



**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:

Date	Version #	Description of Change	Author
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

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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
- 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
Application for New Project			
1.	STEP 1	Project Type and Info	Record the Project Name, Number, Scope, Project Occupancy, and other required project details specific to the project.
2.	STEP 2	Contact Information	Add new Contact(s) specific to the application: <ul style="list-style-type: none"> • Applicant (PM or CM) • UCDH Project Manager • Consulting Construction Manager
3.	STEP 3	Design Professionals	Add a New Licensed Professional(s) and their Contact(s) information specific to the application.
4.	STEP 4	Submittal Documentation	Upload Plans, Specifications, Calculations, or any other document relevant to your project in PDF format only.
5.	STEP 5	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.	STEP 6	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 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 <i>the "Sign In"</i> button	The user is logged into their account
3.	Click on the "Projects" tab and then click on "Create Application."	The online Application screen should be displayed
4.	Select a value for the drop-down field "Project Type."	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	Step 1: Project Type and Info > Project Information 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. Note: 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 " Continue Application " button	Step 1: Project Type and Info > Project Occupancy screen is displayed
8.	Pick a value for " Project Occupancy " 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 " Continue Application " button	Step 1: Project Type and Info > Project Delivery Plan screen is displayed
10.	Enter the value for the following fields on the " Project Delivery Plan " screen: 1. Construction Delivery Method: (*Mandatory field) 2. Construction Sequencing:	Pick any value listed below for the " Construction Delivery Method. " 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 " Construction Sequencing " field	Enter the value from the drop-down field " Construction Sequencing. " 1. Incremental package 2. Single package

12.	Click on the "Continue Application" button	Step 3: Contact Information > Applicant screen is displayed
13.	Click on the "Add New" Button to add a new contact or "Select from Account" to pick the existing contact. "Continue Application" takes you to the next screen. "Save and resume later" saves your application and all the data you have entered.	
14.	Click on the "Add New" Button to add a new contact	The "Contact Information" 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 "Continue" button.	Step 3: Contact Information > Applicant screen is displayed with the contact information
17.	Click on the "Continue Application" button	Step 3: Contact Information > UCDH Project Manager screen is displayed
18.	Click on the "Add New" Button to add a new contact or "Select from Account" to pick the existing contact.	
19.	Click on the "Add New" Button to add a new UCDH Project Manager	The "Contact Information" 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 "Contact Addresses" screen.	
22.	Click on "Add Additional Contact Address"	The "Contact Address Information" dialog box is displayed

23.	<p>Enter the following fields under Contact Address Information:</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) - Defaults to the United States 	
24.	Click on the "Continue" button	Step 3: Contact Information > UCDH Project Manager screen is displayed
25.	Click on the "Continue Application" button	Step 3: Contact Information > CM screen is displayed
26.	<p>NOTE: 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	Step 4: Design Professionals > Licensed Professionals screen is displayed
28.	Click on the "Add New" Button to add a new Licensed Professional	The " Licensed Professional Information " screen is displayed
29.	<p>Enter the information for the Licensed Professional contact:</p> <ol style="list-style-type: none"> 1. License Type: (*Mandatory field) 2. State License Number: (*Mandatory field) 3. First: (*Mandatory field) 5. Last: (*Mandatory field) 6. Name of Business: (*Mandatory field) 7. Work Phone: 8. Mobile Phone: (*Mandatory field) 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.	The " License Type " field has the following values: 1. Architect 2. Civil 3. Electrical 4. Geotechnical 5. Mechanical 6. Other 7. Structural	
31.	Click on the " Save and Close " button.	The added information is saved and displayed on the " Licensed Professional List " screen.
32.	Click on the " Continue Application " button	Step 5: Submittal Documentation > Digital Projects screen is displayed
33.	Upload files. The following Document Types must be uploaded for this application: Plans .	Upload files to the area " Drag files here to upload or click to select files " screen is displayed.
34.	Select the appropriate " Doc Type ". Note: This is a mandatory field.	
35.	Enter text in the " Description " 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 " Virtual Folders ." Note: 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 " Continue Application " button	Step 6: Review screen is displayed
39.	This screen lets you review the information that you've entered on your UCDH Building application.	
40.	Click on the " Edit " 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>Step 7: The Record Issuance 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 "BXX-XXXX" Application Format:<BYY>-<4-digit sequential number></p>
43.	You have successfully submitted your application for the UCDH Building Project.	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

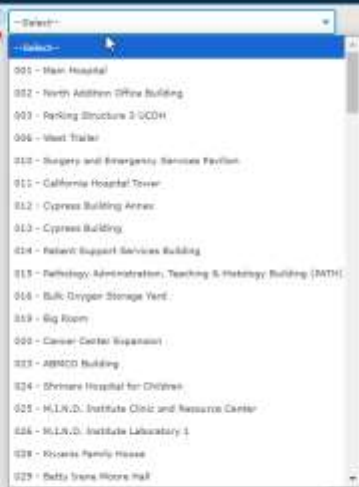
UCDH Building

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 labeled '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 to its right: 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:

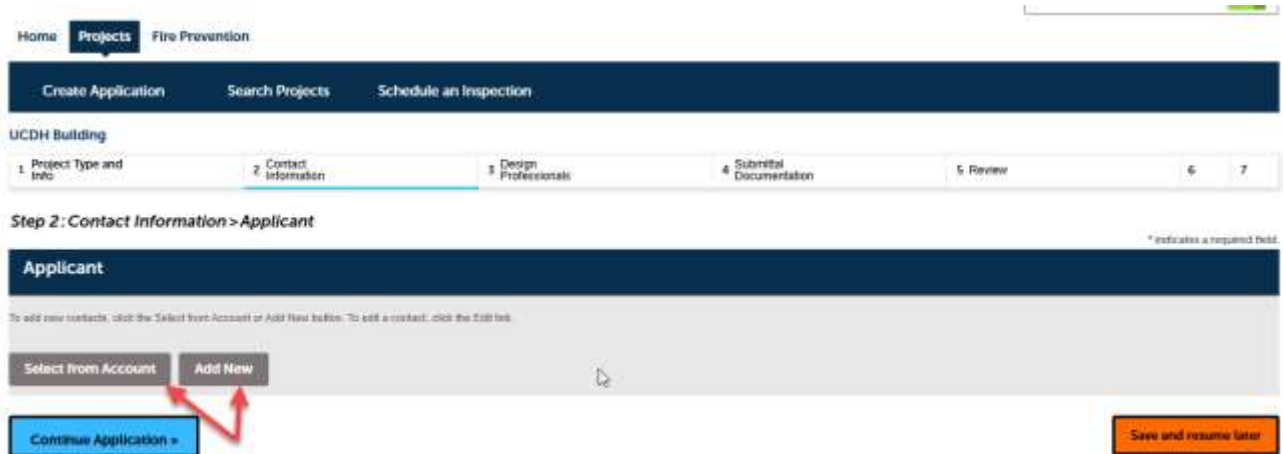
- Incremental package
- Single package

The screenshot shows the 'Project Delivery Plan' section of a web application. At the top, there are navigation tabs: 'Home', 'Projects', and 'Fire Prevention'. Below this is a dark blue header with buttons for 'Create Application', 'Search Projects', and 'Schedule an Inspection'. The main content area is titled 'UCDH Building' and features 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 1: Project Type and Info > Project Delivery Plan'. The form contains two dropdown menus: 'Construction Delivery Method' and 'Construction Sequencing'. Both dropdowns are open, showing a list of options. Red arrows point from the text above to these dropdowns. The 'Construction Delivery Method' dropdown lists: Design-Bid-Build, Design/Build, Developer Led (P3), JOC Job Order Contract, Progressive D/B, and Self Performed. The 'Construction Sequencing' dropdown lists: Incremental package and Single package. There are also buttons for 'Continue Application >' and 'Save and resume later'. A search bar is visible in the top right corner.

2.2 STEP 2: eServices Portal

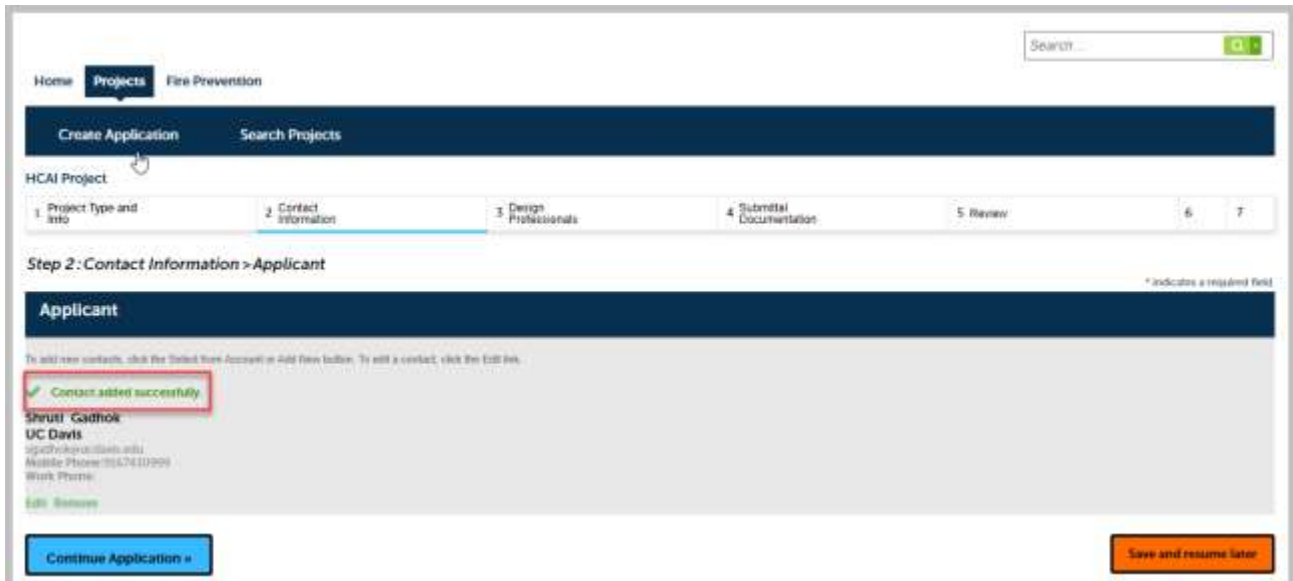
2.2.1 Contact Information > Applicant

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.

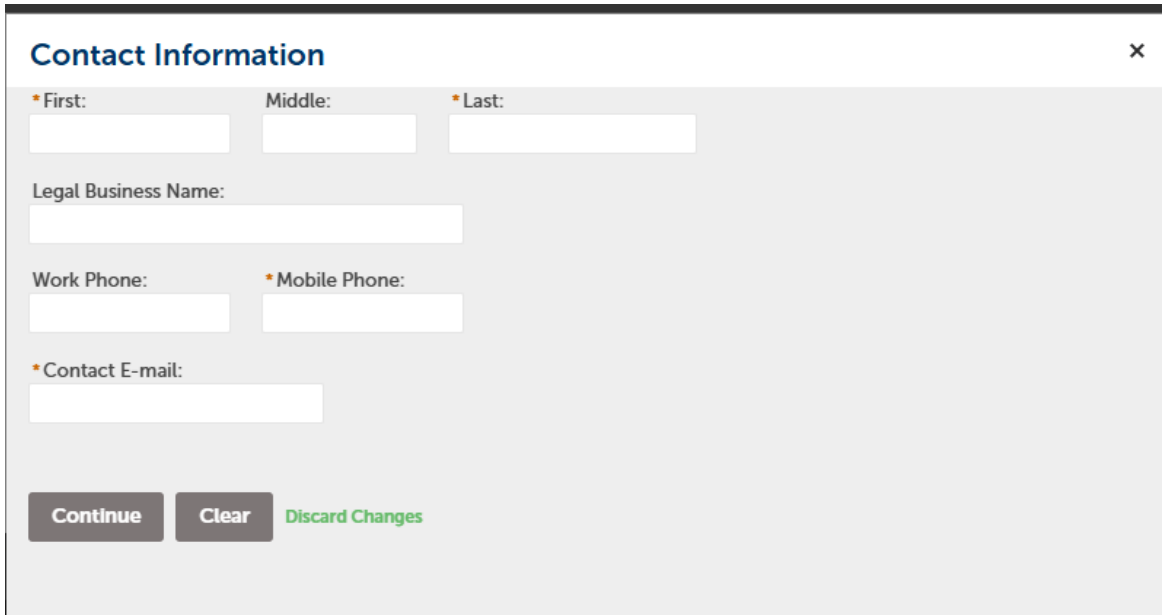


2.2.2 Adding/Selecting Contacts

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.

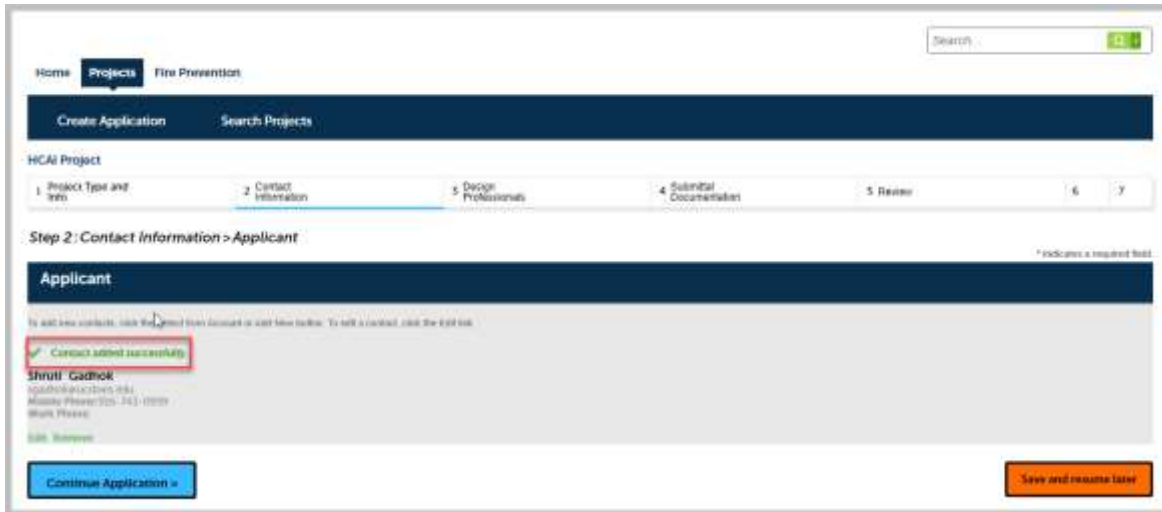


Clicking on the “Add New” button will display the “**Contact Information**” screen, where you can enter the required information for each contact on the Application.



The image shows a web form titled "Contact Information" with a close button (X) in the top right corner. The form contains several input fields: "First:" (required), "Middle:", and "Last:" (required), each with a text box. Below these is a "Legal Business Name:" text box. Further down are "Work Phone:" and "Mobile Phone:" (required) text boxes. At the bottom is a "Contact E-mail:" (required) text box. At the bottom of the form 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 image shows a web application interface. 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". A progress bar shows seven steps: 1. Project Type and Info, 2. Contact Information, 3. Design Professionals, 4. Submittal Documentation, 5. Review, 6, and 7. Step 2, "Contact Information", is currently active. Below the progress bar, the text "Step 2: Contact Information > Applicant" is displayed. A dark blue header reads "Applicant". Below this, a message states: "To add new contacts, click the Add New Contact or Add New Contact. To edit a contact, click the Edit link." A green checkmark icon and the text "Contact added successfully" are highlighted with a red box. Below this, the contact details for "Shruti Gadnok" are shown, including email (sgadnoka@ucdavis.edu), mobile phone (530-743-0200), and work phone. At the bottom left is a blue button labeled "Continue Application >" and at the bottom right is an orange button labeled "Save and resume later".

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 indicator 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 indicator, the current step is labeled 'Step 2: Contact Information > UCDH Project Manager'. A dark blue header bar contains the text 'UCDH Project Manager'. Below this, 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 red-bordered error message box contains the text: '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

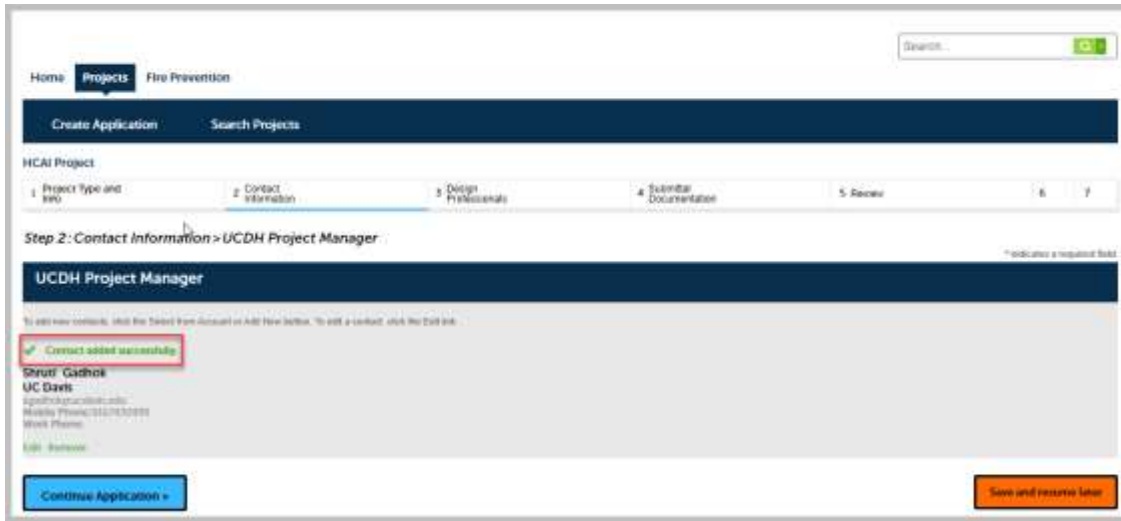
The “*Select from Account*” function is available for Contacts, and they must be added by clicking the *Select from Account* button to use the information in your Public User account. Click on the “*Continue*” button to save the selected contact.

The screenshot shows the UCDH Project Manager interface. At the top, there is a navigation bar with 'Home', 'Projects', and 'Fire Prevention'. Below this is a dark blue bar with 'Create Application', 'Search Projects', and 'Schedule an Inspection'. The main content area has a progress bar with steps 1 through 7. Step 2, 'Contact Information', is highlighted. Below the progress bar, there is a section titled 'UCDH Project Manager' with a sub-header 'UCDH Project Manager'. Underneath, there are three buttons: 'Select from Account', 'Add New', and 'Look Up'. A red arrow points from the 'Add New' button to the 'Continue Application' button. There is also a 'Save and resume later' button on the right.

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 'Contact Information' and a close button 'X'. The form contains several input fields: '* First:', 'Middle:', '* Last:', 'Legal Business Name:', 'Work Phone:', '* Mobile Phone:', and '* Contact E-mail:'. At the bottom, there are three buttons: 'Continue', 'Clear', and 'Discard Changes'.

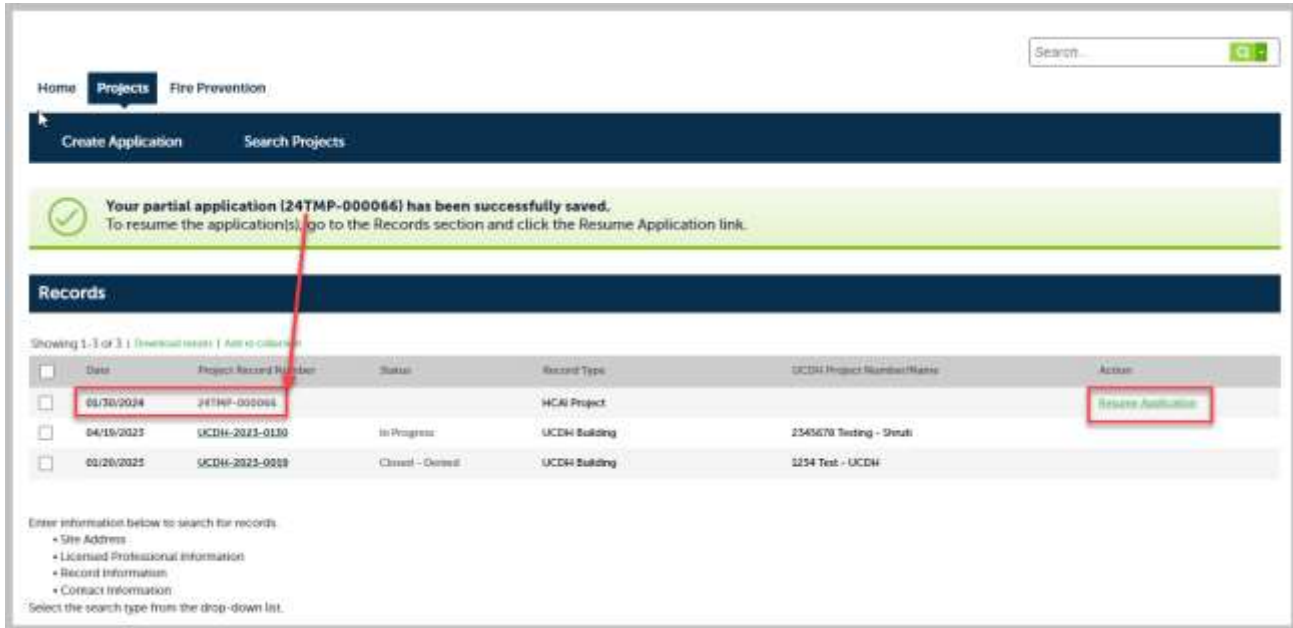
Click on “Continue Application” to proceed to the next screen.



2.2.5 Save and Resume Later Button

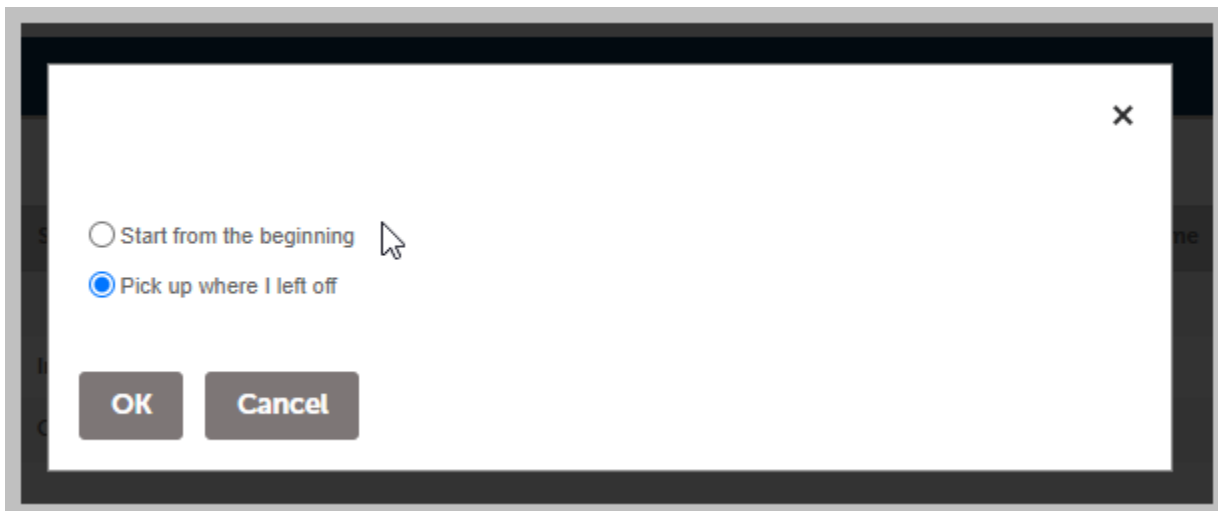
If you click the **“Save and resume later”** button, your application is saved, and you will be redirected to the Project List page. The eServices Portal will issue a temporary Project ID and display the application on the Project list.

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	0254 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

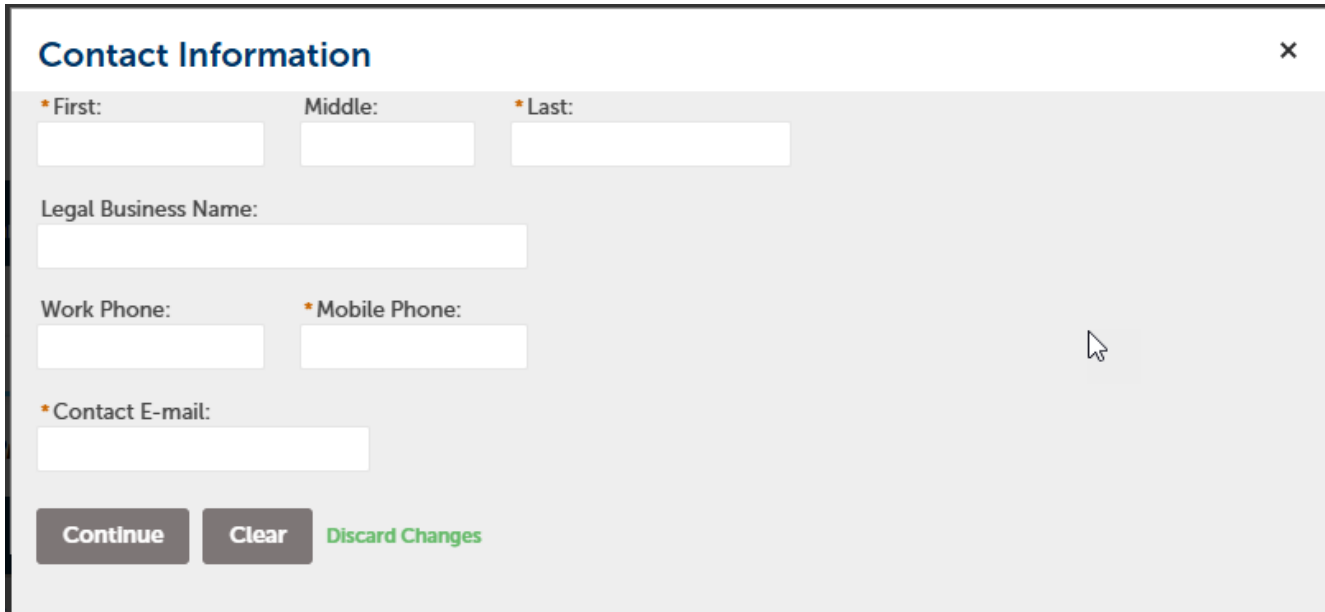
The **“Select from Account”** function is also available for the **“Consulting Construction Manager”** section. This is not a mandatory section to continue with the application workflow; however, if entering the information for “Consulting Construction Managers,” it should be added by clicking the “Select 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. It features a navigation menu at the top, a progress indicator for the current step (Contact Information), and a set of action buttons (Select from Account, Add New, Look Up) for managing contacts. A 'Continue Application' button is prominently displayed at the bottom left, and a 'Save and resume later' button is at the bottom right.

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

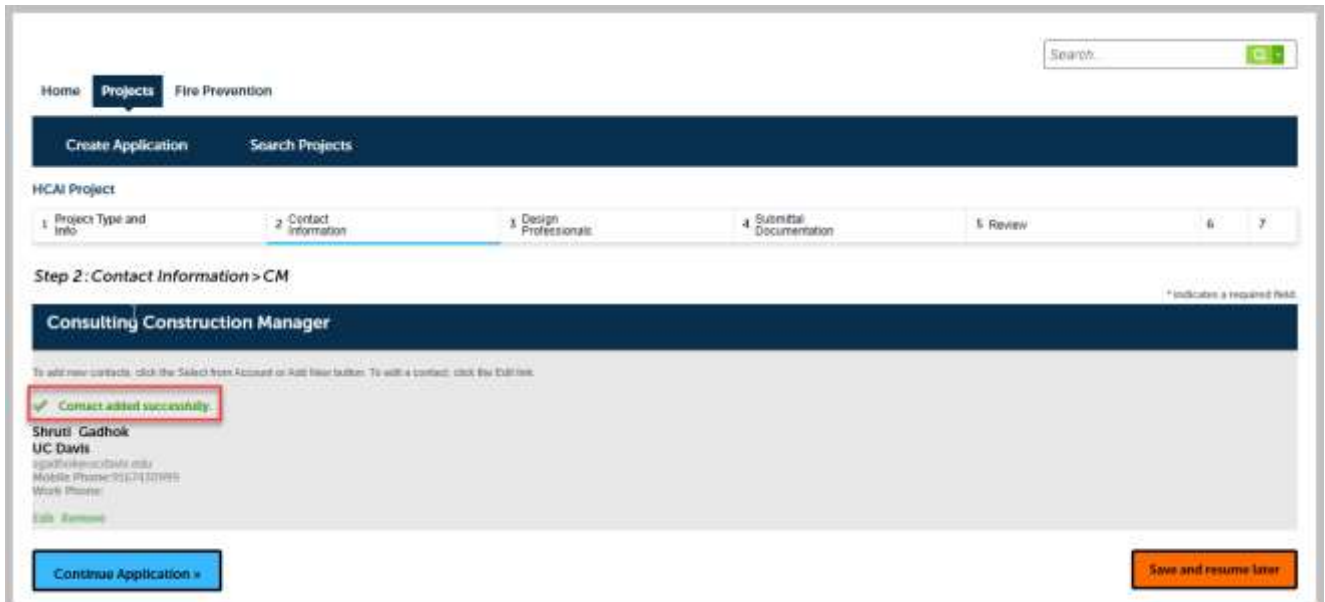
Clicking on the **“Add New”** button will display the **“Contact Information”** screen, where you can enter the required information for the Consulting Construction Manager.



The image shows a 'Contact Information' form 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 image shows a project navigation screen with a search bar at the top right. The navigation menu includes 'Home', 'Projects', and 'Fire Prevention'. Below the menu are buttons for 'Create Application' and 'Search Projects'. The main content area shows a progress bar for 'HCAI Project' with steps: 1 Project Type and Info, 2 Contact Information (highlighted), 3 Design Professionals, 4 Submittal Documentation, 5 Review, 6, and 7. Below the progress bar, it says 'Step 2: Contact Information > CM'. A dark blue header reads 'Consulting Construction 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 green checkmark icon is next to the text 'Contact added successfully.' Below this, 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'. The main content area is titled 'UCDH Building' and features 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. Step 3 is currently active. Below the progress bar, the text reads 'Step 3: Design Professionals > Licensed Professionals'. A dark blue header for this section is titled 'Licensed Professionals List'. Below this header, there is a red warning 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 a green success message: '✔ Licensed Professional added successfully'. A table titled 'Showing 1-3 of 3' lists three professionals. At the bottom of the screen, there are two buttons: a blue 'Continue Application >' button and an orange 'Save and resume later' button.

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

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 repeat these steps until all Licensed Professionals for this project have been added to the application. When the list is complete, click "Continue Application".

Add New

✔ Licensed Professional added successfully

Showing 1-3 of 3

State License Number	License Type	Contact Name	Name of Business	Phone/Fax	Action
011121	Electrical		Apple, INC	987-549-5498	Edit Delete
021121	Civil		Manvel, INC	912-565-7989	Edit Delete
031121	Architect		Captain America, INC	916-786-6032	Edit Delete

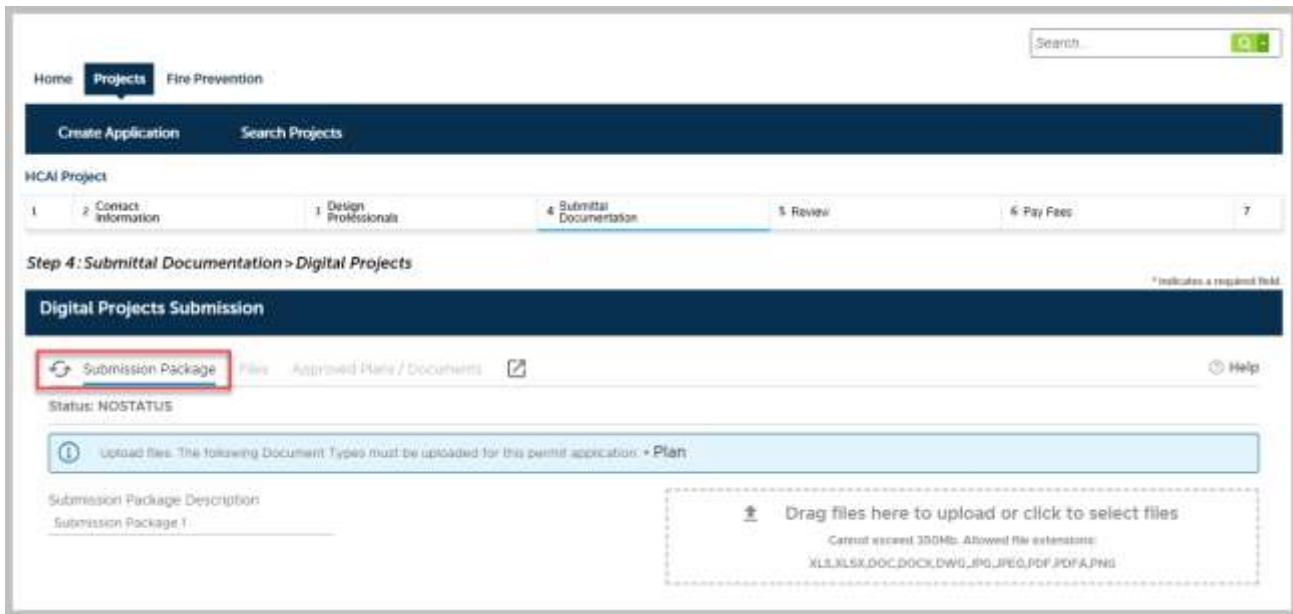
Continue Application > Save and resume later

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

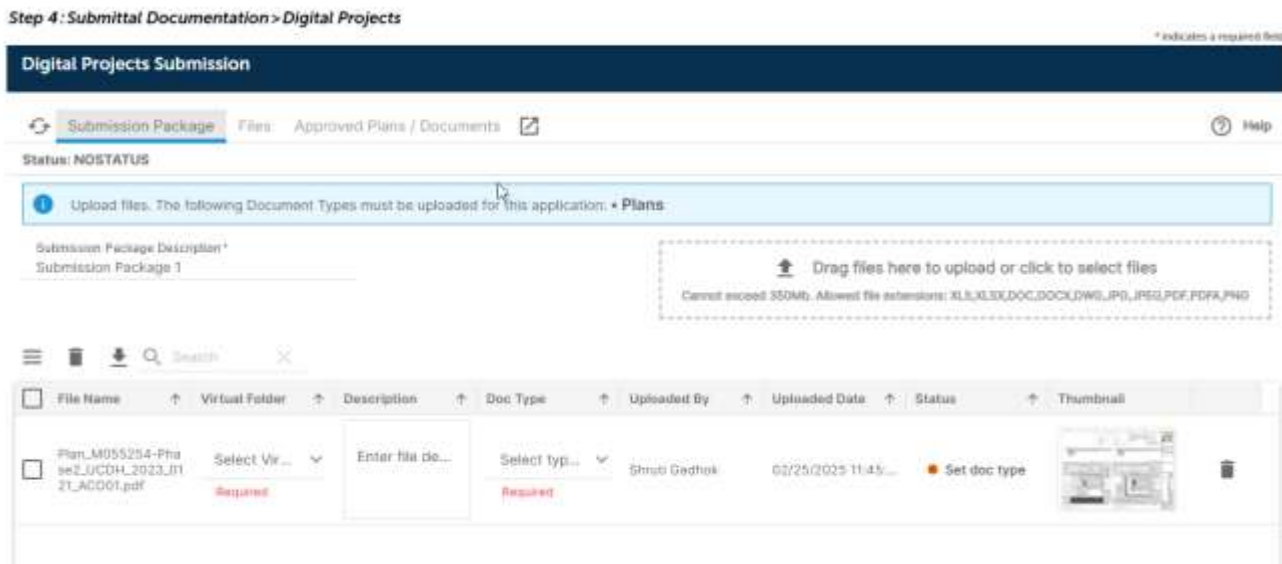
2.4.1 Submission Package

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:

Virtual Folder Description

Select Virta... Enter file de...

- 10-Initial Submittal
- 11-Backcheck-01
- 12-Backcheck-02
- 13-Backcheck-03
- 14-Backcheck-04
- 15-Backcheck-05
- 40-Approved Documents
- 80-Project Documents

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		
Plans		
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.

Home **Projects** Fire Prevention

Create Application Search Projects Schedule an Inspection

UCDH Building

1 Contact Information 2 Design Professionals 3 **4 Submittal Documentation** 5 Review 6 Pay Fees 7

Step 4: Submittal Documentation > Digital Projects * indicates a required field

Digital Projects Submission

Submission Package Files Approved Plans / Documents Help

Status: NOSTATUS

Package is ready to submit, or upload additional files

Submission Package Description*
Submission Package T

Drag files here to upload or click to select files
Cannot exceed 350MB. Allowed file extensions: XLS,XLSX,DOC,DOCX,DWG,JPG,JPEG,PDF,PDFX,PNG

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 Gadholik	03/25/2023 11:45...	Ready to Submit	

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 Edit

Project Type: Decision and/or Main work

Enter Project Information Edit

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 Edit

Occupancy Group	Yes/No
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-2	No
I-4	No
I	No
M	No
M-1	No
M-2	No
M-3	No
M-4	No
M-5	No
M-6	No
M-7	No
M-8	No
M-9	No
M-10	No
M-11	No
M-12	No
M-13	No
M-14	No
M-15	No
M-16	No
M-17	No
M-18	No
M-19	No
M-20	No
M-21	No
M-22	No
M-23	No
M-24	No
M-25	No
M-26	No
M-27	No
M-28	No
M-29	No
M-30	No
M-31	No
M-32	No
M-33	No
M-34	No
M-35	No
M-36	No
M-37	No
M-38	No
M-39	No
M-40	No
M-41	No
M-42	No
M-43	No
M-44	No
M-45	No
M-46	No
M-47	No
M-48	No
M-49	No
M-50	No
M-51	No
M-52	No
M-53	No
M-54	No
M-55	No
M-56	No
M-57	No
M-58	No
M-59	No
M-60	No
M-61	No
M-62	No
M-63	No
M-64	No
M-65	No
M-66	No
M-67	No
M-68	No
M-69	No
M-70	No
M-71	No
M-72	No
M-73	No
M-74	No
M-75	No
M-76	No
M-77	No
M-78	No
M-79	No
M-80	No
M-81	No
M-82	No
M-83	No
M-84	No
M-85	No
M-86	No
M-87	No
M-88	No
M-89	No
M-90	No
M-91	No
M-92	No
M-93	No
M-94	No
M-95	No
M-96	No
M-97	No
M-98	No
M-99	No
M-100	No

Will be Applicable: No

Project Delivery Plan Edit

Project Delivery Plan

Construction Delivery Method: Design/Built

Construction Sequencing: Single package

Submission Worksheet: UJ Alternative (S1) (S10)

Applicant Edit

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 the 'Attachment' section of the application form. It includes a table with one row of data and a certification checkbox. A red arrow points to the checkbox.

Name	Type	Size	Created/Updated	Action
19121281_188 Percent CD Drawings.pdf	Plans	560.81 KB	01/03/2025	Actions

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

Date: _____

[Save and resume later](#) [Continue Application](#)

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

The screenshot shows the 'Attachment' section of the application form after the checkbox has been checked. The date field is now populated with the current date.

Name	Type	Size	Created/Updated	Action
19121281_188 Percent CD Drawings.pdf	Plans	560.81 KB	01/03/2025	Actions

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

Date: 01/03/2025

[Save and resume later](#) [Continue Application](#)

2.6 STEP 6: Record Issuance

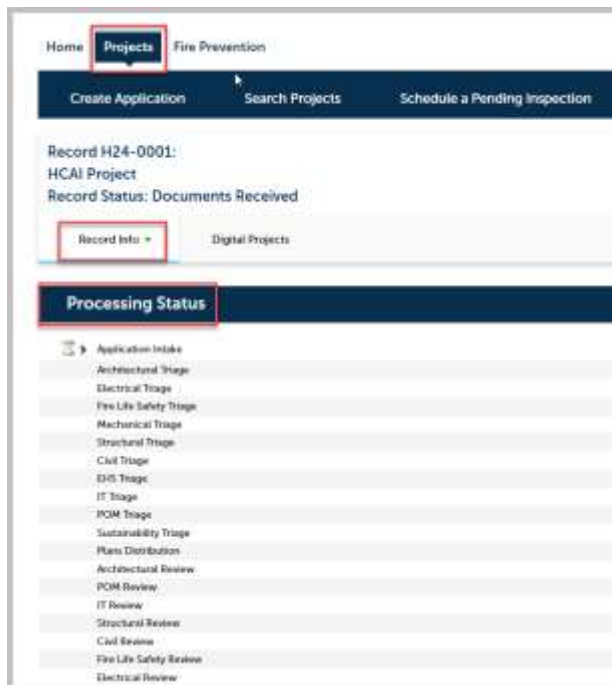
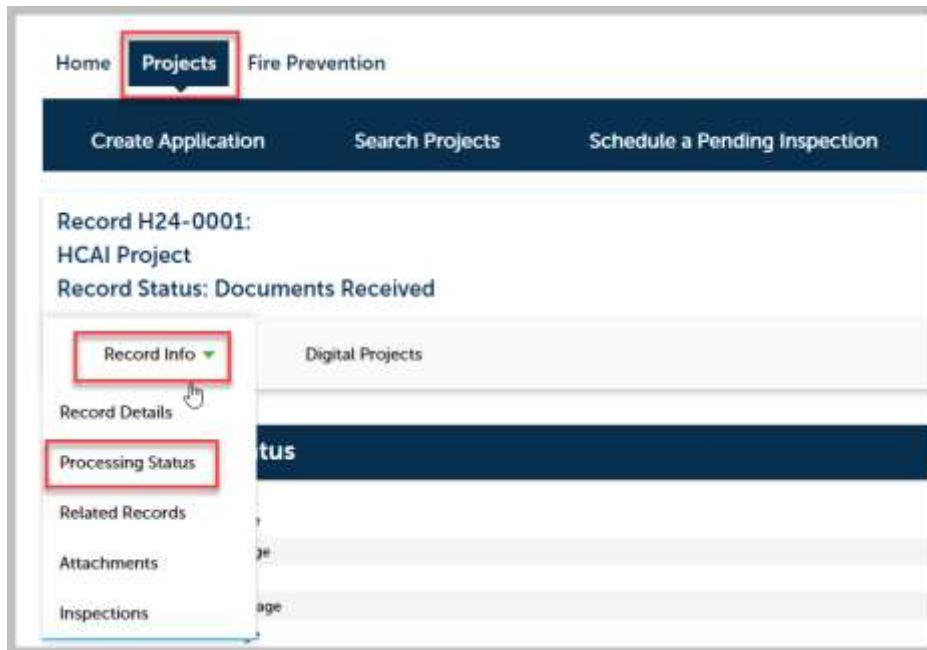
The eServices Portal displays a project submission confirmation on this final screen, including the project record number. You can also view detailed information about the project by clicking on the “View Record Details” button. Email confirmation is automatically sent to your application's contact user 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 contains "Home", "Projects" (highlighted), and "Fire Prevention". A dark blue bar below the navigation contains the options "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 indicator, a green banner with a checkmark icon contains the text: "Your application has been successfully submitted and is now in the eServices Portal project tracking system." Below this banner, a red box highlights a message: "Thank you for using our online services. Your Record Number is B25-0190." Underneath, it states: "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 right-pointing arrow, and the text "Click this button to view details of your application." is visible to its right.

!!!! 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 “Yes”
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. HS-BuildingDeptPlanReview@ucdavis.edu
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
Attachments by Record Type		
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.