



**UCDH eServices Portal  
Applications for New Projects**

Version Number: 5.0

## REVISION HISTORY

This section records the revision history of changes made to this living document:

<b>Date</b>	<b>Version #</b>	<b>Description of Change</b>	<b>Author</b>
2/20/2023	1.0	First final version	S. Gadhok
8/17/2023	2.0	Added steps for Location, new mandatory field, and Appendix E with Building Address.	S. Gadhok
1/30/2024	3.0	Updated the document with new screenshots and values after the implementation.	S. Gadhok
2/27/2025	4.0	Updated the document with changes to the Project Delivery Plan field and DigEPlan screens.	S. Gadhok
3/21/2025	5.0	Updated the document regarding the removal of the HCAI project.	S. Gadhok

### APPROVAL TEAM

This section records the names of the people who have “*Approved*” this document.

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## 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; 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@ucdavis.edu](mailto:HS-BuildingDeptPlanReview@ucdavis.edu)
- D. This document covers:
  - i. [Step-by-step instructions on how to submit your UCDH \(new\) application](#)
  - ii. [Appendix A: Field Description](#)
  - iii. [Appendix B: Attachment by Record Type](#)

## 1 Page Flow Overview

This guide details the predefined steps to create and submit project applications. The steps for applying for a “New Project” differ slightly from those for submitting PADs. Below is an illustration of the page flow steps.

Table 1: eServices Portal Page flow

No.	Step	Page Title	Description
<b>Application for New Project</b>			
1.	<b>STEP 1</b>	Project Type and Info	Record the Project Name, Number, Scope, Project Occupancy, and other required project details specific to the project.
2.	<b>STEP 2</b>	Contact Information	Add new Contact(s) specific to the application: <ul style="list-style-type: none"> <li>• Applicant (PM or CM)</li> <li>• UCDH Project Manager</li> <li>• Consulting Construction Manager</li> </ul>
3.	<b>STEP 3</b>	Design Professionals	Add a New Licensed Professional(s) and their Contact(s) information specific to the application.
4.	<b>STEP 4</b>	Submittal Documentation	Upload Plans, Specifications, Calculations, or any other document relevant to your project in PDF format only.
5.	<b>STEP 5</b>	Review	This is the final opportunity to review the information entered in the application for accuracy. During this step, “Edits” can be made if necessary.
6.	<b>STEP 6</b>	Record Issuance	Project applications (UCDH) 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 new 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 can 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 the **Continue Application** or **“Save and resume later”** button to save the data entered on the page.
- ✓ If a page contains a section allowing multiple records to be added, for example, multiple licensed professionals or 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 UCDH Application – Step-by-Step Instructions

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

STEP	STEP DESCRIPTION	EXPECTED RESULTS
1.	Go to the Accela Citizen's Portal website <a href="https://aca-prod.accela.com/UCDMC/Default.aspx">https://aca-prod.accela.com/UCDMC/Default.aspx</a>	Accela Citizen's Portal Website is displayed.
2.	Login by using your user ID/password and click on <i>the "Sign In"</i> button	The user is logged into their account
3.	Click on the <b>"Projects"</b> tab and then click on <b>"Create Application."</b>	The online Application screen should be displayed
4.	Select a value for the drop-down field <b>"Project Type."</b>	Select any value listed below for the field Project Type: 1. Alteration/Renewal 2. Demolition and/or Abatement 3. New Construction 4. Site Work
5.	Click on <i>the "Continue Application"</i> button	<b>Step 1: Project Type and Info &gt; Project Information</b> screen is displayed
6.	Validate the fields under Project Information: 1. UCDH Project Number: (*Mandatory field) 2. UCDH Project Name: (*Mandatory field) 3. Emergency Project: (*Mandatory field) 4. Building Name: (*Mandatory field) 5. Type of Construction: (*Mandatory field) 6. Project Square Footage: (*Mandatory field) 7. Is this project adding square footage to the building: (*Mandatory field) 8. Added Square Footage: (*Mandatory field) 6. <b>Note:</b> This field will be displayed if the previous radio button is selected as "YES" 9. Fire Alarm Required: (*Mandatory field) 10. Project Scope Narrative: (*Mandatory field) 11. Construction Cost Estimate: (*Mandatory field) 12. Number of Stories: (*Mandatory field) 13. Fire Sprinklers: (*Mandatory field) 14. Are fire sprinklers a code requirement for this project? (*Mandatory field) 15. California Building and Fire Code Edition (Year): (*Mandatory field) 16. OTC Requested:	If an OTC review is requested, you must contact the UCDH Building Department to schedule a review of all documents.

7.	Click on the " <b>Continue Application</b> " button	<b>Step 1: Project Type and Info &gt; Project Occupancy</b> screen is displayed
8.	Pick a value for " <b>Project Occupancy</b> " relating to your project. A-1 A-2 A-3 B H-1 H-2 H-3 H-4 H-5 I-2 I-4 L M R-1 R-2 R-2.1 R-3.1 R-4 S-1 S-2 U Not Applicable	This is a mandatory field where you have to pick a value that is relevant to your project. If you are not sure, then select " <i>Not Applicable.</i> "
9.	Click on the " <b>Continue Application</b> " button	<b>Step 1: Project Type and Info &gt; Project Delivery Plan</b> screen is displayed
10.	Enter the value for the following fields on the " <b>Project Delivery Plan</b> " screen: 1. Construction Delivery Method: (*Mandatory field) 2. Construction Sequencing:	Pick any value listed below for the " <b>Construction Delivery Method.</b> " 1. Design-Bid-Build 2. Design/Build 3. Developer Led (P3) 4. JOC-Job Order Contract 5. Progressive D/B 6. Self-Performed
11.	Enter the value in the " <b>Construction Sequencing</b> " field	Enter the value from the drop-down field " <b>Construction Sequencing.</b> " 1. Incremental package 2. Single package

12.	Click on the " <b>Continue Application</b> " button	<b>Step 3: Contact Information &gt; Applicant</b> screen is displayed
13.	Click on the " <b>Add New</b> " Button to add a new contact or " <b>Select from Account</b> " to pick the existing contact. " <b>Continue Application</b> " takes you to the next screen. " <b>Save and resume later</b> " saves your application and all the data you have entered.	
14.	Click on the " <b>Add New</b> " Button to add a new contact	The " <b>Contact Information</b> " screen is displayed
15.	Enter your contact information for the following fields: 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. Country: (defaults to United States)	
16.	Click on the " <b>Continue</b> " button.	<b>Step 3: Contact Information &gt; Applicant</b> screen is displayed with the contact information
17.	Click on the " <b>Continue Application</b> " button	<b>Step 3: Contact Information &gt; UCDH Project Manager</b> screen is displayed
18.	Click on the " <b>Add New</b> " Button to add a new contact or " <b>Select from Account</b> " to pick the existing contact.	
19.	Click on the " <b>Add New</b> " Button to add a new UCDH Project Manager	The " <b>Contact Information</b> " screen is displayed
20.	Enter the UCDH Project Manager's information: 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 address in the " <b>Contact Addresses</b> " screen.	
22.	Click on " <b>Add Additional Contact Address</b> "	The " <b>Contact Address Information</b> " dialog box is displayed

23.	<p>Enter the following fields under Contact Address Information:</p> <ol style="list-style-type: none"> <li>1. Address Type: (*Mandatory field) - Defaults to Mailing</li> <li>2. Primary (Check-box)</li> <li>3. Address Line 1: (*Mandatory field)</li> <li>4. Address Line 2:</li> <li>5. City: (*Mandatory field)</li> <li>6. State: (*Mandatory field)</li> <li>7. Zip Code: (*Mandatory field)</li> <li>8. Country/Region: (*Mandatory field) - Defaults to the United States</li> </ol>	
24.	Click on the "Continue" button	<b>Step 3: Contact Information &gt; UCDH Project Manager</b> screen is displayed
25.	Click on the "Continue Application" button	<b>Step 3: Contact Information &gt; CM</b> screen is displayed
26.	<p><b>NOTE:</b> Adding a CC Manager is not required to complete your application. However, if you would like to add one to your application, please see the steps for the UCDH Project Manager.</p>	
27.	Click on the "Continue Application" button	<b>Step 4: Design Professionals &gt; Licensed Professionals</b> screen is displayed
28.	Click on the "Add New" Button to add a new <b>Licensed Professional</b>	The " <b>Licensed Professional Information</b> " screen is displayed
29.	<p>Enter the information for the Licensed Professional contact:</p> <ol style="list-style-type: none"> <li>1. License Type: (*Mandatory field)</li> <li>2. State License Number: (*Mandatory field)</li> <li>3. First: (*Mandatory field)</li> <li>5. Last: (*Mandatory field)</li> <li>6. Name of Business: (*Mandatory field)</li> <li>7. Work Phone:</li> <li>8. Mobile Phone: (*Mandatory field)</li> <li>10. Address: (*Mandatory field)</li> <li>11. Address Line 2:</li> <li>12. City: (*Mandatory field)</li> <li>13. State: (*Mandatory field)</li> <li>14. Zip: (*Mandatory field)</li> <li>15. Contact E-mail: (*Mandatory field)</li> </ol>	

30.	The " <b>License Type</b> " field has the following values: 1. Architect 2. Civil 3. Electrical 4. Geotechnical 5. Mechanical 6. Other 7. Structural	
31.	Click on the " <b>Save and Close</b> " button.	The added information is saved and displayed on the " <b>Licensed Professional List</b> " screen.
32.	Click on the " <b>Continue Application</b> " button	<b>Step 5: Submittal Documentation &gt; Digital Projects</b> screen is displayed
33.	Upload files. The following Document Types must be uploaded for this application: <b>Plans</b> .	Upload files to the area " <b>Drag files here to upload or click to select files</b> " screen is displayed.
34.	Select the appropriate " <b>Doc Type</b> ".  <b>Note:</b> This is a mandatory field.	
35.	Enter text in the " <b>Description</b> " box if you want the reviewers to know anything.	
36.	Select a value from the drop-down related to your application plan review cycle from the " <b>Virtual Folders</b> ."  <b>Note:</b> This is a mandatory field.	
37.	The following message is displayed. "Package is ready to submit, or upload additional files"	Your application and documents uploaded are saved
38.	Click on the " <b>Continue Application</b> " button	<b>Step 6: Review</b> screen is displayed
39.	This screen lets you review the information that you've entered on your UCDH Building application.	
40.	Click on the " <b>Edit</b> " button on any screen.	The screen that you have picked is opened and you can change/edit the information for your application.
41.	Scroll down 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

42.	Click on the " <i>Continue Application</i> " button	<p><b>Step 7: The Record Issuance</b> screen is displayed.</p> <p>The message "<i>Your application has been successfully submitted and is now in the eServices Portal project tracking system.</i>" is displayed in the green box.</p> <p>Thank you for using our online services. Your Record Number is "<b>BXX-XXXX</b>" Application Format:&lt;BYY&gt;-&lt;4-digit sequential number&gt;</p>
43.	<b>You have successfully submitted your application for the UCDH Building Project.</b>	Email is received with details for your UCDH Building application.

## 2 eServices Portal Screens

### 2.1 STEP 1: Project Type and Info

**Project Type values:**

1. Alteration/Renewal
2. Demolition and/or Abatement
3. New Construction
4. Site Work

Home Projects Fire Prevention

Create Application Search Projects Schedule an Inspection

UCDH Building

1 Project Type and Info 2 Contact Information 3 Design Professionals 4 Submittal Documentation 5 Review 6 7

Step 1: Project Type and Info > Project Type

\* Indicates a required field

Enter Type of Project

Select Project Type

\*Project Type:

--Select--  
--Select--  
Alteration/Renewal  
Demolition and/or Abatement  
New Construction  
Site Work

Continue Application >

Save and resume later

Click on the “**Continue Application**” button to move to the next screen.

## 2.1.1 Project Information

Home **Projects** Fire Prevention

Create Application Search Projects Schedule an Inspection

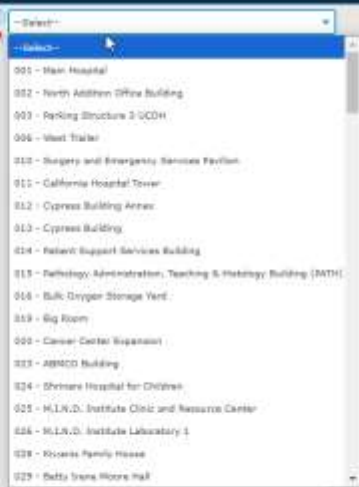
UCDH Building

1 Project Type and Info 2 Contact Information 3 Design Professionals 4 Submittal Documentation 5 Review 6 7

Step 1: Project Type and Info > Project Information \* indicates a required field

### Enter Project Information

**PROJECT INFORMATION**

\* Building Name:  

\* UCDH Project Number:

\* UCDH Project Name:

\* Emergency Project:  Yes  No

\* Type of Construction:


\* Project Square Footage:

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

\* Fire Alarm Required:  Yes  No

\* Project Scope Narrative:

[spell check](#)

\* Type of Construction:  

\* Project Square Footage:

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


\* Fire Alarm Required:  Yes  No

\* Project Scope Narrative:

[spell check](#)

\* Construction Cost Estimate:

\* Number of Stories:

\* Fire Sprinklers:  

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

\* California Building and Fire Code Edition (Year):

Added Square Footage:  ?

\* Fire Alarm Required:  Yes  No

\* Project Scope Narrative:

[spell check](#)

\* 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):

OTC Requested:

## 2.1.2 Project Occupancy

Please refer to “**CBC—Chapter 3**” for Project Occupancy classification and use it for further clarification on the various Project Occupancy codes.

The screenshot displays the 'HCAI Project' web application interface. At the top, a progress bar shows seven steps: 1. Project Type and Info (active), 2. Contact Information, 3. Design Professionals, 4. Submit/Documentation, 5. Review, 6, and 7. Below the progress bar, the current step is 'Step 1: Project Type and Info > Project Occupancy'. A dark blue header bar contains the text 'Project Occupancy'. The main content area is titled 'Primary Occupancy Group' and includes the instruction: 'Please refer to the architectural code analysis for this information.' Below this, a list of occupancy codes is provided, each with a radio button: A.1, A.2, A.3, B, H.1, H.2, H.3, H.4, H.5, I.2, I.4, L, M, R.1, R.2, R.2.1, R.3.1, R.4, S.1, S.2, U, and 'Not Applicable'. At the bottom left, there is a blue button labeled 'Continue Application >'. At the bottom right, there is an orange button labeled 'Save and resume later'. A small asterisk with the text '\* Indicates a required field.' is located in the top right corner of the main content area.

## 2.1.3 Project Delivery Plan

If you're unsure about the values in this section, please check with your *UCDH Project Manager* or *Design Professional (DPOR)* for the appropriate selection.

### Construction Delivery Method Values:

- Design-Bid-Build
- Design/Build
- Developer Led (P3)
- JOC-Job Order Contract
- Progressive D/B
- Self-Performed

### Construction Sequencing Values:

- Incremental package
- Single package

Home Projects Fire Prevention

Create Application Search Projects Schedule an Inspection

UCDH Building

1 Project Type and Info 2 Contact Information 3 Design Professionals 4 Submittal Documentation 5 Review 6 7

Step 1: Project Type and Info > Project Delivery Plan

Project Delivery Plan

PROJECT DELIVERY PLAN

\*Construction Delivery Method: --Select--

Construction Sequencing: --Select--

Continue Application >

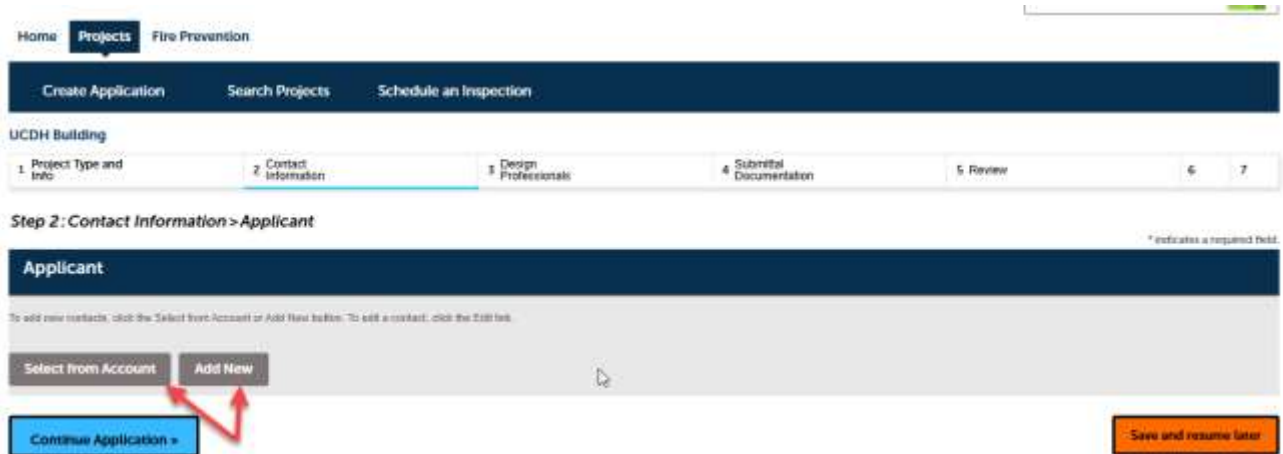
Save and resume later

\* indicates a required field.

## 2.2 STEP 2: eServices Portal

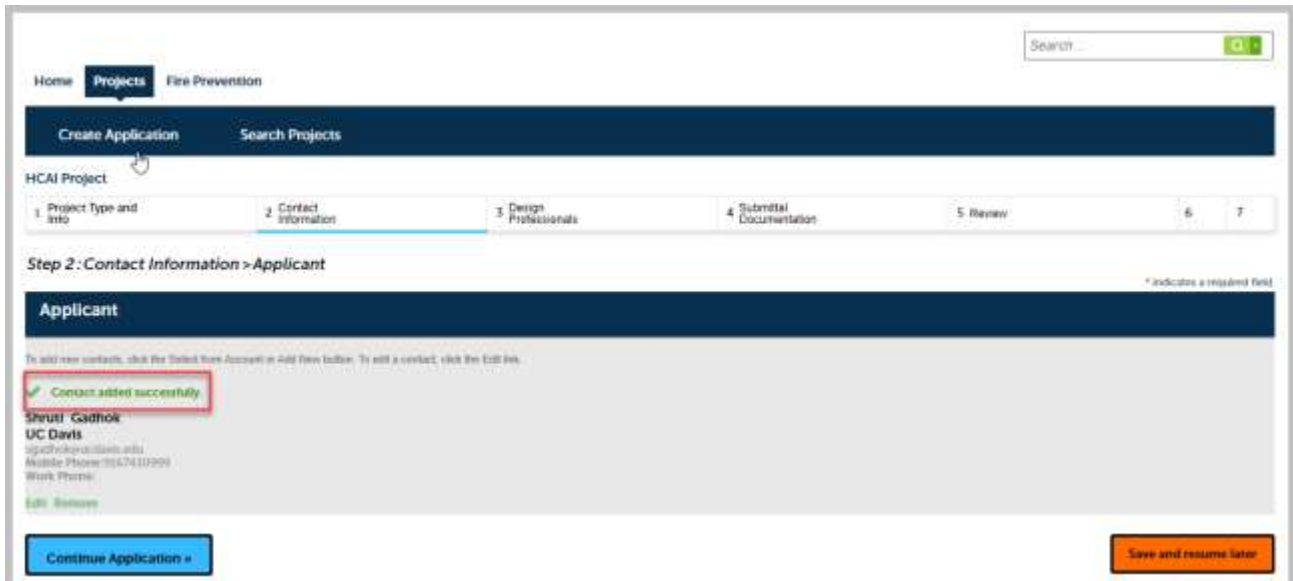
### 2.2.1 Contact Information > Applicant

There are two contact types: contact information “**Applicant**” and “**UCDH Project Manager**” are mandatory on every application. The “**Applicant**” and “**UCDH Project Manager**” will also receive all correspondence (emails) from UCDH regarding the project.

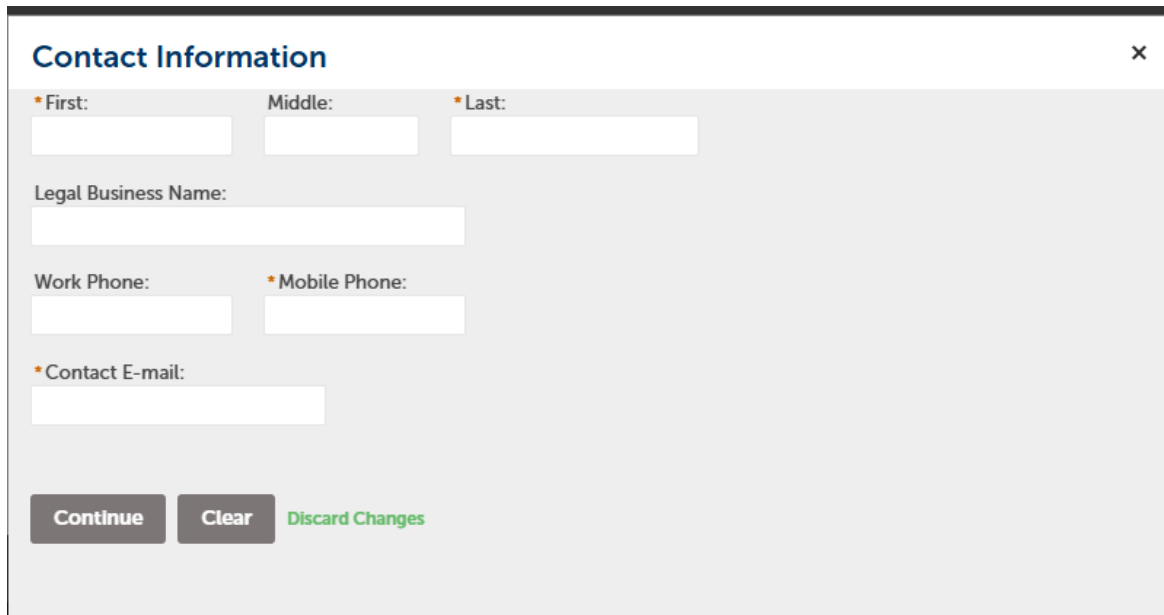


### 2.2.2 Adding/Selecting Contacts

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 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.

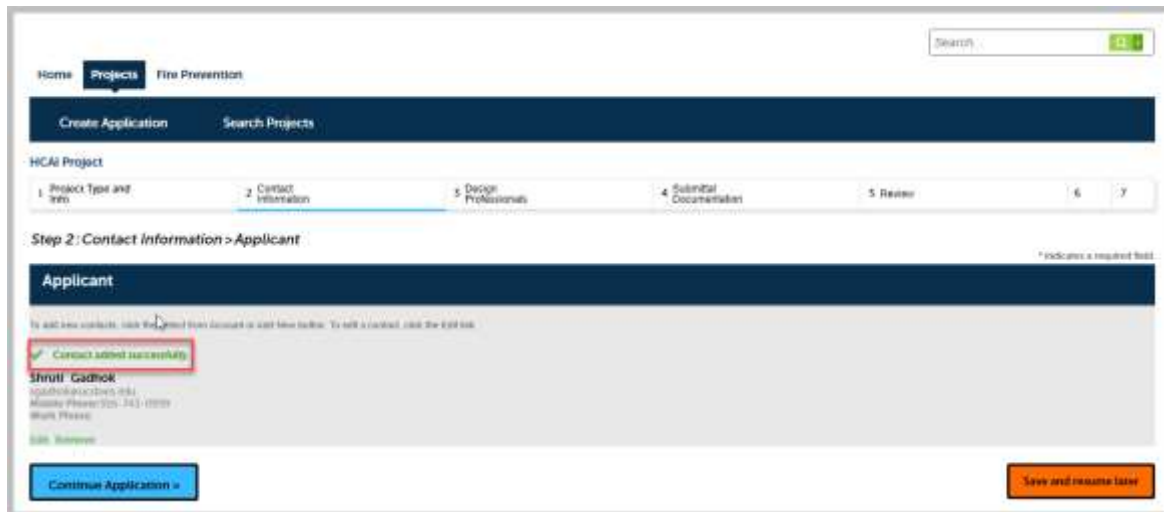


The screenshot shows a modal window titled "Contact Information" with a close button (X) in the top right corner. The form contains the following fields:

- \* First: [Text Input]
- Middle: [Text Input]
- \* Last: [Text Input]
- Legal Business Name: [Text Input]
- Work Phone: [Text Input]
- \* Mobile Phone: [Text Input]
- \* Contact E-mail: [Text Input]

At the bottom of the form, there are three buttons: "Continue" (dark grey), "Clear" (dark grey), and "Discard Changes" (green text).

The following message will be displayed once the new contact information has been added successfully to your application.



The screenshot shows the application progress screen. At the top, there are navigation tabs: "Home", "Projects", and "Fire Prevention". Below this is a search bar and two buttons: "Create Application" and "Search Projects". The main content area shows a progress bar with seven steps: 1. Project Type and Info, 2. Contact Information, 3. Design Professionals, 4. Submittal Documentation, 5. Review, 6, and 7. The current step is "Step 2: Contact Information > Applicant". Below the progress bar, there is a section titled "Applicant" with a success message: "Contact added successfully". The message is highlighted with a red box. Below the message, there is a card for "Shruti Gadnok" with contact information: "sgadnoka@ucdavis.edu", "Mobile Phone: (530) 743-0200", and "Work Phone: (530) 743-0200". At the bottom of the screen, there are two buttons: "Continue Application" (blue) and "Save and resume later" (orange).

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

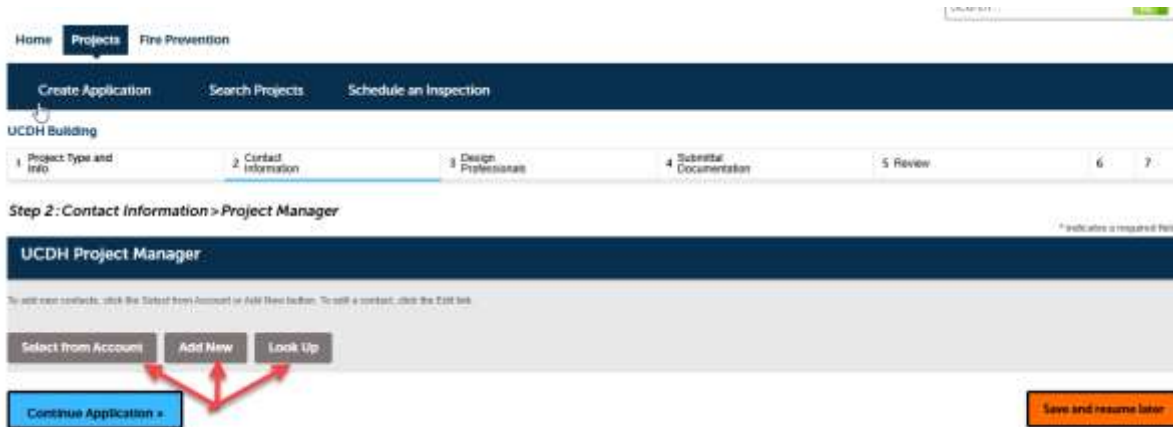
## 2.2.3 Contact Information > UCDH Project Manager

Entering the contact information for the UCDH Project Manager is mandatory to submit your application. You cannot move forward with the application workflow without completing this step. The Error Message below will be displayed if you do not select or add a new UCDH Project Manager to your application workflow.

The screenshot displays a web application interface for the UCDH Project Manager. At the top, there is a navigation bar with 'Home', 'Projects', and 'Fire Prevention' tabs. A search bar is located in the top right corner. Below the navigation bar, there are two main buttons: 'Create Application' and 'Search Projects'. The main content area is titled 'HCAI Project' and features a progress bar with seven steps: 1. Project Type and Info, 2. Contact Information (highlighted in blue), 3. Design Professionals, 4. Submittal Documentation, 5. Review, 6, and 7. Below the progress bar, the current step is 'Step 2: Contact Information > UCDH Project Manager'. A dark blue header bar contains the text 'UCDH Project Manager'. Below this, there is a message: 'To add new contacts, click the Select from Account or Add New button. To edit a contact, click the Edit link.' A red-bordered box highlights an error message: 'This section is required. Please add one record.' Below the error message are three buttons: 'Select from Account', 'Add New', and 'Look Up'. At the bottom of the form, there are two buttons: 'Continue Application >' (blue) and 'Save and resume later' (orange).

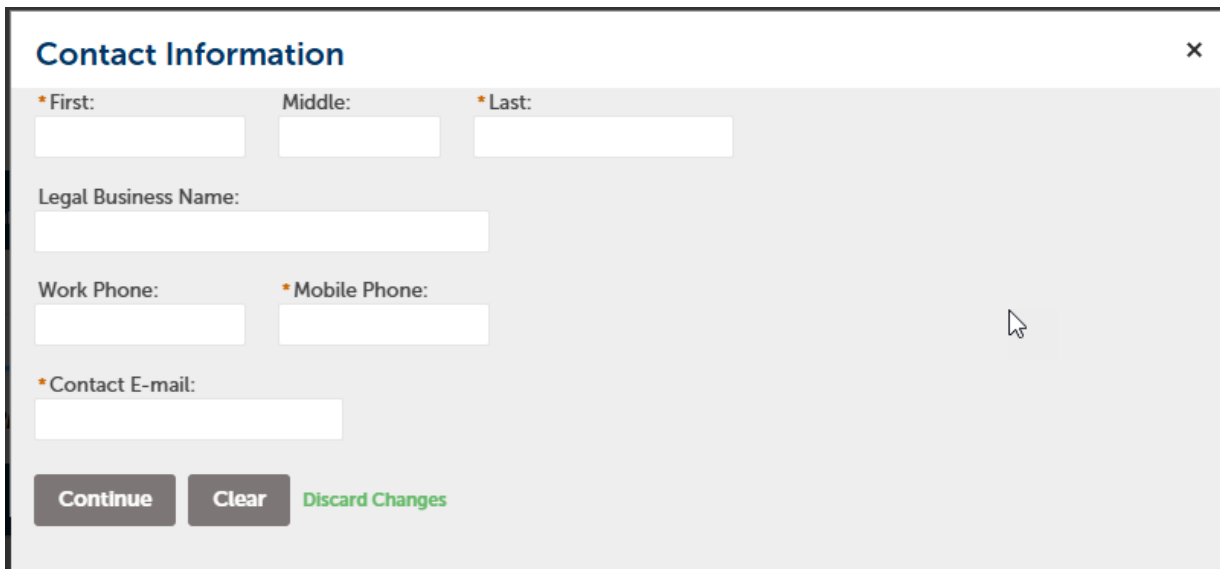
## 2.2.4 Adding / Selecting a UCDH Project Manager

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 in your Public User account. Click on the “*Continue*” button to save the selected contact.



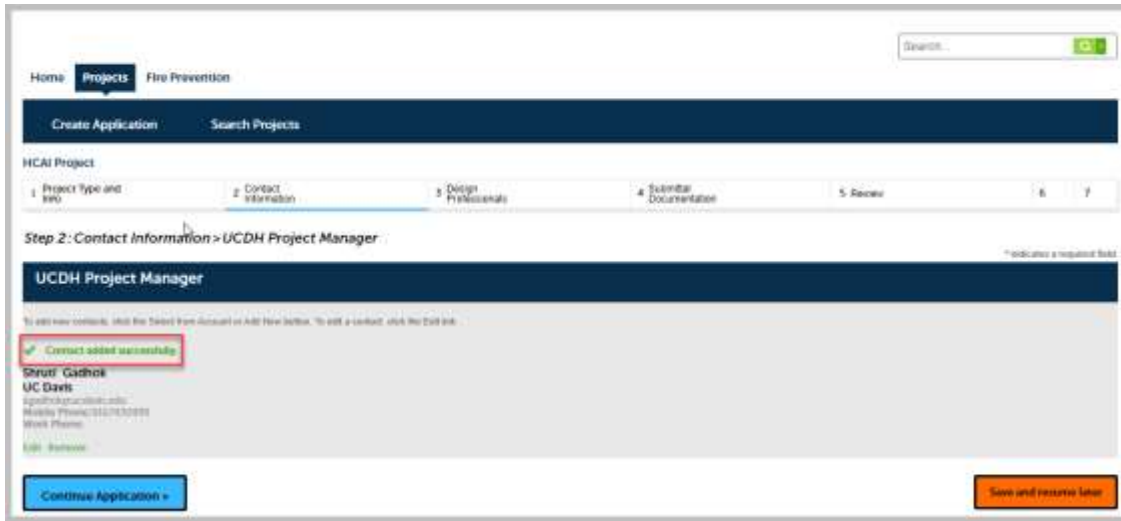
The screenshot shows the 'UCDH Project Manager' selection screen. At the top, there are navigation tabs for 'Home', 'Projects', and 'Fire Prevention'. Below this is a dark blue header with 'Create Application', 'Search Projects', and 'Schedule an Inspection'. A progress bar indicates the current step is '2 Contact Information'. The main content area is titled 'UCDH Project Manager' and includes instructions: 'To add new contacts, click the Select from Account or Add New button. To edit a contact, click the Edit link.' Three buttons are visible: 'Select from Account', 'Add New', and 'Look Up'. A blue 'Continue Application >' button is at the bottom left, and an orange 'Save and resume later' button is at the bottom right. Red arrows point from the 'Continue Application >' button to the 'Add New' button.

Clicking on the “*Add New*” button will display the “*Contact Information*” screen, where you can enter the required information for the UCDH Project Manager on the Application.



The screenshot shows the 'Contact Information' form. It has a title bar with 'Contact Information' and a close button 'x'. The form contains several input fields: '\* First:', 'Middle:', and '\* Last:' (all with asterisks indicating required fields). Below these is 'Legal Business Name:'. Then 'Work Phone:' and '\* Mobile Phone:' (with an asterisk). Finally, '\* Contact E-mail:' (with an asterisk). At the bottom, there are three buttons: 'Continue', 'Clear', and 'Discard Changes'.

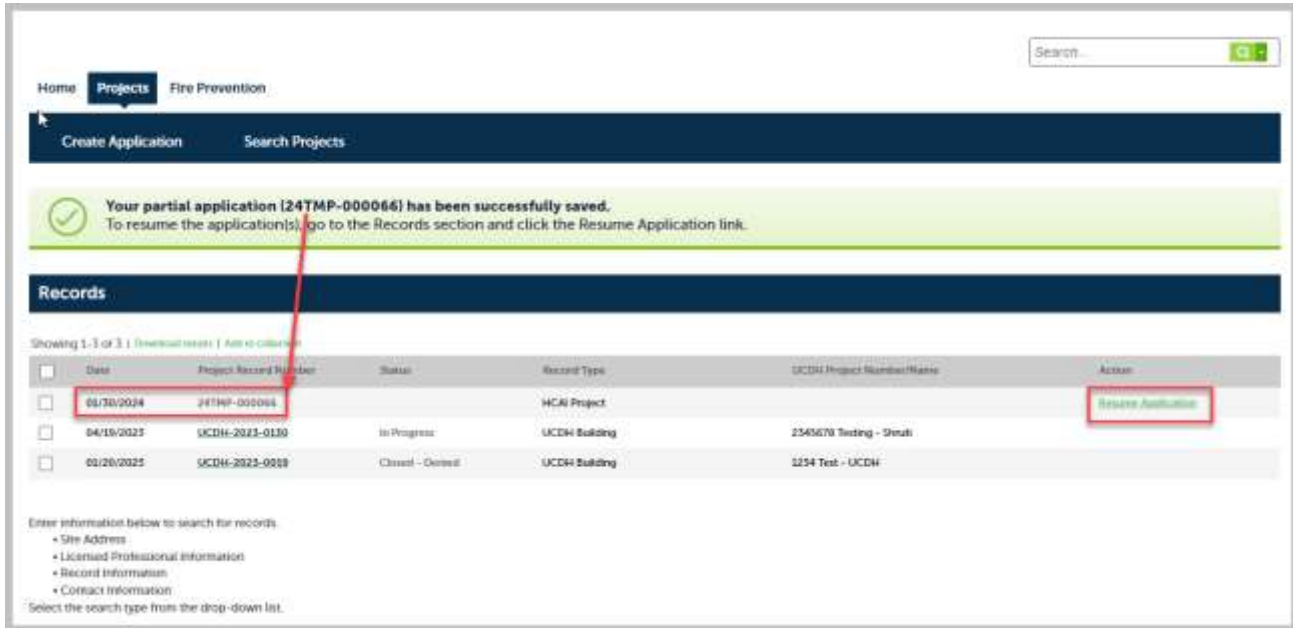
Click on “Continue Application” to proceed to the next screen.



## 2.2.5 Save and Resume Later Button

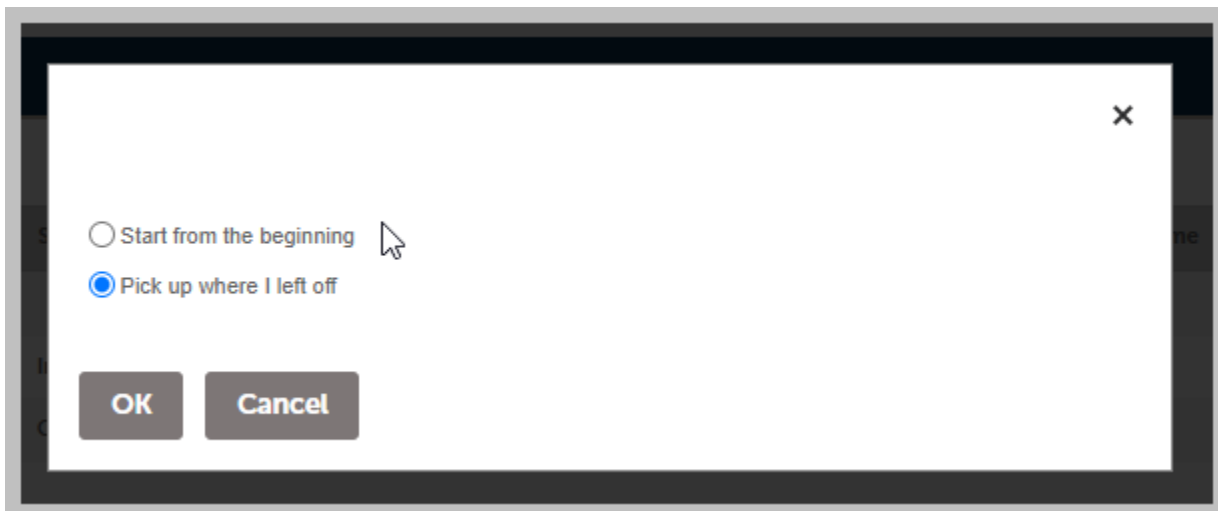
If you click the **“Save and resume later”** button, your application is saved, and you will be redirected to the Project List page. The eServices Portal will issue a temporary Project ID and display the application on the Project list.

Click the **“Resume Application”** button to revive/complete your application.



The screenshot shows the 'Records' section of the eServices Portal. A notification at the top states: "Your partial application (247MP-000066) has been successfully saved. To resume the application(s), go to the Records section and click the Resume Application link." Below this is a table of records. The first row is highlighted, and a red box is drawn around the 'Resume Application' button in the 'Action' column. A red arrow points from the notification text to this button.

Date	Project Record Number	Status	Record Type	UCDH Project Number/Name	Action
08/20/2024	247MP-000066		HCN Project		Resume Application
04/19/2023	UCDH-2023-0130	In Progress	UCDH Building	2343670 Testing - Shred	
02/20/2023	UCDH-2023-0018	Closed - Denied	UCDH Building	2254 Test - UCDH	



The screenshot shows a dialog box with two radio button options. The second option, "Pick up where I left off", is selected. There are "OK" and "Cancel" buttons at the bottom.

Start from the beginning

Pick up where I left off

OK Cancel

## 2.2.6 Consulting Construction Manager

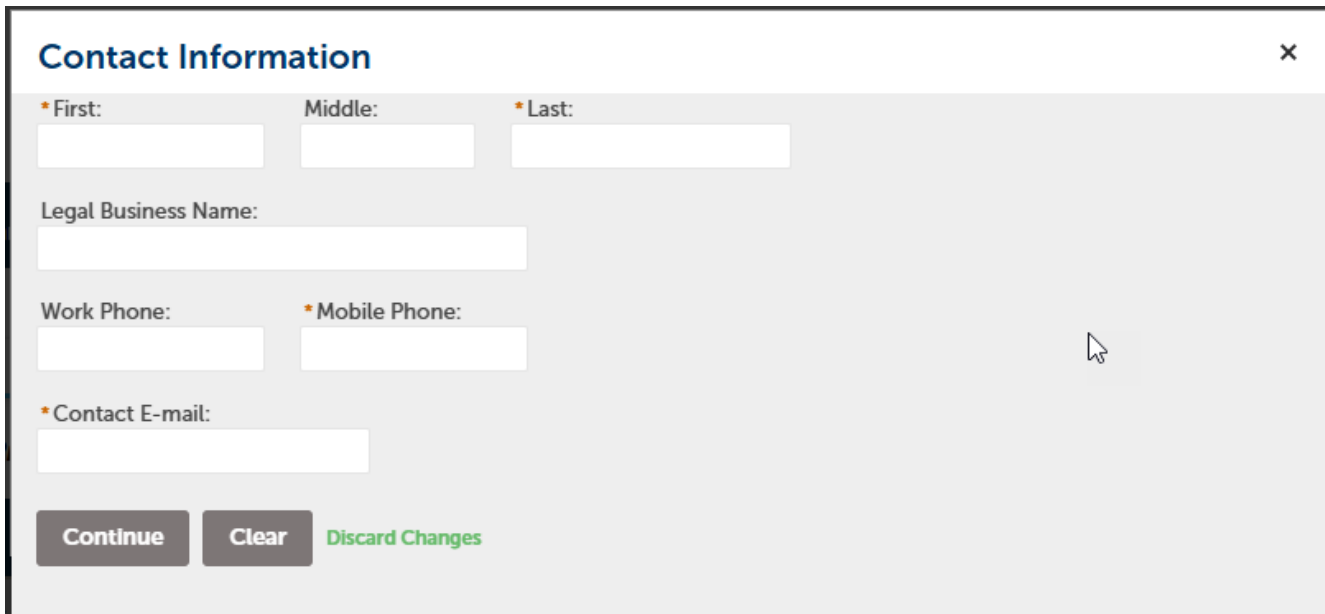
The **“Select from Account”** function is also available for the **“Consulting Construction Manager”** section. This is not a mandatory section to continue with the application workflow; however, if entering the information for “Consulting Construction Managers,” it should be added by clicking the “Select from Account” button to use the information contained in your Public User account or selecting “Add New” to add a new Consulting Construction Manager.

**Note:** This section is not required in the application. You can proceed with the application if you don’t have a consulting construction manager.

The screenshot displays the application's workflow for adding a Consulting Construction Manager. The interface is clean and professional, with a dark blue header for the current section. The progress bar clearly indicates the current step in the process. The 'Select from Account' button is highlighted with a red arrow, indicating the recommended action for users who have existing contacts in their account.

Click on the **“Continue”** button to save the selected contact.

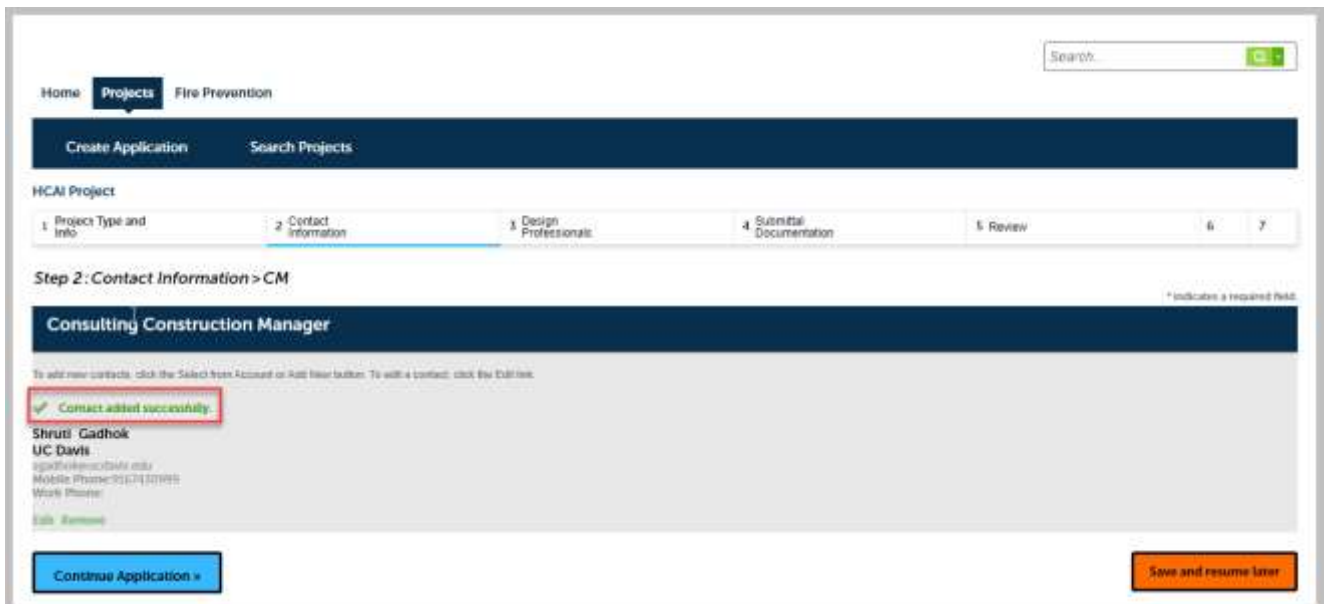
Clicking on the **“Add New”** button will display the **“Contact Information”** screen, where you can enter the required information for the Consulting Construction Manager.



The screenshot shows a modal window titled "Contact Information" with a close button (X) in the top right corner. The form contains the following fields:

- \* First:
- Middle:
- \* Last:
- Legal Business Name:
- Work Phone:
- \* Mobile Phone:
- \* Contact E-mail:

At the bottom of the form, there are three buttons: "Continue" (dark grey), "Clear" (dark grey), and "Discard Changes" (green text).



The screenshot shows a web application interface with a navigation menu (Home, Projects, Fire Prevention) and a search bar. The main content area displays a progress bar for an "HCAI Project" with steps: 1. Project Type and Info, 2. Contact Information, 3. Design Professionals, 4. Submittal Documentation, 5. Review, 6, 7. The "Contact Information" step is currently active. Below the progress bar, the title "Step 2: Contact Information > CM" is shown. A dark blue header reads "Consulting Construction Manager". A message states: "To add new contacts, click the Select from Account or Add New button. To edit a contact, click the Edit link." A green success message "Contact added successfully." is displayed, with a red box around it. Below the message, the contact details for "Shruti Gadhok" are listed: "UC Davis", "sgadhok@ucdavis.edu", "Mobile Phone: (510) 741-0199", and "Work Phone:". At the bottom, there are two buttons: "Continue Application" (blue) and "Save and resume later" (orange).

Click the **“Continue Application”** button to proceed to the next screen.

## 2.3 STEP 3: Design Professionals

### 2.3.1 Design Professionals > Licensed Professionals

Home **Projects** Fire Prevention

Create Application Search Projects Schedule an Inspection

UCDH Building

1 Project Type and Info 2 Contact Information 3 **Design Professionals** 4 Submittal Documentation 5 Review 6 7

Step 3: Design Professionals > Licensed Professionals \* indicates a required field

#### Licensed Professionals List

Enter all Licensed Professionals that have affixed their professional stamp to the construction documents for this project. This information is necessary for the permit, once issued.  
To add each professional to the project record, click the "Add New" button and input these steps until all Licensed Professionals for the project have been added to the application. When the list is complete, click "Continue Application".

**Add New**

Showing 0-0 of 0

State License Number	License Type	Contact Name	Name of Business	Mobile Phone	Action
No records found.					

**Continue Application >** **Save and resume later**

Click the **“Add New”** button to enter the mandatory fields marked with red asterisks (\*).

- License Type
- State License #
- Name of Business
- First Name
- Last Name
- Address
- City
- State
- Zip
- Mobile Phone
- Contact E-mail

The screenshot shows a web form titled "Licensed Professional Information". The form contains several fields, each with a red asterisk indicating it is mandatory. A dropdown menu for "License Type" is open, showing options: --Select--, Architect, Civil, Electrical, Geotechnical, Mechanical, Other, and Structural. A red arrow points from the "License Type" dropdown to the "License Type" field label. At the bottom of the form, there are three buttons: "Save and Close", "Clear", and "Discard Changes".

**Licensed Professional Information**

\* License Type: --Select--    \* State License #:

\* Name of Business:     \* First:     \* Last:

\* Address:

Address Line 2:     \* City:     \* State: --Select--    \* Zip:

\* Mobile Phone:     Work Phone:

\* Contact E-mail:

**Save and Close**    **Clear**    [Discard Changes](#)

Click on the **“Save and Close”** button to save the information on this screen.

This screen can accommodate multiple licensed professionals. **Please enter the information of all the Licensed Professionals who have affixed their professional stamps to the construction documents. This information will later be carried over to the Building Permit, once issued (post plan approval).**

The screenshot shows a web application interface for 'UCDH Building'. At the top, there are navigation links for 'Home', 'Projects', and 'Fire Prevention'. Below this is a dark blue header with three buttons: 'Create Application', 'Search Projects', and 'Schedule an Inspection'. A progress bar below the header shows seven steps: 1. Project Type and Info, 2. Contact Information, 3. Design Professionals (highlighted), 4. Submittal Documentation, 5. Review, 6, and 7. The main content area is titled 'Step 3: Design Professionals > Licensed Professionals'. It includes a sub-header 'Licensed Professionals List' and a message: 'Enter all Licensed Professionals that have affixed their professional stamp to the construction documents for this project. This information is necessary for the permit, once issued. To add each professional to the project record, click the "Add New" button and repeat these steps until all Licensed Professionals for this project have been added to the application. When the list is complete, click "Continue Application".' Below the message is an 'Add New' button and a green success message: 'Licensed Professional added successfully'. A table displays the current list of professionals:

State License Number	License Type	Contact Name	Name of Business	Phone/Fax	Action
011121	Electrical		Apple INC	987-546-5435	<a href="#">Edit</a> <a href="#">Delete</a>
021121	Civil		Manvel, INC	912-365-7889	<a href="#">Edit</a> <a href="#">Delete</a>
031121	Architect		Captain America, INC	916-786-6032	<a href="#">Edit</a> <a href="#">Delete</a>

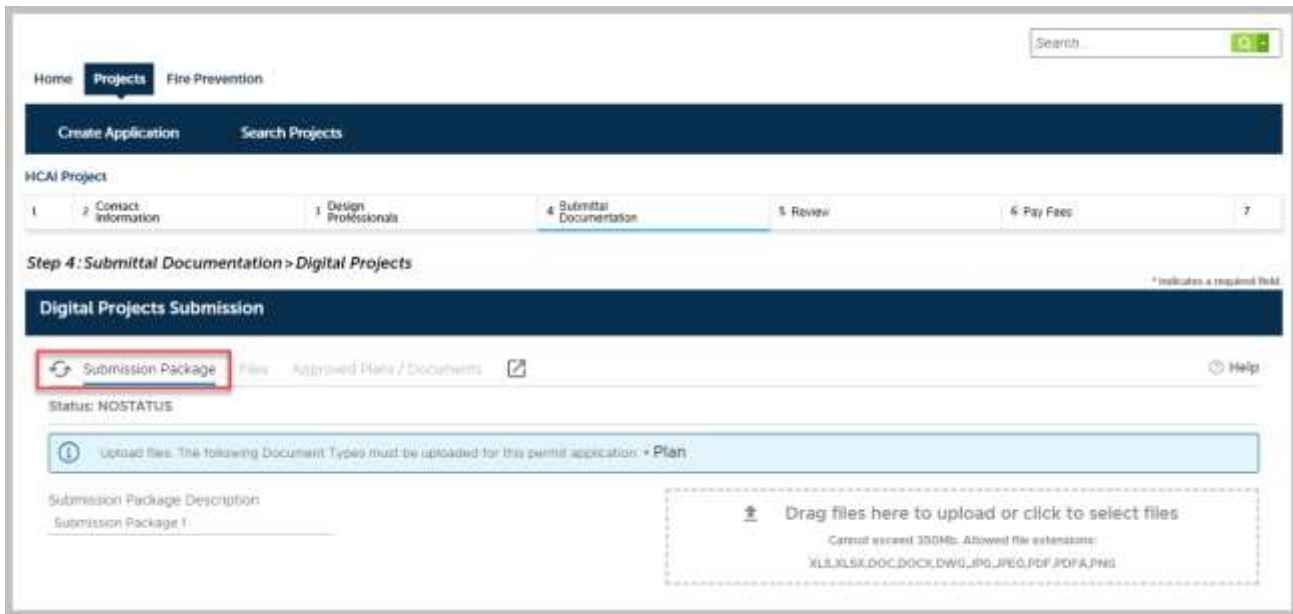
At the bottom of the screen, there are two buttons: a blue 'Continue Application >' button and an orange 'Save and resume later' button.

Once all professionals have been added, click the "Continue Application" button to proceed to the next screen.

## 2.4 STEP 4: Submittal Documentation > Digital Projects

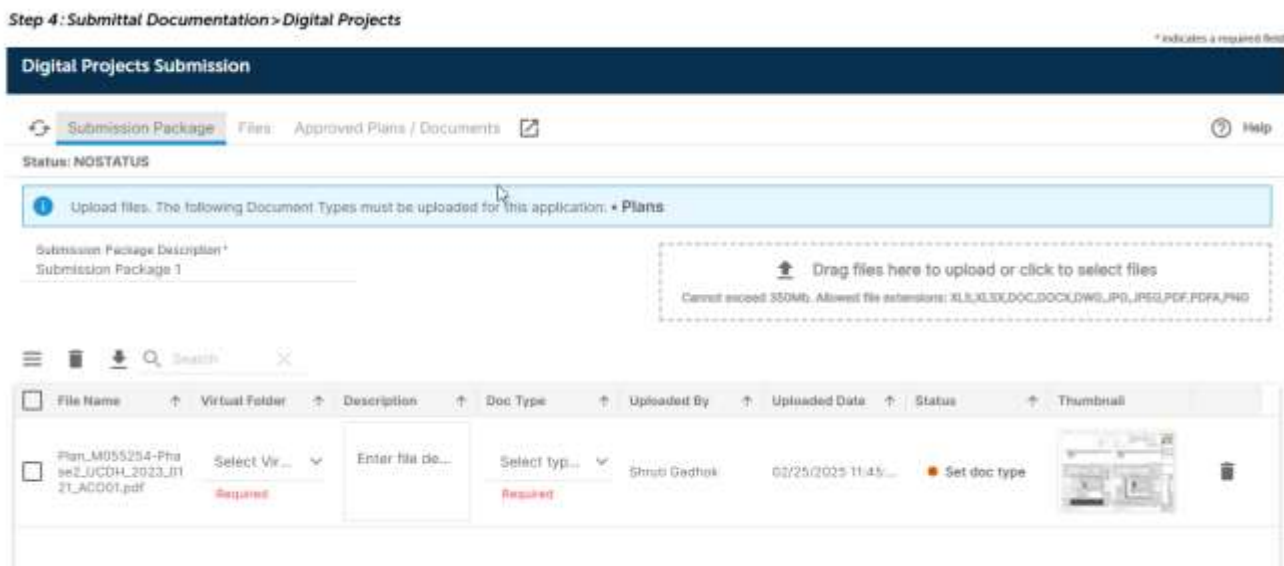
### 2.4.1 Submission Package

For each type of attachment, drag and drop the file into the lower-left corner of the **“Drag files here to upload or click to select files”** section.

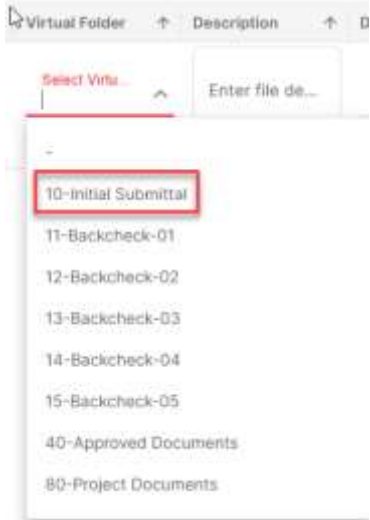


**Note:** For UCDH new applications, uploading **“PLANS”** to your application is mandatory.

The following screen will appear once you drag and drop the required document (s “Plans”) in the area.



## Virtual Folder:



The screenshot shows a form with two main sections. The top section is labeled "Virtual Folder" and contains a dropdown menu with the text "Select Virta..." and a text input field labeled "Enter file de...". The dropdown menu is open, showing a list of options: "10-Initial Submittal", "11-Backcheck-01", "12-Backcheck-02", "13-Backcheck-03", "14-Backcheck-04", "15-Backcheck-05", "40-Approved Documents", and "80-Project Documents". The option "10-Initial Submittal" is highlighted with a red rectangular box.

Select the appropriate “*Virtual Folder*” and “*Doc Type*” from the dropdown lists and enter a description of each attachment in the text field “*Description*”.

For additional information on document types, see **Appendix A - Field Description** and **Appendix B – Attachment by Record Type**.

**Doc Type:**

Doc Type	Uploaded By	Up
Select type *	Shruti Gadhok	02,
Calculations		
Certificate of Beneficial Occupancy		
Current Workers Compensation Certificate		
Inspections		
Letters		
Manufacturer Cut Sheets		
Narrative		
Other Support Documents		
Permit Draft		
Permit Signed		
<b>Plans</b>		
Preliminary Construction Schedule		
Reference Documents		
Responses		
Specifications		
Supplementary Documents		
TIC		

The following screen will appear once your document is uploaded and the required fields have been filled out.

The screenshot shows the 'Digital Projects Submission' page. At the top, there are navigation tabs for 'Home', 'Projects', and 'Fire Prevention'. Below this is a dark blue header with three buttons: 'Create Application', 'Search Projects', and 'Schedule an Inspection'. A progress bar indicates the current step is '4 Submittal Documentation', with other steps being '1 Contact Information', '2 Design Professionals', '3 Review', '5 Pay Fees', and '7'. The main heading is 'Digital Projects Submission'. Below the heading, there are tabs for 'Submission Package', 'Files', and 'Approved Plans / Documents'. The status is 'NOSTATUS'. A message box states 'Package is ready to submit, or upload additional files'. There is a 'Submission Package Description' field with the text 'Submission Package T'. A dashed box contains the instruction 'Drag files here to upload or click to select files' and lists allowed file extensions: 'Cannot exceed 350MB. Allowed file extensions: XLS,XLSX,DOC,DOCX,DWG,JPG,JPEG,PDF,PDFA,PNG'. Below this is a table of uploaded files:

File Name	Virtual Folder	Description	Doc Type	Uploaded By	Uploaded Date	Status	Thumbnail
<input type="checkbox"/> Plan_M059254-Phase2_UCDH_2023_0121_ACD01.pdf	10-Initial S...	Enter file de...	Plans	Shruti Gadhol	03/25/2023 11:45...	<span style="border: 1px solid red; padding: 2px;">Ready to Submit</span>	

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

## 2.5 STEP 5: Review

This section enables you to validate your application before you submit it. The **“EDIT”** buttons are located in each section.

### 2.5.1 EDIT BUTTONS

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

**Step 5: Review**

Save and resume later Continue Application >

Please review all information below. Click the "Edit" buttons to make changes to sections or "Continue Application" to move on.

**Record Type**

UCDH Building

**Enter Type of Project**

Select Project Type  
Project Type: Decision and/or Main work Edit

**Enter Project Information**

PROJECT IDENTIFICTION	
UCDH/FDC Project Number	000
UCDH/FDC Project Name	UCDH TEST
Emergency Project	No
Building Name	000 - Surgery and Emergency Services Pavilion
Type of Construction	Type 2B - Non-Combustible Non-rated Structural Elements

**Project Occupancy**

Occupancy Group	
A-1	No
A-2	No
A-3	No
B	No
B-1	No
B-2	No
B-3	Yes
B-4	No
B-5	No
I-1	No
I-2	No
I-3	No
I-4	No
S	No
S-1	No
S-2	No
S-3	No
S-4	No
S-5	No
S-6	No
S-7	No
S-8	No
S-9	No
S-10	No
S-11	No
S-12	No
S-13	No
S-14	No
S-15	No
S-16	No
S-17	No
S-18	No
S-19	No
S-20	No
U	No
Not Applicable	No

**Project Delivery Plan**

PROJECT DELIVERY PLAN	
Construction Delivery Method	Design/Built
Construction Sequencing	Single package
Submission Milestone	12-Milestone (S1-100%)

**Applicant**

David Griffin  
UC Davis  
Mobile Phone (530) 244-0088  
Contact E-mail: dgriffin@ucdavis.edu

## 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.

The screenshot shows a web application interface for a UCDH Project Manager. The user is Sabrina Preciado. The form includes sections for 'Consulting Construction Manager' and 'Licensed Professional List'. The 'Attachment' section shows a file named '19217282\_128 Precast CD Drawings.pdf' with a size of 560.81 KB, uploaded on 01/03/2025. Below the attachment table is a certification text: '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.' There is an unchecked checkbox labeled 'By checking this box, I agree to the above certification.' and a 'Date' field. A red arrow points to the checkbox. At the bottom, there are buttons for 'Save and resume later' and 'Continue Application'.

The current date will be entered and displayed once you check the Terms and Conditions box.

This screenshot is identical to the previous one, but the checkbox 'By checking this box, I agree to the above certification.' is now checked. The 'Date' field now displays '01/03/2025', which is the current date. The red arrow is no longer present.

## 2.6 STEP 6: Record Issuance

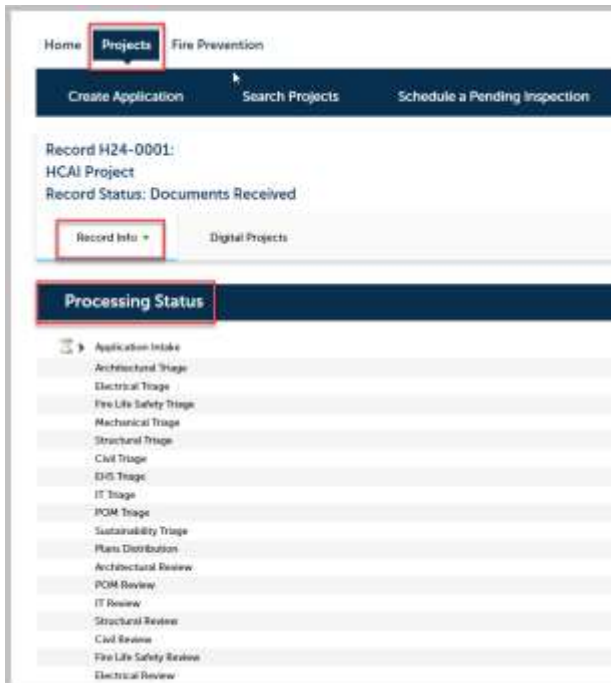
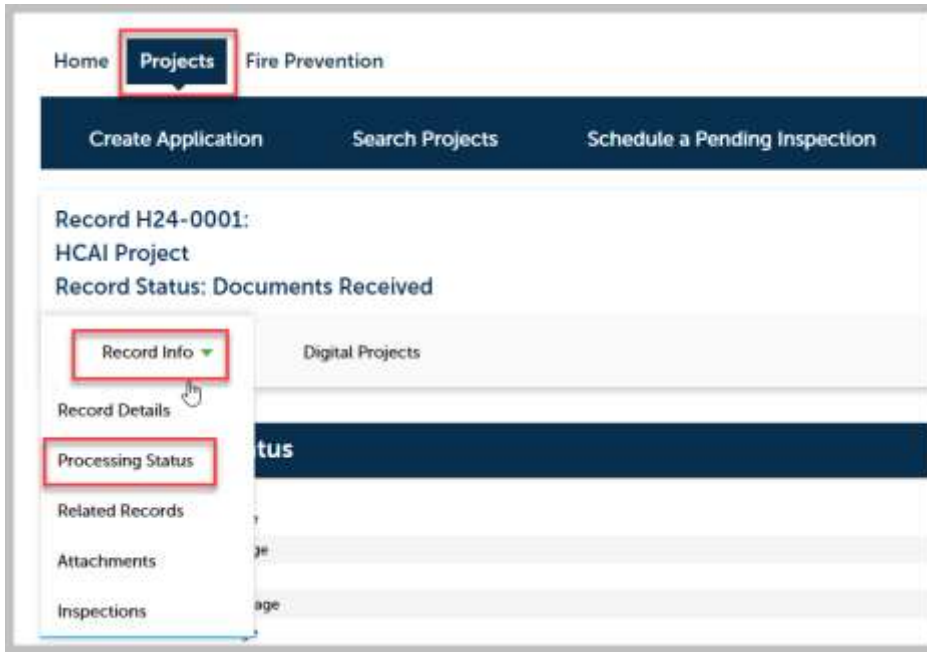
The eServices Portal displays a project submission confirmation on this final screen, including the project record number. You can also view detailed information about the project by clicking on the “View Record Details” button. Email confirmation is automatically sent to your application's contact user and the UCDH project manager.

The screenshot displays the eServices Portal interface. At the top right, there is a search bar with the text "Search..." and a green search icon. Below this, a navigation bar includes "Home", "Projects" (which is highlighted), and "Fire Prevention". A dark blue bar contains three main actions: "Create Application", "Search Projects", and "Schedule an Inspection". The main content area is titled "UCDH Building" and features a progress indicator with five steps: 1, 2, 3, 4, and 5. Step 5, labeled "Review", is the current step, and a red box highlights the "Record Issuance" button next to it. Below the progress bar, a green banner with a checkmark icon states: "Your application has been successfully submitted and is now in the eServices Portal project tracking system." A red box highlights a message box that says: "Thank you for using our online services. Your Record Number is B25-0190." Below this, a line of text reads: "You will need this record number to check the status of your application." At the bottom, a red box highlights a button labeled "View Record Details" with a small arrow icon, and a line of text below it says: "Click this button to view details of your application."

**!!!! Congratulations! You have successfully submitted a New Project for the UCDH Building!!!!**

## 2.7 Processing Status

To find the status of your application, you can go to **“Projects”** → **“Record Info”** → **“Processing Status”**. The screen below displays the workflow an application will go through.



**Appendix A: Field Description**

No.	Field Name	Field Description
1.	Building Name	Building Name and Address from the dropdown list
2.	UCDH Project Number	This information must match the UCDH account
3.	UCDH Project Name	This information must match the UCDH account
4.	Emergency Project	If the project does include emergency work, select <b>“Yes”</b>
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	Estimated cost of construction
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). This information is automatically populated.
15.	OTC Requested	If an Over-the-Counter review is requested, you must contact the UCDH Building Department to schedule a review of all documents. <a href="mailto:HS-BuildingDeptPlanReview@ucdavis.edu">HS-BuildingDeptPlanReview@ucdavis.edu</a>
16.	Project Occupancy	Select the appropriate occupancy type(s) for the project. Refer to the plans cover sheet for this information if unknown.
17.	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

**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 pertinent 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 or any Licensed Professional associated with that project. However, attachments cannot be deleted by Public Users once they are uploaded – even if they are erroneous. Attachments can only be deleted by UCDH intake staff. ***A description of the most common attachments and the records that they can be associated with are listed in the table below:***

Attachment Name	Record Type	Description
<b>Attachments by Record Type</b>		
Plan	UCDH Building UCDH Post Approval Document (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	UCDH Building UCDH Post Approval Document	Structural calculations, hydraulic calculations, etc., are necessary to support the design criteria and parameters of the plans.
Specifications	UCDH Building UCDH Post Approval Document	The Contract Documents contain the written requirements for materials, equipment, systems, standards, and workmanship for the work and performance of related services.
Job Card	UCDH Building UCDH Post Approval Document	The Job Card identifies all materials and tests to be performed on the project, all special inspections on the project, and the firm(s) and/or individual(s) to perform the required tests and assessments. The Job Card must also identify each Licensed Professional who must verify that the work complies with the approved construction documents.
Workers Compensation Insurance Certificate	UCDH Application for Building Permit	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	UCDH Building UCDH Post Approval Document	All other classified documents may be uploaded, including soil reports, product data sheets, reference drawings, etc.
Other	UCDH Building UCDH Post Approval Document	Miscellaneous classification of attachments.