

MaineHousing Plan Review Process/Format Requirements

In 2019, MaineHousing introduced a digital plan review process to supplement and/or replace the previous format involving the submission of paper sets of drawings and specifications. For most projects, the initiative results in associated efficiencies including eliminating shipping costs, more effective and manageable document storage, and improvements in the efficacy of the review process at each of the typical design phases.

The following instructions guide partners in MaineHousing's digital document submittal format and structure. The specific PDF editing software MaineHousing has selected to perform digital plan review is BlueBeam Revu.

Preparing Plan Sets for submittal:

- Drawings and Specifications to be submitted in PDF format with a single PDF for Drawings and a separate single PDF for the specifications. This may require batching before sending.
- The drawings and specs are encouraged be flattened before saving as a PDF document. Doing so may limit excessive text and/or form fields and may also reduce file size.
- PDF's should be appropriately titled so that their content is clear (e.g. 50% drawing submittal, 50% spec submittal)
- Ancillary documents that are required to supplement the submittal such as Geo-tech reports, MH Kitchen Storage worksheet, Unit size calculation info and such may also be committed to PDF or kept in original format. These documents however are to be submitted as individual documents with specific titles as opposed to being batched in a single PDF.

Submitting to MaineHousing

- Immediately following the project kick off meeting (as described in Part 2 section 4 of QS)), the Construction Analyst assigned to the project will create a project folder on the MaineHousing "Sharefile" system and send an invitation to the project team to enable access to Sharefile. The invite will typically be sent to the Designer of record, Owner, Construction Manager (if involved). The invite will generate a link to the site where a user name and password will need to be set up. As with similar programs, continued access to the project folder will be available provided user name and password have been successfully entered.
- All drawings and specifications shall be submitted via the MaineHousing Sharefile system. Use of other private cloud based entities/services will not be accepted. Thumb drives are also not permitted. To the extent complications are encountered, consult with the Construction Analyst to determine under what circumstances alternatives may be entertained.
- While the primary purpose of the Sharefile system is to accommodate the effective transfer of documents of large file size, other documents associated with a plan set submittal may also be uploaded to the site regardless of document size. Otherwise, smaller documents such as listed above (kitchen storage, unit calculations, accessibility worksheet, estimates, etc.) may continue to be transmitted via E-mail as has historically occurred. As noted above, those docs are to remain as individual documents as opposed to being batched in a multi doc pdf.
- Throughout the review period and the construction process, use of Sharefile need only be for larger documents. To the extent that SK's, requisition packages, Change Orders, etc. can be managed through E-mail, that form of delivery will continue to be acceptable, as will the use of other proprietary software where the intended use is for digital signing of documents where necessary.

The Plan Review Report:

- Using Bluebeam Revu 2019 as our PDF editing software, drawings and specifications will be marked up using various editing tools including text boxes, clouds arrows, etc. Comments will be graphically distinct and a mark-up summary report will be generated and will appear either at the fore or aft pages of the pdf document. Bluebeam incorporates a feature similar to that found in other software which should allow a click on a particular mark-up symbol in the summary report to take you to the specific page of drawings or specs where the markup can be found.
- In concert with the requirement to receive 2 independent pdf's for the drawings and the specs, MaineHousing will in turn generate a plan review report of 2 separate pdfs (drawings and specs) with markup summary reports at the end of each document.
- A plan review report will typically involve the 2 pdf docs noted above along with any documents determined to be appropriate or necessary, including a cover letter. All will be titled appropriately for ease of distinguishing.
- Resulting plan reviews at all phases (50's, 90's 100's) will be transmitted via Sharefile and a notice will be generated indicating that the report is ready for access by the project design/development team.

Responses to MH plan reviews:

- Responses to all mark-ups are required to be provided at the time that a subsequent plan set becomes available. Our expectation is that the Designer of record and/or sub Engineering entities involved in the design will provide mark-up by mark-up responses indicating action taken to address, what considerations are pending if any, or if there is disagreement or misunderstanding. Designer responses greatly enhances our ability to determine and locate what has been resolved and what may remain under consideration and the exercise improves our ability to review the subsequent plan set in a more favorable time frame.
- Responses may be provided in different forms. Incorporating responses adjacent to the markup as listed on the summary report has proven effective and favorable. (as opposed to including responses to the mark-ups on the drawing or spec pages). There is typically enough space on the summary report to accomplish this. Construction Services remains open to other alternatives that may provide the same level or greater efficiency for all. Details are encouraged to be worked out in advance with the project Construction Analyst as may be necessary.
- Responses should serve to address the comments or questions raised in the MH report and be reflected on the plan set that is being submitted for advanced review. While understanding that there may be legitimate cause that certain line items bear further review and legitimately unresolved, to the extent the Construction Analyst determines that there is either an excessive pattern of responses indicating deferral of resolution ... or an excessive degree of revisions, corrections, or additions that have been noted to have been included but cannot be located on the subsequent plan set, the review may be terminated and the submittal will be rejected.
- Responses are required to be provided for each formal review including the 50% and 90% plan set. To the extent determined necessary by the Construction Analyst, responses to 100% review may be required.