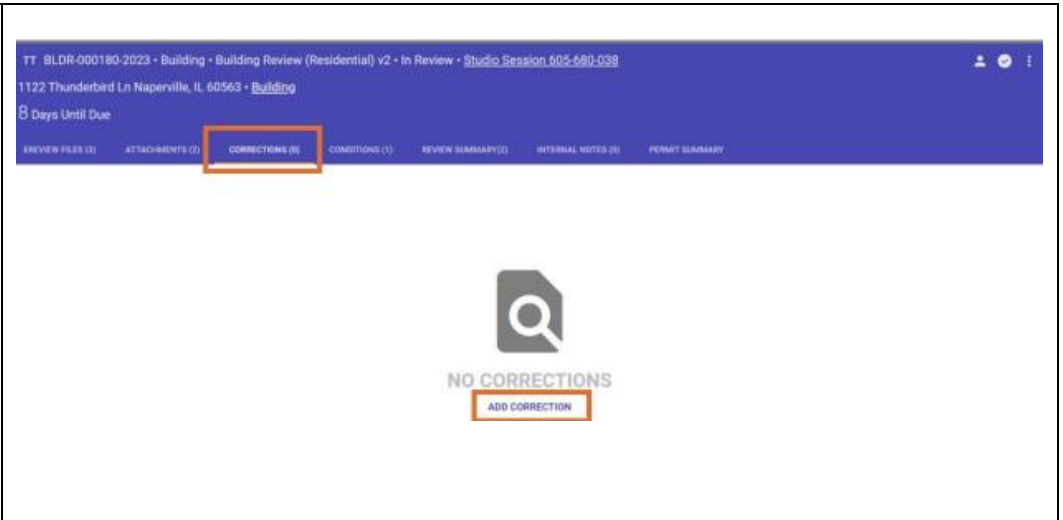
File Category	File Name	Attachment Group	Uploaded	Uploaded By	Notes
	<a href="#">Signal_at_Susan_Holland_12/18/2024.jpg</a>		12/18/2024, 10:43 AM	Susan Holland	Uploaded via CBS

## 2C. Corrections

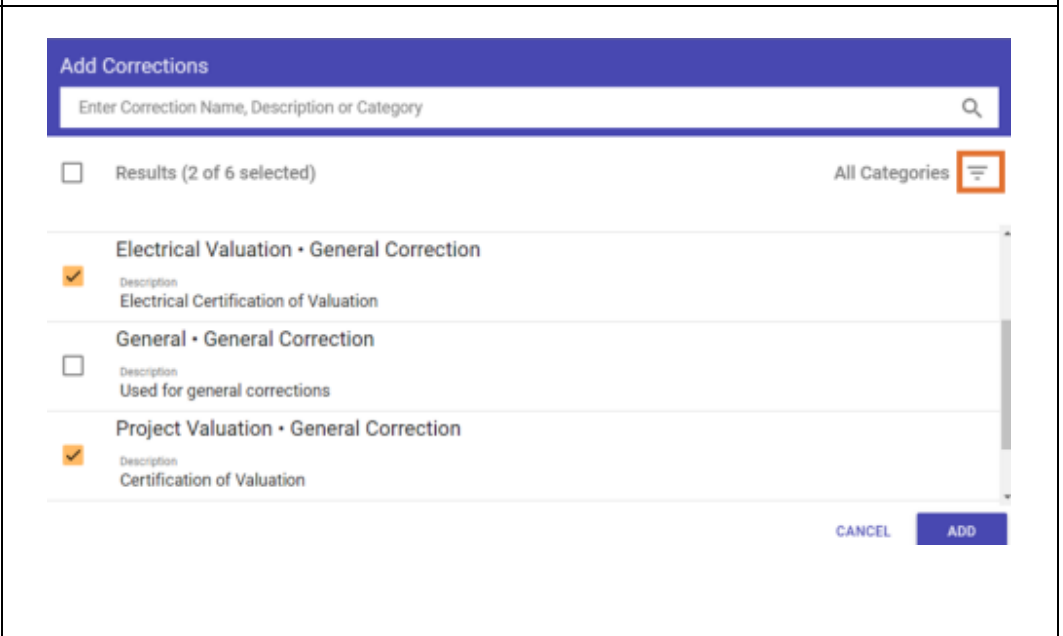
1. **Add Corrections:** Select if corrections are needed.


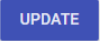
*Note: Corrections stop the review from being approved and generate a V2 of this submittal.*

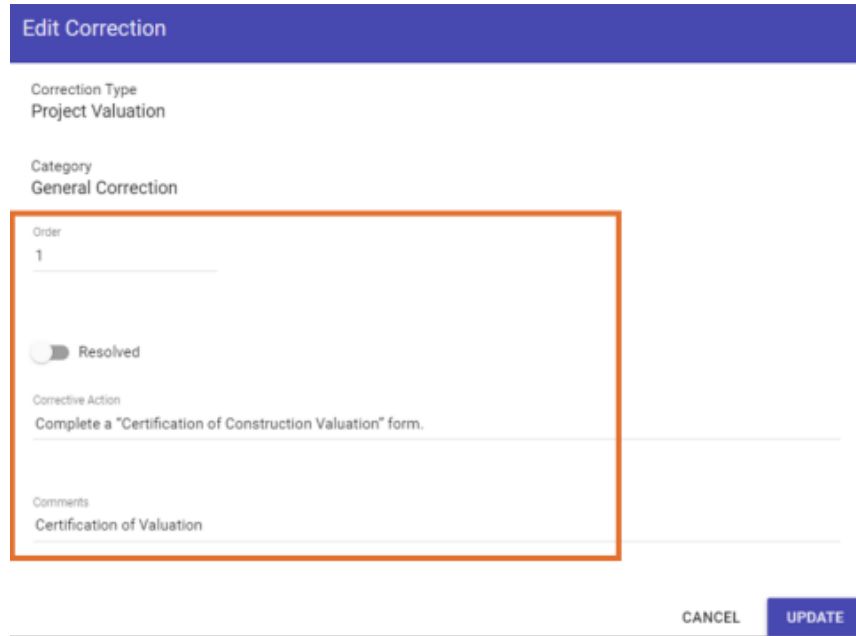
*If no corrections are needed, proceed to [2D: Review Summary](#).*



2. Select  to display all available corrections
  - a. Select  on one or more in list
  - b. Select 

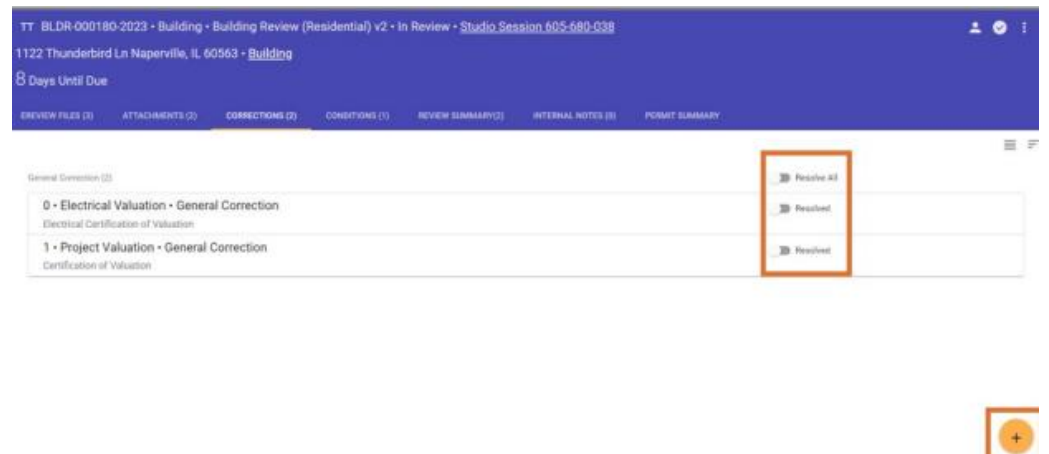


3. Select  on a correction to:
  - a. Update the order
  - b. Mark as resolved
  - c. Add corrective action
  - d. Add comments
4. Click  when done




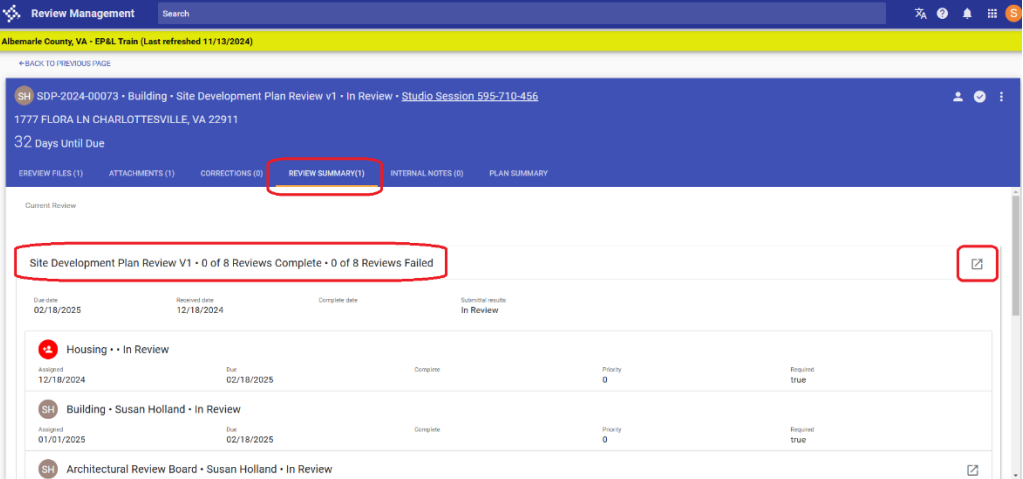
5. Use the **Resolved** toggle as each condition is resolved

*Note: This will most likely occur in later versions of a resubmitted review.*



## 2D. Review Summary

1. Select **Review Summary**:
  - a. Select review card to expand it and see all other reviews in the submittal
  - b. Select  to launch an item review or the entire workflow



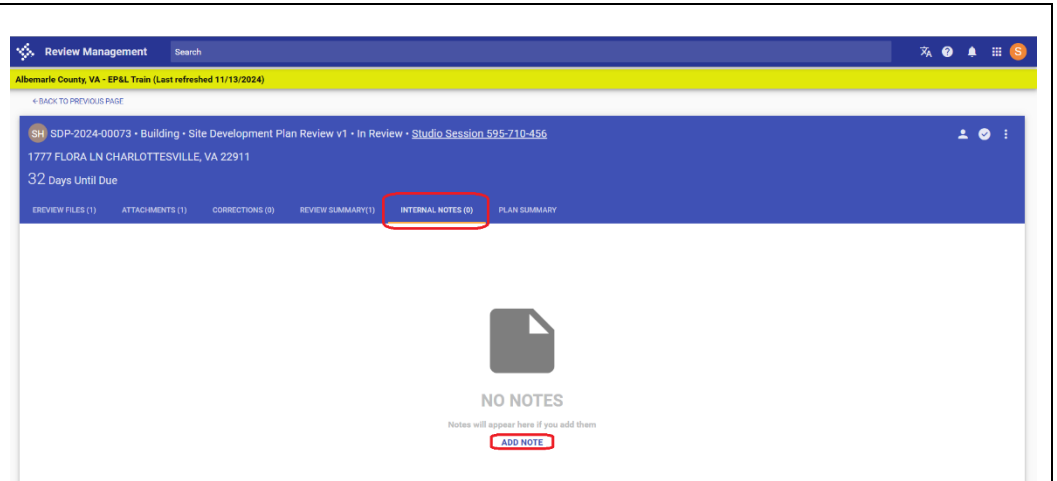
The screenshot displays the 'Review Management' interface for 'Albemarle County, VA - EP&L Train (Last refreshed 11/13/2024)'. The main header shows 'SDP-2024-00073 - Building - Site Development Plan Review v1 - In Review' with a 'Studio Session 595-710-456' and '1777 FLORA LN CHARLOTTESVILLE, VA 22911'. A '32 Days Until Due' notification is present. The navigation bar includes 'REVIEW FILES (1)', 'ATTACHMENTS (1)', 'CORRECTIONS (0)', 'REVIEW SUMMARY (1)', 'INTERNAL NOTES (0)', and 'PLAN SUMMARY'. The 'Current Review' section highlights 'Site Development Plan Review V1 - 0 of 8 Reviews Complete - 0 of 8 Reviews Failed' with an external link icon. Below this is a table of reviews:

Due date	Received date	Complete date	Submittal result
02/18/2025	12/18/2024		In Review
<b>Housing - In Review</b>			
Assigned: 12/18/2024	Due: 02/18/2025	Complete	Priority: 0, Required: true
<b>Building - Susan Holland - In Review</b>			
Assigned: 01/01/2025	Due: 02/18/2025	Complete	Priority: 0, Required: true
<b>Architectural Review Board - Susan Holland - In Review</b>			

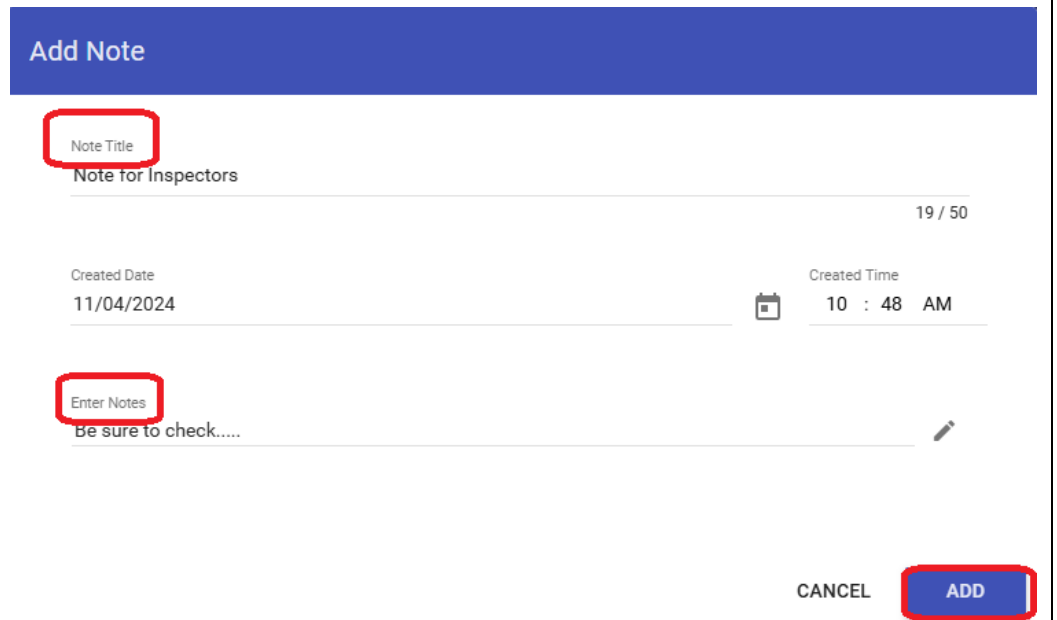
## 2E. Internal Notes

1. Select **Add Note** to add more information to a review. Viewable by staff only.

*Note: While internal notes cannot be viewed by applicants, they **can** be subject to a FOIA request.*



2. In the popup, enter a **title** and the **note**
  - a. Select **ADD**




## 2F. Parent Summary

1. Select **Permit Summary** or **Plan Summary** to see basic information about the parent record.

The screenshot shows the 'Review Management' interface for 'Albemarle County, VA - EP&L Train (Last refreshed 11/13/2024)'. The main header displays 'SDP-2024-00073 - Building - Site Development Plan Review v1 - In Review - Studio\_Session\_595:710-456' and '1777 FLORA LN CHARLOTTESVILLE, VA 22911'. Below this, it indicates '32 Days Until Due'. A navigation bar contains tabs for 'REVIEW FILES (1)', 'ATTACHMENTS (1)', 'CORRECTIONS (0)', 'REVIEW SUMMARY(1)', 'INTERNAL NOTES (0)', and 'PLAN SUMMARY', with the last tab highlighted in red. The main content area shows a table with the following data:

Case number	SDP-2024-00073	Due	02/18/2025	Applied	12/18/2024
Project		Valuation	\$0.00	Square Footage	0 sq. ft.
Review Coordinator	Susan Holland	Plan Type - Class	Site Development Plan - Site Development Plan - Initial		
Location	1777 FLORA LN CHARLOTTESVILLE, VA 22911				
Main Zone Name		Main Zone Code		Main Zone Description	
Description					
Contacts	Susan Holland, Applicant; Lara Croft, Property Owner; Lara Croft, Primary Contact				


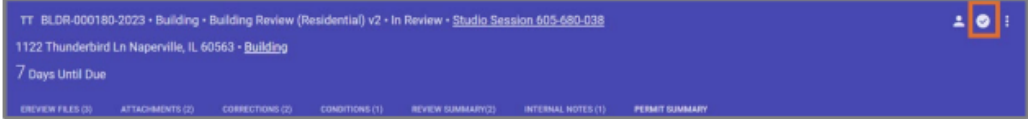

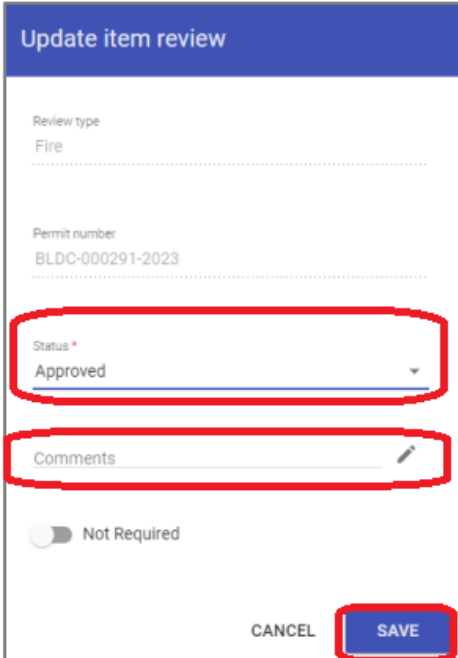
## 2G. Overflow Menu

1. Select  for the overflow menu to:
  - a. Open the **Permit** or **Plan** application
  - b. Email the lead reviewer assigned to the application
  - c. Email other reviewers
  - d. Email contacts

The screenshot shows the same 'Review Management' interface as in 2F, but with the overflow menu open over the 'PLAN SUMMARY' tab. The menu options are:

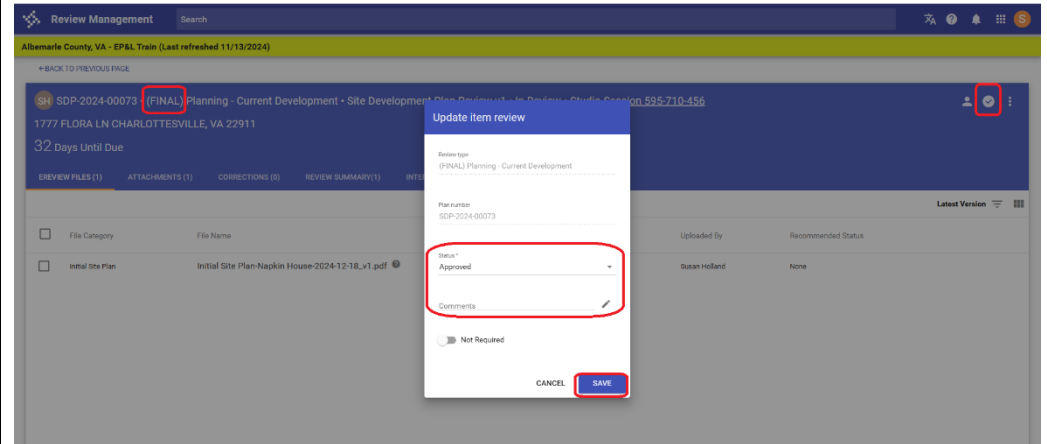
- Open Plan Summary
- Email Review Coordinator
- Email Reviewers
- Email Contacts

### 3. Complete Review

<p>1. Select  on the review</p>	
<p>2. In the <b>Update Item Review</b> popup:</p> <ol style="list-style-type: none"><li>Select the appropriate status:<ol style="list-style-type: none"><li><b>Approved:</b> Review passes</li><li><b>Requires Re-submit:</b> User needs to update documents and/or make other changes</li><li><b>Not Required:</b> This review was not required. <i>Also toggle on "Not Required"</i></li></ol></li><li>Enter <b>comments</b> if needed</li><li>Select </li></ol> <p><i>Note: The review status is automatically updated on the workflow action</i></p>	

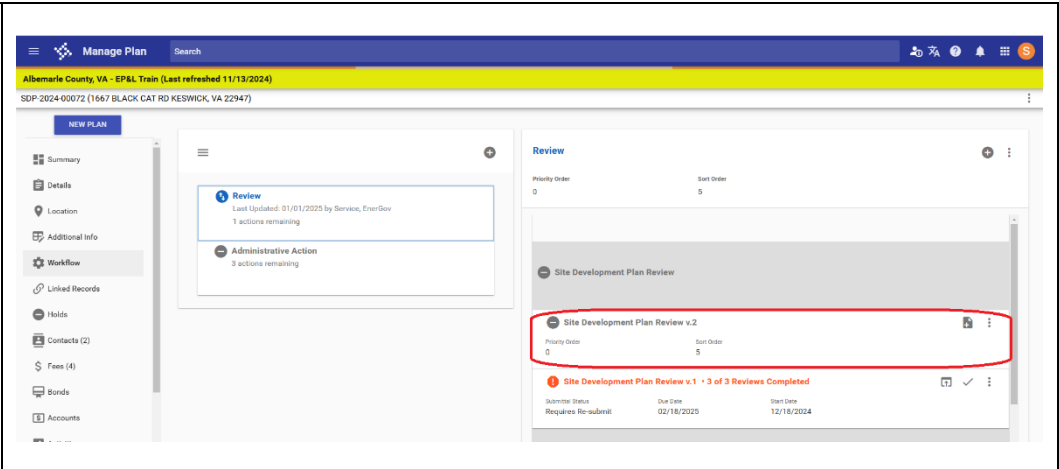
3. When all reviews have been completed, then the **Lead Reviewer** can access and complete the **(FINAL) review**
  
4. **Lead Reviewer** updates the status of their review
  - a. If all reviews are **Approved**, the submittal is closed with an **Approved** status
  - b. If one or more **Requires Re-submit**, the submittal is given a **Requires Re-submit** status.

*Note: The Bluebeam session is automatically closed when the Lead Reviewer completes their review. The applicant can now see all markups, corrections, and comments in Civic Access.*



## 4. Resubmitted Reviews

1. When a submittal has a status of **Requires Resubmit**, a Version 2 (v2) of the submittal is created in the workflow.



2. When the applicant has completed their updates and resubmitted, the application proceeds through the Review Coordinator QC review as though it is a new application.

When the Review Coordinator receives the new submittal, the reviews are automatically assigned to teams. A new Bluebeam session is started. All reviews then start again at [1: Bluebeam Studio Session](#).

See "Review Coordinator SOP"

## Appendix

### Tyler Documentation

- [My Reviews Summary User Guide](#)
- [Manage My Reviews User Guide](#)