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## POLICY INTENT NOTICE (PIN)

### SUBJECT

Integrated Review (IR)

*(Formerly Collaborative Review and Construction (CRC) process  
& Phased Plan Review (PPR))*

**PIN: 50**

**Effective: 07/30/2021**



### PURPOSE

The Office of Statewide Health Planning and Development (OSHPD; hereinafter referred to as the “Office”) implemented its Phased Plan Review (PPR) process in 2007. Due to the Industry’s growing demand for utilizing LEAN principles and Integrated Project Delivery methods, in 2013 the Office implemented an optional plan review process known as Collaborative Review and Construction (CRC). Several iterations of these integrated review processes have been used successfully on many projects reducing the time to first approval by up to six months and minimizing the number of back checks and post approval documents during construction. With new developments in Electronic Plan Review, many of the benefits for CRC have been incorporated and are available for a wider assortment of projects. With this in mind, CRC and PPR are being combined and is now known as Integrated Review (IR). This Policy Intent Notice (PIN) incorporates lessons learned on PPR and CRC projects completed to date and incorporates them into the new IR process.

### BACKGROUND

From the California Health and Safety Code, Section 129765:

(b) Notwithstanding subdivision (a), the Office, at its sole discretion, may enter into a written agreement with the hospital governing authority for the phased submittal and approval of plans. The Office shall charge a fee for the review and approval of plans submitted pursuant to this subdivision. This fee shall be based on the estimated cost but shall not exceed the actual cost of the entire phased review and approval process for those plans. This fee shall be deducted from the application fee pursuant to Section 129785.

From the California Code of Regulations, Title 24, Part 1:

**7-111 INTEGRATED REVIEW** is the process that engages the office, at its sole discretion, early in the project design and continues through the development and submission of documents during the (design phases of) conceptualization, criteria design, detailed design, implementation documents, office review, and final plan approval. Within each phase milestones are established for specific, agreed upon points where segments of the design/building system are completely designed and/or defined in their entirety. The Office provides an agreed upon level of review that allows for written conditional acceptance of these elements and/or systems.

**7-121(c) Integrated review.**

A request for Integrated Review (IR) must be submitted to the Office in writing prior to the presubmittal meeting being scheduled. In addition to the items listed in Section 7-121(a), for IR projects, the architect or engineer in responsible charge shall submit the following information to the Office:

1. Complete project schedule.
2. Proposed review matrix outlining all phases, milestones, increments, and segments for the project.
3. Initial draft of the Integrated Review Plan (IRP) proposed, defining roles and accountability of the participants.

**7-130 Integrated submittal, review and approval.**

The Office, in its sole discretion, may enter into a written agreement with the hospital governing board or authority for the phased/integrated submittal, review and approval of construction documents.

**7-133(h) Integrated Review submittal.**

1. The fee for integrated submittal, review and approval pursuant to Section 7-130 shall be based on the written agreement, which shall include a schedule for payment. The integrated review fee shall be 1.95 percent of the estimated construction cost as calculated in accordance with Section 7-133(a) 4 through 7.

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**POLICY**

This OSHPD Policy implements the Integrated Review Process.

**PROCEDURE**

See Appendix A: Definitions

The table which follows describes the Integrated Review process, including project parameters which must be considered, description of sequential steps through completion, required elements, and goals and best practices.

<b>INTEGRATED REVIEW</b>
<b>Project Parameters: The project parameters below are provided as a guideline and are subject to modifications on a project-by-project basis at the discretion of the Office.</b>
<ul style="list-style-type: none"> <li>• Project Cost: &gt; \$50 million</li> </ul>
<ul style="list-style-type: none"> <li>• Increments: 6</li> </ul>
<ul style="list-style-type: none"> <li>• Phases: 3 per Increment + final Implementation documents.</li> </ul>
<ul style="list-style-type: none"> <li>• Segments: 3 per Phase.</li> </ul>
<ul style="list-style-type: none"> <li>• Submittals: 1 per segment. (Indicate which disciplines require review)</li> </ul>
<b>Required Elements:</b>
<ul style="list-style-type: none"> <li>• Request for Integrated Review RIR (OSH-FD-122)</li> </ul>
<ul style="list-style-type: none"> <li>• Integrated Review Plan (IRP) and Review Matrix</li> </ul>
<ul style="list-style-type: none"> <li>• Presubmittal Meeting</li> </ul>
<ul style="list-style-type: none"> <li>• Owner-approved Space and Operational Program prior to first submittal.</li> </ul>
<ul style="list-style-type: none"> <li>• Integrated Review and Record Review Set</li> </ul>
<ul style="list-style-type: none"> <li>• Plan Check Review Log</li> </ul>
<ul style="list-style-type: none"> <li>• Current review completed before Back Check</li> </ul>
<ul style="list-style-type: none"> <li>• For projects &gt; \$100 million – BIM Modeling Software or at a minimum 3D Modeling Software.</li> </ul>
<ul style="list-style-type: none"> <li>• For projects &gt; \$100 million – Project Design Team Integrated with a CM/CG and major subcontractors for the MEP trades.</li> </ul>
<b>Optional Elements:</b>
<ul style="list-style-type: none"> <li>• Plan Exchange Meetings</li> </ul>

<b>IR – Process</b>
Upon acceptance of IR by the Office, assign OSHPD staff for the plan review of permit sets.
Owner to schedule the Presubmittal Meeting with the Office to review draft IRP and Review Matrix outlining tasks through approval of last CD or implementation submittal.
Submit final IRP including Review Matrix for Office review and approval.
Upon approval of IRP, submit first review with plan review application as scheduled within the approved Review Matrix.
Plan reviews shall consist of: <ul style="list-style-type: none"> <li>• Plan Exchange Meetings as needed: 1-hour discipline-to-discipline pre-review meetings for design consultants to clarify segments to reviewers or 1-hour discipline-to-discipline post-review meetings for reviewers to clarify comments to design consultants.</li> <li>• Submittals and review per Review Matrix schedule.</li> <li>• Rolling Reviews: All comments and conditional acceptance for each discipline will be entered in the OSHPD Plan Check Review Log and be available to design team.</li> <li>• Major Code Issues must be immediately resolved with rolling reviews, emails, meetings, or teleconference.</li> <li>• Back checks for the segment will be performed at next scheduled review per Review Matrix.</li> </ul>
Integrated Review ends when all permit sets of construction documents have been approved. This includes deferred approvals.



## APPENDIX A: DEFINITIONS

**Amended Construction Document (ACD):** Work shall be installed in accordance with the approved construction documents and any changes made during construction that are not in compliance with the approved construction documents shall be resubmitted for approval as an amended set of construction documents. *[OSHPD 1, 2, 4 & 5] Change in the work shall be in accordance with Title 24, Part 1, Chapter 7, Section 7-153.*

**Conditional Acceptance:** This is the Office's acknowledgment that a certain segment, as currently shown, has been accepted by the Office for code compliance, with the condition that no changes that affect this acceptance are made to the project.

**Construction Documents:** Written, graphic and pictorial documents prepared or assembled for describing the design, location and physical characteristics of the elements of a project necessary for obtaining a building permit. This would include integrated phased review submittals.

**Increment:** Per Part 1, Title 24, Section 7-131(b), Increments shall be limited to complete phases of construction, such as demolition, site work and utilities, foundations and basement walls, structural framing, architectural work, mechanical work, electrical work, etc.

**Note:** Approval of increments require review and conditional acceptance of all items affecting the increment. If these required items are not to be constructed within an increment, they shall be clearly marked for reference only or be simultaneously submitted in another increment.

**Integrated Review:** The process that engages the Office, at its sole discretion, early in the project design and continues through the development and submission of documents during the design phases of conceptualization, criteria design, detailed design, implementation documents, office review, and final plan approval. Within each phase milestones are established for specific, agreed upon points in time where segments of the design/building system are completely designed and/or defined in their entirety. The Office provides an agreed upon level of review that allows for written conditional acceptance of these elements and/or systems.

**Note:**

- Review turnaround times are negotiated.
- Rolling reviews may only be used within an IR for resolution of Major Code Issues.

**Integrated Review Meetings:** Meetings between the design team and plan reviewers to review progress, outstanding issues and major code issues.

**Integrated Review Plan (IRP):** IRP is an agreement between the Hospital governing authority and the Office that describes the project scope, plan review type, and corresponding fees. The IRP shall define the roles and responsibilities of the participants with the review matrix and the project schedule as the basis for the IRP. See Appendix D.

**Note:**

- The fee for integrated reviews shall be in accordance with CAC, Section 7-133(h) as being amended.
- Integrated reviews require a non-refundable fee of not less than 10% of the total fee and is due upon approval of the written agreement. This portion of the fee shall be deducted from the application fee specified in CAC, Section 7-133(a).
- The IRP may be terminated because of major design or scoping changes to the project, non-compliance with the agreed upon schedule, and inadequate responsiveness to comments. If terminated, the project must be resubmitted using the traditional plan review approach. The Deputy Director or a Deputy Division Chief may terminate the IRP on behalf of the Office.
- The IRP replaces the MOU referenced in the current regulations.

**Integrated Review Schedule:** Typically, a Gantt chart or bar graph showing the schedule for all phases of plan review and construction.

**Major Code Issue (MCI):** Non-compliant portion of the project that may require significant redesign. MCI's require resolution prior to subsequent submittals.

**Milestone:** A point in time defined by the percentage of completeness of a specified integrated design phase for the entire project (or increment for incremented projects), when specific segments are reviewed.

**Phase:** Represents level of completion of construction documents for a project or an increment. Based on 2007, version 1, AIA Guide for Integrated Project Delivery, and numbered for use in the OSHPD data tracking system (Accela) and the Review Matrix.

**Integrated Phase**

- 1) Conceptualization/Criteria Design
- 2) Detailed Design
- 3) Pre-Implementation
- 4) Implementation Documents

**Traditional Phase**

- Schematic Design
- Design Development
- <100% - Construction Documents
- 100% - Construction Documents

**Note:** Phases shall be for each increment as needed.

**Phased Plan Review:** See Integrated Review.

**Plan Check Review Log:** A log shared by the OSHPD and the design team that tracks comments and their resolution and is managed by an architect and engineers within the Office. See Appendix C.

**Plan Exchange Meetings:** As-needed meetings between the design team and plan reviewers at major hand-offs of documents:

To the Office - Design team will clarify segments to be reviewed.

From the Office - Review staff will clarify general scope of comments.

**Presubmittal Meeting:** This meeting is required per Part 1, Title 24, Section 7-121(c), for projects \$20 million and over. This meeting will be held after approval of the Request for Integrated Review. It will include a presentation of the project, proposed increments, and a rough draft of the IRP, including a Review Matrix outlining all milestones, increments, phases and segments for the project.

**Review Matrix:** A tool to plan the entire Integrated Review process that includes the following items: Tasks, milestones, design times, review times, comment response times, construction times, and the priority needed for acceptance of certain segments.

**Note:** These are all considerations required for a well-thought-out matrix. See attached Sample Review Matrix in Appendix B.

**Record Review Set:** Review of all submittals to the Office shall be completed prior to changing any plans. Any changes as a result of responses to comments or design revisions shall be incorporated into the next back check submittal. These submittals are maintained within the Office Electronic Plan Review (ePR) system as record review sets.

**Request for Integrated Review (RIR) OSH-FD-122:** This [form](#) is available on the OSHPD website and is required to request that the Office utilize an Integrated (Phased) Review process for a specific project. It will give pertinent information for the Office to determine if an Integrated Review process is appropriate. The Office will try to keep the same assigned staff on the project for its entire duration to the extent possible.

**Rolling Review:** Plan review utilizing a plan check review log wherein plan review comments are available through the Office website, design team responses are logged, and the Office acceptance is recorded. Comment resolution may be discussed in integrated review or plan exchange meetings or through collaboration tools in ePR; however, corrected plans shall not be submitted for back check until the entire submittal under review is complete.

**Segment:** Clearly defined part(s) of the building or building system that is substantially complete and submitted for review of specific elements (e.g. architectural layout, Fire/Life Safety conditions, accessibility). If submitted under an increment the segment must only include work to be constructed within that increment. Segments receive conditional acceptance, not plan approval. Building permits are for projects or increments; hence, segments do not have associated building permits.

APPENDIX B:

**SAMPLE REVIEW MATRIX**

Sample Integrated Review Matrix

Phase	Segment	Estimated Submittal Date	Estimated Review Completion	Elements to be Reviewed	Disciplines Required				
					ARCH	STRUCT	MECH	ELEC	FLSO
<b>INCREMENT 1 - SITE UTILITIES AND SHORING</b>		<b>12/01/20</b>	<b>08/21/21</b>						
<b>PHASE 3 - PRE-IMPLEMENTATION</b>		<b>12/01/20</b>	<b>07/13/21</b>						
3	3a Site Utilities	12/01/20	07/13/21	Site fire service plan (OSHDP review) Site Utility Plan - Domestic water, sewer, med gas, elec/telecom and storm drain (concurrent OSHDP and city review) Temporary egress during tower construction	X		X	X	X
	3b Shoring	05/03/21	07/13/21	Shoring for construction of hospital expansion		X			
<b>PHASE 4 - IMPLEMENTATION</b>		<b>07/17/21</b>	<b>08/14/21</b>						
4	4 Final Increment #1 Package	07/17/21	08/14/21	Review drawings against segmental conditional approvals	X	X	X	X	X
	Permit Process	08/15/21	08/21/21	Final clean set for approval stamping					
<b>INCREMENT 2 - FOUNDATION AND SUPERSTRUCTURE</b>		<b>07/03/21</b>	<b>06/15/22</b>						
<b>PHASE 1 - CONCEPTUAL/CRITERIA</b>		<b>07/03/21</b>	<b>08/18/21</b>						
1	1a Detailed Approach and Loading	07/03/21	08/18/21	Detailed approach to design including sample calculations Dead load, live load, seismic load and loading maps Architectural plans (for reference only)		X			
	<b>PHASE 2 - DETAILED DESIGN</b>		<b>08/28/21</b>	<b>11/17/21</b>					
2	2a Gravity Framing	08/28/21	11/17/21	Application of Approach Gravity framing model Gravity framing details		X			
	2b Lateral Framing	08/28/21	11/17/21	Application of Approach Global modeling issues Massing Moment frame beam and column sizing		X			
<b>PHASE 3 - PRE-IMPLEMENTATION</b>		<b>11/27/21</b>	<b>02/16/22</b>						
3	3a Diaphragm/Chords/Drags/Connections Typical Details and Specifications	11/27/21	02/16/22	Diaphragm, chord and collector analysis Diaphragm, chord and collector design Special moment frame connection design Chord and collector connection design Slab Dimension control plans - floor openings and edge of slab Existing Building structural modifications	X	X			
	3b Foundation Design/Waterproofing	11/27/21	02/16/22	Foundation, retaining wall - model, details, general notes Specifications (structural divisions 1 thru 5) Subgrade waterproofing and details MEP utility under-slab and penetrations through basement walls Architectural, MEP floor plans (for reference only)	X	X	X	X	X
<b>PHASE 4 - IMPLEMENTATION</b>		<b>02/26/22</b>	<b>06/01/22</b>						
4	4 Final Increment #2 Package	02/26/22	06/01/22	Typical details, general notes Structural specifications	X	X	X	X	X
	Permit Process	06/04/22	06/14/22	Miscellaneous design items not reviewed in prior segments Final clean set for approval stamping					
<b>INCREMENT 3 - BUILDING ENCLOSURE, VERTICAL CIRCULATION</b>		<b>11/01/21</b>	<b>10/12/22</b>						
<b>PHASE 3 - PRE-IMPLEMENTATION</b>		<b>11/01/21</b>	<b>08/24/22</b>						
3	3a Building Enclosure & Vertical Circulation	11/01/21	03/29/22	Architectural Core & Shell Plans Edge of slab firestopping Elevator and Stair plans, sections, details and calculations Exterior seismic joint assemblies and details Building mounted signage Building connection plans, framing, details and calculations	X	X			X
	3b Curtain Wall, Screen Wall and Window Washing	04/02/22	06/22/22	Curtain wall and screen wall structural drawings and calculations Exterior wall embeds	X	X			
	3c Exterior Framing	06/11/22	08/24/22	Window washing davits and equipment layout, anchorage and calculations Exterior light gage metal framing drawings and calculations		X			
<b>PHASE 4 - IMPLEMENTATION</b>		<b>09/02/22</b>	<b>10/05/22</b>						
4	4 Final Increment #3 Package	09/02/22	10/05/22	Review drawings against segmental conditional approvals	X	X			X
	Permit Process	10/08/22	10/12/22	Final clean set for approval stamping					



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Phase	Segment	Estimated Submittal Date	Estimated Review Completion	Elements to be Reviewed	Disciplines Required				
					ARCH	STRUCT	MECH	ELEC	FLSD
<b>INCREMENT 4 - INTERIOR CONSTRUCTION &amp; MEP SYSTEMS</b>		<b>11/01/20</b>	<b>12/21/22</b>						
<b>PHASE 1 - CONCEPTUAL/CRITERIA</b>		<b>11/01/20</b>	<b>01/31/21</b>						
1	1a Preliminary Submittal	11/01/20	01/31/21	Functional Program Arch, Struct, Mech, Plumb, Elec preliminary design drawings Basis of Design documents Preliminary Fire/Life Safety analysis plans - smoke compartments, exiting Plumbing fixture counts	X	X	X	X	X
<b>PHASE 2 - DETAILED DESIGN</b>		<b>09/25/21</b>	<b>12/18/21</b>						
2	2a Fire/Life Safety Package	09/25/21	12/18/21	Complete Fire/Life Safety Plans including: occupant load analysis, exit calculation, wall ratings, wall assembly and head of wall details Engineering judgements Site Accessibility Plan	X				X
	2b Accessibility Compliance Package	09/25/21	12/18/21	Architectural floor plans - enlarged toilet/shower rooms, typical workstations, interior elevations with accessory mounting configurations	X				
	2c Hazardous Materials Inventory	09/25/21	12/18/21	Hazardous material inventory					X
<b>PHASE 3 - PRE-IMPLEMENTATION</b>		<b>04/11/22</b>	<b>11/19/22</b>						
3	3a Interior Build-Out	04/11/22	11/19/22	Complete Arch, Mech, Plumb, Elec interior build-out drawings Low voltage including nurse call, public address, audio/visual and security Pneumatic Tube Fire Sprinkler Fire Alarm Specifications	X		X	X	X
	3b Interior Framing and Structural Details	07/31/22	11/19/22	Misc. interior support, framing and structural details		X			
<b>PHASE 4 - IMPLEMENTATION</b>		<b>11/20/22</b>	<b>12/13/22</b>						
4	4 Final Increment #4 Package	11/20/22	12/13/22	Review drawings against segmental conditional approvals	X	X	X	X	X
	Permit Process	12/14/22	12/21/22						
<b>INCREMENT 5 - EQUIPMENT ANCHORAGE</b>		<b>09/19/22</b>	<b>02/28/23</b>						
<b>PHASE 3 - PRE-IMPLEMENTATION</b>		<b>09/19/22</b>	<b>01/31/23</b>						
3	3a Special Seismic Certification	09/19/22	12/11/22	Special seismic certification MEP equipment anchorage details and calculations Medical equipment anchorage, details and calculations Furniture anchorage details and calculations Casework anchorage details and calculations Modular ceiling system details and calculations		X			
	3c Equipment Anchorage	09/19/22	01/31/23			X			
<b>PHASE 4 - IMPLEMENTATION</b>		<b>02/07/23</b>	<b>02/21/23</b>						
4	4 Final Increment #5 Package	02/07/23	02/21/23	Review drawings against segmental conditional approvals		X			
	Permit Process	02/22/23	02/28/23						
<b>INCREMENT 6 - SEISMIC BRACING</b>		<b>06/01/22</b>	<b>04/12/23</b>						
<b>PHASE 3 - PRE-IMPLEMENTATION</b>		<b>06/01/22</b>	<b>03/09/23</b>						
3	3a Seismic Bracing Floors B thru 3	06/01/22	02/10/23	MEP seismic bracing for floors B thru 3		X			
	3c Seismic Bracing Floors 4 thru 6	02/11/23	03/09/23	MEP seismic bracing for floors 4 thru 6		X			
<b>PHASE 4 - IMPLEMENTATION</b>		<b>03/10/23</b>	<b>04/07/23</b>						
4	4 Final Increment #6 Package	03/10/23	04/07/23	Review drawings against segmental conditional approvals		X			
	Permit Process	04/08/23	04/12/23						

**Notes:**

1. Submittals should be in an order such that the segments submitted to OSHPD are **substantially complete** and provide enough information in conjunction with prior submittals to allow for a complete review. Segments must only include work to be constructed within that increment. Information provided that is not to be constructed within the submitted increment must be clearly marked for reference only or be simultaneously submitted in another increment.
2. Phase: 1) Conceptualization/Criteria Design, 2) Detailed Design, 3) Pre-Implementation, 4) Implementation Documents, 5) Construction, 6) Agency Review/Final Buyout, and 7) Closeout. For incremental projects, phases shall be for each increment.

**APPENDIX C:**

**SAMPLE PLAN CHECK REVIEW LOG**

Project#: Backcheck#: Project Title:			Facility#:									
PDF File	Page No.	Sheet Title	Comment No.	Discipline	Comment Date	Comment By	Category	Subcategory	Comment	Comment Disposition	Response By	Response
AL_H191129-21-00 Arch Interior.pdf	1	A0.00	440	ARCH	12/13/2019	Antonio De Luca	No Category	No Subcategory	A-6 PROVIDE WRITTEN VERIFICATION FORM THE APPROPRIATE SCHOOL DISTRICT THAT ANY FEE, CHARGE, DEDICATION, OR OTHER REQUIREMENT LEVIED BY THE GOVERNING BOARD OF THAT SCHOOL DISTRICT HAS BEEN COMPLIED WITH, AS SPECIFIED. PER POLICY INTENT NOTICE (PIN) 48	Open		
AL_H191129-21-00 Arch Interior.pdf	1	A0.00	438	ARCH	12/13/2019	Antonio De Luca	No Category	No Subcategory	A-4 CIVIL AND LANDSCAPE DRAWINGS ARE REVIEWED FOR INFORMATION RELATED TO HOSPITAL BUILDING CODE COMPLIANCE, UNDER THE CALIFORNIA CODE OF REGULATIONS. LOCAL REVIEW REQUIRED FOR SIT E WORK	Open		
AL_H191129-21-00 Arch Interior.pdf	1	A0.00	435	ARCH	12/13/2019	Antonio De Luca	No Category	No Subcategory	A-1 CONSTRUCTION DOCUMENTS SHALL BE 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 THIS CODE AND RELEVANT LAWS, ORDINANCES, RULES AND REGULATIONS, AS DETERMINED BY THE BUILDING OFFICIAL. CBC 107.2.1.	Open		
AL_H191129-21-00 Arch Interior.pdf	1	A0.00	434	ARCH	12/13/2019	Antonio De Luca	No Category	No Subcategory	G-1 PLEASE REDUCE YOUR OSHPD COMMENTS AND REDUCE YOUR BACK CHECK FROM OSHPD BY SIMPLY COORDINATING YOUR PROJECTS BEFORE SUBMITTAL.  G-2 PLEASE MINIMIZE AND CLEARLY IDENTIFY NON-REVIEW RELATED CHANGES. MORE CHANGES THAT OCCUR AT THE BACKCHECK LEVELS CAUSE ADDITIONAL COMMENTS AND BACK CHECKS	Open		

APPENDIX D:

SAMPLE AGREEMENT

INTEGRATED REVIEW PLAN

By and Between

OFFICE OF STATEWIDE HEALTH PLANNING & DEVELOPMENT

And

(Hospital governing authority name here)

Recitals

- A. California Health and Safety Code Section 129765(b) allows the Office of Statewide Health Planning and Development (OSHPD) to enter into a written agreement with (Hospital governing authority name here) in order to engage in the Integrated Review submittal and approval process of hospital plans.
- B. (Hospital governing authority name here), and (description i.e. California nonprofit public benefit corporation here) desires to participate in the Integrated Review submittal and approval process of hospital plans.
- C. By this Integrated Review Plan (IRP), OSHPD and (Hospital governing authority name here) hereby agree as follows:

Agreement

- 1) This IRP covers the submittal and approval of structural, mechanical, electrical, fire and life safety, and architectural plans for the (Project Name and Address here).
- 2) The Project shall include one building only under this IRP. The building is described as the proposed: (Project Name here) hospital building.

Note: Only one architectural building per IRP for Incremental projects.

- 3) This IRP shall cover structural, mechanical, electrical, fire and life safety, and architectural design of the Project. Attached hereto as Exhibit 1 is the (Hospital governing authority name here) Review Matrix which specifies the milestones, tasks, increments and segments, with anticipated submittal and review completion dates for the entire Project.

4) For Integrated Review (IR)

At the end of each OSHPD integrated review submittal and review, segments may be conditionally approved. The plans shall receive final approval only upon submittal and final review of all the remaining project plan segments and shall be in accordance with California Health & Safety Code Section 129765(a). Collaborative Review and Construction is now known as Integrated Review and in accordance with 2019 California Administrative Code (CAC), Part 1, Section 7-133 as being revised. (Hospital governing authority name here) agrees to pay 1.95% of the estimated construction cost per paragraph 5). The final fee shall be based upon the determination of the final actual construction cost and shall be due prior to occupancy being granted.

5) Use one of the options below:

a) For IR with Increments

(Hospital governing authority name here) agrees to pay an integrated review fee of 1.95% of the estimated construction cost. This Integrated Review fee shall not exceed the total Project application fee. A nonrefundable fee of 10 percent of the fee shall be due upon approval of the written agreement and shall be deducted from the application fee specified in Section 7-133(a) or for fees pursuant to Section 7-133(e) for incremental reviews. In accordance with 2019 CAC, Part 1, Section 7-133 as being revised, (Hospital governing authority name here) agrees to pay 1.95% x (estimated construction cost of each Increment) at the first submission of Construction Documents (or per agreed upon schedule) for each increment submittal. The final fee shall be based upon the determination of the final actual construction cost and shall be due prior to occupancy being granted.

b) For IR with No Increments

(Hospital governing authority name here) agrees to pay a phased plan review fee of 100% of the total Project Application Fee based on 1.95% of the estimated cost of construction. This Integrated Review fee shall not exceed the total Project application fee. A nonrefundable fee of 10 percent of the fee shall be due upon approval of the written agreement and shall be deducted from the application fee specified in Section 7-133(a). In accordance with 2019 CAC, Part 1, Section 7-133 as being revised, (Hospital governing authority name here) agrees to pay 1.95% x (estimated construction cost of project) at the first submission of Construction Documents (or per agreed upon schedule). The final fee shall be based upon the determination of the final actual construction cost and shall be due prior to occupancy being granted.

6) OSHPD and (Hospital governing authority name here) shall engage in an ongoing review of the Project as it proceeds to ensure that the Project is yielding the intended results.

7) Failure of (Hospital governing authority name here) to meet Project requirements including the deadlines set forth in Exhibit 1 may result in the termination of this IRP, and the Project being removed from the Integrated Review process and returned to the regular plan review process of OSHPD. Such failure shall be determined to occur at the sole discretion of OSHPD. In the event this IRP is terminated, (Hospital governing authority name here) shall pay to OSHPD all

actual costs incurred by OSHPD in performing under this IRP.

8) No amendment to this agreement is valid unless in writing and signed by both parties. No oral agreement or understanding not incorporated in this agreement is binding on the parties.

9) When written notice is required, such notice shall be made as follows:

OSHPD  
Attn: (Deputy Director or Deputy Division Chief)  
Facilities Development Division  
2020 West El Camino Avenue, Suite 800  
Sacramento, CA 95833

Hospital Governing Authority Name  
(Hospital governing authority name here) Address  
(Hospital governing authority name here) Phone

The contract managers for this IRP are as follows:

a) OSHPD: \_\_\_\_\_, Senior Architect  
Telephone Number:  
Address:

b) (Hospital governing authority name here): \_\_\_\_\_, Project Director  
Telephone Number:  
Address:

**POLICY INTENT NOTICE (PIN)**

10) This IRP is effective on the date last signed by both parties. However, OSHPD is under no obligation to commence performance under this IRP until such time as the first segment is submitted to the Office and the fees required pursuant to Paragraph 7 are paid.

Hospital Governing Authority Name  
And Description

By: \_\_\_\_\_  
(Name of Hospital governing authority name here) Representative  
Project Director

\_\_\_\_\_

Date

Office of Statewide Health Planning and Development

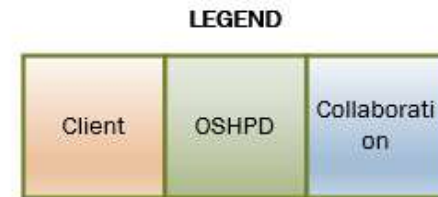
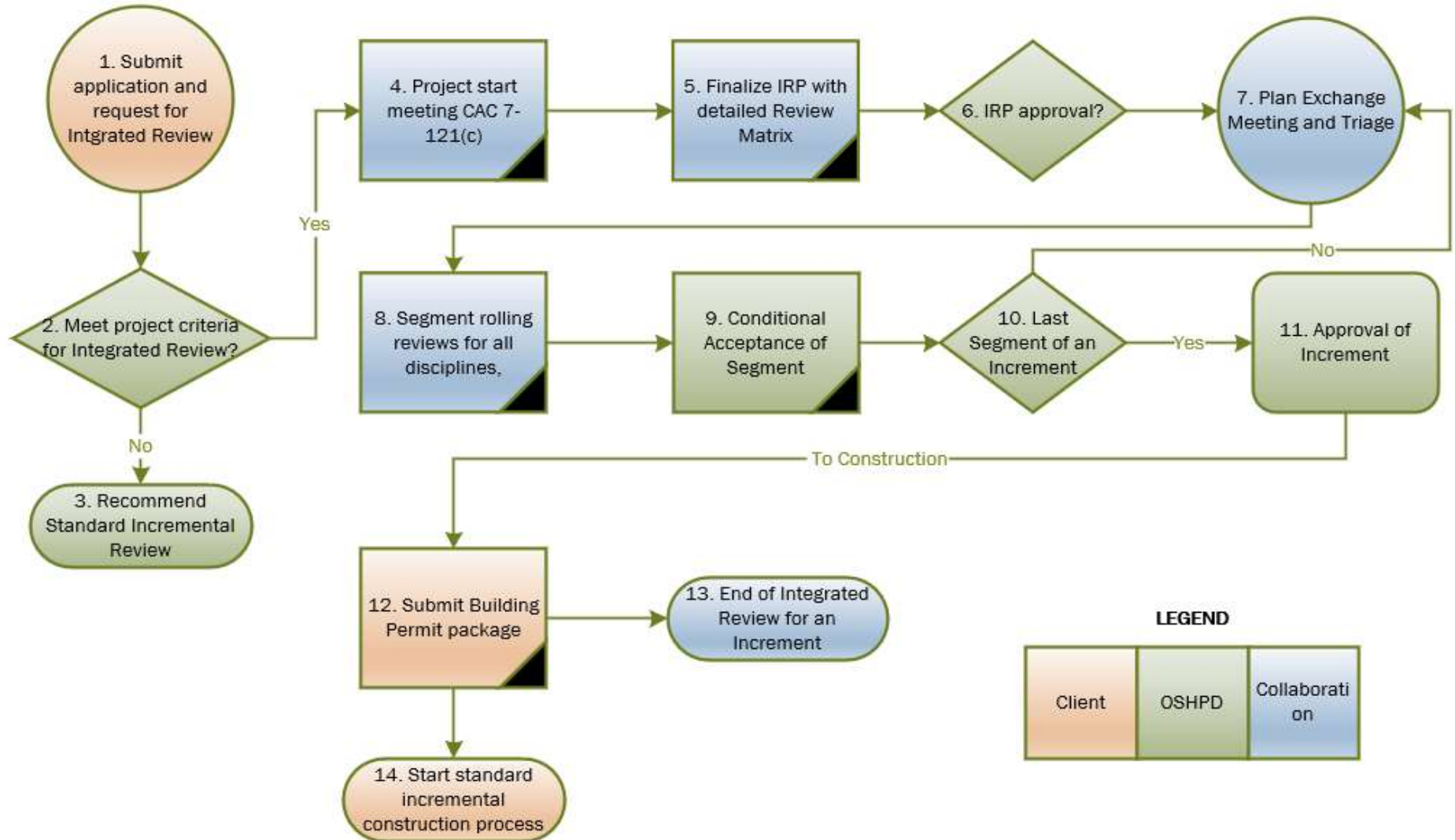
By: \_\_\_\_\_  
(Name of Deputy Director or Deputy Division Chief), (Deputy  
Director or Deputy Division Chief)  
State of California  
Office of Statewide Health Planning and Development

\_\_\_\_\_

Date

APPENDIX E:

### Flow Chart for Integrated Review



APPENDIX F

# Integrated Review (IR)

