

Development Services

REVIEW TEAM REFERENCE

Edmonton

Updated April 2016



Inspection Requests

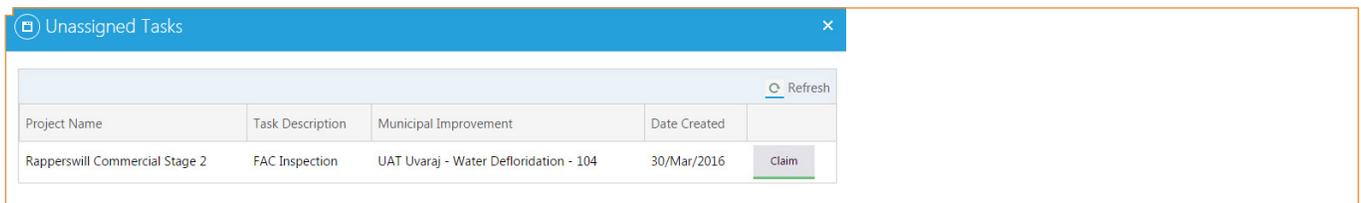
This guide provides instructions for the most commonly used functions for Review Teams in eServices and ePlan.

When an inspection is requested by the consultant, an email will be sent to each of the members of the review team notifying them of the task. A task will be created and placed on the Unassigned Task list for the review team responsible for the municipal improvement.

Claiming an Inspection Task

An email will notify the person \ group members of new tasks that have been assigned to the review team group. A user will Claim the task from the Unassigned Tasks list.

1. **Login** to the eServices system. (<https://eservices.edmonton.ca>)
2. Select the **Unassigned Tasks** on the menu bar



Project Name	Task Description	Municipal Improvement	Date Created	
Rapperswill Commercial Stage 2	FAC Inspection	UAT Uvaraj - Water Defloridation - 104	30/Mar/2016	Claim

3. Find the task and select the **Claim button**
4. The **task will be moved** from the Unassigned Tasks list to the MyTasks list of the user who claimed the task.

Inspection Requests

Submit Inspection Documents (ePlan)

Inspection documents must be submitted before inspections take place. When an Inspection is requested by the Consultant in eServices, ePlan will notify the primary consultant on a project to submit the Inspection Documentation for the municipal improvement. The following workflow steps make up the Inspection Documents workflow.

Applicant Upload – Primary consultant on the project

- >> The Applicant Upload task is started automatically when the Inspection Request is submitted by the consultant.
- >> The ePlan Applicant Upload is the workflow task that requests the inspection documents to be submitted by the consultant for review by the Review Team who is responsible for the municipal improvement.

PreScreen Review – review team responsible for the Municipal Improvement

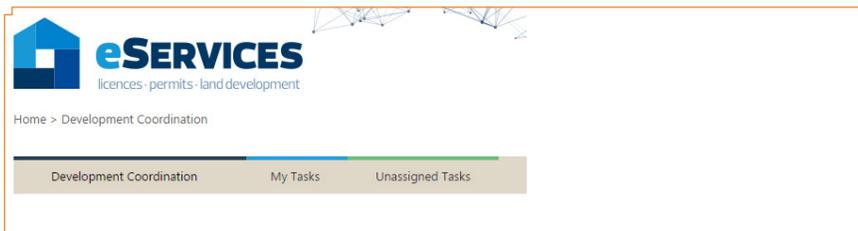
- >> When the ePlan Applicant Upload task has been completed – the workflow will be passed to the Review Team that is responsible for the review of the documents. ePlan will notify the members of the ePlan group (review team) responsible to review the inspection documentation. A member of the group will take the task to review the documents and if the documents are satisfactory will complete the ePlan task – which is the final task in the Inspection Documents workflow.
- >> If the documents are incomplete or need revision – the Review Team member will make comments on the task indicating what action needs to take place and then return the workflow to the Applicant to make the appropriate changes.

Inspection Results

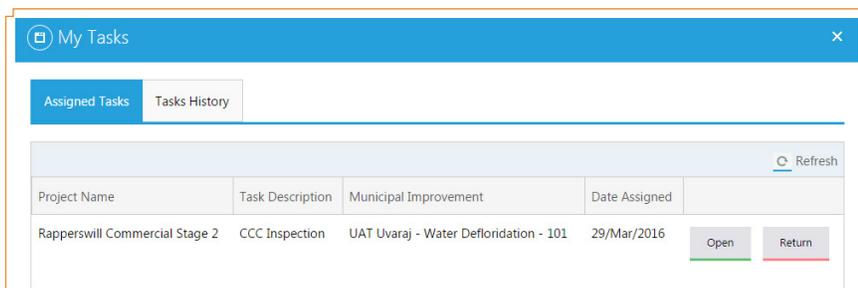
After the inspection documents have been submitted by the Applicant (through ePlan), the reviewing organization will conduct an inspection. The results of the inspection will be communicated directly to the Consultant.

After the Inspection is complete, the review team member that Claimed the Inspection task will then complete that task in eServices.

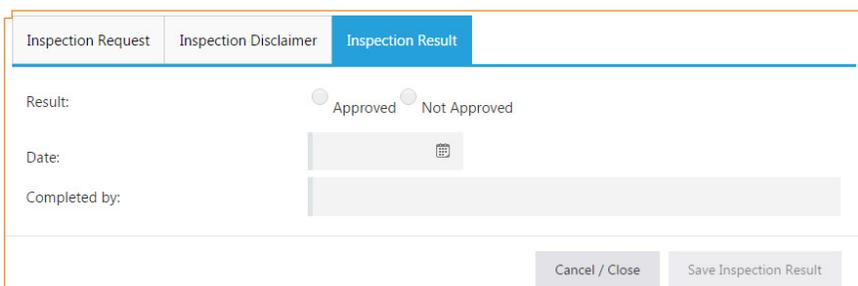
1. **Login** to the eServices system. (<https://eservices.edmonton.ca>)
2. Go to the **MyTasks** menu selection



3. Select the **Open** button to select the task and sign the Inspection Result



4. The system will take you to the project and open the Inspection Result form to complete the inspection approval process



Inspection Results

5. **Select the result** of the inspection – **Approved** or **Not Approved**.
6. **Enter the date** that the Inspection was completed – the inspection date can be in the past.
7. Select the **Save Inspection Result** button

If the Inspection is Approved:

- >> eServices will apply for the CCC \ FAC automatically
- >> a workflow in ePlan will be started for the CCC \ FAC documentation

If the Inspection is Not Approved

- >> a record of the Inspection will be kept and can be viewed on CCC \ FAC pages
- >> the consultants will be able to re-apply for another inspection

Other functions included in the User Manual

-  [CCC-FAC Review – ePlan workflow](#)
-  [Changing Warranty Period Dates](#)
-  [Changing the Expiry Date of an Inspection](#)