

UC DAVIS HEALTH

Building Department and Fire Prevention eServices Portal

Post-Approval (PAD) Application – HCAI and UCDH

Version Number: 2.0

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REVISION HISTORY

This section records the revision history of changes made to this living document:

Date	Version #	Description of Change	Author
2/14/2024	1.0	First version (Draft)	S. Gadhok
2/28/2024	2.0	Final Version	S. Gadhok

Purpose

Welcome to the UCDH eServices Portal User Guide for UCDH and HCAI PAD Applications.

- A. The purpose of this document is to provide guidance and step-by-step instructions for proper submittal documentation to facilitate Plan reviews.
- B. The list is not comprehensive, as relevant documentation will vary by project scope.
- C. For specific project questions related to submittal documents, email your questions to the following email:
 - HS-BuildingDeptPlanReview@ucdh.edu
- D. This document covers:
 - i. [Step-by-step instructions on how to submit your HCAI PAD application](#)
 - ii. [Step-by-step instructions on how to submit your UCDH PAD application](#)
 - iii. [Appendix A: Field Description](#)
 - iv. [Appendix B: Attachment by Record Type](#)

1 Page Flow - Overview

The predefined steps to create and submit project applications are detailed in this guide. The steps involved in applying for “**PAD**” projects are slightly different from those in submitting for a new project. Most of the information from the ‘*parent*’ project is copied to the amendment, which significantly speeds up the application process. Below is an illustration of the page flow steps for amendments:

No	Step	Page Title	Description
Application for New Project			
1.	STEP 1	PAD Details	Record the Submittal Type, Applicant Tracking Number, Scope, and PAD Construction Cost Estimate specific to the PAD application
2.	STEP 2	Contacts	Add new Contact specific to the PAD application: <ul style="list-style-type: none"> Applicant (PM or CM)
3.	STEP 3	Professionals	In this section you can add an additional New Licensed Professional(s) and their Contact(s) information specific to the application. If the PAD is an <i>Amended Construction Document</i> , do not add Licensed Professional(s) to the application that are already listed on the parent project. Scroll to the bottom of the page and click "Continue Application". If the PAD is a <i>Deferred Approval</i> , the Design Professional with delegated responsibility for the design must be included on the application.
4.	STEP 4	PAD Attachments	Upload Plans, Specifications, and Calculations or any other document relevant to your project in PDF format only
5.	STEP 5	Review	Final opportunity to review the information entered in the application for accuracy. During this step, “ <i>Edits</i> ” can be made if necessary
6.	STEP 6	Record Issuance	PAD (UCDH and HCAI) applications are submitted and the eServices Portal issues a “Record Number”

Table 1: e Services PAD Portal Page Flow

1.1 Field Description

No.	Field Name	Field Description
1.	Submittal Type	Indicate the type of project that is being submitted for review
2.	Application Tracking Number	Example: ACD-01 or DA-01
3.	Scope of Work Associated with this PAD	Project scope for your PAD application
4.	Over-The-Counter Review Requested	For non-HCAI projects only
5.	PAD Construction Cost Estimate	PAD estimated project cost. If you don't have enter a zero (0) to continue since this is a mandatory field.

1.2 Page Flow – Application

Listed below are some basic rules to apply using the eServices Portal:

- ✓ When creating a PAD application for a project, follow the page flow to avoid errors or missed data.
- ✓ You can save your application at any time during the process by clicking the **“Save and resume later”** button and then clicking on the **“Resume Application”** link in your *“My Records” / “Dashboard”*
- ✓ When resuming an existing *“in-progress”* status application, you will be given the option to start from the beginning or continue where the application was left off.
- ✓ You can navigate back and forth within the completed pages.
- ✓ You must click on the **Continue Application** or **Save and resume later** 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 professionals or multiple contacts, the eServices Portal will automatically Save the selection. If any edits are needed, click the *“Edit”* link for the individual. To add the next record, click **Add New** as applicable.
- ✓ It is recommended that you click on **“Save and resume later”** button as needed to prevent data loss due to data entry errors.
- ✓ If any required data is missing from the page when the **“Continue Application”** button is clicked, an error message is displayed on the top of the page. You must correct any errors before continuing to the next page flow screen.

1.3 HCAI PAD Application – Step-by-Step Instructions

Listed below are step-by-step instructions on how to create and submit a new HCAI PAD application.

STEP	STEP DESCRIPTION	EXPECTED RESULTS
1.	Go to the Accela Citizen's Portal website https://aca-prod.accela.com/UCDMC/Default.aspx	Accela Citizen's Portal Website is displayed
2.	Login by using your user ID/password and click on the Sign In button	The user is logged into their account
3.	Click on the " Projects " tab and find the HCAI Project Application that you had previously created	Your HCAI Project application created earlier should be displayed under the Records screen
4.	The PAD Application can only be created once the parent (HCAI Project Application) has a status of " Accepted for Submittal to HCAI "	
5.	There are two ways to create an HCAI PAD application: 1. Click on the "Amendment" link under the field "Action" or 2. Click on the record number and then click on the " Create Amendment " button.	
6.	Click on the " Record Number " to open your HCAI Project application	Step 1: Step 1: PAD Details > PAD Details screen is displayed
7.	Click on the " Project Record Number " link	Record Details screen is displayed with the " Create Amendment " link
8.	Click on the "Create Amendment" link	Step 1: Step 1: PAD Details > PAD Details screen is displayed

9.	<p>Enter the value in the following fields under the PAD Details sub-screen. Fields with red asterisks (*) are required fields for this screen.</p> <ol style="list-style-type: none"> 1. Submittal Type: (*Mandatory field) 2. Applicant Tracking Number: (*Mandatory field) 3. Scope of Work Associated with this PAD: (*Mandatory field) <p>COSTS:</p> <ol style="list-style-type: none"> 4. PAD Construction Cost Estimate: (*Mandatory field) 	<p><u>Applicant Tracking Number:</u> This field is used to reference the unique amended construction document or deferred approval number for tracking purposes. Example: ACD01, DA-01</p> <p><u>PAD Construction Cost Estimate:</u> If the amount is unknown, please enter "0" zero.</p>	
10.	<p>Enter the values for "Submittal Type":</p> <ol style="list-style-type: none"> 1. Amended Construction Document 2. Deferred Approval 		
11.	Click on the "Continue Application" button	Step 2: Step 2: Contacts>Contacts screen is displayed	
12.	<p>The "Look Up" search function is currently not available for Contacts, so they must be added by clicking the Select from Account button to use information contained in your Public User account OR clicking the Add New button and completing each applicable field.</p> <p><i>Note: Multiple Contacts may be added to the project, but the system only sends the email communications to only one applicant and one Project Manager.</i></p>		
13.	Click " Select from Account "	The "Select Contact from Account" screen is displayed. Existing contact for the account is displayed	
14.	Additional contacts can be added to the application by clicking on the " Add New " button, however they will not receive any communications.	The " Contact Information " screen is displayed	

15.	<p>Enter the following information for the contact:</p> <ol style="list-style-type: none"> 1. First: (*Mandatory field) 2. Middle: 3. Last: (*Mandatory field) 4. Legal Business Name: 5. Work Phone: 6. Mobile Phone: (*Mandatory field) 7. Contact E-mail: (*Mandatory field) 	Mandatory fields display contact information for the applicant
16.	Click on the "Continue" button	Step 2: Step 2: Contacts>Contacts screen is displayed with the added contact information and the following message, <i>"Contact added successfully."</i>
17.	Click on the "Continue Application" button	Step 3: Step 3: Professionals>Professionals screen is displayed
18.	<p>A message under the Professionals screen is displayed:</p> <p>If this PAD is an Amended Construction Document, do not add Licensed Professional(s) to this application that is already listed on the parent project. Scroll to the bottom of the page and click "Continue Application".</p> <p>If this PAD is a Deferred Approval, the Design Professional with delegated responsibility for the design must be included on this application.</p>	
19.	Click on the "Continue Application" button	Step 4: Step 4: PAD Attachments > Attachments screen is displayed
20.	<p>The following documents are required to be uploaded for the HCAI-PAD application:</p> <ol style="list-style-type: none"> 1. Narrative 2. Plans 3. Reference Documents 	You can only upload. PDF files as "Attachments"

21.	Select the 3 required documents and drag and drop the files in the <i>“Drag files here to upload or click to select files”</i>	
22.	Upload the Plans in the Digital Projects screen under the <i>“Drag files here to upload or click to select files”</i> box.	
23.	Once the file has been uploaded the following fields are displayed: <ol style="list-style-type: none"> 1. File Name 2. Virtual Folder (<i>*Mandatory field</i>) 3. Description 4. Doc Type (<i>*Mandatory field</i>) 5. Uploaded By 6. Uploaded Date 7. Status 8. Thumbnail 9. Actions 	<u>Description</u> : You can enter any description in this field that you like
24.	Pick a value for the <i>“Doc Type”</i> field: <ol style="list-style-type: none"> 1. Calculations 2. Letters 3. Manufacturer Cut Sheets 4. Narrative 5. Other 6. Plans 7. Reference Documents 8. Responses 9. Specifications 10. Supplementary Documents 	

25.	<p>Pick only the values highlighted in “<i>Blue</i>” in the drop-down “<i>Virtual Folder</i>” field:</p> <ol style="list-style-type: none"> 1. 01-Milestone (SD 50%) 2. 02-Milestone (SD 100%) 3. 03-Milestone (DD 50%) 4. 04-Milestone (DD 100%) 5. 05-Milestone (CD 50%) 6. 06-Milestone (CD 95%) 7. 10-Initial CD 100% 8. 11-Backcheck-01 (CD 100%) 9. 12-Backcheck-02 (CD 100%) 10. 13-Backcheck-03 (CD 100%) 11. 14-Backcheck-04 (CD 100%) 12. 15-Backcheck-05 (CD 100%) 13. 40-Approved Documents 14. 80-Project Documents 15. 90-Field Operations Documents (In Construction) 16. 99-Project Closure Documents 	
26.	Click on the “ <i>Continue Application</i> ” button	Step 5: Review screen is displayed
27.	This screen lets you review the information that you've entered for your HCAI PAD application	
28.	<p>Scroll down to the end of your application and check the checkbox.</p> <p><i>“By checking this box, I agree to the above certification.”</i></p>	The “ <i>Date</i> ” field is auto-filled with today's date

29.	Click on the "Continue Application" button	<p>The message "<i>Your application has been successfully submitted.</i>" is displayed</p> <p>Thank you for using our online services. Record Number: <HYY>-<xxxx>-<xxxx> H = HCAI YY = Current Year xxxx = Parent Application number xxxx = Number for your HCAI PAD application</p>
30.	You've successfully submitted your application for HCAI Post Approval Document (PAD)	

1.4 UCDH PAD Application – Step-by-Step Instructions

Listed below are step-by-step instructions on how to create and submit a new “UCDH PAD” application.

STEP	STEP DESCRIPTION	EXPECTED RESULTS
1.	Go to the Accela Citizen's Portal website. https://aca-prod.accela.com/UCDMC/Default.aspx	Accela Citizen's Portal Website is displayed
2.	Login by using your user-id/password and click on the Sign In button	The user is logged into their account.
3.	Click on the " Projects " tab and find the parent application " UCDH Building Application " for which you are creating the PAD.	Project Record Number is displayed under the "Projects" à "Records" homepage.
4.	The PAD Application can only be created if the parent (UCDH Application) has a status of " Approved – Pending Permit " or " Construction In Progress "	
5.	There are 2 ways to create a PAD application: 1. Click on the " Amendment " link under the field " Action ". 2. Click on the " Record Number " to open your UCDH Building parent application	The "Record Details" screen is displayed with your UCDH Building application details.
6.	Click on the " Create Amendment " button or " Amendment " link	Step 1: Step 1: PAD Details > PAD Details screen is displayed.
7.	Enter the mandatory field under the " PAD Details " screen. 1. Submittal Type: (*Mandatory field) 2. Applicant Tracking Number: (*Mandatory field) 3. Scope of Work Associated with this PAD: (*Mandatory field) 4. Over-The-Counter Review Requested: COSTS: 5. PAD Construction Cost Estimate: (*Mandatory field)	
8.	Select the values for the field " Submittal Type ": 1. Amended Construction Document 2. Deferred Approval	
9.	Enter " Applicant Tracking Number "	

10.	Enter "Scope of Work Associated with this PAD:"	
11.	Enter "PAD Construction Cost Estimate:"	
12.	Click on "Over-The-Counter Review Requested:" field. (Optional)	The following message is displayed: <i>"If OTC review is requested, you must contact the UCDH Building Department to schedule a review of all documents."</i>
13.	Click on the " Continue Application " button	Step 2: Step 2: Contacts>Contacts screen is displayed
14.	The "Look Up" search function is currently not available for Contacts, so they must be added by clicking the Select from Account button to use information contained in your Public User account OR clicking the Add New button and completing each applicable field. <i>Note: Multiple Contacts may be added to the project, but the system only sends the email communications to only one applicant and one Project Manager.</i>	
15.	Click on the " Continue Application " button	An error message is displayed: "This section is required. Please add one record."
16.	Click on the " Add New " button to add a new contact	Contact Information screen is displayed
17.	Enter the following information for the contact: 1. First: (*Mandatory field) 2. Middle: 3. Last: (*Mandatory field) 4. Legal Business Name: 5. Work Phone: 6. Mobile Phone: (*Mandatory field) 7. Contact E-mail: (*Mandatory field) 8. Country:	
18.	Click on the " Continue " button	The " Contact Information " screen is displayed with all the Contact Information displayed that was added in the previous steps

19.	Clicking on the "Clear" button will clear the entered data and the "Discard Changes" button will not save the changes/data entered.	
20.	Click on the "Continue Application" button	Step 3: Step 3: Professionals >Professionals screen is displayed
21.	Click on the "Add New" button under "Licensed Professionals"	<p>Note: This is not a required step and will let you move forward with your application.</p> <p>If the PAD is an Amended Construction Document, do not add Licensed Professional(s) to the application that are already listed on the parent project. Scroll to the bottom of the page and click "Continue Application".</p> <p>If the PAD is a Deferred Approval, the Design Professional with delegated responsibility for the design must be included on the application.</p>
22.	<p>If you click on "Add New" button to add a Licensed Professional the "Licensed Professional Information" screen is displayed. Enter a value in the mandatory fields (marked in red asterisks):</p> <ol style="list-style-type: none"> 1. License Type: (*Mandatory field) 2. State License #: (*Mandatory field) 3. First: (*Mandatory field) 4. Last: (*Mandatory field) 5. Name of Business: (*Mandatory field) 6. Mobile Phone: (*Mandatory field) 7. Work Phone: 8. Address: (*Mandatory field) 9. Contact E-mail: (*Mandatory field) 10. Address Line 2: 11. City: (*Mandatory field) 12. State: (*Mandatory field) 13. Zip: (*Mandatory field) 	

23.	<p>Pick a value from the drop-down for "License Type:"</p> <ol style="list-style-type: none"> 1. Architect 2. Civil 3. Contractor 4. Electrical 5. Geotechnical 6. Mechanical 7. Other 8. Structural 	
24.	<p>Click on the "Save and Close" button</p>	<p>Added Licensed Professional/s will be displayed under the "Licensed Professionals" screen</p>
25.	<p>Click on the "Continue Application" button</p>	<p>Step 4: Step 4: PAD Attachments>Attachments screen is displayed</p>
26.	<p>The following documents are required to be uploaded for Amended Construction Document (ACD) application:</p> <ol style="list-style-type: none"> 1. Narrative 2. Plans and 3. Reference Documents 	
27.	<p>The following documents are required to be uploaded for Deferred Approval:</p> <ol style="list-style-type: none"> 1. Plans 	
28.	<p>Upload the Plans in the Digital Projects screen under the "Drag files here to upload or click to select files" box.</p>	

<p>29.</p>	<p>Once the file has been uploaded the following fields are displayed:</p> <ol style="list-style-type: none"> 1. File Name 2. Virtual Folder (*Mandatory field) 3. Description 4. Doc Type (*Mandatory field) 5. Uploaded By 6. Uploaded Date 7. Status 8. Thumbnail 9. Actions 	
<p>30.</p>	<p>Select a value under the "Doc Type" field</p>	<p>Selected values are displayed under the "Doc Type" field:</p> <ol style="list-style-type: none"> 1. Calculations 2. Letters 3. Manufacturer Cut Sheets 4. Narrative 5. Other 6. Plans 7. Reference Documents 8. Responses 9. Specifications 10. Supplementary Documents

31.	<p>Pick only the values highlighted in “<i>Blue</i>” in the drop-down “<i>Virtual Folder</i>” field:</p> <ol style="list-style-type: none"> 1. 01-Milestone (SD 50%) 2. 02-Milestone (SD 100%) 3. 03-Milestone (DD 50%) 4. 04-Milestone (DD 100%) 5. 05-Milestone (CD 50%) 6. 06-Milestone (CD 95%) 7. 10-Initial CD 100% 8. 11-Backcheck-01 (CD 100%) 9. 12-Backcheck-02 (CD 100%) 10. 13-Backcheck-03 (CD 100%) 11. 14-Backcheck-04 (CD 100%) 12. 15-Backcheck-05 (CD 100%) 13. 40-Approved Documents 14. 80-Project Documents 15. 90-Field Operations Documents (In Construction) 16. 99-Project Closure Documents 	<p>Select a value relating to your project from the drop-down field “<i>Virtual Folders</i>”.</p>
32.	<p>Once the two mandatory fields have been entered and the plans uploaded, the “<i>Status</i>” field will change to “<i>Ready to Submit</i>” status.</p>	
33.	<p>The “<i>Uploaded Date</i>” field will display the date and timestamp when the file was uploaded.</p>	<p>Your application and documents uploaded are saved.</p>
34.	<p>Click on the “<i>Save and resume later</i>” button</p>	<p>The user is taken back to the “PROJECTS” screen and a message is displayed:</p> <p>Your partial application (24TMP-xxxxxxx) has been successfully saved. E.g.: <YYTMP>-<xxxx25></p> <p>To resume the application(s), go to the Records section and click the “<i>Resume Application</i>” link</p>
35.	<p>Click on the “<i>Continue Application</i>” button</p>	<p>Step 5: Review screen is displayed</p>

36.	This screen lets you review and or edit the information that you've entered on your UCDH PAD application	
37.	Click on the " Edit " button on any screen	The screen that you've picked is opened and you can change/edit the information before submitting your application.
38.	Click on the " Continue Application " button	Step 5: Review screen is displayed.
39.	Scroll down and check the checkbox. <i>"By checking this box, I agree to the above certification."</i>	The " Date: " field is auto-filled with the current date.
40.	Click on the " Continue Application " button	<p>06 Record Issuance screen is displayed:</p> <p>The message <i>"Your application has been successfully submitted and is now in the eServices Portal project tracking system."</i> is displayed.</p> <p>Thank you for using our online services. Your Record Number is "BYY-xxxx--xxxx"</p> <p>(BYY-xxxx) is your parent's application. (xxxx) is an extension/PAD application number.</p>
41.	CONGRATULATIONS!!!! You've successfully submitted your application for UCDH PAD.	Validate that you've received an email with the record ID

2.0 eServices Portal Screens

“Amendments” to an Application for a New Project (referred to as a ‘parent project’) can be Post Approval Documents (PAD). To create an application for an amendment, locate the “Parent” application for the new project record and create the amendment by doing the following:

1. Search your “**Parent**” project for which you want to submit an Amendment either by using the “**Search Projects**” feature or by locating it on your project list under the “**Project**” tab.
2. If your Public User account is associated or delegated with the required permission to create a PAD application, an “**Amendment**” link will be visible at the end of the project record.
3. You may also create a new PAD application by clicking on the Project Record Number and then the “**Create Amendment**” button.

2.0.1 UCDH PAD Application

The screenshot shows the 'Records' section of the portal. At the top, there are navigation links for 'Home', 'Projects', and 'Fire Prevention'. Below this is a dark blue bar with buttons for 'Create Application', 'Search Projects', and 'Schedule a Pending Inspection'. The main content area is titled 'Records' and shows a table of project records. The table has columns for Date, Project Record Number, Status, Record Type, UCDH Project Number/Name, and Action. The record with Project Record Number 'B24-0003' is highlighted with a red box, and the 'Amendment' link in its 'Action' column is also highlighted.

<input type="checkbox"/>	Date	Project Record Number	Status	Record Type	UCDH Project Number/Name	Action
<input type="checkbox"/>	02/14/2024	H24-0002-0008	Documents Received	HCAI Post Approval Document	23243 vxzcv	
<input type="checkbox"/>	02/13/2024	24TMP-000018		HCAI Post Approval Document		Resume Application
<input type="checkbox"/>	02/09/2024	B24-0003	Approved - Pending Permit	UCDH Building	31231 adfsad	Amendment
<input type="checkbox"/>	02/01/2024	H24-0001	In Plan Review	HCAI Project	3243 adfsad	
<input type="checkbox"/>	02/01/2024	H24-0002	Accepted for Submittal to HCAI	HCAI Project	23243 vxzcv	Amendment
<input type="checkbox"/>	11/29/2023	B23-0182	Approved - Pending Permit	UCDH Building	65432UAT UAT Testing - Dry Run	Amendment
<input type="checkbox"/>	11/29/2023	B23-0183	Documents Received	UCDH Building	123123 UAT DRY RUN - for PAD	
<input type="checkbox"/>	11/27/2023	B23-0181	Pre-Construction Meeting	UCDH Building	2344534 UAT Project Testing	
<input type="checkbox"/>	10/10/2023	B23-0165	In Plan Review	UCDH Building	232342 Aggie Square - Test	
<input type="checkbox"/>	10/06/2023	23TMP-000285		UCDH Building		Resume Application

2.0.2 HCAI PAD Application

To start a new application for HCAI PAD, your parent application has to be in **“Accepted for Submittal to HCAI”** status.

<input type="checkbox"/>	Date	Project Record Number	Status	Record Type	UCDH Project Number/Name	Action
<input type="checkbox"/>	10/06/2023	23TMP-000285		UCDH Building		Resume Application
<input type="checkbox"/>	10/10/2023	B23-0165	In Plan Review	UCDH Building	232342 Aggie Square - Test	
<input type="checkbox"/>	11/27/2023	B23-0181	Pre-Construction Meeting	UCDH Building	2344534 UAT Project Testing	
<input type="checkbox"/>	11/29/2023	B23-0182	Documents Received	UCDH Building	65432UAT UAT Testing - Dry Run	
<input type="checkbox"/>	11/29/2023	B23-0183	Documents Received	UCDH Building	123123 UAT DRY RUN - for PAD	
<input type="checkbox"/>	02/09/2024	B24-0003	Approved - Pending Permit	UCDH Building	31231 adfsad	
<input type="checkbox"/>	02/01/2024	H24-0001	In Plan Review	HCAI Project	3243 adfsad	
<input type="checkbox"/>	02/01/2024	H24-0002	Accepted for Submittal to HCAI	HCAI Project	23243 vxzcv	Amendment
<input type="checkbox"/>	01/20/2023	UCDH-2023-0019	Closed - Denied	UCDH Building	1234 Test - UCDH	
<input type="checkbox"/>	04/19/2023	UCDH-2023-0130	In Triage	UCDH Building	2345678 Testing - Shruti	

Click on the project number link to open the Project Details page. On the details page, click on the **Create Amendment** button to create a PAD amendment.

Home **Projects**

Create an Application Search Projects

Record UCDH-2022-0239:
UCDH Building
Record Status: Approved

Record Info ▾

Record Details

Applicant: Shruti Gadhok UC Davis Health Mobile Phone:9167430199 sgadhok@ucdavis.edu Mailing 2172 Club Center Drive Sacramento, CA, 95835 United States	Licensed Professional: dfasd sdfa sgadhok@ucdavis.edu sdfas asdfsdf adasdf, CA, 89745 Mobile Phone:87987987987 Contractor 87987
--	--

▶ More Details

Create Amendment

2.1 STEP 1: PAD Details

Home **Projects** Fire Prevention

Create Application Search Projects Schedule a Pending Inspection

HCAI Post Approval Document

1 Step 1: PAD Details 2 Step 2: Contacts 3 Step 3: Professionals 4 Step 4: PAD Attachments 5 Review 6 7

Step 1: Step 1: PAD Details > PAD Details * indicates a required field.

PAD Details

PLAN REVIEW

* Submittal Type: --Select-- --Select--
Amended Construction Document
Deferred Approval

* Applicant Tracking Number:

* Scope of Work Associated with this PAD:
spell check

Over-The-Counter Review Requested:

COSTS
Enter the estimated CHANGE in project costs as a result of this submittal. (Do not enter full project cost). If this submittal is a reduction in cost, enter a minus sign (-) with the cost to indicate a negative number (ex: -5000.00).

* PAD Construction Cost Estimate:

[Continue Application »](#) [Save and resume later](#)

Drop-down values for the field “**Submittal Type**” are:

1. Amended Construction Document
2. Deferred Approval

Applicant Tracking Number:

Example: ACD-01 or DA-01

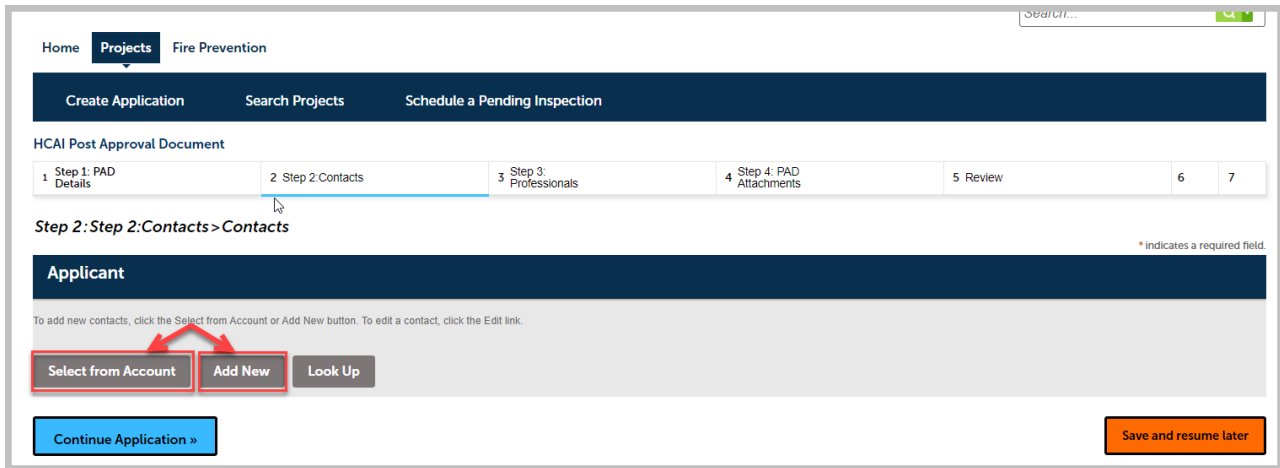
PAD Construction Cost **Estimate**:

If the value is unknown enter a zero “0”

2.2 STEP 2: Contacts

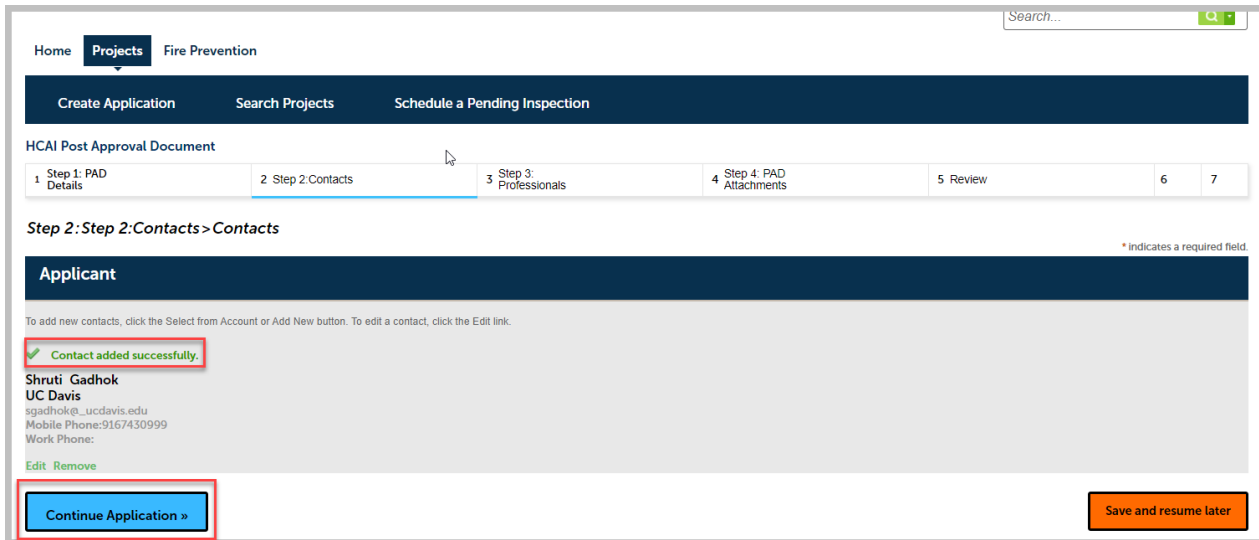
2.2.1 Contact Information > Applicant

Entering the **“Applicant”** information is mandatory on every application. An applicant is *who is applying*. **“Applicant”** and **“UCDH Project Manager”** listed in the parent application will receive all the correspondence (emails) from UCDH eServices Portal once the project has been submitted.



2.2.2 Selecting and Adding New Contacts

The **“Select from Account”** function is available for Contacts, and they must be added by clicking the **“Select from Account”** button to use the information contained in your Public User account. Click on the **“Continue”** button to save the selected contact.



Clicking on the “Add New” button will display the “Contact Information” screen where you can enter the required information for each contact on the Application.

The screenshot shows a form titled "Contact Information" with a close button (X) in the top right corner. The form contains the following fields:

- * First: [Text Input]
- Middle: [Text Input]
- * Last: [Text Input]
- Legal Business Name: [Text Input]
- Work Phone: [Text Input]
- * Mobile Phone: [Text Input]
- * Contact E-mail: [Text Input]
- Country: [Dropdown Menu] (Currently set to United States)

At the bottom of the form, there are three buttons: "Continue" (dark grey), "Clear" (dark grey), and "Discard Changes" (green).

The screenshot shows the "HCAI Post Approval Document" application progress screen. The top navigation bar includes "Home", "Projects", and "Fire Prevention". Below this, there are three main actions: "Create Application", "Search Projects", and "Schedule a Pending Inspection".

The progress bar shows seven steps:

- 1 Step 1: PAD Details
- 2 Step 2: Contacts
- 3 Step 3: Professionals
- 4 Step 4: PAD Attachments
- 5 Review
- 6
- 7

The current step is "Step 2: Step 2: Contacts > Contacts". A note indicates that an asterisk (*) indicates a required field.

The "Applicant" section displays the following information:

- Shruti Gadhok
- sgadhok@ucdavis.edu
- Mobile Phone: 945-698-7452
- Work Phone:

There are "Edit" and "Remove" links below the applicant information. A green checkmark icon and the text "Contact added successfully." are displayed in a red-bordered box. At the bottom, there are two buttons: "Continue Application »" (blue) and "Save and resume later" (orange).

Click on the “Continue Application” to proceed to the next screen.

2.3 STEP 3: Professionals

2.3.1 Step 3: Professionals > Professionals

Only the information that is cloned down from the parent project record to the child (PAD record). For the Professionals, they wouldn't need to enter professionals into the application because they are already under the parent unless they are adding a new professional to the project. We would need to manually add the new professionals to the parent project if they do add one in the PAD application.

Step 3: Step 3: Professionals > Professionals

If this PAD is an Amended Construction Document, do not add Licensed Professional(s) to this application that are already listed on the parent project. Scroll to the bottom of the page and click "Continue Application".

If this PAD is a Deferred Approval, the Design Professional with delegated responsibility for the design must be included on this application.

* indicates a required field.

Licensed Professionals

To add a new licensed professional, click the Select from Account or Add New button. To edit a licensed professional, click the Edit link. To find a licensed professional, click the Look Up button.

Add New **Look Up**

Showing 0-0 of 0

State License Number	License Type	Contact Name	Name of Business	Mobile Phone	Action
No records found.					

Continue Application » **Save and resume later**

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

2.3.2 Save and Resume Later Button

If you click the **“Save and resume later”** button, your application is saved, and you will be redirected to the Project List page. eServices Portal will issue a temporary Project ID and display the application in the Project list. You can click on the **“Resume Application”** button at a later time to complete and submit your application.

The screenshot shows the 'Projects' section of the eServices Portal. At the top, there are navigation tabs for 'Home' and 'Projects'. Below this is a dark blue bar with 'Create an Application' and 'Search Projects' buttons. A green notification banner states: 'Your partial application (23TMP-000002) has been successfully saved. To resume the application(s), go to the Records section and click the Resume Application link.' Below the notification is a 'Records' section with a 'Show on Map' button. A table lists project records with columns for Date, Project Record Number, Status, Record Type, UCDH Project Number/Name, and Action. A red arrow points from the notification to the first row of the table, which has 'UCDH Post Approval Document' in the Record Type column and 'Resume Application' in the Action column, both highlighted with red boxes.

<input type="checkbox"/>	Date	Project Record Number	Status	Record Type	UCDH Project Number/Name	Action
<input type="checkbox"/>	01/05/2023	23TMP-000002		UCDH Post Approval Document		Resume Application
<input type="checkbox"/>	12/14/2022	UCDH-2022-0239-PAD-0001	Open - Returned	UCDH Post Approval Document	56165 dad	
<input type="checkbox"/>	12/01/2022	UCDH-2022-0239	Approved	UCDH Building	56165 dad	Amendment
<input type="checkbox"/>	12/01/2022	22TMP-000563		UCDH Building		Resume Application
<input type="checkbox"/>	12/01/2022	22TMP-000565		HCAI Project		Resume Application
<input type="checkbox"/>	11/28/2022	UCDH-2022-0228	In Plan Review	UCDH Building	ABC258 Testing defects	
<input type="checkbox"/>	11/28/2022	UCDH-2022-0229	In Progress	UCDH Building	32134 sASD	
<input type="checkbox"/>	11/28/2022	HOSP-2022-0230	In Plan Review	HCAI Project	213423 sadfasdf	
<input type="checkbox"/>	11/23/2022	UCDH-2022-0226	Closed - Denied	UCDH Building	dfawerwq dsfsad	
<input type="checkbox"/>	11/21/2022	HOSP-2022-0215	Closed - Denied	HCAI Project	23132 testing - Milestone	

2.4 STEP 4: PAD Attachments > Attachments

This section allows you to upload the documents in your application.

2.4.1 Digital Projects

For each type of submission, drop the file in the **“Drag files here to upload or click to select files”** area.

Home Projects Fire Prevention

Create Application Search Projects Schedule a Pending Inspection

HCAI Post Approval Document

1	2 Step 2: Contacts	3 Step 3: Professionals	4 Step 4: PAD Attachments	5 Review	6 Pay Fees	7
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Step 4: Step 4: PAD Attachments > Attachments
Attach the plans/documents separately for review by the UCDH Building Department. Enter as many rows as needed. (Document types must be attached separately. Please do not combine into one file). * Indicates a required field.

Digital Projects

Submission Package Files Approved Plans / Documents Help

Status: NOSTATUS

Upload files. The following Document Types must be uploaded for this permit application: • Plans

Submission Package Description
Submission Package 1

Drag files here to upload or click to select files
Cannot exceed 350Mb. Allowed file extensions:
XLS, XLSX, DOC, DOCX, DWG, JPG, JPEG, PDF, PDF/A, PNG



Note: For UCDH and HCAI PAD Amended Construction Document applications it is mandatory to upload **“PLANS”**, **“Reference Documents”** and **“Narrative”** to your application.

Once your document is uploaded the following screen will be displayed; the Status will be **“Ready to Submit.”** You can drag and drop all the three required documents in the **“Drag fields here to upload or click to select files”** box.



NOTE: Refer to the document **“User Guide - Electronic Plan Review Document Submittal Requirements”** for file naming standards.

Digital Projects

Submission Package | Files | Approved Plans / Documents | Help

Status: NOSTATUS

Package is ready to submit, or upload additional files

Submission Package Description
Submission Package 1

Drag files here to upload or click to select files
Cannot exceed 350Mb. Allowed file extensions: XLS,XLSX,DOC,DOCX,DWG,JPG,JPEG,PDF,PDFA,PNG

File Name	Virtual Folder	Description	Doc Type	Uploaded By	Uploaded Date	Status	Thumbnail	Actions
Plan_9557230_UCDH_22_4947_ACD02.pdf	02-Milestone (...)	Enter file desc...	Plans		02/14/2024 10:59:26	Ready to Submit		

1 of 1 files are ready for submittal

EXPORT LIST

Click on the **“Continue”** button to progress to the next step in your application.



NOTE: When and if the sheet number and title of the drawings don't transfer properly, you can add it in the screen that opens up when you click on the status field. After that it will accept your plans and you can submit your application.

2.5 STEP 5: Review

This section enables you to validate your application before you submit it. The **“EDIT”** buttons can be found in each section.

2.5.1 EDIT BUTTONS

Edit button enable you to **“Review”** the data entered and make edits if needed before applying. Click on the **“Edit”** button on each application step to make the necessary changes.

Home **Projects** Fire Prevention

Create Application Search Projects Schedule a Pending Inspection

HCAI Post Approval Document

1	2	3 Step 3: Professionals	4 Step 4: PAD Attachments	5 Review	6 Pay Fees	7 Record Issuance
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Step 5: Review

[Continue Application »](#) [Save and resume later](#)

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

Record Type

HCAI Post Approval Document

PAD Details

PLAN REVIEW [Edit](#)

Submittal Type: Amended Construction Document

Applicant Tracking Number: 1231

Scope of Work Associated with this PAD: dfasdf

Over-The-Counter Review Requested: No

COSTS [Edit](#)

PAD Construction Cost Estimate: 123423

Applicant [Edit](#)

2.5.2 Terms and Conditions

Once you have verified all the data entered in your application, click on the **“Terms and Conditions”** checkbox, and click on **“Continue Application”** to **“SUBMIT”** your application.

The screenshot shows the application form with the following sections:

- Applicant** (with an **Edit** button):
Shruti Gadhok
UC Davis
Mobile Phone: 9167430999
Contact E-mail: sgadhok@ucdavis.edu
- Licensed Professionals** (with an **Edit** button):
Showing 0-0 of 0
Table with columns: State License Number, License Type, Contact Name, Name of Business, Mobile Phone, Action. No records found.
- Certification text: "I certify that I have read and understand the instructions that accompany this application and that the statements made as part of this application are true, complete, and correct and that no material information has been omitted. By checking the box below, I understand and agree that I am electronically signing and filing this application."
- Checkbox: By checking this box, I agree to the above certification. (A red arrow points to this checkbox.)
- Date field: Date: (empty)
- Buttons: **Continue Application »** (blue) and **Save and resume later** (orange).

Verify that Today's date is entered once you click on the checkbox.

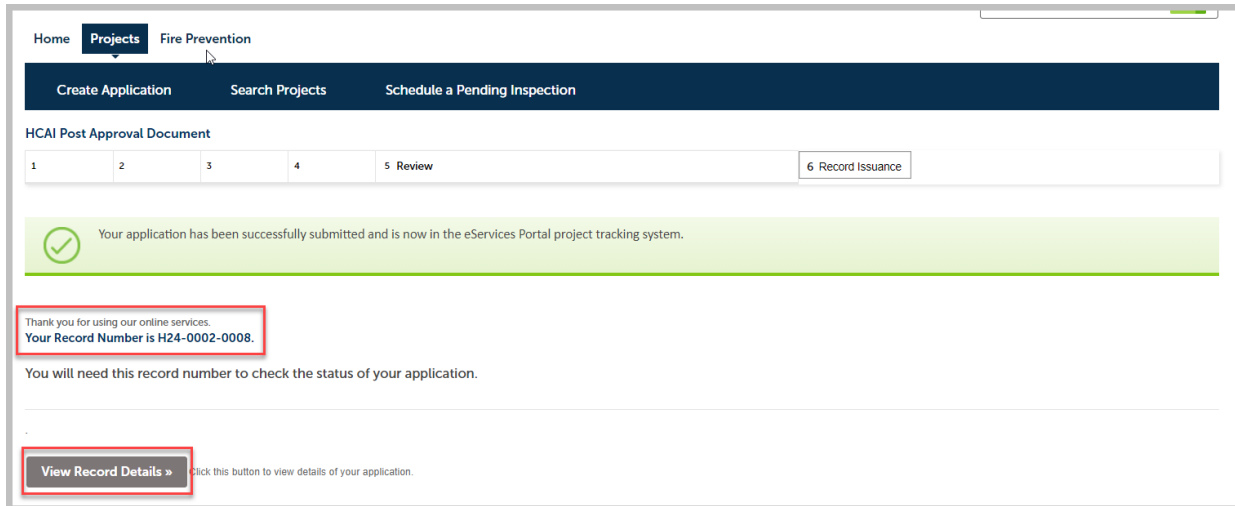
The screenshot shows the application form with the following sections:

- Certification text: "I certify that I have read and understand the instructions that accompany this application and that the statements made as part of this application are true, complete, and correct and that no material information has been omitted. By checking the box below, I understand and agree that I am electronically signing and filing this application."
- Checkbox: By checking this box, I agree to the above certification. (The checkbox and text are highlighted with a red box.)
- Date field: Date: 02/14/2024 (The date field is highlighted with a red box.)
- Buttons: **Continue Application »** (blue) and **Save and resume later** (orange).

Click on the **“Continue”** button to progress to the next step in your application.

2.6 STEP 6: Record Issuance

On this final screen, the eServices Portal displays a project submission confirmation including the project record number. You can also view detailed information about the project by clicking on the “**View Record Details**” button. Email confirmation is automatically sent to the Applicant and UCDH Project Manager email listed in your application.



Congratulations! You have successfully submitted a PAD Application (UCDH and HCAI).

2.7 Electronic Plan Submission

For “*Electronic plan submittal*” and “*Electronic plan review*,” select your record and click on “**Projects**” → “**Record Info**” → and select “**Attachments**” from the drop-down.

The screenshot shows a web application interface. At the top, there are navigation tabs: 'Home', 'Projects', and 'Fire Prevention'. Below these are three main action buttons: 'Create Application', 'Search Projects', and 'Schedule a Pending Inspection'. The main content area displays information for 'Record B24-0003-0001: UCDH Post Approval Document' with a status of 'Documents Received'. A dropdown menu is open under 'Record Info', showing options like 'Record Details', 'Processing Status', 'Related Records', 'Attachments' (highlighted with a red box), and 'Inspections'. Below the dropdown, there is a 'Project Description' section with text: 'Copy UCDH FDC Project Number (31231) from parent record (B24-0003) Copy UCDH FDC Project Name (adfasd) from parent record (B24-0003)'. At the bottom, there are contact details for 'Work Phone: 9164843011', 'Mobile Phone: 9164843011', and 'Contractor 8', along with a 'More Details' link.

Click on “**Add Documents**” to upload additional documents in your application.

The screenshot shows the 'Attachments' section of the application. It features a dark blue header with the word 'Attachments'. Below the header, there is a red warning message: '** If you are uploading any documents without uploading a plan file, please notify the UCDH Building Department via email at HS-BuildingDeptPlanReview@ucdavis.edu. **'. A note states: 'The maximum file size allowed is 400 MB. Please upload PDF files'. Below this is a table with the following data:

Name	Type	Virtual Folders	Action	Description	Upload Date	Latest Update	Document Status	Size
Plan_9557230_UCDH_22_4947_ACD02.pdf	Plans	02-Milestone (SD 100%)	Actions	Plan_9557230_UCDH_22_4947_ACD02.pdf	02/15/2024	02/15/2024	Uploaded	2.20 MB

At the bottom of the section, there is a button labeled 'Add Documents' highlighted with a red box.

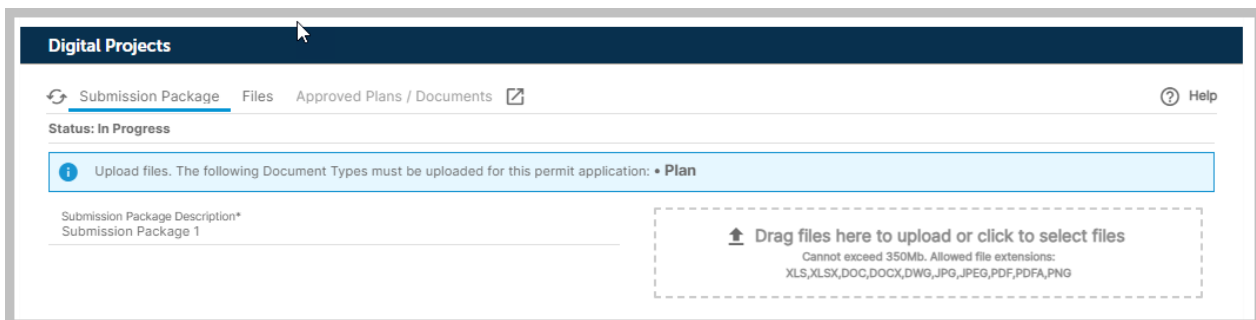
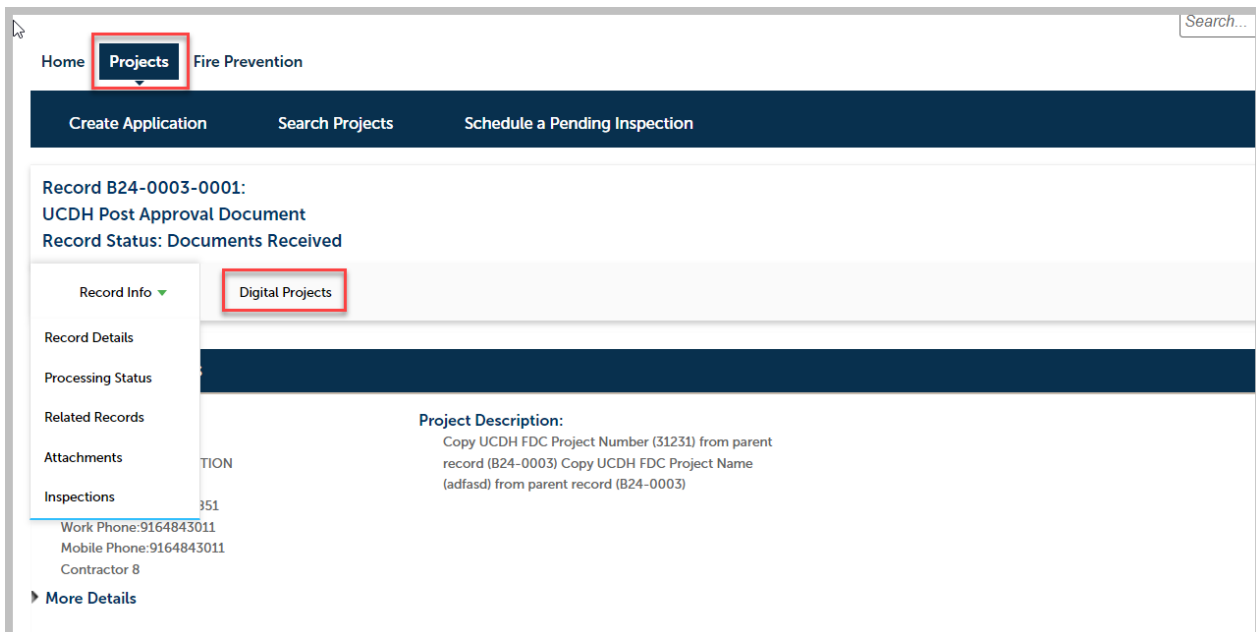


NOTE: Refer to the document “*User Guide - Electronic Plan Review Document Submittal Requirements*” for file naming standards.

2.8 Resubmitting Corrected Plan Review Documents

When the UCDH Building Department and Fire Prevention completes the review of your project, plan review files that require correction will have comments on the reviewed documents (Plans, Specifications, Calculations, etc.). Documents that include a date/time stamp in the filename and indicate "*Revision Required*" under the Document Status column are these documents that have been reviewed and include the comments.

Resubmit a corrected document, under the "*Digital Projects*" tab. Failure to do so, may result in your application being "*Returned at Triage*".



Appendix A: UCDH – File Naming Convention

UCDH - Plan Review Documents				
Documents should be in PDF Format Only				
No.	Document Type	Full Naming Convention (Example)	File Naming Convention	Description
1.	Calculations	Calc_Structural_9559310.pdf Calc_Structural_9559310_vol1.pdf Calc_Structural_9559310_vol2.pdf	<Calc_<type>_<UCDHProject#>.pdf	Calc_Struct Calc_Fire Calc_Anchorage Calc_Hydraulic, Calc_Precast, or Other Calculations as appropriate Note: Please use volume numbers for calculations with more than 1,000 pages or several volumes (see example).
2.	Geotechnical Report	GeotechRpt_9559310.pdf	<GeotechRpt>_<UCDHProject#>.pdf	Geotechnical Report
3.	Image Documents	Image_9559310.pdf	<Image>_<UCDHProject#>.pdf	Photos, Sketches
4.	Other <i>(Only use when no other description will work)</i>	Docs_9559310.pdf	<Docs>_<UCDHProject#>.pdf	Short Description of Document
5.	Manufacturer Cut Sheets	Prod_9559310_Fire Alarm.pdf	<Prod>_<UCDHProject#>_<Product Submittal Type>.pdf	Product Submittals E.g.: Fire Alarm, Fire Sprinkler
6.	Responses/Correction Report <i>(In Excel Format Only)</i>	Response_9559310.xlsx	<Response Comments>_<UCDHProject#>.xlsx	Responses to Plan Review comments
7.	TIO	TIO_9559310.pdf	<TIO>_<UCDHProject#>.pdf	TIO – Testing, Inspections and Observation
8.	Plans	Plan_9559310.pdf Plan_9559310_vol1_G_A_C_S.pdf	<Plan>_<UCDHProject#>_<volume#>_<First Initial for each discipline>.pdf	If you have 1 volume, don't enter the volume number. Plans with more than 100 Sheets or several volumes use volume numbers. After the volume#, enter the first initial for the discipline. E.g.: G for Geotechnical,

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				S=Structural, C=Civil
	Plans - ACD	Plan_9559310_B24-0023_ACD01.pdf	<Plan>_<UCDHProject#>_<UCDHparentrecord#>_<ACD><2-digit sequential#>.pdf	Amended construction document
	Plans - DA	Plan_9559310_B24-0023_DA01.pdf	<Plan>_<UCDHProject#>_<UCDHparentrecord#>_<DA><2-digit sequential#>.pdf	Deferred Approval
9.	Specifications	Specs_9559310.pdf Specs_9559310_vol1.pdf Specs_9559310_vol2.pdf	<Specs>_<UCDHProject#>.pdf	Specifications /Project Manual Note: If you have 1 volume, don't enter the volume number. Please use volume numbers for specifications with more than 1,000 pages or several volumes (see example).
10.	Reference Documents	Ref_9559310.pdf	<Ref>_<UCDHProject#>.pdf	Reference Only
11.	Narratives (Required for Amended Construction documents)	Narr_9559310_B24-0023_ACD01.pdf	<Narr>_<UCDHProject#>_<UCDHparentrecord#>_<ACD>><2-digit sequential#>.pdf	Narrative
12.	Letters	Letter_9559310.pdf	<Letter>_<UCDHProject#>.pdf	Letter

Appendix B: HCAI - File Naming Convention

HCAI - Plan Review Documents				
Documents should be in PDF Format only				
No.	Document Type	Full Naming Convention (Example)	File Naming Convention	Description
1.	Calculations	Calc_Structural_9559310.pdf	<Calc>_<type>_<UCDHPProject#>.pdf	Calc_Struct Calc_Fire Calc_Anchorage Calc_Hydraulic Calc_Precast Or Other Calculations as appropriate
2.	Functional Program	Func_9559310.pdf	<Func>_<UCDHPProject#>.pdf	Functional Program
3.	Geotechnical Report	GeoTechRpt_9559310.pdf	<GeoTechRpt>_<UCDHPProject#>.pdf	Geotech Report
4.	Image Documents	Image_9559310.pdf	<Image>_<UCDHPProject#>.pdf	Photos, Sketches
5.	Other (Only use when no other description will work)	Docs_9559310.pdf	<Docs>_<UCDHPProject#>.pdf	Short Description of Document
6.	Manufacturer Cut Sheets	Prod_9559310_Fire Alarm.pdf	<Prod>_<UCDHPProject#>_<Product Submittal Type>.pdf	Product Submittals E.g.: Fire Alarm, Fire Sprinkler
7.	Responses/Correction Report (In Excel Format Only)	Response_9559310.xlsx	<Response Comments>_<UCDHPProject#>.xlsx	Responses or Corrections Report
8.	Pharmacy Summary Checklist	Pharmacy Summary Checklist_9559310.pdf	<Pharm Summary Checklist>_<UCDHPProject#>.pdf	Pharmacy Summary Checklist
9.	TIO	TIO_9559310.pdf	<TIO>_<UCDHPProject#>.pdf	Testing, Inspections, and Observations Program
10.	Plans	Plan_9559310.pdf	<Plan>_<UCDHPProject#>.pdf	Plans for HCAI Projects
11.	Specifications	Specs_9559310.pdf	<Specs>_<UCDHPProject#>.pdf	Specifications
12.	Reference Documents	Ref_9559310.pdf	<Ref>_<UCDHPProject#>.pdf	Reference Only
13.	Narratives (Required for Amended Construction documents)	Narr_9559310_H23-0000_ACD01.pdf	<Narr>_<UCDHPProject#>_<UCDHparentrecord#>_<ACDxx>.pdf	Narrative
14.	Plan – Reference Only	Ref_S220543-34-00.pdf	<Ref>_<HCAIApprovedProject#>.pdf	References Only
15.	Project Cancellation Notice	WithdrawApplication_9559310.pdf	<WithdrawApplication>_<UCDHPProject#>.pdf	Project Cancellation or Withdrawal application

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				Post Approval Application
16.	Plans HCAI New project	Plan_9559310.pdf Plan_9559310_vol1.pdf	<Plan>_<UCDHProject#>.pdf <Plan>_<UCDHProject#>_<volume#>.pdf	If you only have 1 volume, do not enter the volume number. Plans with more than 100 Sheets or several volumes use volume number
	Plans – ACD HCAI - PAD	Plan_9559310_H23-0000-PAD-0002_CO01.pdf	<Plan>_<UCDHProject#>_<UCDHparentrecord#>_<PAD Applicant Tracking#>.pdf	ACD Plans for HCAI Projects
	Plans – DA HCAI - PAD	Plan_9559310_H23-0000-PAD-0002_DA01.pdf	<Plan>_<UCDHProject#>_<UCDHparentrecord#>_<DA>_<2-digit sequential#>.pdf	Deferred Approval for HCAI Projects

Appendix C: Attachment by Record Type

Attachments are electronic files such as PDFs or image files that you can upload from your computer to the eServices Portal, and then associate the attachment with a specific project record, such as a Project, Building Permit, Post-Approval Document, etc. Attachments can be just about any relevant document or file, such as special instructions, diagrams, pictures, or other information relevant to the record, however, the Document Types are limited based on the record the attachment is being uploaded to; this is known as public user permissions for each attachment associated with a record. Once a document, plan, photo, etc. is uploaded to eSP, the attachment can be downloaded and viewed by any Public User with Facility Authorization and by any Licensed Professional associated with that project. However, attachments cannot be deleted by Public Users once they are uploaded – even if they are erroneous. Attachments can only be deleted by UCDH intake staff. A description of attachments and the records that they can be associated with are listed in the table below:

Attachment Name	Record Type	Description
Attachments by Record Type		
Plan	HCAI and UCDH Projects PAD	Construction floor plans 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 applicable codes and relevant laws, ordinances, rules, and regulations. Plans do not include specifications, calculations, product data, etc.
Calculations	HCAI and UCDH Projects PAD	Structural calculations, hydraulic calculations, etc. necessary to support the design criteria and parameters of the Plans.
Specifications	HCAI and UCDH Projects PAD	The portion of the Contract Documents consists of the written requirements for materials, equipment, systems, standards, and workmanship for the work, and performance of related services.
Testing, Inspections, and Observations Program (TIO)	HCAI Project <i>(For HCAI projects only)</i>	The TIO program identifies all materials and tests to be performed on the project, all special inspections to be performed on the project, and the firm(s) and/or individual(s) to perform each of the required tests and, inspections. The TIO program must also identify each Licensed Professional who must verify that the work complies with the approved construction documents.
Functional Program	HCAI Project <i>(For HCAI projects only)</i>	An executive summary of the project, required by CAC Section 7-119, that clearly describes the purpose of the project, the project components, and scope affected support functions, operational and environment of care requirements, architectural space and technology requirements, and planning considerations.
Workers Compensation Insurance Certificate	UCDH Project	California law requires employers to have workers' compensation insurance if they have even one employee. Proof of sufficient workers' compensation insurance or a certificate of self-insurance is required for the issuance of any Building Permit.
Documents	HCAI and UCDH Projects HCAI and UCDH PAD	All other documents not already classified may be uploaded; this would include soil reports, product data sheets, reference drawings, etc.
Image Documents	HCAI and UCDH Projects PAD	Photos may be uploaded if they are relevant to the project.
Other	HCAI and UCDH Projects PAD	Miscellaneous classification of attachments.