

## **MAINEHOUSING PLAN REVIEW PROCESS / FORMAT REQUIREMENTS**

Construction Services requires all submittals to be made on its new Procorem platform. This new platform provides improvement in file storage and sharing, and easier reference to earlier versions.

### **PREPARING PLAN SETS FOR SUBMITTALS**

- Drawings and Specifications are 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.
- Drawings are to be “flattened” before saving as a PDF for submittal. This will remove metadata associated with the design firms’ internal processes and reduce file size.
- PDF’s should be appropriately titled so that their content is clear (e.g. 50% drawing submittal, 50% specifications submittal). Reference to the last revised date is also required in all file names as well as throughout the plan sheets and specifications.

### **SUBMITTALS VIA PROCOREM “WORK CENTER”**

Following the issuance of MaineHousing’s Notice to Proceed and the initial Project Kick-off meeting described at Part 2 (A)(4) of the 2024 Quality Standards & Procedures Manual (QS&PM), the CA will create a “Work Center” in Procorem and generate invitations by email for use by the Owner’ representatives, design consultants, and others involved with the project. Partners must accept the invitation and create a free Procorem log-in in order to access the Work Center.

During Plan Review and contract negotiations, all drawings, specifications, supplemental work products, and contract documents for review or other action by the Construction Services shall be submitted by means of file uploads to this Work Center.

At the Construction Kick-off meeting, the Owner, Design Professional, and Construction Manager/General Contractor (OAC team) may discuss with the CA the extent to which other sharing tools the OAC team subscribes to (e.g. ProCore) that may supplement Procorem during the course of construction.

During the construction period, final closeout procedures, or in preparation for Permanent Loan Closing, the OAC team may be required to update and continue use of Procorem to the assigned CA’s satisfaction.

### **OTHER REQUIRED SUBMITTALS**

- Supplemental work products, such as Geotechnical/Soils reports, Kitchen Storage worksheet, Accessibility Worksheet, and SF Unit Tabulations worksheet(s), are each required to be transmitted as separate PDFs.

- The SF Unit Tabulations worksheet is to be provided as a specially formatted Excel file. This Excel file is “mapped” to our database (using ProLink HFA, the back-end software we’ve adopted internally). It must be a project-specific “SmartDox” version of the form furnished by the Construction Analyst (CA) and completed by a designated point person at the design firm without copy/paste or other operations that may corrupt links to our database.

#### PLAN REVIEW VIA BLUEBEAM “MARKUP SUMMARY”

- The CA uses BlueBeam Revu as the PDF editing software for mark ups. Drawings and specifications will be marked up with several tools including text boxes, clouds, arrows, etc. Comments will be graphically distinct and a Mark-up Summary will be generated and appended to the PDF document returned to applicants via the Procorem Work Center. Entries in the Mark-up Summary will be hyperlinked to the appropriate edit or comment on a given plan sheet or page. The CA will then incorporate the Mark-up Summary by reference into a Design Review memo.
- All numbered comments in a Design Review memo require line-by-line written responses by the Design Professional. These responses must be provided in a memo of transmittal, on the Design Professional’s letterhead, either in advance of or as part of the next submittal.
- Unless the CA instructs otherwise, all comments in the Mark-up Summary likewise require line-by-line written responses. This may be done in various ways.
  - The first and potentially the simplest is to excerpt the Markup Summary from the plan set returned via Procorem, save as a separate PDF, and edit that PDF by adding text at each item indicating the Design Professional’s responses. The result is an informal but acceptable set of collated comments and responses (such as on the 50% plans) for attaching to the Design Professional’s memo/transmittal for their next design submittal (such as the 90% plans).
  - Another method is to open the plan set returned via Procorem and add the Design Professional’s responses by inserting new “clouds” and “text boxes” using Bluebeam or similar software. Using this method, care must be taken to ensure the Design Professional’s responses show up in the same manner as the CA’s “clouds” and “text boxes,” etc., and are not merely entered as “notes” that only appear to other users when pointed to or “hovered” over. Hyperlinks are recommended in this method.
- Written responses are required to be provided by the Design Professional for each stage of Design Review including the 50% and 90% reviews. To the extent determined by the CA, responses to Construction Services comments on 100% review may also be required.

End of PLAN REVIEW PROCESS / FORMAT REQUIREMENTS