



Facilities Design
and Construction

UC Davis Health eServices Portal

Public User Guide

Version Number: 1.0

Applications – Post-Approval Documents

Table of Contents

1 Page Flow Overview 2

1.1 Page Flow – Application..... 3

1.2 HCAI Application – Steps..... 4

1.3 UCDH Application – Steps..... 9

2 eServices Portal Screens 17

2.0.1 Select a Record Type..... 17

2.1 STEP 1: Project Type and Info 19

2.2 STEP 2: eServices Portal 21

2.2.1 Contact Information > Applicant..... 21

2.2.2 Adding/Selecting Contacts 21

2.2.3 Contact Information > UCDH Project Manager..... **Error! Bookmark not defined.**

2.2.4 Adding / Selecting UCDH Project Manager **Error! Bookmark not defined.**

2.2.5 Save and Resume Later Button 24

2.2.6 Consulting Construction Manager **Error! Bookmark not defined.**

2.3 STEP 3: Design Professionals..... 23

2.3.1 Design Professionals > Licensed Professionals 23

2.4 STEP 4: Submittal Documentation > Documentations..... 25

2.4.1 Attachments..... 25

2.4.2 Document Type, Description, and Virtual Folders 28

2.5 STEP 5: Review 31

2.5.1 EDIT BUTTONS 31

2.5.2 Terms and Conditions 32

2.6 STEP 6: Record Issuance 33

2.7 Electronic Plan Submission 34

Appendix A: Field Description..... 35

Appendix B: Attachment by Record Type 36

Purpose

Welcome to the UCDH eServices Portal User Guide

- A. The purpose of this document is to provide guidance and step-by-step instructions for proper submittal documentation to facilitate Plan reviews.
- B. The list is not comprehensive, as relevant documentation will vary by project scope.
- C. For specific project questions related to submittal documents, email your questions to the following email:
 - HS-BuildingDeptPlanReview@ucdh.edu
- D. This document covers:
 - i. [Step-by-Step instructions on how to submit your HCAI application](#)
 - ii. [Step-by-Step instructions on how to submit your UCDH application](#)
 - iii. [Appendix A: Field Description](#)
 - iv. [Appendix B: Attachment by Record Type](#)

1 Page Flow Overview

The predefined steps to create and submit project applications are detailed in this guide. The steps involved in applying for “PAD” projects are slightly different from those in submitting for a new project. Most of the information from the ‘parent’ project is copied to the amendment, which significantly speeds up the application process. Below is an illustration of the page flow steps for amendments:

Table 1: eServices PAD Portal Page flow

No.	Step	Page Title	Description
Application for New Project			
1		Record Type	Select record type for PAD: <ul style="list-style-type: none"> • UCDH Building • HCAI Project
2	STEP 1	Project Type and Info	Record the Project Name, Number, Scope, Project Occupancy, and other required project details specific to the project
3	STEP 2	Contact Information	Add new Contact specific to the application: <ul style="list-style-type: none"> • Applicant (PM or CM)
4	STEP 3	Design Professionals	Add a New Licensed Professional(s) and their Contact(s) information specific to the application
5	STEP 4	Submittal Documentation	Upload Plans, Specifications, and Calculations or any other document relevant to your project in PDF format only
6	STEP 5	Review	Final opportunity to review the information entered in the application for accuracy. During this step, “Edits” can be made if necessary
7	STEP 6	Record Issuance	Project applications (UCDH and HCAI) are submitted and the eServices Portal issues a “Record Number”

1.1 Page Flow – Application

Listed below are some basic rules to apply using the eServices Portal:

- ✓ When creating an application for a PAD project, follow the page flow to avoid errors or missed data.
- ✓ You can save your application at any time during the process by clicking the “**Save and resume later**” button and then clicking on the “**Resume Application**” link in your “*My Records*” / “*Dashboard*”
- ✓ When resuming an existing in-progress application, you will be given the option to start from the beginning or continue where the application was left off.
- ✓ You can navigate back and forth within the completed pages.
- ✓ You must click on the **Continue Application** or **Save and resume later** button to save the data entered on the page.
- ✓ If a page contains a section that allows for multiple records to be added, for example, multiple licensed professionals or multiple contacts, the eServices Portal will automatically Save the selection. If any edits are needed, click the “Edit” link for the individual. To add the next record, click **Add New** as applicable.
- ✓ It is recommended that you click the “**Save and resume later**” button as needed to prevent data loss due to data entry errors.
- ✓ If any required data is missing from the page when the **Continue Application** button is clicked, an error message is displayed on the top of the page. You must correct any errors before continuing to the next page flow screen.

1.2 HCAI PAD Application – Step-by-Step instructions

Listed below are step-by-step instructions on how to create and submit a new HCAI PAD application.

STEP	STEP DESCRIPTION	EXPECTED RESULTS
1	Go to the Accela Citizen's Portal website https://aca-prod.accela.com/UCDMC/Default.aspx	Accela Citizen's Portal Website is displayed
2	Login by using your user id/password and click on the Sign In button	The user is logged into their account
3	Click on the "Projects" tab and find the HCAI Project Application that you had previously created	Your HCAI Project application created earlier should be displayed under the Records screen
4	The PAD Application can only be created once the parent (HCAI Project Application) has a status of "Accepted w/Comments for HCAI"	
5	There are two ways to create an HCAI PAD application: 1. Click on the record number and then click on the "Create Amendment" button or 2. Click on the "Amendment" link under the field "Action"	
6	Click on the "Record Number" to open your HCAI Project application	Record Details screen is displayed with your HCAI Project application details
7	Validate that the "Create Amendment" button is enabled only when the Record Status of the application is "Accepted w/Comments for HCAI"	Record Status of your Application is = "Accepted w/Comments for HCAI"
8	Click on the "Create Amendment" button	Select an Amendment Type screen is displayed
9	Click on the "HCAI Post Approval Document" drop-down and select the radio button "HCAI Post Approval Document"	
10	Click on the "Continue Application" button	Step 1: Step 1: PAD Details > PAD Details screen is displayed

User Guide – PAD Applications

11	<p>Enter the following fields under PAD Details:</p> <ol style="list-style-type: none"> 1. Submittal Type: (*Mandatory field) 2. Applicant Tracking Number: (*Mandatory field) 3. Scope of Work Associated with this PAD: (*Mandatory field) 4. Change Initiated By: (*Mandatory field) 5. PAD Construction Cost Estimate: (*Mandatory field) 	
12	<p>Enter the values for "Submittal Type":</p> <ol style="list-style-type: none"> 1. Amended Construction Document 2. Deferred Approval 	
13	<p>Enter the values for "Change Initiated By":</p> <ol style="list-style-type: none"> 1. As-Built Condition 2. Contractor Requested 3. Design Professional Requested 4. Discovered Condition 5. Document Clarification 6. Other (Specify) 7. Owner Requested 8. Required for Code Compliance 	
14	Click on the "Continue Application" button	Step 2: Step 2: Contacts>Contacts screen is displayed
15	Click on the "Add New" Button to add a new contact or "Select from Account" to pick the existing contact or "Look Up" to look up the contact information from the existing accounts	
16	Click on the "Add New" Button to add a new contact	Contact Information screen is displayed

17	<p>Enter the following information for the contact:</p> <ol style="list-style-type: none"> 1. First: (*Mandatory field) 2. Middle: 3. Last: (*Mandatory field) 4. Legal Business Name: 5. Work Phone: 6. Mobile Phone: (*Mandatory field) 7. Contact E-mail: (*Mandatory field) 8. Fax: 	Mandatory fields display contact information for the applicant
18	Enter the contact address information in the " Contact Addresses " box	
19	Click " Add Additional Contact Address "	The " <i>Contact Address Information</i> " dialog box will be displayed
20	<p>Enter the following fields under Contact Address Information:</p> <ol style="list-style-type: none"> 1. Address Type ** Defaults to Mailing 2. Primary (Check-box) 3. Address Line 1: (*Mandatory field) 4. Address Line 2: 5. City: (*Mandatory field) 6. State: (*Mandatory field) 7. Zip Code: (*Mandatory field) 8. Country/Region: (*Mandatory field) ** Defaults to the United States 	Contact Information screen is displayed
21	Click " Select from Account "	The " <i>Select Contact from Account</i> " screen is displayed Existing contact for the account is displayed
22	Click on the " Continue " button	Step 2: Step 2: Contacts>Contacts screen is displayed with the contact information for the contact selected
23	The message " <i>Contact added successfully</i> " is displayed	

User Guide – PAD Applications

24	Click on the "Continue Application" button	Step 3: Step 3: Professionals>Professionals screen is displayed
25	A message under the Professionals screen will be displayed: If this PAD is an Amended Construction Document, do not add Licensed Professional(s) to this application that is already listed on the parent project. Scroll to the bottom of the page and click "Continue Application". If this PAD is a Deferred Approval, the Design Professional with delegated responsibility for the design must be included on this application.	
26	Click on the "Continue Application" button	Step 4: Step 4: PAD Attachments > Attachments screen is displayed
28	The following documents are required to be uploaded for the HCAI-PAD application: 1. Narrative 2. Plans 3. Reference Documents	You can only upload .PDF files as "Attachments"
29	Click on "ADD" to add documents to your application	The "ADD" screen is displayed. The name of the document that you want to pick is shown
30	Click on the checkbox to select the document	The document is selected and the "Continue" button is enabled after checking the checkbox

31	<p>Pick a value for the "Type" field</p> <ol style="list-style-type: none"> 1. Calculations 2. Letters 3. Manufacturer Cut Sheets 4. Narrative 5. Other 6. Plans 7. Reference Documents 8. Specifications 	
32	Select the value "Plan" from the "Type" field	
33	The field " File " displays the name of the file attached and 100% once the document is attached	
34	Click on the " Save " button	The attachment is saved/uploaded to the application
35	<p>The following message is displayed <i>"The attachment(s) has/have been successfully uploaded."</i></p> <p>It may take a few minutes before changes are reflected</p>	
36	Select "Add" to attach another document	The "File Upload" screen is displayed
37	Click on "Add" to attach another document "Remove All" to remove the attached document and "Cancel" to go back to the Attachment screen	
38	Click on the "Add" button to upload another document	<p>Windows Explorer screen is displayed where you can pick your document to be attached.</p> <p>Once the document is uploaded successfully, the "Continue" and "Remove All" buttons are enabled</p>
39	Click on the "Continue" button	The attachments screen is displayed
40	Select a value under the "Type" field	
41	Click on the "Continue Application" button	Step 5: Review screen is displayed

42	This screen lets you review the information that you've entered for your HCAI PAD application	
43	Scroll down to the end of your application and check the checkbox <i>"By checking this box, I agree to the above certification."</i>	The "Date" field is auto-filled with today's date
44	Click on the "Continue Application" button	The message "Your application has been successfully submitted." is displayed Thank you for using our online services. Your Record Number is "HOSP-CCYY-xxxx-PAD-xxxx"
45	You've successfully submitted your application for HCAI Post Approval Document (PAD)	

1.3 UCDH PAD Application – Step-by-Step instructions

Listed below are step-by-step instructions on how to create and submit a new UCDH PAD application.

STEP	STEP DESCRIPTION	EXPECTED RESULTS
1	Go to the Accela Citizen's Portal website https://aca-prod.accela.com/UCDMC/Default.aspx	Accela Citizen's Portal Website is displayed
2	Login by using your user-id/password and click on the Sign In button	The user is logged into their account
3	Click on the "Projects" tab and find the parent application "UCDH Building Application" for which you are creating the PAD.	Project Record Number is displayed under the "Projects" → "Records" homepage.

User Guide – PAD Applications

4	The PAD Application can only be created once the parent (UCDH Application) has a status of "Approved" or "Approved with Comments"	
5	There are 2 ways to create a PAD application: 1. Click on the "Amendment" link under the field "Action" 2. Click on the "Record Number" to open your UCHD Building parent application	The "Record Details" screen is displayed with your UCDH Building application details
6	Click on the "Create Amendment" button or "Amendment" link	Step 1: Step 1: PAD Details > PAD Details screen is displayed
7	Enter the mandatory field under the "PAD Details" screen 1. Submittal Type: (*Mandatory Field) 2. Applicant Tracking Number: (*Mandatory Field) 3. Scope of Work Associated with this PAD: (*Mandatory Field) 4. Change Initiated By: (*Mandatory Field) 5. Over-The-Counter Review Requested: 6. PAD Construction Cost Estimate: (*Mandatory Field)	
8	Select the values for the field "Submittal Type" : 1. Amended Construction Document 2. Deferred Approval	
9	Enter "Applicant Tracking Number"	
10	Enter "Scope of Work Associated with this PAD:"	
11	<i>Pick a value for "Change Initiated By":</i>	The following values are displayed correctly: 1. As-Built Condition 2. Contractor Requested 3. Design Professional Requested 4. Discovered Condition 5. Document Clarification 6. Other (Specify) 7. Owner Requested 8. Required for Code Compliance

User Guide – PAD Applications

12	Select value "Other (Specify)" "Change Initiated By" field	
13	"Other Reason" (*Mandatory field) is displayed	
14	Enter "PAD Construction Cost Estimate:"	
15	Click on the "Over-The-Counter Review Requested:" field if ???	The following message is displayed: <i>"If OTC review is requested, you must contact the UCDH Building Department to schedule a review of all documents."</i>
16	Click on the "Continue Application" button	Step 2: Step 2: Contacts>Contacts screen is displayed
17	Click on the "Add New" Button to add a new contact or "Select from Account" to pick the existing contact or "Look Up" to look up the contact information from the existing accounts	
18	Click on the "Continue Application" button	An error message is displayed: "This section is required. Please add one record."
19	Click on the "Add New" Button to add a new contact	Contact Information screen is displayed
20	Enter the following information for the contact: 1. First: (*Mandatory field) 2. Middle: 3. Last: (*Mandatory field) 4. Legal Business Name: 5. Work Phone: 6. Mobile Phone: (*Mandatory field) 7. Contact E-mail: (*Mandatory field) 8. Fax:	
21	Enter the contact address information in <i>the</i> "Contact Addresses" sub-screen	
22	Click <i>the</i> "Add Additional Contact Address" button- to add the contact address	<i>The "Contact Address Information" screen is displayed</i>

User Guide – PAD Applications

23	<p>Enter the value for the following fields under the Contact Address Information screen:</p> <ol style="list-style-type: none"> 1. Address Type: (*Mandatory field) ** Defaults to Mailing 2. Primary (Check-box) 3. Address Line 1: (*Mandatory field) 4. Address Line 2: 5. City: (*Mandatory field) 6. State: (*Mandatory field) 7. Zip Code: (*Mandatory field) 8. Country/Region: (*Mandatory field) <p>** Defaults to the United States</p>	
24	Click on the "Save and Close" button	Entered addresses are displayed under the "Contact Addresses" box with the message "Contact address added successfully."
25	Click on the "Continue" button	The "Contact Information" screen is displayed with all the Contact Information displayed that was added in the previous steps
26	Clicking on the "Clear" button will clear the entered data and the "Discard Changes" button will not save the changes/data entered.	
27	Click on the "Continue Application" button	Step 3: Step 3: Professionals >Professionals screen is displayed
28	Click on the "Add New" button under "Licensed Professionals"	Note: This is not a required Step and will let you move forward with your application. Here you can add contractors that are not listed in your parent application and would like to add more

29	<p>Enter the following mandatory fields on the “<i>Licensed Professional Information</i>” screen:</p> <ol style="list-style-type: none"> 1. License Type: (* Mandatory Field) 2. State License Number: (*Mandatory Field) 3. First: (*Mandatory Field) 4. Middle: 5. Last: (*Mandatory Field) 6. Name of Business: (*Mandatory Field) 7. Work Phone: 8. Mobile Phone: 9. Fax: 10. Address: (*Mandatory Field) 11. Address Line 2: 12. City: (*Mandatory Field) 13. State: (*Mandatory Field) 14. Zip: (*Mandatory Field) 15. Contact E-mail: (*Mandatory Field) 	
30	<p>Pick a value from the drop-down for the “<i>License Type:</i>”</p> <ol style="list-style-type: none"> 1. Architect 2. Civil 3. Contractor 4. Electrical 5. Geotechnical 6. Mechanical 7. Other 8. Structural 	
31	Click on the “ <i>Save and Close</i> ” button	Added Licensed Professional/s will be displayed under the “ <i>Licensed Professionals</i> ” screen
32	Click on the “ <i>Continue Application</i> ” button	Step 4: Step 4: PAD Attachments>Attachments screen is displayed

User Guide – PAD Applications

33	<p>The following documents are required to be uploaded for <i>Amended Construction Document (ACD) application</i>:</p> <ol style="list-style-type: none"> 1. Narrative 2. Plans and 3. Reference Documents 	<p>You can only upload .PDF files for Plans</p>
34	<p>The following documents are required to be uploaded for <i>Deferred Approval</i>:</p> <ol style="list-style-type: none"> 1. Plans 	<p>You can only upload .PDF files for Plans</p>
35	<p>Click on "Add" to attach another document</p> <p>"Continue" to move to the main screen</p> <p>"Remove All" to remove the attached document and</p> <p>"Cancel" to go back to the Attachment screen</p>	
36	<p>Click on the "Add" button to upload another document</p>	<p>Windows Explorer screen is displayed where you can pick all documents that need to be attached to your application.</p> <p>The document is uploaded.</p> <p>Once you upload all the documents Continue and Remove All buttons are enabled</p>
37	<p>Click on the "Continue" button</p>	<p>The attachments screen is displayed</p>
38	<p>Select a value under the "Type" field</p>	<p>Selected values are displayed under the "Type" field:</p> <ol style="list-style-type: none"> 1. Calculations 2. Letters 3. Manufacturer Cut Sheets 4. Narrative 5. Other 6. Plans 7. Reference Documents 8. Specifications

User Guide – PAD Applications

39	"Narrative", "Reference Documents" and "Plans" are mandatory to be uploaded just for (ACD) UCDH PAD application	An error message will be displayed if the required documents are not uploaded: " An error has occurred. Narrative, Plans, and Reference Documents are required to be uploaded for Amended Construction Documents"
40	Click on the "Save" button	The attachment is saved/uploaded to your application
41	The following message is displayed <i>"The attachment(s) has/have been successfully uploaded."</i> It may take a few minutes before changes are reflected	The message is displayed, and both the uploaded documents are displayed under the "Attachments" Screen NOTE: You as an applicant cannot delete any document that you've uploaded by accident. You will have to contact the Intake Staff to delete it from your application once your application is submitted.
42	Click on the "Save and resume later" button	The user is taken back to the "PROJECTS" screen and a message is displayed: Your partial application (23TMP-xxxxxxx) has been successfully saved. To resume the application(s), go to the Records section and click the "Resume Application" link
43	Click on the "Continue Application" button	Step 5: Review screen is displayed
44	This screen lets you review and or edit the information that you've entered on your UCDH PAD application	
45	Scroll down to the bottom of your application and check the checkbox: <i>"By checking this box, I agree to the above certification."</i>	The "Date:" field is auto-filled with today's date

User Guide – PAD Applications

46	Click on the "Continue Application" button	<p>The message "Your application has been successfully submitted." is displayed.</p> <p>Thank you for using our online services. Your Record Number is "UCDH-CCYY-xxxx-PAD-xxxx"</p> <p>(UCDH-CCYY-xxxx) is your parent application (PAD-xxxx) is an extension/PAD application number</p>
47	You've successfully submitted your application for UCDH PAD	Validate that you've received an email with the record id

2 eServices Portal Screens

“Amendments” to an Application for New Project (referred to as a ‘parent project’) can be Post Approval Documents (PAD). To create an application for an amendment, locate the “Parent” application for the new project record and create the amendment by doing the following:

1. Search the “**Parent**” project for which you want to submit an Amendment either by using the “**Search Projects**” feature or by locating it on your project list under the “**Project**” tab.
2. If your Public User account is associated or delegated with the required permission to create a PAD application, an “**Amendment**” link will be visible at the end of the project record.
3. You may also create a new PAD application by clicking on the Project Record Number and then the “**Create Amendment**” button.

<input type="checkbox"/>	Date	Project Record Number	Status	Record Type	UCDH Project Number/Name	Action
<input type="checkbox"/>	12/14/2022	UCDH-2022-0239-PAD-0001	Open - Returned	UCDH Post Approval Document	56165 dad	
<input type="checkbox"/>	12/01/2022	UCDH-2022-0239	Approved	UCDH Building	56165 dad	Amendment
<input type="checkbox"/>	12/01/2022	22TMP-000563		UCDH Building		Resume Application

To start a new application for HCAI PAD, your parent application has to be in “**Accepted**” or “**Accepted w/Comments for HCAI**” status.

<input type="checkbox"/>	11/14/2022	UCDH-2022-0202	In Progress	UCDH Building	1234 Application 1 - UAT	
<input type="checkbox"/>	11/14/2022	HOSP-2022-0203	Accepted w/Comments for HCAI	HCAI Project	5465 Testing 1	Amendment

Click on the project number link to open the Project Details page. On the details page, click on the **Create Amendment** button to create a PAD amendment.

The screenshot shows a web interface for project details. At the top, there are navigation links for 'Home' and 'Projects'. Below this is a dark blue header with 'Create an Application' and 'Search Projects' buttons. The main content area displays 'Record UCDH-2022-0239: UCDH Building' with a 'Record Status: Approved'. A 'Record Info' dropdown menu is visible. Below this is a 'Record Details' section with two columns of contact information: 'Applicant' (Shruti Gadhok, UC Davis Health, Mobile Phone: 9167430199, sgadhok@ucdavis.edu, Mailing: 2172 Club Center Drive, Sacramento, CA, 95835, United States) and 'Licensed Professional' (dfasd sdfa sgadhok@ucdavis.edu, sadfas, asdfasdf, adasdf, CA, 89745, Mobile Phone: 87987987987987, Contractor 87987). A 'More Details' link is present, and a 'Create Amendment' button is highlighted with a red box at the bottom left.

2.1 STEP 1: PAD Details

The screenshot displays the 'UCDH Post Approval Document' application interface. At the top, there are navigation links for 'Home' and 'Projects', and buttons for 'Create an Application' and 'Search Projects'. A progress bar indicates the current step: 'Step 1: PAD Details'. Below this, the 'PAD Details' section is titled, followed by a 'PLAN REVIEW' section. This section includes fields for 'Submittal Type', 'Applicant Tracking Number', and 'Scope of Work Associated with this PAD'. A 'spell check' tool is also visible. The 'Change Initiated By:' field has a dropdown menu with the following options: As-Built Condition, Contractor Requested, Design Professional Requested, Discovered Condition, Document Clarification, Other (Specify), Owner Requested, and Required for Code Compliance. Below the 'PLAN REVIEW' section is the 'COSTS' section, which includes a field for 'PAD Construction Cost Estimate'. At the bottom of the form, there are two buttons: 'Save and resume later' and 'Continue Application'.

Drop-down values for the field “**Change Initiated By:**” are:

- As-Built Condition
- Contractor Requested
- Design Professional Requested
- Discovered Condition
- Document Clarification
- Other (Specify)
- Owner Requested
- Required for Code Compliance

2.1.1 Project Information

Home Projects

Create Application Search Projects

UCDH Building

1 Project Type and Info 2 Contact Information 3 Design Professionals 4 Submittal Documentation 5 Review 6

Step 1: Project Type and Info > Project Information

Enter Project Information

PROJECT INFORMATION

*UCDH FDC Project Number:

*UCDH FDC Project Name:

Emergency Project: * Yes No

Building Name: * required field

Type of Construction: *

Project Square Footage: *

Is this project adding square footage to the building: * Yes No

001 - Main Hospital
002 - North Addition Office Building
003 - Parking Structure III UCDHS
010 - Surgery and Emergency Services Pavilion
012 - Medical Records Building
013 - Cypress Building
014 - Patient Support Services Building
015 - Pathology Administration, Teaching & Histology Building (PATH)
016 - Bulk Oxygen Storage Yard
020 - Cancer Center Expansion
023 - ABMCO Building
024 - Shriners Hospital for Children
025 - M.I.N.D. Institute Clinic and Resource Center
026 - M.I.N.D. Institute Laboratory 1
028 - Kwaan's Family House
029 - Betty Irene Moore Hall
030 - Radiation Oncology Trailer
031 - Clinical Triage Trailer
033 - Education Building

--Select--
--Select--
Type IA - Non Combustible (Protected Structural Elements) 3HR
Type IB - Non Combustible (Rated Structural Elements) 2HR
Type IIA - Non Combustible (Rated Structural Elements) 1HR
Type IIB - Non Combustible (Non-Rated Structural Elements)
Type IIIA - Non Combustibles (Exterior Walls Only)
Type IIIB - Non Combustible (Bearing Walls Rated)
Type IV - Combustible (Structural Elements Rated) 1HR
Type V - Combustible (All Elements Not Rated)
Mixed Type

Fire Alarm Required: * Yes No

Project Scope Narrative: *

Construction Cost Estimate: *

Number of Stories: *

Fire Sprinklers: *

Are fire sprinklers a code requirement for this project?: * Yes No

California Building and Fire Code Edition (Year): *

Request Milestone Page-Turn:

Save and resume later Continue Application >

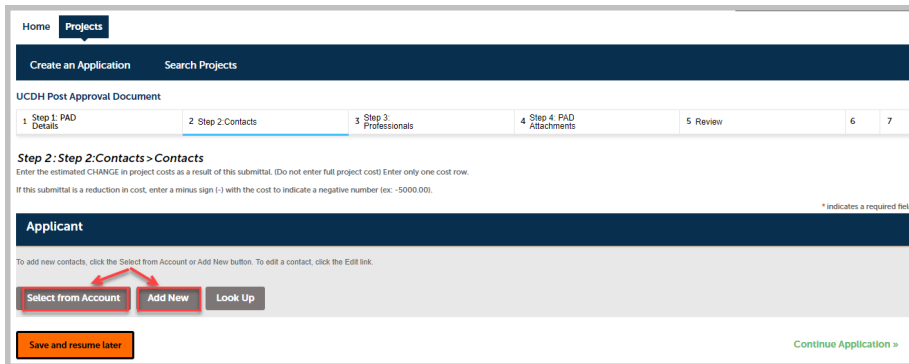
spell check

--Select--
--Select--
No
Partial
Yes

2.2 STEP 2: Contacts

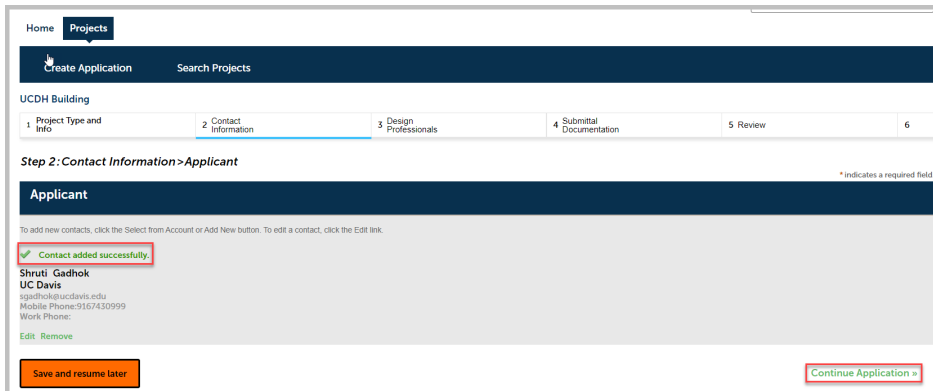
2.2.1 Contact Information > Applicant

Entering the **“Contact”** information is mandatory on every application. The contact *is an individual who is applying*. **“Contact”** and **“UCDH Project Manager”** listed in the parent application will receive all the correspondence (emails) from UCDH eServices Portal once the project has been submitted.

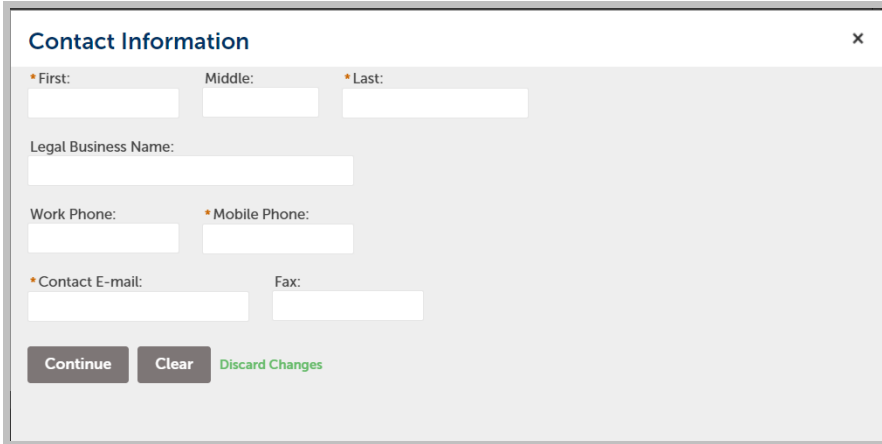


2.2.2 Adding/Selecting Contacts

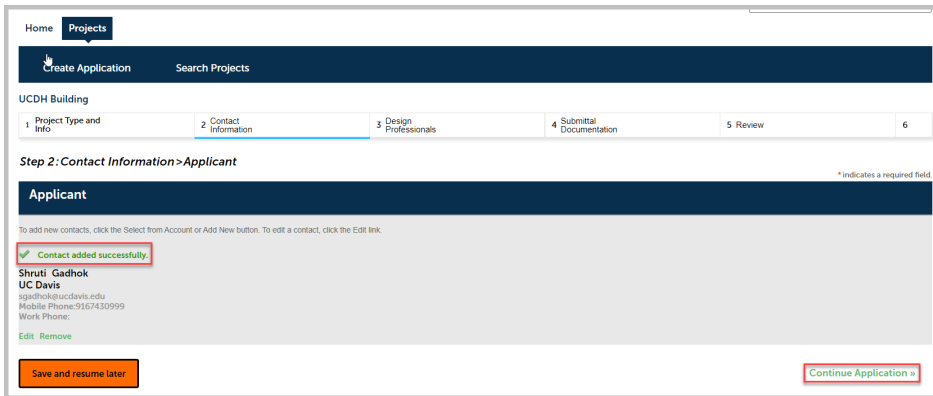
The **“Select from Account”** function is available for Contacts, and they must be added by clicking the **“Select from Account”** button to use the information contained in your Public User account. Click on the **“Continue”** button to save the selected contact.



Clicking on the “Add New” button will display the “Contact Information” screen where you can enter the required information for each contact on the Application.



The screenshot shows a 'Contact Information' form with the following fields: First, Middle, Last, Legal Business Name, Work Phone, Mobile Phone, Contact E-mail, and Fax. Required fields are marked with an asterisk. At the bottom, there are buttons for 'Continue', 'Clear', and 'Discard Changes'.



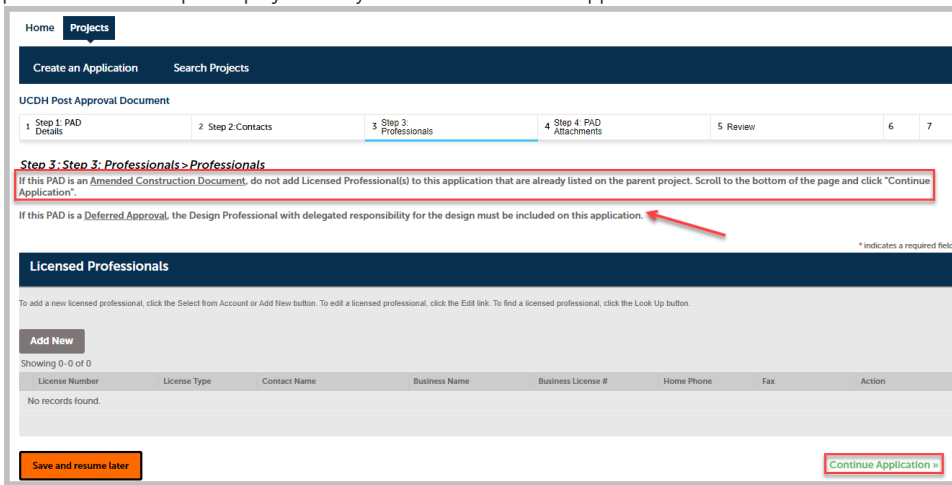
The screenshot shows the 'Applicant' screen in the application process. It includes a progress bar with steps: 1 Project Type and Info, 2 Contact Information, 3 Design Professionals, 4 Submittal Documentation, 5 Review, and 6. Below the progress bar, it says 'Step 2: Contact Information > Applicant'. A message box indicates 'Contact added successfully' for Shrutl Gadhol, UC Davis, with contact details. At the bottom, there are buttons for 'Save and resume later' and 'Continue Application'.

Click on the “Continue Application” to proceed to the next screen.

2.3 STEP 3: Design Professionals

2.3.1 Design Professionals > Licensed Professionals

Only the information that is cloned down from the parent project record to the child (PAD record). For the Professionals, they wouldn't need to enter professionals into the application because they are already under the parent unless they are adding a new professional to the project. We would need to manually add the new professionals to the parent project if they do add one in the PAD application.



2.3.2 Save and Resume Later Button

If you click the “*Save and resume later*” button, your application is saved, and you will be redirected to the Project List page. eServices Portal will issue a temporary Project ID and display the application in the Project list. You can click on the “*Resume Application*” button at a later date to complete and submit your application.

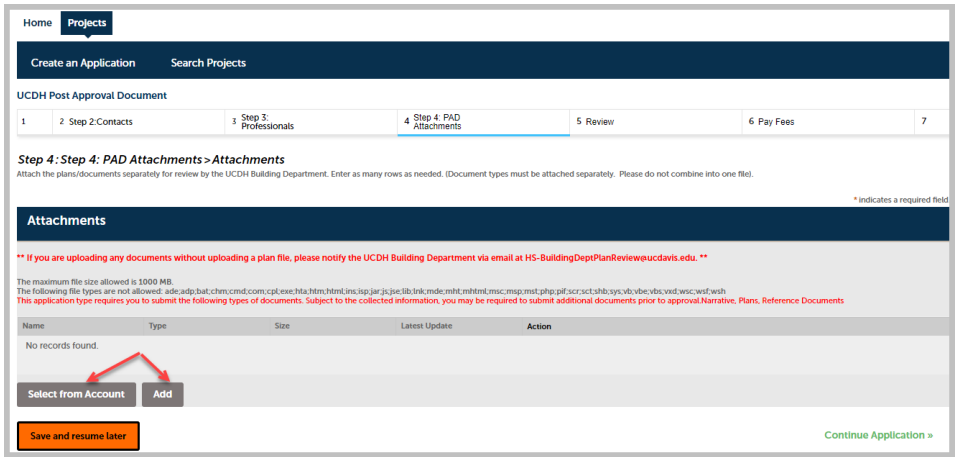
The screenshot shows the 'Records' section of the eServices Portal. At the top, there is a navigation bar with 'Home' and 'Projects' tabs. Below it, there are buttons for 'Create an Application' and 'Search Projects'. A green notification banner states: "Your partial application (23TMP-000002) has been successfully saved. To resume the application(s), go to the Records section and click the Resume Application link." Below the notification is a 'Records' table with columns: Date, Project Record Number, Status, Record Type, UCDH Project Number/Name, and Action. The first row of the table is highlighted, and its 'Resume Application' button is circled in red. A red arrow points from the notification message to this row.

Date	Project Record Number	Status	Record Type	UCDH Project Number/Name	Action
01/05/2023	23TMP-000002		UCDH Post Approval Document		Resume Application
12/14/2022	UCDH-2022-0239-PAD-0001	Open - Returned	UCDH Post Approval Document	56165 dad	
12/01/2022	UCDH-2022-0239	Approved	UCDH Building	56165 dad	Amendment
12/01/2022	22TMP-000563		UCDH Building		Resume Application
12/01/2022	22TMP-000565		HCAI Project		Resume Application
11/28/2022	UCDH-2022-0228	In Plan Review	UCDH Building	ABC258 Testing defects	
11/28/2022	UCDH-2022-0229	In Progress	UCDH Building	32134 sASD	
11/28/2022	HOSP-2022-0230	In Plan Review	HCAI Project	213423 sadfasdf	
11/23/2022	UCDH-2022-0226	Closed - Denied	UCDH Building	dfawerwq dsfsad	
11/21/2022	HOSP-2022-0215	Closed - Denied	HCAI Project	23132 testing - Milestone	

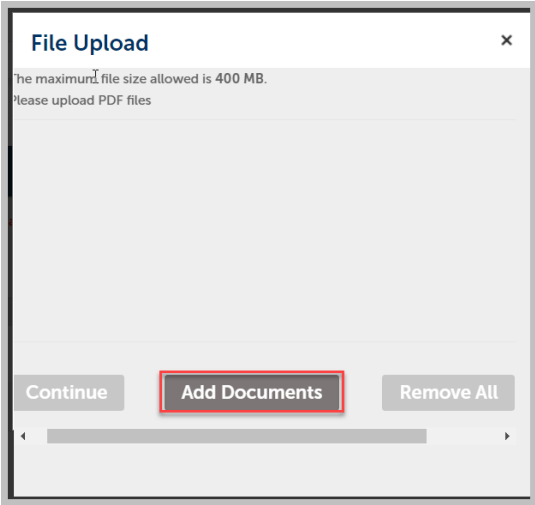
2.4 STEP 4: PAD Attachments

2.4.1 Attachments

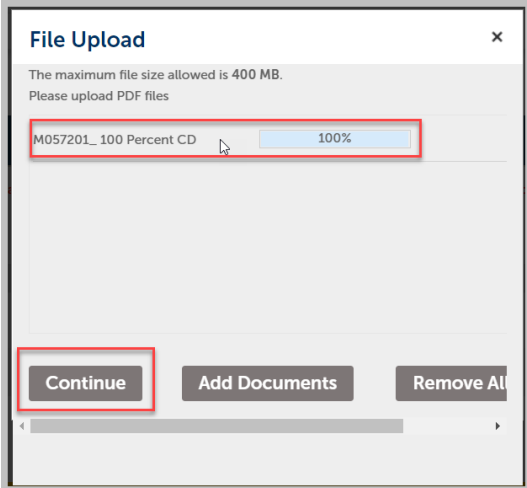
For each type of attachment, click on the **“Add Documents”** button to upload a new document in the Attachment section.



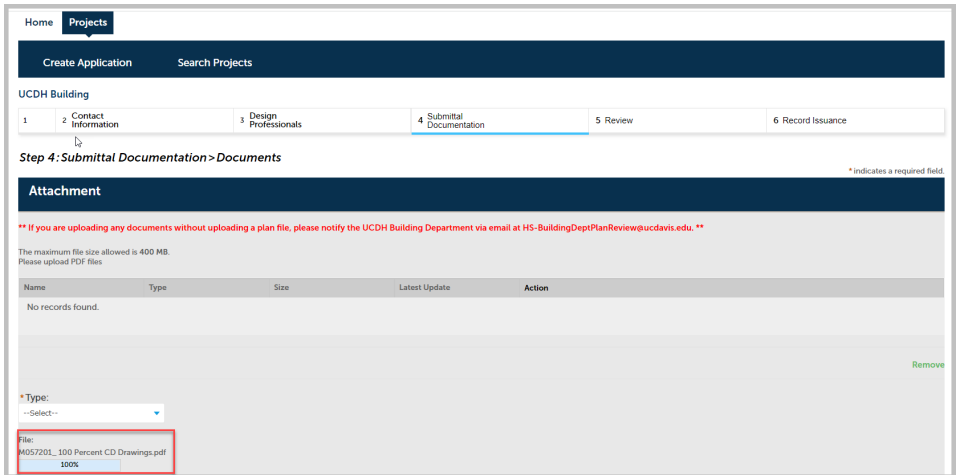
The **“File Upload”** screen is displayed once you click on the **“Add Documents”** button. Once the **“Add Documents”** button is clicked, a Windows Explorer screen will appear for you to select the documents that you want to upload to your application.



Once your document is uploaded the following screen will be displayed, showing the Percentage and the name of your document. You can add several documents to your application by clicking on the “Add Documents” button.

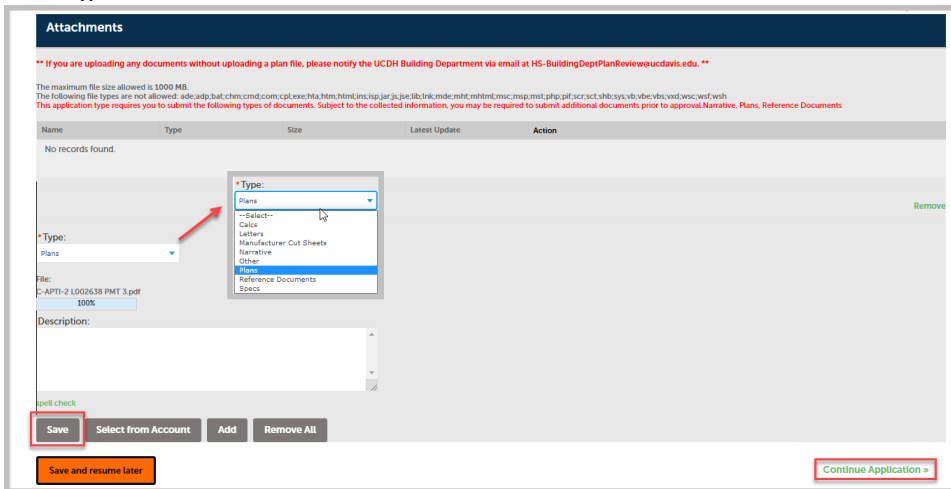


Click on the “Continue” button to progress to the next step in your application



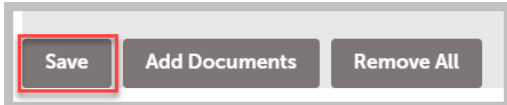
2.4.2 STEP 4: Submittal Documentation > Documents

When the progress bar reaches 100% and your document name appears, use the dropdown menu in the “Type” field to select the appropriate document type for the file being uploaded. For additional information on document types, see Appendix A - Field Description and Appendix B – Attachment by Record Type.

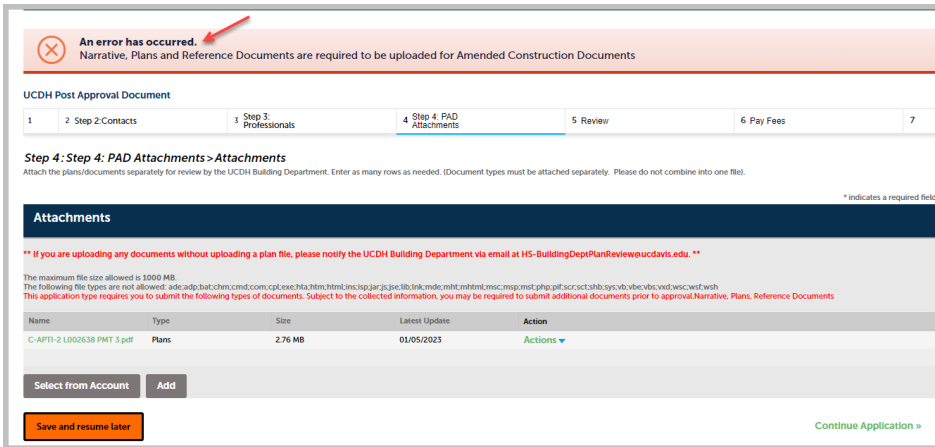
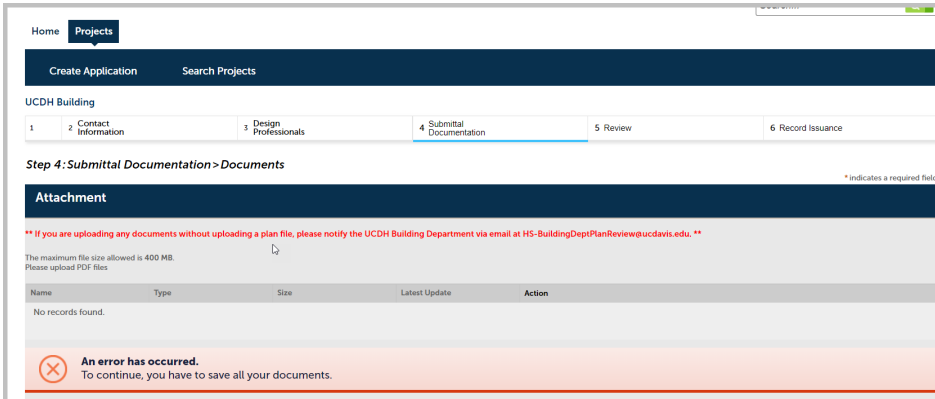


Enter a description of the attachment in the text field “Description”

Click on the “Save” button once you’ve uploaded the document and entered all the required fields.



If you don't click on the "Save" button you will receive an *error message* shown below.



The screen below displays the document name that you've uploaded, the Type, the size of the document, and the date the document was uploaded.

The screenshot displays the 'UCDH Building' application interface. At the top, there are navigation links for 'Create Application' and 'Search Projects'. A green success message states: 'The attachment(s) has/have been successfully uploaded. It may take a few minutes before changes are reflected.' Below this is a progress bar with six steps: 1 Contact Information, 2 Design Professionals, 3 Submittal Documentation (highlighted), 4 Review, and 5 Record Issuance. The current step is 'Step 4: Submittal Documentation > Documents'. A section titled 'Attachment' contains a red warning message: '** If you are uploading any documents without uploading a plan file, please notify the UCDH Building Department via email at HS-BuildingDeptPlanReview@ucdavis.edu. **'. Below the warning, it says 'The maximum file size allowed is 400 MB. Please upload PDF files.' A table lists the uploaded document:

Name	Type	Size	Latest Update	Action
HS2702L_100 Percent CD Drawings.pdf	Plans	560.81 KB	01/03/2023	Actions

Below the table are buttons for 'Add Documents', 'Save and resume later', and 'Continue Application >'. The footer contains contact information: 'UC DAVIS HEALTH | 4800 Second Ave | F55B Suite 3030 | Sacramento, CA 95817 | Email: HS-BuildingDeptPlanReview@ucdavis.edu'.

2.5 STEP 5: Review

This section enables you to validate your application before you submit it. The “EDIT” buttons can be found in each section.

2.5.1 EDIT BUTTONS

Edit buttons enable you to “Review” the data entered and make edits if needed before applying. Click on the “Edit” button on each application step to make the necessary changes.

The screenshot shows a web application interface for 'UCDH Building' with a progress bar indicating the current step is '5 Review'. Below the progress bar, there are two main buttons: 'Save and resume later' (highlighted in orange) and 'Continue Application' (with a right-pointing arrow). A small instruction reads: 'Please review all information below. Click the "Edit" buttons to make changes to sections or "Continue Application" to move on.' The interface is divided into three sections, each with an 'Edit' button:

- Record Type:** Shows 'UCDH Building'.
- Enter Type of Project:** Shows 'Project Type: Demolition and/or Abatement'.
- Enter Project Information:** Shows a table of project details.

PROJECT INFORMATION	
UCDH FDC Project Number:	123
UCDH FDC Project Name:	UCDH TEST
Emergency Project:	No
Building Name:	D10 - Surgery and Emergency Services Pavilion
Type of Construction:	Type III - Non Combustible (Non-Rated Structural Elements)

2.5.2 Terms and Conditions

Once you have verified all the data entered in your application, click on the **“Terms and Conditions”** checkbox, and click on **“Continue Application”** to **“SUBMIT”** your application.

UCDH Project Manager [Edit]

Sabrina Preciado
Mobile Phone 916-358-9623
Contact E-mail: sspreciado@ucdavis.edu

Consulting Construction Manager [Edit]

Licensed Professional List [Edit]

Showing 1-1 of 1

State License Number	License Type	Contact Name	Name of Business	Mobile Phone	Action
5465	Architect	John Doe	ABC	921-365-1236	Edit

Attachment [Edit]

**** If you are uploading any documents without uploading a plan file, please notify the UCDH Building Department via email at HS-BuildingDeptPlanReview@ucdavis.edu. ****

The maximum file size allowed is 400 MB.
Please upload PDF files.

Name	Type	Size	Latest Update	Action
M057201_100 Percent CD Drawings.pdf	Plans	560.81 KB	01/03/2023	Actions ▼

I certify that I have read and understand the instructions that accompany this application and that the statements made as part of this application are true, complete, and correct and that no material information has been omitted. By checking the box below, I understand and agree that I am electronically signing and filing this application.

By checking this box, I agree to the above certification. Date:

Save and resume later Continue Application >

Verify that Today's date is entered once you click on the checkbox.

Attachment [Edit]

**** If you are uploading any documents without uploading a plan file, please notify the UCDH Building Department via email at HS-BuildingDeptPlanReview@ucdavis.edu. ****

The maximum file size allowed is 400 MB.
Please upload PDF files.

Name	Type	Size	Latest Update	Action
M057201_100 Percent CD Drawings.pdf	Plans	560.81 KB	01/03/2023	Actions ▼

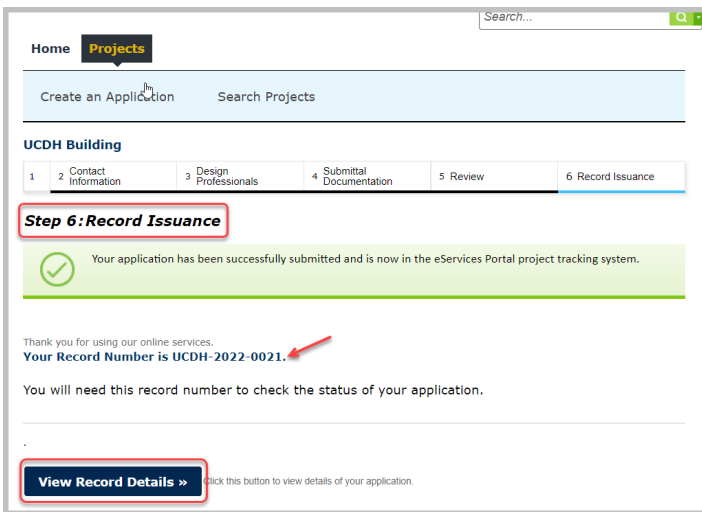
I certify that I have read and understand the instructions that accompany this application and that the statements made as part of this application are true, complete, and correct and that no material information has been omitted. By checking the box below, I understand and agree that I am electronically signing and filing this application.

By checking this box, I agree to the above certification. Date: 01/03/2023

Save and resume later Continue Application >

2.6 STEP 6: Record Issuance

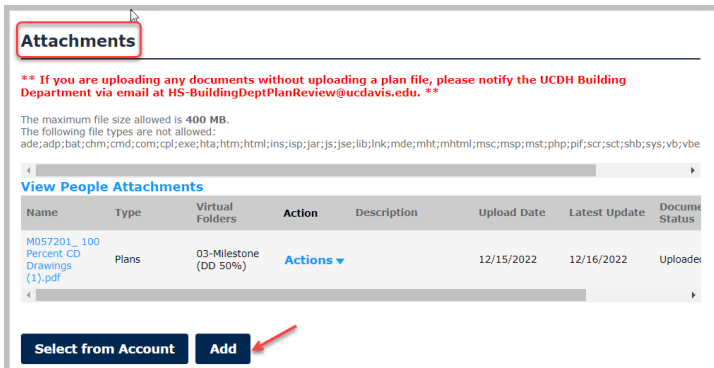
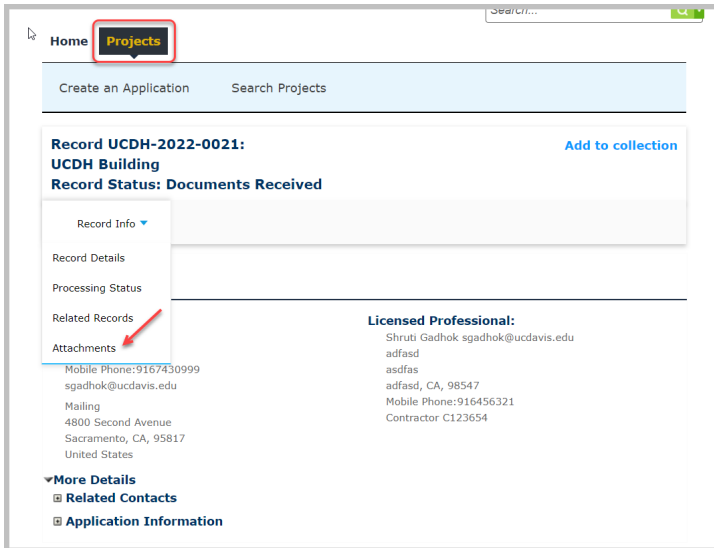
On this final screen, eServices Portal displays a project submission confirmation including the project record number. You can also view detailed information about the project by clicking on the “View Record Details” button. Email confirmation is automatically sent to the Contact user and UCDH Project Manager email listed in your application.



Congratulations! You have successfully submitted an Application (UCDH and HCAI) for a New Project to UCDH!

2.7 Electronic Plan Submission

For “Electronic plan submittal” and “Electronic plan review,” you can go to “Select from Account” or “Add” documents, click the Dropdown menu “Record Info”, and select “Attachments”



NOTE: Follow the instructions listed in “ePR-Electronic-Plan-Review- Submittal-Requirements.docx” for file naming convention and other details on how to format the electronic documents before uploading.

Appendix A: Field Description

No.	Field Name	Field Description
1	UCDH FDC Project Number	This information must match the UCDH account
2	UCDH FDC Project Name	This information must match the UCDH account
3	Emergency Project	If the project does include emergency work, select "Yes"
4	Building Name	Building Name and Address from the dropdown list
5	Type of Construction	CBC CHAPTER 6 Existing and proposed
6	Project Square Footage	Enter the area of the project in square feet. This is a required field
7	Is this project adding square footage to the building	Added Square Footage: Additional footage requesting
8	Fire Alarm Required	Fire Alarm (Yes / No) Existing and New
9	Project Scope Narrative	Enter the project scope narrative
10	Construction Cost Estimate	
11	Number of Stories	The number of stories your building will have
12	Fire Sprinklers	Fire sprinklers (Yes / No) Existing and New
13	Are fire sprinklers a code requirement for this project	
14	California Building and Fire Code Edition (Year)	Use the value for the current building and fire code cycle. (Code changes every 3 years)
15	Request Milestone Page-Turn	
16	Project Occupancy	
17	HCAI Building Number	Enter the HCAI Building Number for each building that this project affects. Building numbers are available for look-up at: https://hcai.ca.gov/wp-content/uploads/2020/11/110619a2.pdf (For HCAI Projects only)
18	Project Type	Indicate which kind of project is being submitted for review: 1. Alterations/Remodel (Use this for Emergency Work) 2. Demolition and /or Abatement 3. New Construction 4. Site Work
19	Submittal Type	Indicate the type of project that is being submitted for review

Note: When a project includes emergency work, an IOR can be added to the application. If Emergency Work = No, IOR cannot be added to the submittal.

Commented [SG1]: Check with Sabrina if this is true.

Appendix B: Attachment by Record Type

Attachments are electronic files such as PDFs or image files that you can upload from your computer to the eServices Portal, and then associate the attachment with a specific project record, such as a Project, Building Permit, Post-Approval Document, etc. Attachments can be just about any relevant document or file, such as special instructions, diagrams, pictures, or other information relevant to the record, however, the Document Types are limited based on the record the attachment is being uploaded to; this is known as public user permissions for each attachment associated with a record. Once a document, plan, photo, etc. is uploaded to eSP, the attachment can be downloaded and viewed by any Public User with Facility Authorization and by any Licensed Professional associated with that project. However, attachments cannot be deleted by Public Users once they are uploaded – even if they were erroneous. Attachments can only be deleted by UCDH intake staff. A description of attachments and the records that they can be associated with are listed in the table below:

Attachment Name	Record Type	Description
Attachments by Record Type		
Plan	HCAI and UCDH Projects PAD	Construction floor plans of sufficient clarity to indicate the location, nature, and extent of the work proposed and show in detail that it will conform to the provisions of applicable codes and relevant laws, ordinances, rules, and regulations. Plans do not include specifications, calculations, product data, etc.
Calculations	HCAI and UCDH Projects PAD	Structural calculations, hydraulic calculations, etc. necessary to support the design criteria and parameters of the Plans.
Specifications	HCAI and UCDH Projects PAD	The portion of the Contract Documents consists of the written requirements for materials, equipment, systems, standards, and workmanship for the work, and performance of related services.
Testing, Inspection, and Observation Program (TIO)	HCAI Project (For HCAI projects only)	The TIO program identifies all materials and tests to be performed on the project, all special inspections to be performed on the project, and the firm(s) and/or individual(s) to perform each of the required tests and inspections. The TIO program must also identify each Licensed Professional that must verify that the work complies with the approved construction documents.
Functional Program	HCAI Project (For HCAI projects only)	An executive summary of the project, required by CAC Section 7-119, that clearly describes the purpose of the project, the project components, and scope affected support functions, operational and environment of care requirements, architectural space and technology requirements, and planning considerations.
Workers Compensation Insurance Certificate	UCDH Project	California law requires employers to have workers' compensation insurance if they have even one employee. Proof of sufficient workers' compensation insurance or a certificate of self-insurance is required for the issuance of any Building Permit.
Documents	HCAI and UCDH Projects HCAI and UCDH PAD	All other documents not already classified may be uploaded; this would include soil reports, product data sheets, reference drawings, etc.
Image Documents	HCAI and UCDH Projects PAD	Photos may be uploaded if they are relevant to the project.
Other	HCAI and UCDH Projects PAD	Miscellaneous classification of attachments.