OSHPD e-Services Portal

Public User Guide

Version Number: 4.0

Table of Contents

1 Introduction

Welcome to OSHPD Electronic Services Portal Client Access (eCA) User Guide

This user guide provides step-by-step instructions for performing various functions in eCA to submit OSHPD construction project applications.

2 eCA System Overview

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 online accounts, manage their user accounts, create project applications, submit project applications, pay application fees, and track the application statues.

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

2.1 eCA Functionality

Users can navigate the eCA system simply by following the links in the system and clicking on buttons to perform various tasks. eCA is consisted of two main functional areas grouped by *anonymous users* and *registered public users*. Figure 1 below illustrates the main functionalities in each group.
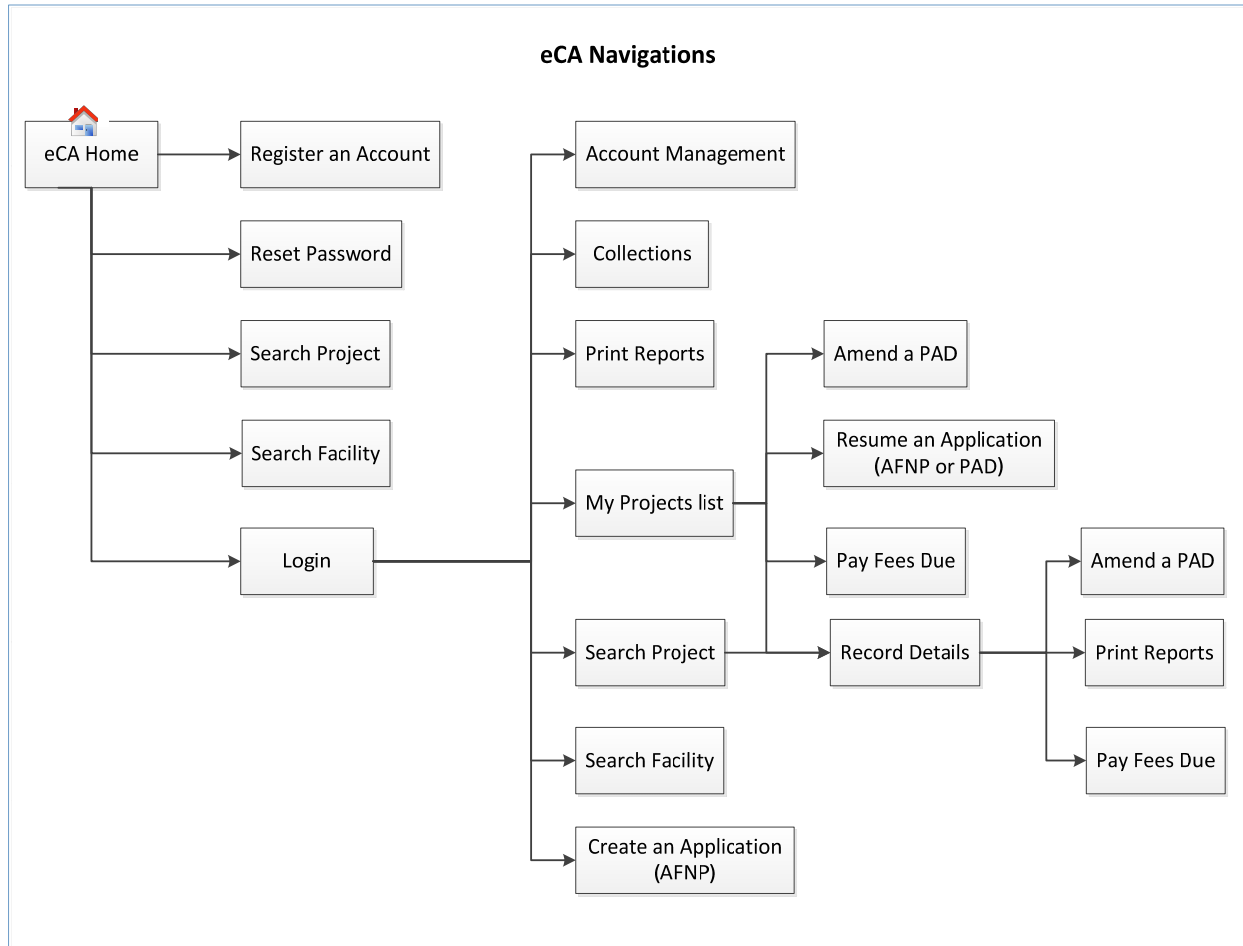
Figure 1 - eCA System Functionality Map

eCA System Functionality Map
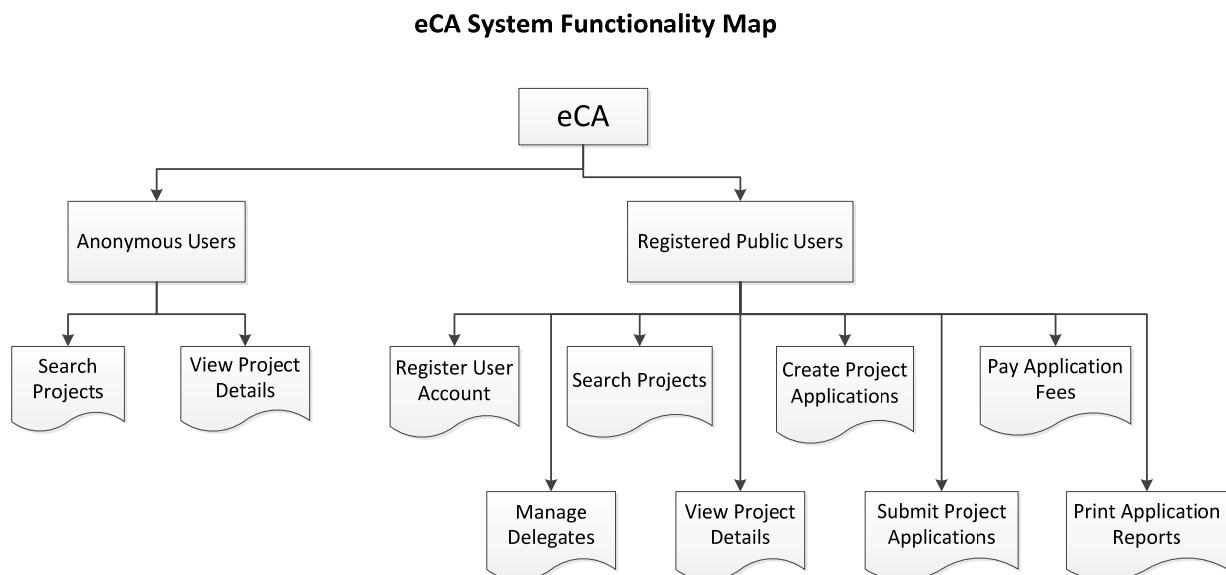
2.2   eCA Navigation

Figure 2 below illustrates the available web pages in eCA system and the navigation path among the web pages. User must log in eCA to create and submit project applications.

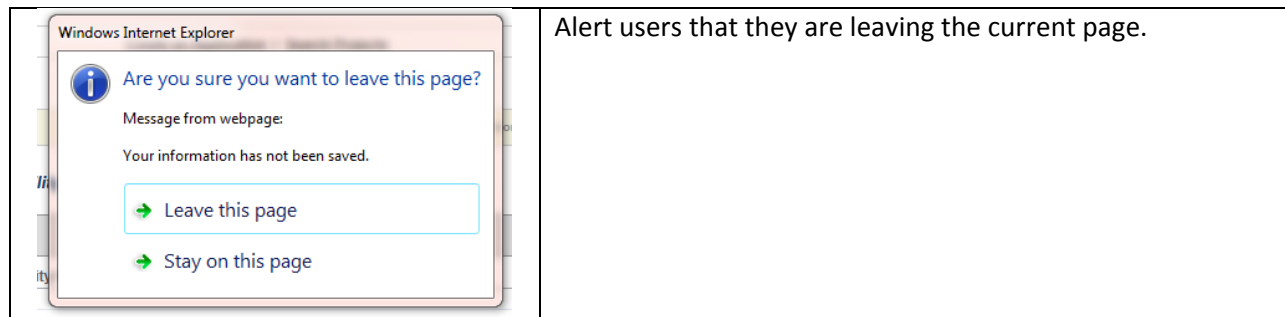**Figure 2 - eCA Navigations**

2.3   eCA Icons

Table 1 below lists the common icons used in eCA.

Table 1 - eCA Icons

Icon	Description
	Search a record in eCA or in a list
	Click on icon to display help instructions

* State License Number: *Enter a valid State License*	Watermark instruction is displayed in the data entry field. When user puts the cursor in the field, the watermark instruction is replaced by the data user enters.
⚠ ⚠ *Last Name:_____	Warns users that there are errors in data entry fields on the form which prevent the page to be saved. The error message appears both on the top of the page and next to the data entry field where the error is generated.
Create an Application	Hyperlinks are displayed as underlines beneath the links.
1 Professionals 2 PAD Details 3 Facility Confirmation	Steps in application submission process. • Blue icon indicates the step you are currently on. • Yellow icon indicates the steps need to be completed. • White icon with underlined texts indicates the completed step that is available for edit.
03/08/201 📅 ◄ March, 2013 ► Su Mo Tu We Th Fr Sa 24 25 26 27 28 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 Today: March 8, 2013	Click on the calendar picker to display the current month. Click any date to populate the date field for data entry.
Save pending submittal 🖫	Click on "Save pending submittal" button to save the application in progress before submittal. eCA generates a temporary project record for the application.
Continue Application »	Click on Continue Application button to proceed to the next step of the application submission process.
Clear	Click on Clear button to clear data entered but has not been saved on the screen. All data is lost after clicking the Clear button.
Cancel	Cancel the task to be performed on the screen.
Save	Save data entered in the section of the form.
*	Data entry is required for the field.

	Alert users that they are leaving the current page.

3   User Registration

To submit project applications in eCA, users must obtain an eCA online account. User registration is the first step in utilizing functionalities in eCA. OSHPD must approve the registered account before users can log in the system.

3.1   Apply for an eCA User Account

User applies for an eCA user account by entering his or her account information. Figure 3 below shows the online form to be filled out by users when registering an eCA account.

User first must accept the OSHPD Privacy Policy.

Figure 3 – Register an eCA Account

After filling out the online registration form, eCA sends user a notification email, see figure below. OSHPD must activate the account before user can log in eCA and starts submitting project applications. eCA sends user an email notifying the registered account is now activated and ready to be used.

Figure 4 - eCA System Generated Emails

Subject: eCA Account Registered

John Smith,

Your OSHPD eCA account status has changed or is pending activation.

Detail information of the Account:
Account ID: JohnSmith
User Name: John Smith
Business Name: OSHPD
Address: 400 R St, Sacramento, CA 95811

If you have questions about this email, please contact OSHPD at (916) 440-8484.

Thank you.

OSHPD eCA Access Manager
Phone: (916) 440-8484
E-mail: eCA.AccessManager@oshpd.ca.gov

Subject: Your OSHPD eCA User Account is Activated!

John Smith,

Your eCA account is now active. Please keep a copy of the following information for your reference. Go to eCA at: https://eserv.oshpd.ca.gov/CitizenAccess/ to start.

Account Information Details:
User ID: JohnSmith
User Name: John Smith
Business Name: Architect Firm
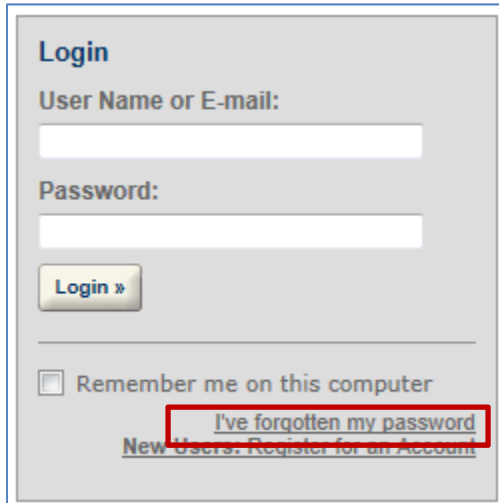Address: 400 R Street, Sacramento, CA 95811

Thank you.

OSHPD eCA Access Manager
Phone: (916) 440-8484
E-mail: eCA.AccessManager@oshpd.ca.gov

3.2   Reset Password

Users can reset their eCA account passwords online. Follow the steps described below.
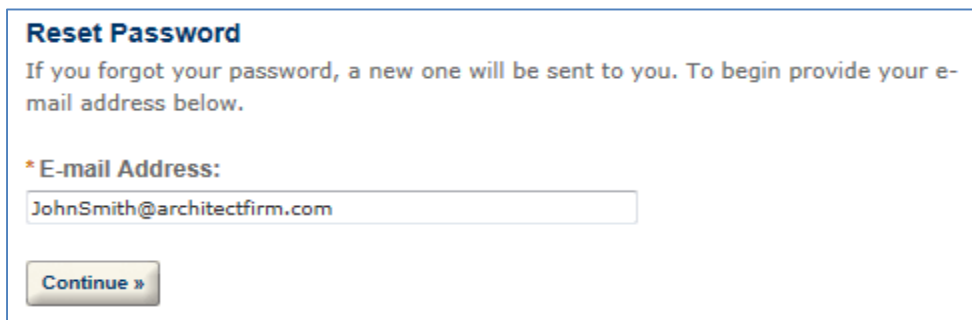
Step 1: Click on "I've forgotten my password" link.
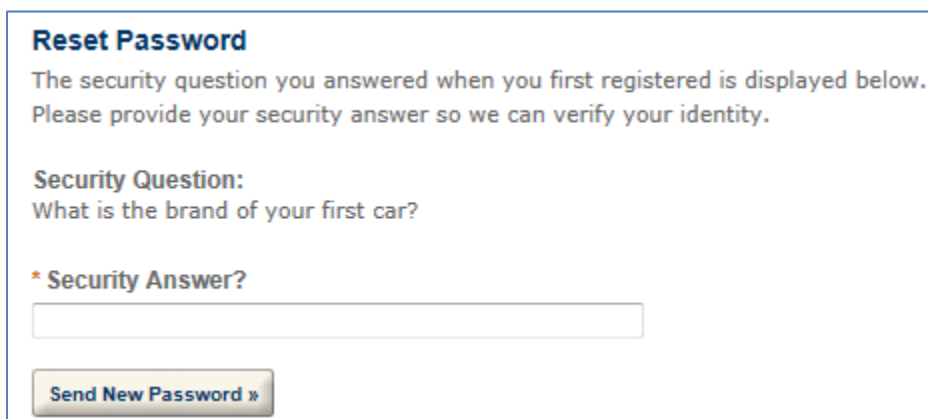
Step 2: Enter the e-mail address used for your account

Step 3: Answer the security question

Step 4: eCA sends user an e-mail containing the new temporary password.

> ☑ **Your password has been reset. An e-mail has been sent containing your new password. Please use the new password to login.**

> You will receive an e-Mail shortly containing a newly generated password. Once logged in you may update this password in "Account Management".

John Smith,

You have successfully reset your eCA password. Your temporary password is **J!Zo01**. You must log in to https://eserv.oshpd.ca.gov/CitizenAccess/ and change it to a permanent password.

If you did not initiate the resetting of your password, please contact OSHPD at (916) 440-8484.
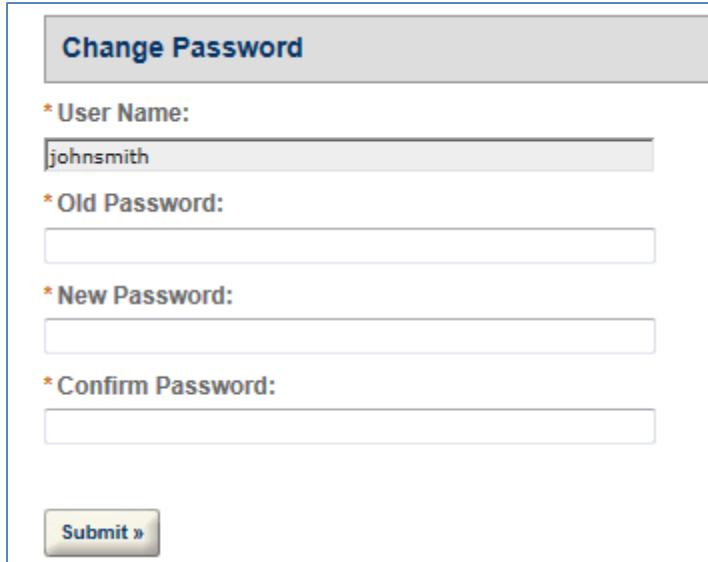
Thank you.

OSHPD eCA Access Manager
Phone: (916) 440-8484
E-mail: eCA.AccessManager@oshpd.ca.gov

Step 5: Log in to eCA with the temporary password provided then update it to a new permanent password. Once the new permanent password is set, user is automatically logged in to eCA.

3.3 Facility Authorization

To access facility's project including creating and submitting new applications, users must obtain the authorization from the facilities they represent. Facility authorization is granted by submitting the Letter of Authorization to OSHPD or by delegating in eCA. To submit a final project application, user must have a valid facility PIN. Facility authorization is descried in details below.

3.3.1 Letter of Authorization

The representatives of the governing board of hospital and facilities must submit a Letter of Authorization to OSHPD. The Letter of Authorization designates the persons who act on behalf of the facilities for all OSHPD construction projects including submitting the project applications in eCA.

The Letter of Authorization is the form FDD310. It is accessible online at
http://oshpd.ca.gov/FDD/Forms/index.html.

3.3.2 Delegation

Any public user can delegate his or her eCA tasks to another public user. The delegate can create or submit the project applications on behave of the facility and the delegator. The delegation is managed in public user's Account Management section.

3.3.3 Linking to Licensed Professional

A public user can add one or multiple active licensed professional records to his or her eCA account. Associating to the licensed professional's records gives user access to all projects that have the professional listed on the application. OSHPD must approve the association first. Association to licensed professionals is managed in the Account Management section.

4 eCA System Orientation

This section provides an overview of the main page and basic system functions and features.

4.1 eCA Home Tab

The home tab is the main page for all user activity. It is the page presented to the users after they log into eCA.

Figure 5 - eCA Home Tab

The home tab offers the following functionality and features.

A. Breadcrumbs – The breadcrumbs show users "where they are" in the system. Users can click the "Home" link to return to the Home Tab. Note: if the users is in a project application, the "Home" link does NOT save the work in process.

B. Logged in User – eCA shows the logged in user name.

C. Collections – This link shows how many collections the user has created and provides link the collections. Collections are a convenient and easy way to group records.

D. Account Management – This link opens the user account management features described later in this manual such as delegation and password maintenance.

E. Logout – This link logs the user out of eCA.

F. Home Tab – One of two tabs that all on the main page, the other being the Projects Tab.

G. Projects Tab – This tab show users all projects associated with their user account (either projects they created, facilities associated to their ID, or via delegation)

H. Facility Information – This link opens the facility search page.

I. Projects – This link opens the project tab and the general search.

4.1.1 Collections

Collections are a convenient way to access projects. Think of it as a "quicklist". Add projects you work on frequently. Add child projects. Remove them. You can add projects from the projects list as well as the search result.

| Collections (2)▼ | Reports (3)▼ | Account Management | Logout |

4.1.1.1 Add Projects to Collections

Via any search results or from the Projects tab, users merely select the projects they wish to user to create a collection or add to an existing collection and then click on the "Add to Collection" hyperlink.

Figure 6 - Add to, or Create, Collections

4.1.1.2 The Collections List

To open and view collections, click on the "Collections" hyperlink at the top of the screen.

Figure 7 - Open Collections

Figure 8 - The Collections List

Collections

This is a list of your collections. To manage a collection, click the link next to the collection name.

Showing 1-2 of 2

Date Modified	Name	Description	Number of Records	
03/19/2013	My Projects	The projects I'm currently working.	3	Delete
03/19/2013	Pending Action	Projects pending outside action from a facility or design professional.	6	Delete

The above figure shows two collections in this user's Collections list. Users can delete collections without deleting or affecting the underlying projects. Users can open the collections and work the projects as the would from the main Project Tab. See Below.

Figure 9 - Sample Collection "My Projects"

My Projects

The projects I'm currently working.

Total Records: 3 (3 Projects)
Inspections Summary: 0 (0 Scheduled, 0 Rescheduled, 0 Approved, 0 Denied, 0 Pending, 0 Cancelled)
Fees Summary: $4,464.80 Paid, $0.00 Due

Rename Collection   Delete Collection

Projects

Move to... | Copy to... | Remove
Showing 1-3 of 3 | Download results
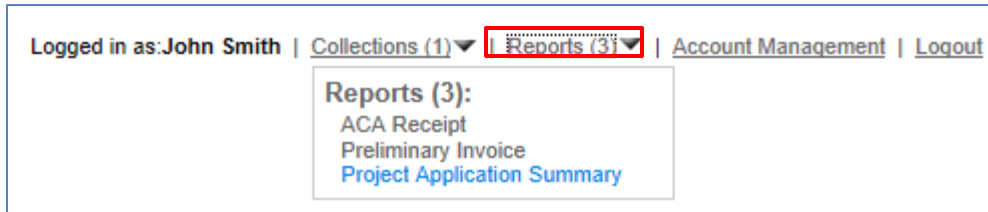
	Date	Project Number	Project Type	Project Name	Status	Related Records	Action
☐	11/01/2011	P-2011-00506	Application for New Project	B-Level Steinkamp Art Installation	Pending Construction Start	3	Amendment
☐	10/29/2011	P-2011-00493	Application for New Project	Logiquipp Storage Unit Installation	Pending Construction Start	2	Amendment
☐	10/26/2011	P-2011-00454	Application for New Project	(L8514) Trash Compactor Replacement	Pending Construction Start	3	Amendment

4.1.2   Reports

eCA provides multiple ways to run reports. The easiest way to generate a report is from the project summary because eCA passes information from the project summary to the report. The other way to generate a report is from the reports hyperlink on the main page. The reports hyperlink allows users to generate a Receipt for the Application Fee, a Preliminary Invoice (for projects which opt to "pay later"), and the Project Application Summary. With the reports link it is necessary to provide the exact project number or receipt number in order to generate the report.

Figure 10 - Reports
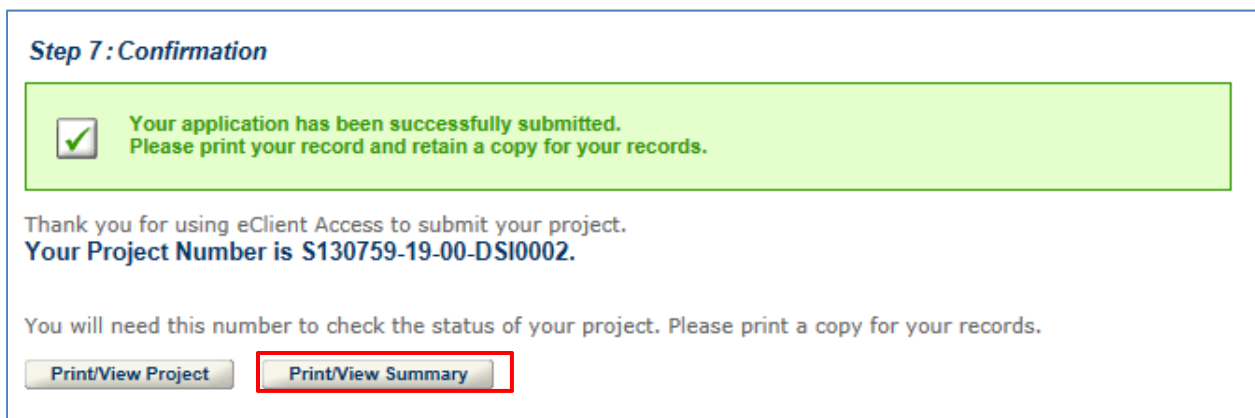
Logged in as:**John Smith** | <u>Collections (1)</u>▼ | <u>Reports (3)</u>▼ | <u>Account Management</u> | <u>Logout</u>

Reports (3):
ACA Receipt
Preliminary Invoice
Project Application Summary

4.1.2.1 *Project Summary Sheet/Transmittal*

The project summary sheet provides users with a printable summary of the project. This report should be included with all "enclosures" submitted to OSHPD.

Figure 11 - Project Summary Sheet - Generate from Project Summary

Step 7 : Confirmation

☑ Your application has been successfully submitted.
Please print your record and retain a copy for your records.

Thank you for using eClient Access to submit your project.
Your Project Number is S130759-19-00-DSI0002.

You will need this number to check the status of your project. Please print a copy for your records.

[Print/View Project]   [Print/View Summary]

Figure 12 - Sample Project Summary Report

OFFICE OF STATEWIDE HEALTH PLANNING AND DEVELOPMENT
FACILITIES DEVELOPMENT DIVISION

Project Number:	S130080-19-00
Project Type:	Application for New Project
Parent Project Number:	

Facility #:	12127
Facility Name:	Ronald Reagan UCLA Medical Center

Project Description:	test
	test
Scope of Change:	
OSHPD Building #:	

Primary Professional/Phone Number:	Victor E. Bermudes, (619) 448-1800
Primary Contact Name/Phone Number:	John Smith

4.1.2.2   Print Receipt

If the user pays by credit card, the user may print the receipt at the time of payment or later, provided the user saves the receipt number.

Figure 13 - Print Receipt

Confirmation

✓ You have paid a fee associated to this Record.
Please print a copy of this receipt and retain a copy your records.

Thank you for using our online services.
Your Record Number is PAD-2013-00064.

You will need this number to check the status of your application or to sch
print a copy of your record and post it in the work area.

[Print/View Receipt]   [Print/View Summary]

Figure 14 - Sample Receipt

REMIT TO:

Kaiser Foundation Hospital - Walnut Creek
1425 South Main Street
Walnut Creek, CA 94596

Office of Statewie Health Planning and Development
Accounting Office
400 R Street, Ste 359
Sacramento, CA 95811-6213

Project related questions contact - Facilities Development Division (916) 440-8300 or (213) 897-0166
Billing related questions contact - Accounting Services (916) 326-3236, Fax (916 322-2527)

Facility Name:	Kaiser Foundation Hospital - Walnut Creek	Facility Number:	10072
Project Description:	asd	Project Number:	H130060-07-00-ACD0002
App Tracking #:		Parent Number:	H130060-07-00
Scope of Change:	fdas		

Fee Item Description	Date	Amount	Amount Due
Application Fee	04/02/2013	$250.00	$0.00

Transaction	Receipt Nbr	Payment Method	Payment Ref#	Date	Amount
Receipt	89292	Credit Card		04/03/2013	$(250.00)

PLEASE PAY THIS AMOUNT --------------->   BALANCE $0.00

4.1.2.3 Preliminary Invoice

The preliminary invoice report is for users who opt for the "pay later" when creating the project. The pay later option enables users to submit a project without generating an invoice from OSHPD (the traditional payment method) or paying immediately with a credit card. Users who select "pay later" can print the preliminary invoice and have another, who is user authorized to pay with a credit card, use the information on the preliminary invoice to find the project and make the payment. If the application fee is not paid within 10 calendar days, OSHPD will issue an invoice to the facility's billing contact.

Figure 15 - Sample Preliminary Invoice

Preliminary Invoice

Invoice Date:	April 03, 2013
Payment Due Date:	May 03, 2013
Current Date:	April 03, 2013

REMIT TO:

Ronald Reagan UCLA Medical Center 757 Westwood Plaza Los Angeles, CA 90095	Office of Statewie Health Planning and Development Accounting Office 400 R Street, Ste 359 Sacramento, CA 95811-6213

Project related questions contact - Facilities Development Division (916) 440-8300 or (213) 897-0166
Billing related questions contact - Accounting Services (916) 326-3236, Fax (916 322-2527)

Facility Name:	Ronald Reagan UCLA Medical Center	Facility Number:	12127
Project Description:	test	Project Number:	S130080-19-00-ACD0002
App Tracking #:		Parent Number:	S130080-19-00
Scope of Change:	Test Scope		

Fee Item Description	Date	Amount	Amount Due
Application Fee	04/03/2013	$250.00	$250.00

4.1.3   Account Management
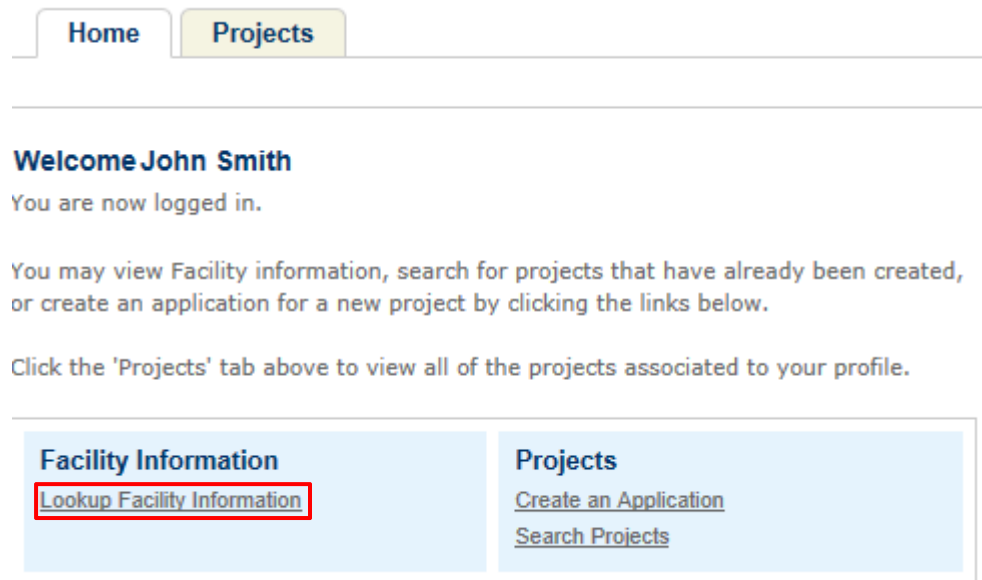User Account Management is detailed in section five of this document.

4.1.4   Logout
Logout logs the user out of eCA so another user may log in. It is a recommended practice to log out when users conclude their session.

4.1.5   Home Tab – Facility Information
The Lookup Facility Information hyperlink on the Home tab enables logged in users to look up facilities by facility number, county code, geographic region, and responsible region (i.e. OSHPD Region).

Figure 16 - Facility Information

eCA uses "Parcel" and "Facility" interchangeably.

Figure 17 - Facility Look up Information

The following screenshot shows the results for a facility search. The screen shows general information about the facility.

Figure 18 - Facility Search Results

Facility Details

Facility Information:
Facility Number:00000

Status:Enabled

Responsible Region:
Type of Facility:
Geographic Region:
County Code:
Beds:667

Facility Name:

eCA Hospital

Addresses

Showing 1-1 of 1

Facility Number	Name	Address
00000	00000-NO FACILITY - SYSTEM USE ONLY	1234 Facility Address, Facility City CA 99999

Owners

Showing 1-1 of 1

Name	Address
00000-NO FACILITY - SYSTEM USE ONLY	1234 FACILITY ADDRESS FACILITY CITY,CA 99999

4.1.6   Home Tab – Projects

The Projects links on the Home Tab allow the user to either create a new AFNP (Section 6 of this document) or search projects (Section 4.3 of this document). The Search Projects hyperlink takes users to the Projects Tab.

Home	Projects

Welcome John Smith
You are now logged in.

You may view Facility information, search for projects that have already been created, or create an application for a new project by clicking the links below.

Click the 'Projects' tab above to view all of the projects associated to your profile.

Facility Information
Lookup Facility Information

Projects
Create an Application
Search Projects

4.1.6.1 Create and an Application

The Create an Application link takes users to create a new Application for New Project (AFNP). See section six of this document.

4.2 Projects Tab

The Projects Tab is the main workspace for most users. It presents users with all projects associated with their user login. Associations are created by:

- License – See user account management.
- Delegation – See user account management.
- Association with a Facility – Established by submitting the FDD310 - eCA Letter of Authorization.
- Created – Projects created by the logged in user.

Figure 19 - Project Tab

Home	Projects					

Create an Application | Search Projects

Projects

Showing 61-70 of 100+ | Download results | Add to collection

☐ Date	Project Number	Project Type	Project Name	Status	Related	Action
☐ 05/15/2012	P-2012-01030	Application for New Project	B2 Level Filtomat Drainage	Active - Plan Review	0	Pay Fees Due Amendment
☐ 05/15/2012	P-2012-01029	Application for New Project	2nd Floor OR 16, 21and 22 add power	Active - Plan Review	0	Pay Fees Due Amendment
☐ 05/15/2012	PAD-2012-04764	Post Approval Document	B-Level Steinkamp Art Installation	Pending	3	Pay Fees Due
☐ 05/09/2012	PAD-2012-04607	Post Approval Document	(L8514) Trash Compactor Replacement	Pending	3	Pay Fees Due
☐ 05/08/2012	P-2012-00969	Application for New Project	Reading Room 2144F - power/data and monitor	Active - Plan Review	1	Pay Fees Due Amendment
☐ 05/07/2012	BP-2012-00750	Application for Building Permit	(151-701) WCR OR #9 LIGHT REPLACEMENT	Active	2	
☐ 04/27/2012	BP-2012-00703	Application for Building Permit	RRUMC 8403 Clinical Lab Power Pole Removal	Approved	2	
☐ 04/20/2012	BP-2012-00665	Application for Building Permit	(L8514) Trash Compactor Replacement	Approved	3	
☐ 04/19/2012	BP-2012-00658	Application for Building Permit	RRU- RRUMC Diesel Fuel Tank Disconnects.	Approved	2	
☐ 04/18/2012	P-2012-00835	Application for New Project	RRU-SAC-Chiller Installation	Open - Remarked	0	Amendment

< Prev 1 2 3 4 5 6 7 8 9 10 ... Next >

4.2.1.1 Search Projects – General Search

Users can search for any projects in the eCA system via the search page.

Figure 20 - Project Search - General Search

4.2.1.2 Search Projects –Search by Licensed Professional

Users may also search for projects by license professional information. This search is flexible. It allows users to search by license type and/or license number. When searching for a license number, eCA allows for the entry of partial license numbers (e.g. "C223" instead of "C22341"). It also allows wildcard searches (e.g. "C223%").

Figure 21 - Project Search - Licensed Professional

5   Account Management

Public user can perform various tasks to manage his or her public user account. User must log in eCA first. Click on "Account Management" link to start managing the account information.
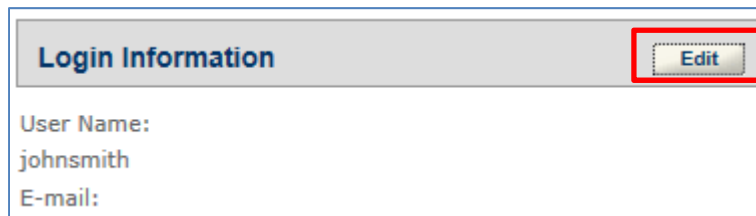
Figure 22: Account Management link

Logged in as:John Smith | ☐ Accessibility Support | Collections (0) | Account Management | Logout
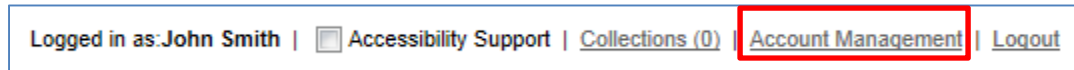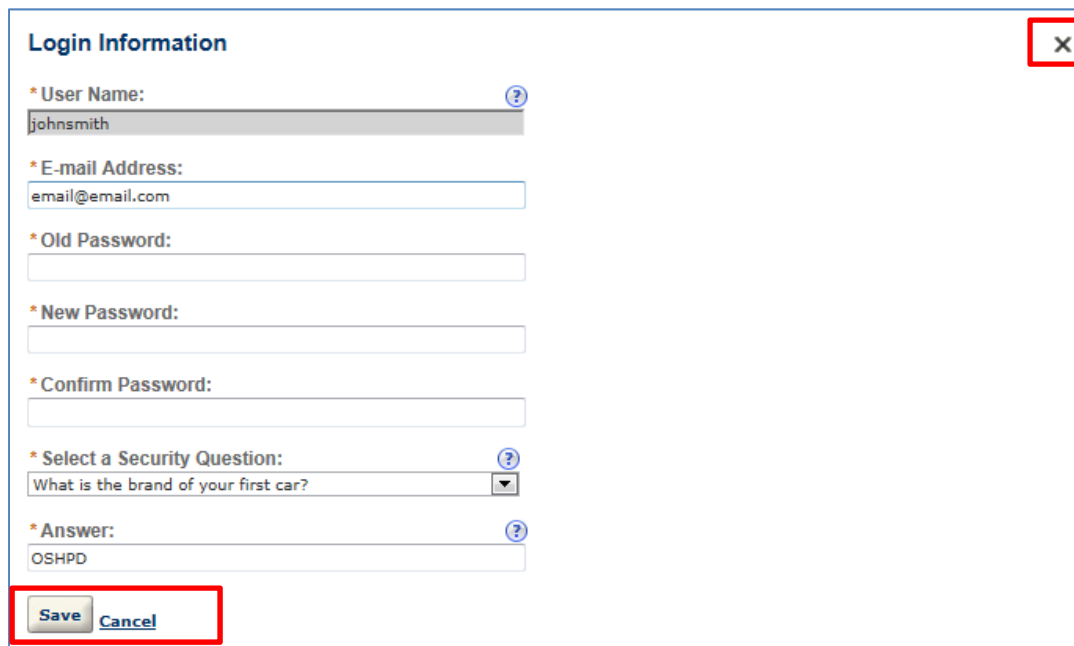
5.1   Login Information

Click on "Edit" button to update the account login information such as e-mail and password. A pop window appears for user to perform the updates.

Figure 23: Edit Login

Login Information   Edit

User Name:
johnsmith
E-mail:

User can update all but the "User Name". Click on "Save" button to save your updates. Click on "Cancel" to cancel the updates. User can click on exit icon "X" on the upper right corner to exit the pop up window.

Figure 24: Update Login Information

Login Information   ×

* User Name: ⑦
johnsmith

* E-mail Address:
email@email.com

* Old Password:

* New Password:

* Confirm Password:

* Select a Security Question: ⑦
What is the brand of your first car?   ▾

* Answer: ⑦
OSHPD

Save   Cancel

5.2   Contact Info

Click on "Edit" button to update the contact information such as name and address. A pop window appears for user to perform the updates.

Figure 25: Edit Contact
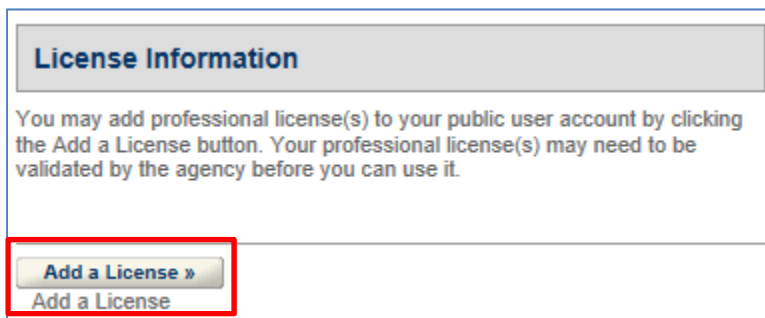
5.3   License Info

User can add licensed professional records to his or her public user account. The license record must be a valid record existing in OSHPD database.

Figure 26: Add a License

Select the "License Type" and enter a valid "State License Number" to find the license.

Once the license record is found, click on the "License Number". A pop up window appears. Click on "OK" to confirm the selection.

Figure 27: Associate a License

Click on "Remove my license" to delete the licensed added to the user account.

Figure 28: Remove a License

After adding a license professional record, eCA sends user an email notification. The addition of licensed professional records to the user account must be approved by OSHPD. Below is a sample email.

Figure 29: Email notification of licensed professional association

Subject: A Licensed has been associated to your OSHPD eCA account

John Smith,

You have added a professional license to your OSHPD eCA user account. OSHPD must approve this association before it becomes active. You will not be notified when the association is approved.

Account Information Details:
User ID: johnsmith
User Name: John Smith
Business Name: OSHPD
Address: 400 R Street, Sacramento, CA 95811

Associated Licensed Professional:
License Number: C16028
License Type: Architect

If you have any questions about this email, please contact OSHPD at (916) 440-8484.

Thank you.

eCA eCA Access Manager
Phone: (916) 440-8484
E-mail: eCA.AccessManager@oshpd.ca.gov

5.4 Delegates

5.4.1 Delegate Overview

User can add another public user to be his or her delegate. By default, the added delegate can view the project data belongs to the user. In addition, user can grant additional permission to the delegate so he or she can perform various tasks on user's behave. The Delegates section displays users who are added to your account and users who added you to their accounts.

5.4.2 Add Delegate

Click on "Add a Delegate" to start managing the delegations. A pop up window appears for user to designate the delegation permissions.

Delegates

Add a Delegate

People who can access my account
None

People whose account I can access
None

Enter the name and the e-mail address of the delegate. The e-mail address must be the address delegate registered with for his or her eCA account. After selecting appropriate delegate permission, click on "Invite a Delegate" button.

Figure 30: Add a Delegate

Add a Delegate   ✕

Enter the name and e-mail address of the person to whom you would like to grant delegate access to your account.

* Name   *** E-mail Address**

Mary Joe   12@12.com

Set Delegate Permission

Delegates can view records across all categories unless you choose to restrict them to specific categories.

View Records in Projects **(Change)**

For the following permissions, the available categories are limited to the ones that you have granted the delegate access to view records.

☑ **Create Applications in Projects** **(Change)**

☑ **Renew Records in Projects** **(Change)**

☑ **Amend Records in Projects** **(Change)**

☐ **Manage Inspections in Projects** **(Change)**

☐ **Manage Documents in Projects** **(Change)**

☑ **Make Payments in Projects** **(Change)**

Add Personal Note

Enter the words below

service ＭＥＲＶＩＰ   🔄 🔊 ❓

Invite a Delegate   **Cancel**

5.4.3   Delegate Permissions

In "Set Delegate Permission" section, select the appropriate permissions. Below is a list of delegate permission descriptions.

Create Applications in Projects: select this checkbox to create new applications or new applications for an existing project.

Renew Records in Projects: select this checkbox to renew application for a project. This permission is currently not used for OSHPD eCA.

Amend Records in Projects: select this checkbox to amend an application such as PAD for an existing project.

Manage Inspections in Projects: select this checkbox to request inspections for a project. This permission is currently not implemented by OSHPD eCA.
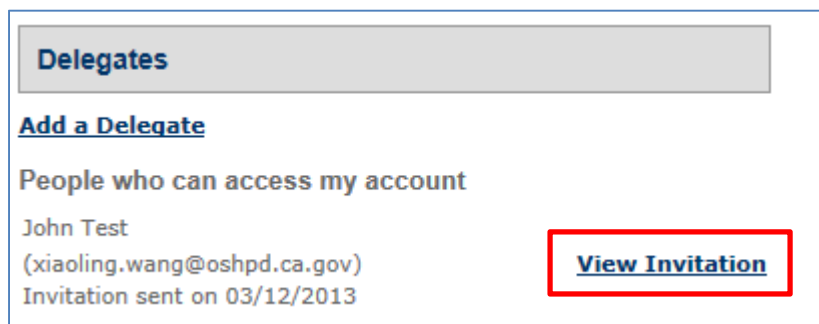
Manage Documents in Projects: select this checkbox to upload and manage documents in eCA. This permission is currently not implemented by OSHPD eCA.

Make Payments in Project: select this checkbox to allow delegate to select application fee payment method and pay fees online.

Select "Create Applications in Projects" and "Amend Records in Projects" to allow your delegate to create PAD for your existing projects.

Select "Make Payments in Projects" in addition to allow your delegate to select payment method and pay for the application fee.

After selecting the delegate permission and inviting the delegate, user has option to change the delegate permission. Click on "View Invitation" link. A pop up window appears to allow user to make any needed permission change.

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5.4.4 Accept or Reject Delegate Invitation

eCA sends an email to the delegates notifying them an user has added them as delegates in eCA. Delegates for acceptance. Below is a sample email delegate receives.

Figure 31: eCA delegation invitation email

An OSHPD eCA user, John Smith, has added you as a delegate. Please log in to your account at https://eserv.oshpd.ca.gov/CitizenAccess/ to accept or reject the delegation invitation.

If you have quetions or expereince any issues, contact us at eserv@oshpd.ca.gov.

Thank you.

Log in to eCA and open the "Account Management" section. Delegate section displays the invitation. User can accept or reject the delegate invitation.

After accepting the invitation, user can review the permission or remove delegate if needed.

Click on "Actions" as shown below to perform above tasks.

5.4.5 Delegate Effect

After accepting the delegate invitation, the delegate's project list displays the projects the delegators created and projects associated with the delegators. Based on the delegation permission, the delegate can amend the PAD or resume applications.

6   Project Applications

6.1   Page Flow Overview

User follows the predefined steps to create and submit project applications. User can submit applications for Application for New Project (AFNP) and Post Approval Document (PAD). The steps involved in submitting AFNP is slightly different from those in submitting for PAD. Below is an illustration of the page flow steps.

Table 2: eCA Pageflow

Page No.	Page Title	Description
Application for New Project		
1	Facility Information	User selects a facility from OSHPD's facility database. eCA auto populates the facility, address, and facility owner information.
2	Contacts	User records Licensed Professional(s) and Contact(s) to the

		application.
3	Project Details	User records Project Name, Scope, and other project details including costs and enclosures.
4	Facility Authorization	User enters a valid Facility PIN code.
5	Payment Options	User selects one of the three application fee payment options.
6	Review	User reviews the data entered on the application and makes edits if necessary.
7	Pay Fees	If user selects "Pay Now" option, user pays the outstanding fee by credit card online.
8	Confirmation	Project application submitted. eCA issues a project ID. User prints project summary sheet, preliminary invoice or payment receipt.
PAD		
1	Professionals	Users add any additional professionals who are not on the parent AFNP application form.
2	PAD Details	Users enter Plan Review information, Deferred Items, Costs, and Enclosures.
3	Facility Confirmation	Users add additional contacts to the application if needed. Users enter the facility PIN in order to proceed to the submittal screen.
4	Payment Method	Users with valid PIN select one of the three payment options: Pay Now, Pay Later, or Invoice Me.
5	Review	Users review the data entered on the application and make any changes if needed.
6	Pay Fee	If users select "Pay Now" option on page 4, they can make application payment online using credit card.
7	Confirmation	After users select a payment option or successfully paid online, eCA issues a final Project ID. User can print the summary sheet and invoice. User can view record details.

6.2 Basic rules of page flow

Below are some basic rules of submitting an application using the page flow.

- ✓ To start creating a project application or to resume an existing application, user must start from the first page flow step.
- ✓ User can navigate back and forth the completed pages.
- ✓ User must click on "Continue Application" or "Save pending submittal" button to save the data entered on the page.
- ✓ If a page contains a section that allows for multiple records to be added, for example multiple licensed professional or multiple contacts, user must click on "Save" button in the section to save each record added to the project.
- ✓ It is recommended that user performs "Save pending submittal" as needed to prevent the data lose due to data entry errors.
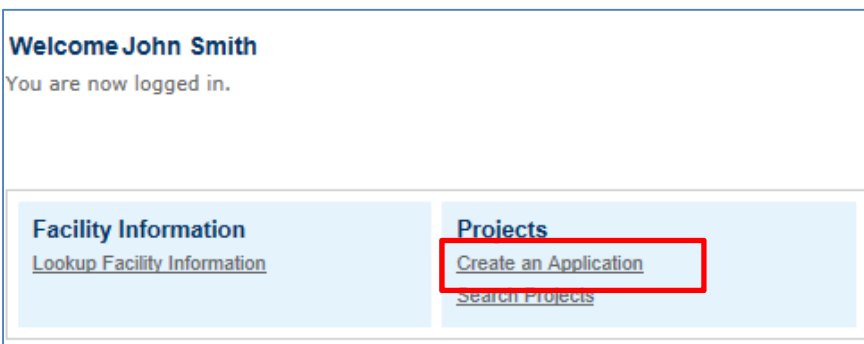
✓ If any required data is missing from the page, upon clicking on "Continue Application", an error message is displayed on the top of the page. User must correct the errors before continuing to the next page flow screen.

6.3 Create and Submit an AFNP

Please follow the steps described below to create an AFNP. Make sure you have been given permission by the facility to create
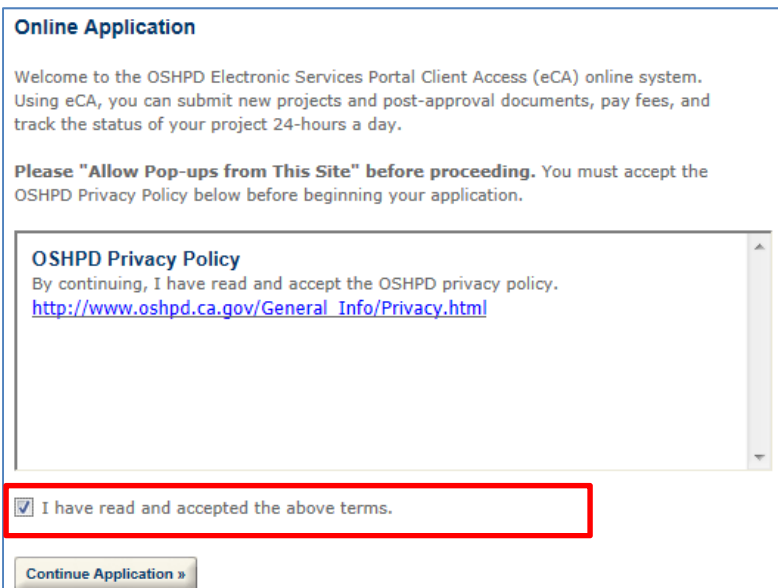
Step 1. **Start create an ANFP**

User must log in eCA, click on the "Create an Application" link in Projects to start a new AFNP.

Step 2. **Accept OSHPD Privacy Policy**

Check "I have read and accepted the above terms" then click on "Continue Application" button. Click on the link in the window to review the privacy policy.

Step 3. **Select Record Type**

Select the "Application for New Project" then click on "Continue Application" button. **Do Not** select "Post Approval Document" or "Alternate Method of Compliance" record type here. The instructions for creating and submitting PAD are provided in section 7.4 of this user guide.

Step 4. **Enter Facility Information**

Enter a Facility ID or Facility Name then click on "Search" button. If the facility is found, the facility information, address, and owner will be auto filled.

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Application for New Project

| 1 Facility Information | 2 Contacts | 3 Project Details | 4 Facility Authorization | 5 Payment Options | 6 | 7 | 8 |

Step 1 : Facility Information > Facility Information

* indicates a required field.

Facility

Enter the Facility ID for this Project (or autofill if available) and then select the Search button. Select the correct facility from the returned list. Both the address and Owner sections will auto fill based on your selection. Please verify that information is correct. Contact OSHPD at eserv@oshpd.ca.gov for adding new facility or updating the current facility information.

* Facility ID
00000

Facility Name
eCA Hospital

Responsible Region:
North Region

County Code:
--Select--

Geographic Region:
North Region

Search   Clear

Address

* Street No.:
400

* Street Name:
R Street

City:
Sacramento

State:
CA

Zip:
95811-

Search   Clear

Owner

Owner Name: ⑦
ECA HOSPITAL

Address Line 1:
400 R Street

City:
Sacramento

State:
CA

Zip:
95811-

Phone:

E-mail:

Search   Clear
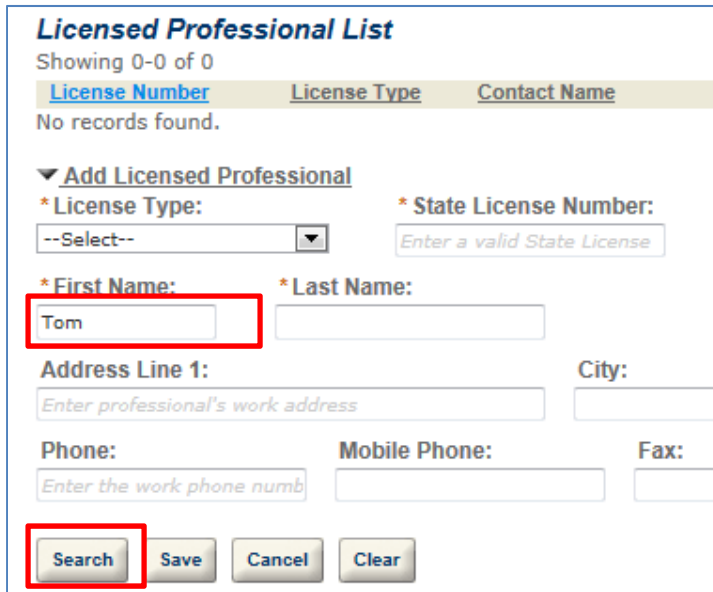
Continue Application »

Save pending submittal 🗔

To search for another facility, click on "Clear" button in Facility section. This clears the previous entered facility. User can search for a new facility described in the steps above.

To advance to the next page flow step, click on "Continue Application". If any required data is missing, an error message will be displayed on the top of the screen.

Step 5. **Add one or multiple Licensed Professionals (LP) to the project.**

On this screen, user first searches an existing and active LP record by at least one search criteria such as License Type, License Number, or Name. Click on "Search" button to perform the search.

Locate the correct LP in the returned list then click on the License Number of the record. The LP information will auto populate the field above.

Indicate whether the licensed professional is the discipline Primary for the project and whether he or she is the Responsible Primary for the project. Click on "Save" button to save the LP to the project. The LP record appears in the List on the top of the screen. Continue the same search and save procedure to add multiple LPs to the project. User can delete the added LP by clicking on the "Delete" link at the end of the record line. To edit the LP information for this project, click on "Edit" link.

Click on "Continue Application" to proceed to the next page flow screen.

Step 6. **Add one or multiple Contacts to this project.**

Similar to adding one or multiple LPs, user can add one or multiple Contacts to this project. User can enter a search criteria such as name or address, click on "Search" button, then select the correct contact from the returned list. User must add at least one Contact to this project.

In addition, user can check "Auto-fill with" and add either the applicant or facility contacts to this project. The information of the highlighted contact will be auto populated in the fields below.

User must select a Contact Type and click on "Save" button to save the selected contact.

Click on "Continue Application" to proceed to the next page flow screen.

Step 7. **Enter Project Details and Additional Details.**

Enter meaningful Project Name and Project Scope description.

Enter ASI according to your project. Make sure you have an available Annual Building Permit (ABP) before selecting the answer "Yes". eCA generates the error message if an available ABP does not exist for the current fiscal year. User can not submit the application unless the error is corrected.

Additional Details

PLAN REVIEW

* Submittal Type:	(?) --Select-- ▼
* Kind of Project:	(?) --Select-- ▼
Total Beds Before Construction:	(?) Number
Total Beds After Construction:	(?) Number
* Square Footage of Project:	(?) Number
* Use Annual Building Permit:	(?) ○ Yes ○ No
* Managed Project Requested:	○ Yes ◉ No
Seismic Compliance Construction Project:	○ Yes ◉ No
* Project includes primary gravity and/or lateral load elements/systems:	○ Yes ○ No
OSHPD Building #:	(?) Ex: BLD-05217, BLD-02934, BLD-01844

Step 8. **Enter Project Tabular Information.**

User must enter at least one Costs row. User can enter one or multiple Costs rows at a time. To add one Costs row, click on "Add a Row" button in COSTS section.

On the pop up window, enter the project costs information then click on "Submit" button. Costs entered are automatically given the "Estimated" cost type.

Continue to add other tabular information in various sections on this screen. When finished, click on "Continue Application" to proceed to the next page flow screen.

Step 9. **Enter Facility PIN code or Save pending submittal.**

Before entering the Facility PIN Code, it is recommended that you have clicked on "Save pending submittal" at least once!

If you are authorized by the facility and have obtained an valid Facility PIN, enter it on the screen, then click on "Continue Application" button to proceed to the next page flow screen.

If you do not have a valid Facility PIN code, click on "Save pending submittal" button to save the record.

If user clicks on "Save pending submittal" button, the application process stops and user is redirected to the project list page. eCA issues a temporary Project ID and displays the application in user's project list. User can "Resume Application" at a later time.

If user enters an invalid Facility PIN, eCA displays an error message and prevents user from proceeding to the next screen. User must re-enter a valid PIN then continue. If user does not have a valid PIN, remove the incorrect PIN entry then save pending submittal.

Step 10. **Select Payment Option.**

After entering a valid Facility PIN code, user can select one of the three payment options. The description of each payment options is as follow:
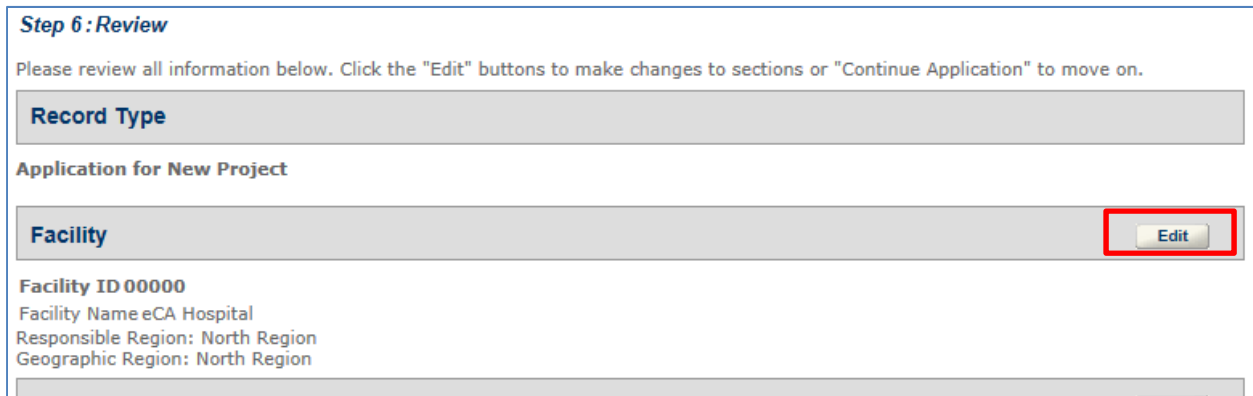

- **Invoice Me**: OSHPD will mail facility the invoice later.
- **Pay Later**: facility intends to make online payment at a later time. If unpaid after ten calendar days, OSHDP will mail the invoice to the facility.
- **Pay Now**: facility intends to make an immediate online payment on the next screen before the application is submitted.

If user does not select a payment type and proceed to complete the application, the Facility PIN may become visible on the review page when the application is resumed later. To prevent the Facility PIN from being displayed, user must select a payment type and complete the application.

Click on "Continue Application" to proceed to the next page flow screen.

Step 11. **User reviews the data entered and makes edits if needed.**

On this screen, user can click on "Edit" button in each application step to make necessary changes.

Once all data is verified, click on "Continue Application" to proceed to the next page flow screen.

If user selected "Invoice Me" or "Pay Later" option, skip to step 14 below.

Step 12. **Pay Application Fees online.**

If user selected "Pay Now" option previously, this screen displays the total fees to be paid.

Listed below are preliminary fees based upon the information you've entered. Some fees are based on the quantity of work items installed or repaired. Enter quantities where applicable. The following screen will display your total fees.

Application Fees

Fees	Qty.	Amount
Application Fee	1	$250.00

TOTAL FEES
Note: This does not include additional inspection fees which may be assessed later.

$250.00

Click on "Continue Application" to proceed to the payment screen.

Step 13. **Submit online payment.**

On this screen, enter the accurate credit card information then click on "Submit Payment" button.

Amount to be charged: $250.00

⊙ Pay with Credit Card

Credit Card Information:

*Card Type: *Card Number: * Security Code: ⑦
--Select--   ▼

*Name on Card: * Exp. Date:
                         01 ▼   2013 ▼

Credit Card Holder Information:
☐ Billing Information:
* Street Address:

*City: * State: *Zip:
                --Select-- ▼

*Phone:

E-mail:

Submit Payment »

Step 14. **Project submission confirmation.**

On this screen, eCA display a project submission confirmation including the project record number. User can print a project record summary from this screen, save or email as a reference copy. User can view the detailed information about the project by clicking on "View Record Details" button.

Congratulations! You have successfully submitted an AFNP.

6.4   Create and submit an Amendment

Amendment to a parent project can be Post Approval Document (PAD) or Alternate Method of Compliance (AMC). To create an amendment application, user can do one of the followings:

1. Search for the project for which you want to submit an Amendment such as PAD either by searching fields or locating it from your project list. If you have permission to create a PAD, a link "Amendment" appears to the last of the project record.

2. Click on the project number link to view project details. On the details page, click on "Create Amendment" to create a PAD.

On the following screen, select the Amendment Type (PAD or AMC) using one of the radio options.

Select an Amendment Type

Choose one of the following available amendment types. For assistance or to apply for an amendment type not listed below please contact us.

○ Alternate Method of Compliance
○ Post Approval Document

Continue Application »

Submit the amendment by following the steps below. Steps for AMC and the PAD application submission are the same unless described otherwise.

Step 1. **Add additional licensed professionals**

When submitting an amendment for a PAD or AMC, the Licensed Professional(s) on the parent project will be automatically copied to the amendment. Only Licensed Professional(s) not listed on the parent project need to be added to the new record. User can add one or multiple additional licensed professionals. Do not add licensed professionals if they already existed on the parent project.

On this screen, user first searches an existing and active Licensed Professional (LP) record by at least one search criteria such as License Type, License Number, or Name. Click on "Search" button to perform the search.

Locate the correct LP in the returned list then click on the License Number of the record. The LP information will auto-populate the field above.

6 results found matching lookup criteria
Click any of the results below to view more details.

Showing 1-6 of 6

License Number	License Type	Licensed Professional Name	Business Name
C19051	Architect	Tom B. Martinez	Tom B. Martinez and Associates
C21823	Architect	Tommy Wong	Bock Engineering, Inc
C22658	Architect	TOMAS OSINSKY	TOMAS OSINSKY DESIGN
C26448	Architect	Tom R. Steeno	Steeno Design Studio
C28849	Architect	Tom Cestarte	WWCOT
C29916	Architect	Tom Bast	OWP/P INC.

* License Type: Architect
* State License Number: C10006
Name of Business: Bermudes Architects

* First Name: Victor E.
* Last Name: Bermudes

* Address Line 1: 8954 Willowgrove Avenue
* City: Santee
* State: CA
* Zip: 92071-

Phone: 619-448-1800
Mobile Phone:

Discipline Primary:
○ Yes ○ No

Responsible Primary (eCA):
○ Yes ○ No

[Search] [Save] [Cancel] [Clear]

Click on "Save" button to save the LP to the project. The LP record appears in the List on the top of the screen. Continue the same search and save procedure to add multiple LPs to the project. User can delete the added LP by clicking on the "Delete" link at the end of the record line. To edit the LP information for this project, click on "Edit" link.

Licensed Professional List
✔ Licensed professional added successfully.

Showing 1-2 of 2

License Number	License Type	Contact Name	Business Name	Action
22658	Architect	TOMAS OSINSKY	TOMAS OSINSKY DESIGN	Edit Delete
M31169	Mechanical	Alexandru Musat	UC DAVIS MEDICAL CENTER	Edit Delete

Click on "Continue Application" to proceed to the next page flow screen.

Step 2. **Record Details**

For PAD amendments, user must record the PAD submittal type from the dropdown list, enter Applicant Tracking Number, Reason for Change, and Scope of Change. For AMC amendments, user must enter Applicant Tracking Number; record the Type of AMC from the dropdown list; enter the Description of Proposal, Reason for Change, and Scope of Change.

- **PAD only - Record the PAD details, enter the information as below.**

PAD Detail

PLAN REVIEW

* Submittal Type:	--Select--
* Applicant Tracking Number:	
* Reason for Change:	
* Scope of Change:	
Public User Email:	

- **AMC only - Record the AMC record details, enter the information as below.**

AMC Details

ALTERNATE METHOD OF COMPLIANCE

Applicants Tracking No.:	
* Type of AMC:	--Select--
* L & C approval required:	○ Yes ○ No
* Local authority approval required:	◉ Yes ○ No
* Description of Proposal:	
* Reason:	
* Scope of Change:	

Click on "Continue Application" to proceed to the next screen.

Step 3. **Continue Recording Details**

- **PAD only - Add Costs data.**

Users must enter at least one Costs row. To add one Costs row, click on "Add a Row" button in COSTS section.

On the pop up window, enter the project costs information (Construction Costs, Fixed Equipment Costs and Imaging Equipment Costs) then click the "Submit" button. Costs entered are automatically recorded as "Estimated".

- **AMC only - Add Applicable Codes**

Enter applicable codes as needed. The Applicable Codes are optional to AMC application submission.

- **PAD and AMC - Add Enclosures**

Add PAD and AMC Enclosures as needed. Enclosures are optional for AMC application submission and must be included when supporting data or construction documents are necessary to assist in the approval of materials or assemblies not specifically provided for in the code.

Step 4. **Add additional Contacts**

Contacts are not required. However, user can add additional contacts if they do not exist on the parent project.

User can enter search criteria such as name or address, click on "Search" button, and then select the correct contact from the returned list.

In addition, user can check "Auto-fill with" and add either the applicant or facility contacts to this project. The information of the highlighted contact will be auto populated in the fields below.

User must select a Contact Type and click on "Save" button to save the selected contact.

Step 6. **Add Facility PIN Code**

If you are authorized by the facility and have obtained an valid Facility PIN, enter it on the screen, then click on "Continue Application" button to proceed to the next page flow screen.

If you do not have a valid Facility PIN code, click on "Save pending submittal" button to save the record.
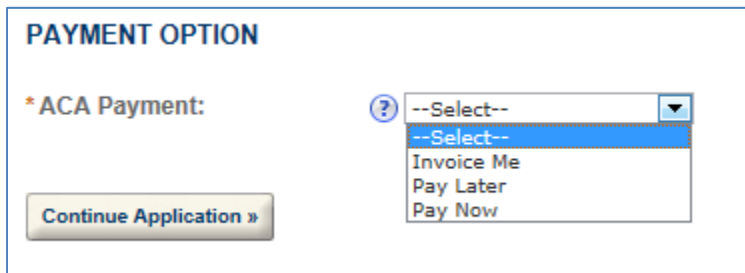
Security
SECURITY
Pin Code:

If a valid PIN is entered, click on "Continue Application" to proceed to the next screen.

Step 7. **Select payment options**

After entering a valid Facility PIN code, user MUST complete the payment option and complete the application. User can select one of the three payment options. The description of each payment options is as follow:

PAYMENT OPTION

* ACA Payment: (?) --Select--
--Select--
Invoice Me
Pay Later
Pay Now

Continue Application »

- **Invoice Me**: OSHPD will mail facility the invoice later.
- **Pay Later**: facility intends to make online payment at a later time. If unpaid after ten calendar days, OSHDP will mail the invoice to the facility.
- **Pay Now**: facility intends to make an immediate online payment by credit card on the next screen before the application is submitted.

If user does not select a payment type and proceed to complete the application, the Facility PIN may become visible on the review page when the application is resumed later. To prevent the Facility PIN from being displayed, user must select a payment type and complete the application.

Click on "Continue Application" to proceed to the next page flow screen.

Step 8. **User reviews the data entered and makes edits if needed.**

On this screen, user can click on "Edit" button in each application step to make necessary changes.

Step 6 : Review

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

Record Type

Application for New Project

Facility   [Edit]

Facility ID 00000
Facility Name eCA Hospital
Responsible Region: North Region
Geographic Region: North Region

Once all data is verified, click on "Continue Application" to proceed to the next page flow screen.

If user selected "Invoice Me" or "Pay Later" option, eCA will skip to step 11 below.

Step 9. **Pay Application Fees online.**

If user selected "Pay Now" option previously, this screen displays the total fees to be paid.

Listed below are preliminary fees based upon the information you've entered. Some fees are based on the quantity of work items installed or repaired. Enter quantities where applicable. The following screen will display your total fees.

Application Fees

Fees	Qty.	Amount
Application Fee	1	$250.00

TOTAL FEES
Note: This does not include additional inspection fees which may be assessed later.

$250.00

Click on "Continue Application" to proceed to the payment screen.

Step 10. **Pay online now**

On this screen, enter the accurate credit card information then click on "Submit Payment" button.

Click on "Continue Application" to proceed to the payment screen.

Step 11. **Project Confirmation**

On this screen, eCA display a project submission confirmation including the project record number. User can print a project record summary from this screen, save or email as a reference copy. User can view the detailed information about the project by clicking on "View Record Details" button.

Congratulations! You have successfully submitted an amendment project application.

6.5   Print Preliminary Invoice after Submitting the Project

To print the preliminary invoice after the project is submitted, follow the steps below.

Step 1. **If user is on the application confirmation page, click "View Record Details" button.**
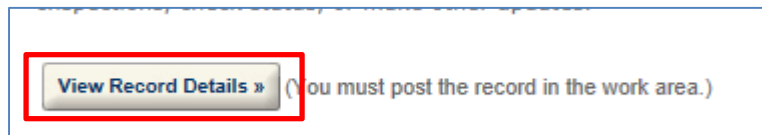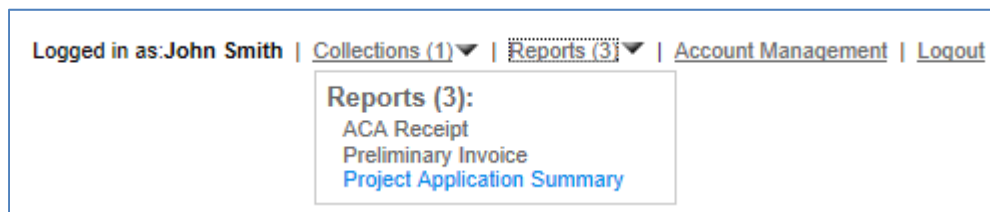

Step 2. **Alternatively, user can click the Project Number link in Projects list to navigate to the project details page.**

Step 3. **Open the "Fees" section on the record details page. Write down or copy the Invoice Number.**

Step 4. **At the top of the page, click the "Reports" link then select "Preliminary Invoice" menu.**

Step 5. In the popup window, enter the invoice number noted in step 3 above, then click "Submit".

Please input report parameter(s):

*Invoice No.:

120035

[Submit] [Cancel]

Step 6. **The preliminary invoice is displayed in the popup window**.

Preliminary Invoice

Invoice Date:	April 05, 2013
Payment Due Date:	May 05, 2013
Current Date:	April 05, 2013

REMIT TO:

Ronald Reagan UCLA Medical Center
757 Westwood Plaza
Los Angeles, CA 90095

Office of Statewie Health Planning and Development
Accounting Office
400 R Street, Ste 359
Sacramento, CA 95811-6213

Project related questions contact - Facilities Development Division (916) 440-8300 or (213) 897-0166
Billing related questions contact - Accounting Services (916) 326-3236, Fax (916 322-2527)

Facility Name:	Ronald Reagan UCLA Medical Center	Facility Number:	12127
Project Description:	test	Project Number:	S130086-19-00-ACD0001
App Tracking #:		Parent Number:	S130086-19-00
Scope of Change:	r		

Fee Item Description	Date	Amount	Amount Due
Application Fee	04/05/2013	$250.00	$250.00