HCAI e-Services Portal

Public User Guide

Version Number: 9.0

Section 1 – System Overview

HCAi

**Department of Health Care
Access and Information**

1   Introduction

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

This section of the user guide provides an overview of the HCAI Electronic Services Portal Client Access program, also referred to as eCA.

Throughout each of these user guides you will see screenshots of the various pages and sections you will use to navigate and enter application information.   Help is available throughout the application. Wherever you see a help icon,   click on the question mark to open help and instructions for that item in the application.

2   eCA System Overview

eCA is an online system that allows the facility representatives and licensed professionals to submit various applications for projects directly to HCAI. eCA enables public users to register for an online account, manage their accounts, create applications for projects and other records, submit project applications directly to HCAI, pay application fees, and track the application status.

eCA is accessible to all public users via the internet at https://esp.oshpd.ca.gov/. To perform the 'core functions', users must register for and obtain a public user account. Once project application is submitted to HCAI via eCA, the information is immediately available to HCAI and can be viewed (only) by the public.

2.1   eCA Functionality

Public users can navigate the eCA system simply by following the various links in the system and clicking on specific buttons to perform various tasks. eCA consists of two main functional areas: "*anonymous users*" and "*registered public users*". Figure 1 below illustrates the main functionalities in each group.
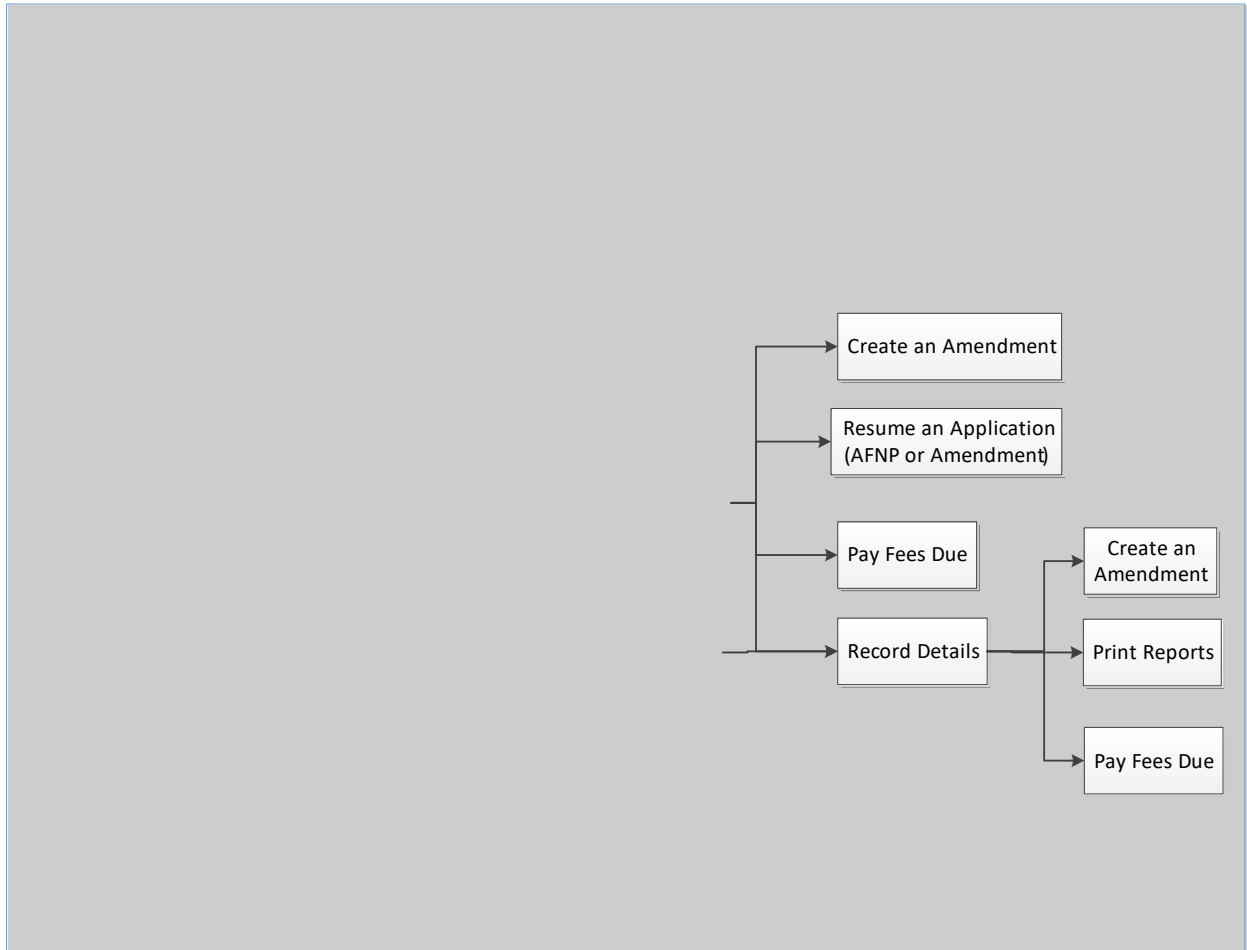
Figure 2.1 - eCA System Functionality Map

eCA System Functionality Map
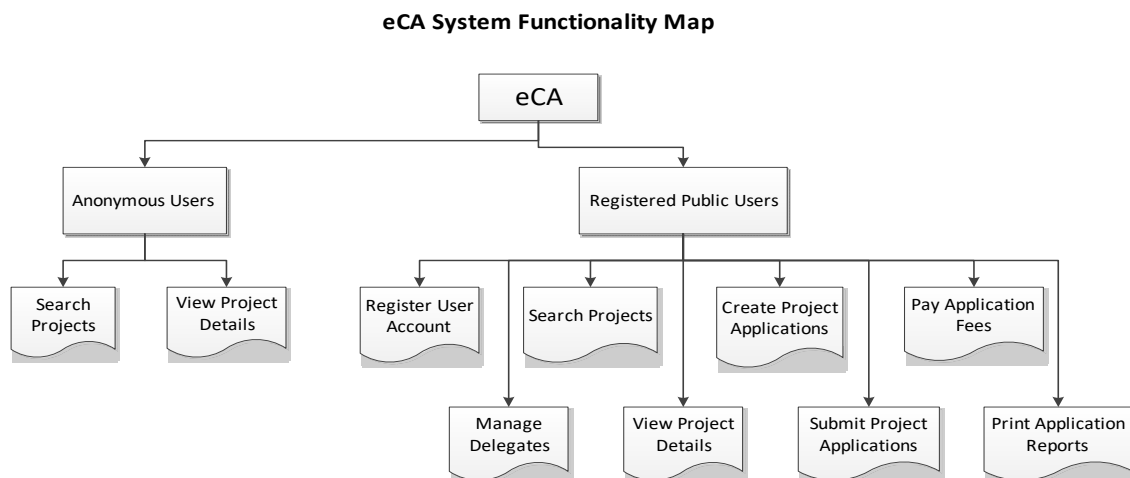
2.2 eCA Navigation

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

Figure 1.2 - eCA Navigations

2.3   eCA Icons

Table 1 below lists the common icons used in eCA.

Table 2.3 - eCA Icons

Icon	Description
Search	Search a record in eCA or in a list
Help X Enter your unique identifier for this submittal. If this is a Deferred Item, this entry should match exactly the entry in the Deferred Items list in the parent Applicaiton for New Project.	Click on the [icon] icon to display help instructions
State License Number: *Enter a valid State License*	Watermark instructions are displayed in the data entry field. When user puts the cursor in the field, the watermark instructions are replaced by the data user enters.
⚠ *Project Name	Warns the user that there are errors in data entry fields on the form which prevents the page from being saved. The error message appears both on the top of the page and next to the data entry field where there is an error.
Account Management Logout	Hyperlinks are displayed with blue-colored text.
1 Facility Information 2 Professionals and Contacts 3 Project Details	Steps in application process, also referred to as "bread Crumbs", that show you where you are in the process. • Blue icon indicates the current step. • Yellow icon indicates the steps that remain to be completed. • White icon with underlined text indicates the completed step(s) which are also available for editing.
*Cost Date: 11/04/2016 📅 ◀ November, 2016 ▶ Su Mo Tu We Th Fr Sa 30 31 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 1 2 3 4 5 6 7 8 9 10 Today: October 30, 2016	Click on the calendar picker to display the current month. Click any date to populate the date field in the proper format.
Save pending submittal	Click on the **Save pending submittal** button to save the application in progress before submittal to HCAI. 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 process.
Clear	Click on the **Clear** button to clear data that has been entered but not saved on the screen.
Cancel Discard Changes	Click on the **Cancel** or **Discard Changes** link to cancel current task being performed on the screen.

Submit **Save and Close**		Click on the **Submit** or **Save and Close** button to save the data entered in the current section of the form.
*		Data entry is required for the field.
Windows Internet Explorer ⓘ Are you sure you want to leave this page? Message from webpage: Your information has not been saved. → Leave this page → Stay on this page		Alerts the user that they are leaving the current page.

3   eCA System Orientation

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

3.1   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 3.1 - eCA Home Tab
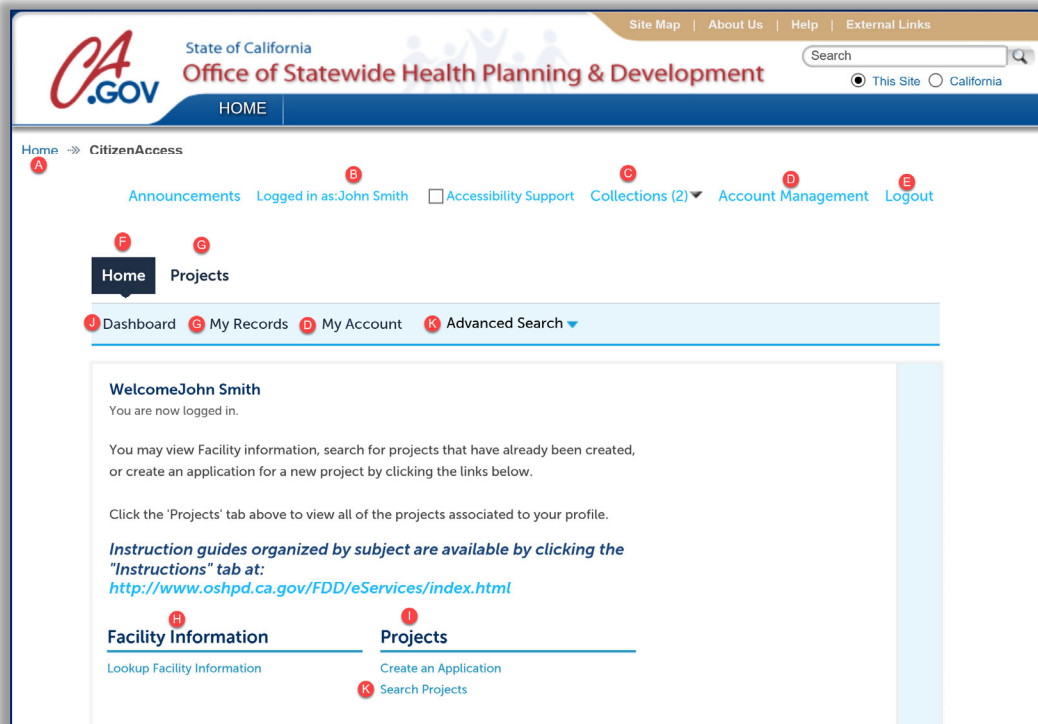
The home tab offers the following functionality and features.

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 user is in a project application, clicking 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 a link to the collections. Collections are a convenient and easy way to group projects you regularly work on – similar to a My Favorites page.

D. **Account Management/My Account** – This link opens the user Account Management features described in Section 4, such as Delegation, License Association and Password maintenance.

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

F. **Home Tab** – Always visible on the main page, clicking on this tab takes the user back to the Home screen.

G. **Projects Tab/My Records Link** – This tab will list all projects associated with the user account:
    a. Projects/Records created by the user
    b. Projects/Records associated with the user's professional license
    c. Projects/Records at the facilities associated to the user
    d. Projects/Records associated to the user by delegation

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

I. **Projects** – This links below allow the user to begin the application process for New Project and to conduct a general search.

J. **Dashboard** – This link displays the User's personalized dashboard which includes a quick display of Collections and all projects that are in-progress for easy selection and completion.

K. **Search/Advanced Search** – This link or selection opens the Projects tab to allow for searching by project/record number, by Facility, by License Number, etc.

3.1.1 Collections

Collections are a convenient way to access projects that you work on more often than others and to sort your projects into logical categories. Think of it as a "My Favorites" page or a "Quicklist". Add projects you work on frequently. Remove them when you're done. Create categories that make sense to you, like projects at Facility A, projects at Facility B, etc. You can add projects to the Collections from the projects list as well as the search result.

Collections (2) ▼   Account Management   Logout

3.1.1.1 Add Projects to Collections

Using any search results or from the Projects tab, users may add projects and records to their collections by checking the box adjacent to the record and then click on the "Add to Collection" hyperlink. The user will be able to create a new Collection or add to an existing Collection. See Figure 6.

Figure 3.1.1.1 - Add to, or Create, Collections

3.1.1.2 The Collections List

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

Figure 3.1.1.2(1) - Open Collections

In the example above, this user shows two collections in their Collections list. Users can add or delete projects/records to the collections, or completely delete the collections, without deleting or affecting the underlying projects. Users can open the collections and work the projects as they would from the main Project Tab. See Figure 8.

Figure 3.1.1.2(2) - Sample Collection "My Projects"

UC Irvine

UC Irvine Medical Center

Total Records: 6 (6 Projects)

Inspections Summary: 0 (0 Scheduled, 0 Rescheduled, 0 Approved, 0 Denied, 0 Pending, 0 Cancelled)

Fees Summary: $1,582.00 Paid, $0.00 Due

Rename Collection   **Delete Collection**

Projects

Move to... | Copy to... | Remove

Showing 1-6 of 6 | Download results

	Date	Project Number	Project Type	Project Name	Status	Related Records	Action
☐	10/05/2016	S162543-30-00	Application for New Project	2880_B1, DH 76/78 Medication Rooms, Add Outlets	Open	0	Amendr
☐	10/03/2016	S162521-30-00	Application for New Project	2981_B1A, ED Registration Consolidation	Pending Construction Start	2	Amendr
☐	09/29/2016	S162495-30-00	Application for New Project	2954_B1, 2nd FL, Room 2423, Work Flow Modification	Pending Construction Start	3	Amendr
☐	09/29/2016	S162496-30-00	Application for New Project	2949_B1, 5th Fl, Rm 5600, Change of Use to EMU Monitoring Room	Pending Construction Start	2	Amendr
☐	08/25/2016	SER-2016-00207	App for Seismic Eval Report	Adding Building to Facility	Active - Plan Review	1	

3.1.2   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 3.1.2 - Reports

Announcements   Logged in as:John Smith   Collections (2) ▼   Reports (6) ▼   Account Management   Logout

Reports (6):
AMC and PAD
Invoice Aging Report
Preliminary Invoice
Professionals by Project
Project Application Summay
eCA Payment Receipt

3.1.2.1 Project Summary Sheet/Transmittal

The project summary sheet provides users with a printable summary of the project. This report should be included as the Transmittal for all "enclosures" submitted to HCAI, whether they are submitted to the office or to the field.

Figure 3.1.2.1(1) - 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 application for post-approval document.
Your Post-Approval Document Number is S162557-37-00-ACD0001.

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 3.1.2.1(2) - Sample Project Summary Report

3.1.2.2 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 2.1.2.2(1) - 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 eClient Access to process your payment.
Your Record Number is S162557-37-00-ACD0001.

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

Print/View Project   Print/View Receipt   Print/View Summary

Project Number:	S162557-37-00-ACD0001
Project Type:	Post Approval Document
Parent Project Number:	S162557-37-00
Facility:	11659 - UCSD La Jolla, John M/Sally B Thornton Hosp & Sulpizio Cardiovascular Ctr

Project Description:	mc16088 Jacobs Sink installation Rm 1.1.-483
	To remove two pieces of equipment and install utility sink in soiled work room 1.1.-483

Applicant Tracking No:	ACD #1
Submittal Type:	Amended Construction Document
Reason for Change:	Reason for change.
Scope of Change:	Scope of change.
Description of Proposal:	

Primary Professional:	Francois M. Lewis, (619) 725-0980, testingesp@oshpd.ca.gov
Primary Contact:	Teresa Frasco

Cost Type	Cost Date	Construction Cost	Fixed Equipment Costs	Total Cost	Cost of Imaging	Reason
Estimated	10/30/2016	$0.00	$0.00	$0.00	$0.00	

Enclosures:

# of Copies	Enclosure Type	Description	Date Sent	Method of Transmittal	Courier Name	Backcheck	Attached

Please include this Project Application Summary form with your construction documents when submitting to OSHPD. This Project Application Summary form replaces the paper application; it is not necessary to include the paper application when project applications are created using eClient Access.

S162557-37-00-ACD0001

State of California - Health and Human Services Agency

Department of Health Care Access and Information

Payment Receipt

Invoice Date:	May 28, 2021
Payment Due Date:	June 27, 2021
Current Date:	March 02, 2022

REMIT TO:

University of California Irvine Medical Center -
Irvine
0 Jamboree Rd and Birch St
Irvine, CA 92612

Department of Health Care Access and Information
Facilities Development Division
2020 West El Camino, Suite 800
Sacramento, CA 95833

Project related questions contact - Facilities Development Division (916) 440-8300 or (213) 897-0166
Billing related questions contact - FDD Accounting Services (916) 440-8331

Facility Name:	University of California Irvine Medical Center - Irvine	Facility Number:	10039
App Tracking:		Project Number:	I210005-30-00
Scope of Change:		Parent Number:	

Fee Item Description	Invoice #/Date	Amount	Amount Due
Application Fee	288366 - 5/28/21	$250.00	$0.00

Transaction	Receipt Nbr	Payment Method	Payment Ref#	Date	Amount Paid
Receipt	171416	Check	4508507	08/09/2021	$250.00

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

Figure 3.3.2.2(2) - Sample Receipt

3.1.2.3 Invoice

The invoice report is for users who opt for the "pay later" option when creating the project. The pay later option enables users to submit a project without paying immediately with a credit card. Users who select "pay later" can print the invoice and have another registered user, who is authorized to pay with a credit card, use the information on the invoice to find the project and make the payment. If the application fee is not paid within 10 calendar days, HCAI will automatically issue an invoice to the facility's billing contact. To print the invoice, go to the report center https://report.hcai.ca.gov and run the invoice aging report for your project/facility. Click the link in the report for Invoice.

Figure 3.1.2.3 - Sample Preliminary Invoice

Department of Health Care Access and Information

Invoice

Invoice Number: 304913
Invoice Date: Feb 14, 2022
Delinquent Date: Mar 16, 2022

If you have submitted payment, please disregard this invoice.

Save time, pay online https://esp.hcai.ca.gov/citizenaccess
A 2.1% Service Fee will be applied to credit card transactions.

Bill To:

Janel Fruchtenicht
10625 - Sutter Health for Sutter Medical Center, Sacramento
2200 River Plaza Drive
Attn: Accounts Payable
Sacramento CA 95833

Remit To:

Department of Health Care Access and Information
Facilities Development Division
2020 West El Camino Avenue, Suite 800
Sacramento, CA 95833

Project Questions Contact: Facilities Development Division (916) 440-8300
Billing Questions Contact: FDDAccounting@hcai.ca.gov (916) 440-8331

Facility: 10625 Sutter Medical Center, Sacramento
Project: S211163-34-00-ACD0001 Sutter WCC Hospital Air Handler 191 Remediation - Stage 2
Description: Modification to the Filter Bank HSS Frame to accommodate filter bank units and to align the frame to the height of Existing HSS Supports

Description	Amount
Application Fee	$250.00

3.1.3   Account Management

User Account Management is detailed in Section 4.

Announcements   Logged in as:John Smith   Collections (2) ▼   Reports (6) ▼   Account Management   Logout

3.1.4   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.

Announcements   Logged in as:John Smith   Collections (2) ▼   Reports (6) ▼   Account Management   Logout

3.1.5   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. HCAI Region).

Figure 3.1.5(1) - Facility Information
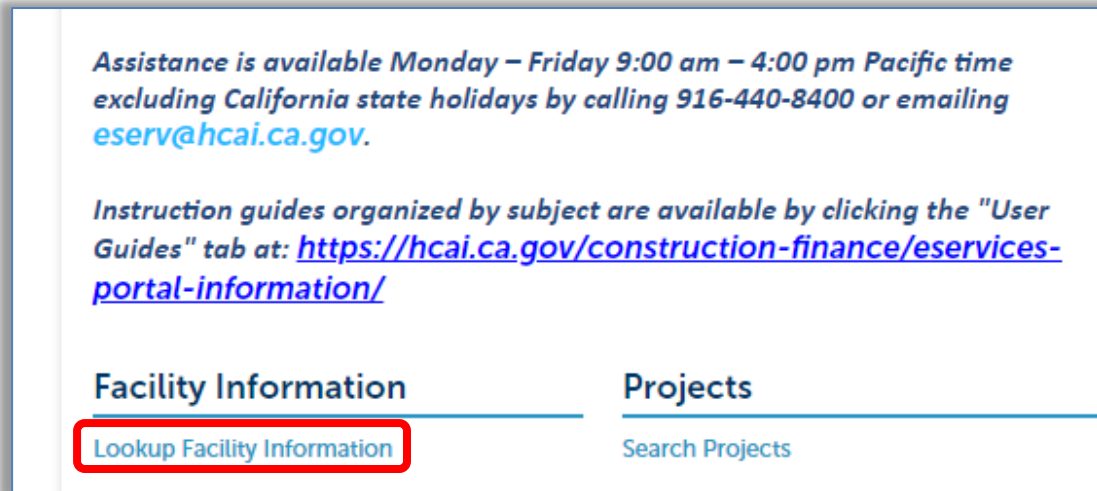
eCA uses "Parcel" and "Facility" interchangeably.

Figure 3.1.5(2) - Facility Look up Information

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

Figure 3.1.5(3) - Facility Search Results

Figure 3.1.6 – Projects Links

3.1.6   Home Tab

Projects
Preapproval
Enforcement

The links on the Home Tab allows the user to either create a new application for a new project (AFNP) (Section 5) or to search for projects/records that have already created (Section 6). Or, create a Preapproval or search for existing. Or, create a request to Re-Open Closed Project under the enforcement page.

The Search hyperlink takes users to the appropriate module.

3.1.6.1 Create and an Application

The Create an Application link takes users to create a new Construction Project, or Preapproval, or Enforcement application. See other User Guides on the web page.

3.2 Projects Tab

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

- License – See user account management.
- Delegation – See user account management.
- Association with a Facility – Established by submitting the OSH-FD-310 - *eCA Letter of Authorization*.
- Created – Projects created by the user.

Figure 3.2 - Project Tab

3.2.1.1 Search Projects – General Search

Users can search for any projects in the eCA system via the search page. See Figure 20.

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.

Figure 3.2.1.1 - Project Search - General Search

Search for Projects

Enter information below to search the eServices Portal database. Project information can be searched for by entering any of the following information:

- Facility ID Number
- OSHPD Project Number
- Professional Licensee Information

Use the dropdown menu to filter the search results by Project Type.

General Search

General Search ▼

☐ Search my records only

Facility ID Number: Project Number: Project Type:
                                          --Select-- ▼

License Type: State License Number: Start Date: ⑦   End Date: ⑦
--Select-- ▼   10/31/2014 🗓   10/30/2 🗓

▼Do not include Additional Criteria
INCREMENTAL MASTER
Seismic Compliance Construction Project: ◯ Yes ◯ No

PLAN REVIEW
Seismic Compliance Construction Project: ◯ Yes ◯ No

[Search] [Clear]

3.2.1.2   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 3.2.1.2 - Project Search - Licensed Professional

3.2.1.3   Search Preapprovals – General Search

Users can search for any Preapproval in the eCA system via the search page. See Figure 3.2.1.3

To obtain the best search results, limit the number of fields and words in the search. For instance, to search for a OPM, enter only the OPM number and leave dashes and OPM out. You can use '%' as a wildcard before and after your search term. The search results will return all records with that preapproval number.

Figure 3.2.1.3 - Preapproval Search