Section 4 – Account Management, Association and Delegation
1 Introduction

Welcome to HCAI Electronic Services Portal Client Access (eCA) User Guide. This user guide provides step-by-step instructions for managing the information in your Public User Account and gives step-by-step instructions on associating your professional license to your account and delegating other public users with your authorities.

2 Account Management

Public users can perform various tasks to manage their public user accounts in eCA. In order to do so, the public user must first log in to their account in eCA. Then click on the “Account Management” link to view and edit the account information.

Figure 2: Account Management link

2.1 Login Information

Under the Login Information section, click on the “Edit” button to update the public user account login information. A pop-up window will appear to make any changes.

Figure 2.1(1): Account Management link

![Login Information](image)

In the pop-up window, public users can update any of their information with the exception of “User Name”. When all of the desired changes are complete, click the “Save” button to save your updates. Click on “Cancel” to cancel the updates. See Figure 3.
2.2 Contact Information
Under the “Contact Information” section, click on the Actions link then “View” to update the Public User Account contact information, such as address and phone numbers. A pop-up window will appear to make changes.

Figure 2.2(1): Contact Information

![Contact Information](image1)

Figure 2.2(2): Update Contact Information

![Update Contact Information](image2)

3 Associating a Professional License to the Account
Registered Public Users that are properly associated with their professional licenses have the added benefits of creating and submitting project applications, obtaining building permits, paying application fees, access to invoices and receipts, checking on the status of pending activities, uploading electronic plans and documents, and more. In order to associate a professional license to a Public User account,
the license record must be a valid license existing in HCAI database and must match the contact information – licenses cannot be associated to other unlicensed users. To associate your account to your professional license (Architect, Engineer, Contractor, Inspector), click the “Add a License” button under License Information. See Figure 6.

Figure 1: Add a License

Figure 3(1): Associating a Professional License

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

Figure 3(2): Associating a Professional License

The following prefixes are required in order for the system to find your license:

- Architect: C
- Civil Engineer: CE
- Electrical Engineer: E
- Mechanical Engineer: M
- Structural Engineer: S
- Geotechnical Engineer: GE
- Certified Engineering Geologist: EG
- Geologist: GEO
- Contractor: No Prefix
- Owner/Builder Contractor: OB
- IOR: A, B, or C
Once the license record is found, click on the “Connect” link to associate it to your account. A pop up window will appear - click on “OK” to confirm the selection. See Figure 3(4).

Figure 3(3): Associating a Professional License

Figure 3(4): Associating a License

Figure 3(5): Email notification of licensed professional association

When a license is associated to a Public User account, eCA will send the public user an email notification. The association of the professional license to the account must be approved by HCAI. Figure 3(5) is a sample of the email that you will receive:
3.1 Deleting a Professional License from the Account
To delete a license that has been previously associated to your Public User account, in the License Information section of Account Management, click the “Actions” dropdown menu and then **Remove** to delete the license. See Figure 3.1.

*Figure 3.1: Remove a License*

4 Delegates

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

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

To delegate another public user, the user must have already created a Public User Account and you must know the email address they entered when they created their account. The Delegates section of Account Management displays users who are added to your account and users who added you to their accounts.
4.2 Add a Delegate

Click the “Add a Delegate” button to start managing your delegations. A pop-up window appears for user to designate the delegation permissions. See Figure 4.2(1).

Figure 4.2(1): Add a Delegate

![Delegates](image1)

Figure 4.2(2): Delegates

![Add a Delegate](image2)

Enter the name that identifies the delegate to you – it does not need to match the user ID – 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, enter the words displayed in the CAPTCHA window then click on “Invite a Delegate” button. See Figure 4.2(2).

Figure 11: Add a Delegate
4.3 Delegate Permissions

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

**Create Applications in Projects:** Select this checkbox to allow delegate to create applications for new projects on your behalf.

**Renew Records in Projects:** This permission is currently not used for HCAI eCA.

**Amend Records in Projects:** Select this checkbox to allow delegate to create amendments such as PADs, AMCs or Building Permits for an existing project.

**Manage Inspections in Projects:** This permission is currently not implemented by HCAI eCA.

**Manage Documents in Projects:** Select this checkbox to allow delegate to upload electronic plans and document in the Attachments section of the project record.

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

After selecting the delegate permission and inviting the delegate, you will have the option to change the delegate’s permissions.

**Figure 4.3(1): Delegates**

Click on “View Invitation” link. A pop-up window will appear to facilitate any needed permission change(s).
4.3.1 Accept or Reject Delegate Invitation

As soon as you add a delegate to your Public User account, eCA sends an email to the delegate notifying them of the invitation. Below is a sample of the email that the delegate receives:

Figure 4.3.1(1): eCA Delegation Invitation Email

The delegate must log-in to eCA and open the “Account Management” section. Under the Delegate section, the invitation is displayed. The delegate must accept or reject the delegate invitation.

Figure 4.3.1(2): Delegation Invitation
Authorities from the delegator are not conferred to the delegate until the invitation is accepted. The delegator can review the permissions, edit the permissions or remove delegate at any time. Click on “Actions” as shown below to perform above tasks.

Figure 4.3.1(3): View/Remove Delegate Permissions

<table>
<thead>
<tr>
<th>People who can access my account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gary (<a href="mailto:gdunger@oshpd.ca.gov">gdunger@oshpd.ca.gov</a>)</td>
</tr>
<tr>
<td>Last accessed account on 10/30/2016</td>
</tr>
<tr>
<td>Michelle (<a href="mailto:eca.access.manager@oshpd.ca.gov">eca.access.manager@oshpd.ca.gov</a>)</td>
</tr>
<tr>
<td>Invitation sent on 10/30/2016</td>
</tr>
</tbody>
</table>

Add a Delegate
People whose account I can access
None

4.3.2 Delegate Effect
After accepting the delegate invitation, the delegate’s project list will display all of the projects that were created by or associated to the delegator. Based on the delegation permission, the delegate can create a new project, a PAD, AMC, or Building Permit, upload plans and documents, pay fees and resume applications that are in-progress.

Figure 4.3.2: Projects Tab

| Projects |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Date  | Project Number  | Project Type  | Project Name  | Status  | Related  | Action  |
| 10/20/2016 | S132760-37-00-ACD0024 | Post Approval Document | Thornton Hospital Autopsy and Management Renovation | Pending | 26 | Pay Fees Due |
| 10/20/2016 | IS091547-0-ACD1257 | Post Approval Document | LPC1 EXPANSION PROJECT | Open | 1 | Pay Fees Due |
| 10/19/2016 | S162029-37-00-BP1U1 | Application for Building Permit | MC16055 SCVC Patient Floors installation | Approved | 3 |  |
| 10/19/2016 | S162639-37-00 | Application for New Project | MC16016 Emergency waiting room 1-401 low wall addition | Open | 0 | Pay Fees Due |
|  |  |  |  |  |  | Amendment |