## USER REGISTRATION AND ACCOUNT MANAGEMENT

1. **What is eCA?**

   The Electronic Services Portal Client Access program, or eCA, is an online system that allows the facility users and licensed professionals to submit the OSHPD construction project applications. eCA enables users to register for accounts, manage their user accounts, create project applications, submit project applications, pay application fees, and track the application.

   eCA is accessible to all public users via the internet at https://eserv.oshpd.ca.gov/CitizenAccess. To perform the core functions, users may access the system anonymously. For expanded functions, users must apply and obtain a user account. Once a project application is submitted to OSHPD, the information regarding construction project is available to the public via eCA.

2. **Do I need a public user account to search for and view project information in the Electronic Services Portal?**

   No. The value of being a registered user is only the ability to submit applications online and pay fees. Anonymous users have the same <u>search</u> and projects <u>view</u> capabilities as registered users.

3. **How do I register for a public user account?**

   To submit project applications in eCA, users must register for an eCA online account. After OSHPD activates the registered user account, the user can utilize the full functionalities of the system. User registration is the first step in performing all tasks in eCA. For detailed instructions on creating a registered user account, see **Section 3.1** of the eCA Public User Guide at the following location:
   http://www.oshpd.ca.gov/FDD/eServices/OSHPD_eCA_User_Guide.pdf

4.  **What are the limitations for User IDs?**

    User IDs must be 4 -32 characters in length and may contain letters, numbers and these special characters: @ _ - .

5.  **What are the requirements for passwords?**

    Passwords must be 8 – 21 characters; passwords are case-sensitive.

6.  **After I register for an account, how long does it take for my account to be activated?**

    After completing the online registration form, eCA sends a notification email to the registered user and to the eCA Access Manager. The eCA Access Manager must activate the account before the user can log into eCA and start submitting project applications.  The eCA Access Manager activates user accounts during normal business hours (M-F 8:00 a.m. – 5:00 p.m.) and usually on the same day the account is created.  eCA sends the user an email notifying them that the registered account is now activated and ready to be used. If it has been more than 2 business days and your account has not been activated, email eCA.AccessManager@oshpd.ca.gov or call (916) 440-8484.

7.  **I forgot my User ID or password – what should I do?**

    If you forget your User ID, you can use the email address you entered when creating your account as your User ID.  After logging in successfully, navigate to the account management page where your User ID will show.

    If you forget your password, see the detailed instructions for resetting your password in **Section 3.2** of the eCA Public User Guide: http://www.oshpd.ca.gov/FDD/eServices/OSHPD_eCA_User_Guide.pdf

8.  **How do I add my professional license to my account?**

    A public user can associate their validated professional license to their eCA account. Associating a valid professional license to an account gives the

user access to all projects that have the licensed professional listed on the application. OSHPD must approve this addition before projects are accessible to the public users in eCA.

To associate your professional license or Hospital Inspector certificate to your account, follow the detailed instructions in **Section 5.3** of the eCA Public User Guide:
http://www.oshpd.ca.gov/FDD/eServices/OSHPD_eCA_User_Guide.pdf

9.  **What is a "Facility PIN"?  Do I need a PIN?**

State law identifies the Hospital Governing Board or Authority as the entity responsible for submitting construction documents to OSHPD for review and approval.  However, construction documents are prepared by licensed design professionals and delivered to OSHPD on behalf of the Hospital Governing Board or Authority.

The Facility Personal Identification Number (PIN) is a security measure that controls the submission of applications to ensure the agent authorized by the Hospital Governing Board or Authority is the only person who can approve the application and obligate the facility to pay all associated fees.

A Facility PIN is required in order to complete any application submitted via eCA.  The Facility PIN is issued to the Legal Owner Designee identified by the Hospital Governing Board or Authority, and he or she may share the PIN with anyone they choose.  If the Legal Owner Designee shares the Facility PIN, that person is an Authorized Agent of the Facility.

10. **How do I obtain a Facility PIN?**

In order to use eCA for online application submission, the Hospital Governing Board or Authority must complete an OSH-FD-310 *Electronic Services Portal Citizen Access (eCA) Letter of Authorization* to identify the Legal Owner Designee for each of the facilities using eCA.  This letter must be submitted to the eCA Access Manager at the address shown in the instructions or submitted electronically to eCA.AccessManager@oshpd.ca.gov.  When the letter is received by OSHPD,

the Facility PIN will be issued to the Legal Owner Designee via email.

11.  **How does the Legal Owner Designee share their authority?**

To share authority with an authorized agent, the Legal Owner Designee must delegate their authority to another person.  Any public user can delegate his or her eCA data and operations to another public user. The delegate can then create or submit project applications on behalf of the delegator to the Legal Owner Designee and/or to OSHPD.

Delegation is managed in the public user's Account Management section. The intended delegate receives an email notification from eCA when he or she is added as a delegate by another public user. The intended delegate must login to their public user account and accept the delegation in the Account Management section before the delegation can take effect.

12.  **Can the Facility PIN be changed?**

Yes.  The Legal Owner Designee may request a Facility PIN be changed by emailing the request to the eCA Access Manager at eCA.AccessManager@oshpd.ca.gov or calling (916) 440-8484.

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**PROJECT SEARCHING AND RESULTS**

1.    **How do I limit the number of results when I search for projects?**

To obtain the best search results, limit the number of fields in the search. For instance, to search for a project, enter only the project number and leave the Facility and State License Number fields empty.  The search results will return all records with that project number, including AMCs, PADs and BPs – whether those records are open or closed.

Search results can be limited by filtering the search using the Project Type drop-down list.  Entering the project number and selecting 'Application for New Project' in the drop-down list will result in only the parent project record.  If the project is an Incremental project, select 'Incremental – New

Building – Master' from the drop-down list.

If your search returns 'No Results', try removing the 'Start Date' filter and searching again.

2.  **What are collections? How do I use them?**

Collections are a convenient way to access the projects you frequently use. Think of it as a "quick list".  You may add the projects you work on frequently to your collections and remove them at any time.  Projects can be added to collections from the projects list as well as the search results. For more information on using Collections, follow the detailed instructions in **Section 4.1.1** of the eCA Public User Guide: http://www.oshpd.ca.gov/FDD/eServices/OSHPD_eCA_User_Guide.pdf

3.  **How do I find the OSHPD staff assigned to my facility?**

The OSHPD staff assigned to a facility are found in the Facility Information section.  To determine which staff are assigned to a facility, you must know the OSHPD Facility ID number; Facility ID Numbers can be found on the ALIRTS page in the "Perm ID" field.  The web page for ALIRTS Advanced Search is: https://www.alirts.oshpd.ca.gov/AdvSearch.aspx.  If you know the Facility ID number,
   a.  Click "Lookup Facility Information" on the eCA Home Page,
   b.  Enter the 5-digit Facility ID number
   c.  Click on the "Look Up" button.

ASSOCIATION & DELEGATION

1.  **Why can't I see my projects?**

Any anonymous user can 'see' any OSHPD project by searching for the project number using the Search Projects screen.  However, registered users that are properly associated with their facilities or licenses have the added benefits of creating and submitting project applications, paying application fees, access to invoices and receipts, checking on the status of

pending activities, and more.

If you are a registered user and cannot act on your projects, one of the following requirements has not been properly fulfilled on your account:

    a.  Your account has not been properly associated to your facility(s),
    b.  The person associated to the facility (Legal Owner Designee) has not added your account as a delegate to his/her account,
    c.  You have not added your professional license to your account,
    d.  You have added your professional license to your account but OSHPD has not approved the association, or
    e.  The professional on whose behalf you are acting has not added your account as a delegate to his/her account.

2.  **When do I need delegate rights? How do I delegate? How do I remove delegates?**

If you are the Legal Owner Designee and your account has been associated to one or more facilities, you may enable other members of your team, such as project managers, construction managers, administrative assistants, etc., to act on projects at your facility(s) by adding their user account as delegates to your account.  Until you delegate other users, <u>only you</u> will be able to submit completed applications to OSHPD, pay application fees, have access to invoices and receipts, check on the status of in-progress applications, etc.

If you are a Licensed Professional (Architect, Engineer, Contractor, Inspector), you may enable other members of your team, such as alternates, administrative assistants, etc., to act on your behalf by adding their user account as delegates to your account.  This will allow you and your delegates to create project applications for new projects, alternate methods of compliance and post-approval documents online and to submit them to the Facility Representative for approval and submission to OSHPD.

To delegate another user, the user must have already created a public user account and you must know the email address they entered when they created their account.  For detailed instructions on adding or removing

delegates to or from your account, see **Section 5.4** of the eCA Public User Guide:
http://www.oshpd.ca.gov/FDD/eServices/OSHPD_eCA_User_Guide.pdf

3. **Why can't I see the 'Create Amendment' button on the View Project screen?**

   If you are a registered user and do not see the Amendment option under your Actions category or you do not see the "Create Amendment" button on the View Project screen, check for one of the following problems:

   a. Make sure you are viewing the <u>parent</u> project record (the Application for New Project or Increment Master Record).
   b. If you are the Legal Owner Designee, confirm that your account has been properly associated to your facility(s).
   c. Confirm that the Legal Owner Designee has added your account as a delegate to his/her account and that you have accepted the invitation.
   d. Confirm you have added your professional license to your account and it has been approved by OSHPD.
   e. Confirm that the professional on whose behalf you are acting has added your account as a delegate to his/her account and that you have accepted the invitation.
   f. If you are a delegate, confirm the "Amend Records in Projects" box has been checked in your delegation invitation or delegation permissions.

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### CREATING APPLICATIONS/ADDING PROFESSIONALS & CONTACTS

1. **Do I still have to complete the paper application form(s) and send them to the OSHPD office?**

   **No.** eClient Access allows you to complete the application online and receive your project number instantaneously. The only piece of paper needed by OSHPD to accompany the construction documents is a copy of the Project Summary sheet.

2.    **How do I create a PAD or and AMC?**

In eCA, creating an Application for Post-Approval Document (PAD) or an Application for Alternate Method of Compliance (AMC) is referred to as creating an amendment to the project.  To create an amendment, you must be either the Legal Owner Designee or his/her delegate or you must be the Design Professional in Responsible Charge of the project or his/her delegate.

For detailed instructions on creating and submitting a PAD or AMC, see **Section 6.4** of the eCA Public User Guide:
http://www.oshpd.ca.gov/FDD/eServices/OSHPD_eCA_User_Guide.pdf

3.    **How do I search for professionals?  How do I add multiple professionals to a record?**

While creating an Application for New Project, all Architect(s) or Engineer(s) in responsible charge of the work and all Architect(s) and Engineer(s) with delegated responsibility for preparation of the construction documents must be listed on the application.  For detailed instructions on searching for licensed professionals as well as adding multiple professionals to the application, see **Section 6.3** of the eCA Public User Guide:
http://www.oshpd.ca.gov/FDD/eServices/OSHPD_eCA_User_Guide.pdf

4.    **What are the "Responsible Primary" and "Discipline Primary"?**

When creating an Application for New Project, the licensed professional in responsible charge of the work must have the "Responsible Primary (eCA)" radio button set to 'Yes'.  This identifies the Design Professional of Record who will be responsible for the administration of construction as described in Title 24, Part 1, Section 7-141, and will be the professional to which all project correspondence is addressed.

If the project includes alternate Architects, Engineers or Inspectors, the primary professional must have the "Discipline Primary" radio button set to 'Yes' and each of the alternate professionals set to 'No'.

5.  **I searched for a Licensed Professional and the Licensed Professional's information populated all the fields.  When I clicked 'Continue Application', I keep getting an error saying "This section is required. Please add at least one record".  Why can't I continue?**

    Prior to clicking the 'Continue Application' button, each Licensed Professional must be individually saved to the project record; after selecting the appropriate Professional, click "Save".  This will save the Professional to the project and allow you add additional Licensed Professionals.

6.  **I searched for a Licensed Professional and received results "No Records Found".  I know the license number is valid.  How do I proceed?**

    When searching for a Licensed Professional, eCA searches the OSHPD database.  If no search results are found, the Licensed Professional is not currently in the database.  To have a Licensed Professional added to the OSHPD database, click the email link in the instructions at the top of the page or email eserv@oshpd.ca.gov; *include in the email message the information required* to complete each field.

7.  **The Licensed Professional or Contact information (name of business, address, phone numbers, etc.) is wrong or has changed.  How do I get this corrected?**

    To have Licensed Professional or Contact information updated in the OSHPD database, click the email link in the instructions at the top of the page or email eserv@oshpd.ca.gov; include in the email message the information required to complete each field.

8.  **What are the different Contact types?**

    Facility Contacts are copied on project correspondence and are the addressee for Project Final Costs.  There are five contact types to choose from:

a. **Administrator:** individual responsible for the day to day operational running of the health care institution.

b. **Applicant:** The governing board of a healthcare facility or other healthcare facility governing authority, as described in Health & Safety Code Section 129760.

c. **Authorized Agent:** The governing board or authority may authorize anyone to be known as the "Agent for Legal Applicant" for an Application for New Project and as "Owner" on the Application for Building Permit and Applications for Post Approval Documents; this individual may sign and approve all construction documents in the full capacity as the Legal Owner.

d. **Billing:** Each facility has a default billing address where all accounting correspondence will be mailed. If this particular project needs accounting correspondence mailed to a different address, enter the recipient and address under the "Billing" contact type.

e. **Facility Representative:** Any other person not listed as one of the Contact types above who needs to receive project correspondence may be listed on the project as a Facility Representative.

9. **What is "Save pending submittal" and how is it used?**

"Save pending submittal" is used to save an application in-progress. When the "Save pending submittal" button is clicked, eCA saves your in-progress application and assigns it a temporary record number. Ex: 13TMP-000123

It is extremely important to click the "Save pending submittal" button on the Facility PIN security page if you do not know the 6-digit PIN; clicking "Continue Application" with an incorrect PIN (or no PIN) will lock the record and it must be reset by OSHPD; you will lose all of the information you entered and will need to restart the application.

10. **What is Auto-fill?  How is this feature used?**

"Auto-fill" is a feature in eCA that will automatically populate various fields on the page with your User Account information, such as name, address, telephone numbers, etc.  To use "Auto-fill" (when the feature is available), click the box next to "Auto-fill with" – your information will immediately

populate the various fields on the page with your personal information from your Public User account.  You may also click the down arrow in the dropdown box next to "Auto-fill with" to select other pre-populated options.

**11.  When creating an amendment, how do I know which licensed professionals and/or contacts are already associated with my project and when I need to add them?**

To view the professionals listed on an OSHPD project, search for and/or select the project by clicking on the project number.  This will open the "Record View" which shows all project information for this record. Immediately below the Project Details section, the Design Professional in Responsible Charge of the project is visible under "Licensed Professional"; to view the remaining Licensed Professionals on the project, click the "View Additional Licensed Professionals" link directly below the Design Professional in Responsible Charge of the project – this will expand the page and reveal all of the Licensed Professionals that OSHPD currently lists for this project/record.

If you are creating an amendment, the Licensed Professional(s) on the parent project will be automatically copied to the amendment; an Amended Construction Document PAD does not typically require additional Licensed Professionals.  If the amendment is a Deferred Submittal Item PAD, the professional with delegated responsibility for design of the deferred submittal item must be added to the amendment record.

**12.  When I enter the Facility PIN, it is not being accepted.  What should I do?**

The 6-digit Facility PIN is issued to the Owner; this is NOT the 5-digit Facility ID number.  If you do not know the Facility PIN, you MUST click the "Save pending submittal" button on the Security page. Do not click "Continue Application" without a valid PIN. If you entered an invalid PIN (or no PIN) and you received an error message, you have lost all of the information you entered and will need to restart the application. If you entered an incorrect Facility PIN but you have a temporary application number (e.g. 13TMP-00014), email eserv@oshpd.ca.gov; *include in your email message* the TMP

identification number so OSHPD can reset this project application.

13.  **How much time do I have to send the construction documents to the OSHPD office after I create the application? What happens if I take too long to send the construction documents to the Office or present them to the OSHPD Field Staff?**

Temporary application numbers (e.g. 13TMP-00014) that are not completed and submitted to OSHPD are automatically deleted from the eServices Portal 30 days after the application is started.

When the Facility PIN and payment options have been successfully completed, the temporary application will be fully submitted and a permanent project number will be generated. Once the permanent project number is created, construction documents must be submitted to the appropriate OSHPD office or presented to the OSHPD Field Staff (for field reviews) within 45 days from the date the application was created and submitted.  Projects created in eCA will be closed due to inactivity if construction documents are not received within 45 days from the date the application was created and submitted.  Projects that are closed due to inactivity will not be reopened and the $250 application fee is non-refundable.

14.  **When the application was completed, I did not print the Project Summary – can I still send construction documents to the OSHPD office?  How can I reprint the Project Summary?**

The project summary is required to be submitted to the Office (or to the Field Staff) with the construction documents to identify that the application was created in eCA.  The project summary is always available for viewing or printing by:
   a.  searching for and/or selecting the project,
   b.  clicking on the project number to open the Record Detail view and
   c.  selecting the Project Application Summary from the reports link at the top of your screen;
   d.  you can also scroll down the page to the "Print/View Summary" button.

Click the link or the button to view and print the project summary sheet and include it with the construction documents when mailing them to the Office or presenting them to the Field Staff.

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**ACCOUNTING, BILLING & PAYMENTS**

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1. **How do I pay the Project Application fee?**

   The $250 project application fee may be paid using any of the following three methods on the Application Fee Payment Option page:
   a. You may pay the application fee online using a credit card at the time the application is being created in eCA using a credit card by selecting "Pay Now".
   b. You may select "Pay Later" if you do not have the credit card for payment but someone else does.  The person with the credit card must log in and pay the application fee within 10 days from the date the application is created or the fee will be invoiced directly to the Facility.
   c. You may select "Invoice Me" and an invoice will be immediately mailed to the Facility.

2. **Can I pay application fees using a Pre-paid account?**

   At this time, pre-paid accounts have not been fully implemented in eCA; pre-paid account functionality will be available in the near future.

3. **Can I pay all invoices using my credit card or only those records created using eClient Access?**

   All project application fees can be paid using a credit card at any time, whether the record was created using eCA or not.

4.  **When I open my Projects tab there are many items that say "Pay Now"; is there a way to distinguish between applications that were created in eCA by our design team and applications that were created by OSHPD? It will decrease likelihood of paying for the same invoice twice.**

    At this point there is not a way to distinguish between projects entered using eCA and projects entered by the OSHPD Program Technician or Field Staff.  All fees that have been assessed and invoiced are eligible to be paid using eCA.  If a check is mailed to OSHPD but not processed, the "Pay Now" option will still be available, adding to the confusion.

5.  **Is there any way to find more detail (i.e. the invoice number) in eCA? It would help greatly with avoiding duplicate payments...**

    On the Record Details screen, expand the "Fees" section. It displays the Invoice Number:



6.  **Who can determine payment method?**

    The person entrusted with the Facility PIN determines the payment method.

7.  **What if I selected "Pay Later" and it is past ten days from when the application was created?**

    The person with the credit card must log in and pay the application fee within 10 days from the day the application was completed or the fee will be invoiced directly to the Facility.

You may call OSHPD Accounting at (916) 326-3200 to determine if the invoice has been processed.

8.  **Will I get an invoice after I create an Application using eCA?**

    An invoice is dependent on the payment method you selected when you created the application:
    a.  If you selected "Invoice Me", an invoice will be processed by OSHPD Accounting and mailed directly to the Facility.
    b.  If you selected "Pay Later" and you haven't paid the application fees online within ten days from the day the application was completed, an invoice will be processed by OSHPD Accounting and mailed directly to the Facility.
    c.  If you selected "Pay Later" and paid the application fees online using a credit card, you will not receive an invoice.

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GETTING HELP

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1.  **Where do I find instructions?**

    Help, Instructions, FAQs and other useful information is located on the eServices Portal home page: http://www.oshpd.ca.gov/FDD/eServices

    Click on the various tabs within the "About the eServices Portal" section to find help and instructions as well pdf documents of various user guides and information.  You do not need to log in or be a registered user to view the eServices Portal home page.

2.  **Who do I contact for help?**

    a.  **For Technical Support:**

        Contact us at eServ@oshpd.ca.gov or call (916) 440-8484 and you will be transferred to a technician for assistance.

b. **For User Registration and Account Management:**

Contact the eCA Access Manager at
eCA.AccessManager@oshpd.ca.gov or call (916) 440-8484.

c. **For Project-Specific Questions:**

Please contact the OSHPD Office or Field Staff for the region in which
the facility is located :
http://oshpd.ca.gov/FDD/Plan_Review/Regions.html#Regions.

3. **How do I request training for eCA?**

For training requests, please email OSHPD at eServ@oshpd.ca.gov.