



CITY OF SANTA ANA  
PUBLIC WORKS AGENCY  
DEVELOPMENT ENGINEERING

# AVOLVE-PROJECTDOX ELECTRONIC PLAN CHECK APPLICANT USER GUIDE GRADING PLAN CHECK

A screenshot of the ProjectDox login interface for the City of Santa Ana. The page has a white background with a blue header bar. At the top left, there is a yellow and orange gradient bar followed by the City of Santa Ana logo and the text "City of Santa Ana". Below this, a text box contains a welcome message: "Welcome to our website. If you continue to browse and use this website you are agreeing to comply with and be bound by the following terms and conditions of use, which together with our privacy policy govern...". Below the text box is a placeholder "[add'l text, etc.]". To the left of the login fields is the text "The City of Santa Ana". The login fields include "E-mail:" and "Password:" labels, each followed by a text input box. Below the password field is a "Login" button. To the right of the login button is a link "Forgot your password?". At the bottom of the page, there is a footer with copyright information: "© 2022 Avolve Software. ProjectDox (Version 9.2.8.909) and ProjectFlow (Version 9.2.8.917) are trademarks of Avolve Software. All rights reserved." and the Avolve Software logo. Below the footer is a link "Getting Started in ProjectDox". At the very bottom, there is a box with the ProjectDox logo and a link "To add ProjectDox to your favorites Click here".

## Apply for an Electronic Plan (E-Plan) Check with Public Works

**Important Note:** It is very important that you complete each task that you receive by clicking on the submit button. If you do not complete your tasks, the city staff will not receive your project and it will delay your project. If you have any questions or would like to verify that you completed a task accordingly, please email [pwa-projectdox@santa-ana.org](mailto:pwa-projectdox@santa-ana.org) with your questions.

### Step 1: Submit an Inquiry

To initiate a request to submit for e-plan check, you must email [pwa-projectdox@santa-ana.org](mailto:pwa-projectdox@santa-ana.org) with the subject line indicating project address and plan check type. Ex. Project Address - Grading

Note: All fields are required to advance the process – do not delete or modify.

Applicant Contact Info	
First Name:	Test
Last Name:	Engineer
Company:	Company A
Email:	<a href="mailto:CosaTestAvolve@gmail.com">CosaTestAvolve@gmail.com</a>
Phone:	XXX-XXX-XXXX
Project Info	
Project/Site Address:	1234 Santa Ana Ave, CA 56789
Customer's Project Reference #:	This is the internal unique ID that customers use for their own records/tracking purposes.
Project Description:	Precise grading work needed related to building permit issuance.
Plan Check Type:	Grading
Is this a regular or accelerated plan check?:	Please put either regular or accelerated

### Step 2: Create Your Account

Once you submit your inquiry, Public Works Staff will review. If your inquiry has been approved, you will be invited to create an account with Avolve-ProjectDox.

# PROJECT INVITE

---

Hello Test,

You have been invited to participate in the plan review for project: **TEST 081822**, as a member of the **Applicant** group.

**TIP: Complete Setup Now**

**Your temporary password will expire quickly.** You must complete your setup before you can upload files or complete any tasks.

Your login: [CosaTestAvolve@gmail.com](mailto:CosaTestAvolve@gmail.com)

Temporary password: **2AE4AA8**

Please complete your account setup now, click on "Login" below.

Login

To complete your setup

Once logged in, you will be prompted to change your password.

## Profile Information

### Welcome to ProjectDox.

Since you currently have a temporary password, you will need to change it to a permanent password and (if you have not done so) enter a security question and answer. This question/answer will be something that only you know, and will enable you to reset your password if you ever forget what it is.

#### Change Password:

New password:\*

Confirm new password:\*

#### Password Reset Question & Answer:

Security question: \*

Security answer: \*

*Password must contain at least one each of: uppercase letter, lowercase letter, number, special character from: \$@!%\*#?& Password length: 10-15 characters.*

#### Contact Information

User Metadata

Project Membership

Group Membership

User Activity

\* Required field

First Name: \*

Applicant

Last Name: \*

Name

Email: \*

cosatestavolve@gmail.com

## Step 3: Upload Your Plans

You will receive an email to access the project that the Coordinator has created.

# PROJECT INVITE

---

Hello Test,

You have been invited to participate in the plan review for project: **TEST Grading PC 071823**, as a member of the **Applicant** group.

Your login is: [CosaTestAvolve@gmail.com](mailto:CosaTestAvolve@gmail.com)

To access this project, please click on "Open Project" below.

**Open Project**

To access this project

You will also receive an email to upload and submit your plans.

# UPLOAD AND SUBMIT

---

Hello Test,

You have a task to complete to start your plan review.

**TIP: Are you a New User?**

**First complete your account setup (required)**, if you haven't already. Open the separate invite email you received, or to request a new password [click here](#) and then select "forgot password".

To begin, please click on "Start Task" below.

**Start Task**

To submit your files  
for **TEST Grading PC 071823 : Grading Work**

When logged in, you will see the following on your dashboard.

TEST Grading PC 071823: Grading Work									
ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIPTION	
<input type="button" value="Accept"/>	Upload and Submit	TEST Grading PC 071823	Applicant	Pending	Medium	8/8/23 1:11 PM	7/18/23 1:11 PM	Grading Work	

Click the Accept button to start the task of uploading and submitting your plans.

A new window will appear with three steps:

- 1) Upload your plans and Grading permit Application Worksheet (<https://www.santa-ana.org/documents/grading/>) \* Note: Application should be added to Documents Folder.
- 2) Confirm plans have been uploaded
- 3) Click Submit

## UPLOAD AND SUBMIT

Task Information

Invite Others

**Task Information**

**Project Name:** TEST Grading PC 071823

**Project Description:** Grading Work

**Workflow:** Public Works Workflow

**Current User Login:** Test Applicant (CosaTestAvolve@gmail.com)

**Task Due Date:** 8/8/23 1:11 PM

**Task Instructions**

Please follow the steps below:

**STEP 1 of 3:** Select and upload your drawing and supporting document files into this project, as required

---

**File Upload for: TEST Grading PC 071823** ?

Please click appropriately for the **type of files** you are uploading.

Uploaded files:

No files uploaded yet.

**STEP 2 of 3:** Check all to confirm you have completed this task and are now ready to submit

---

**Confirmation** ?

\*All files for this project have been uploaded \*Required

**STEP 3 of 3:** Click the "Submit" button below to complete your task

---

When you click on Upload Drawings, a new window will appear.

Folder: TEST Grading PC 071823\Drawings

Browse For Files

or drag files into this area.

Start Upload

---

  001 Grading Title Sheet.PDF 0B/3.77MB 

0 of 1 uploaded [Hide Details](#)


0B/3.77MB


---

**Orange** files are **new uploads**

**Blue** files are new **version uploads**

**Red** files appear to be same as previously uploaded (**will likely be discarded**)

 Ready to start upload

 Remove, fix, re-select to start upload.

IMPORTANT: All plans need to be in PDF format.

Please refer to the City website for plan guidelines.

Once completed, you will receive an email confirming the upload of your plans.

# UPLOAD COMPLETED

---

Hello Test,

The following files have been received for project - **TEST Grading PC 071823 : Grading Work**

Files received:

1. 001 Grading Title Sheet.PDF

## Step 4: Prescreen Review / Initial Payment

Once all three Coordinator groups (Planning, Building, and Public Works) have completed the prescreen review, you will be notified to come to the City counter to do initial payment.

**IMPORTANT:** Please keep track of the Miscellaneous Cash Transaction Number (MCT #) for payment verification purposes.

## Initial Payment Due

---

Hello Test,

You have an important task to complete by **8/29/2023 1:21:02 PM**.

To begin, please select "Start Task" below.

**Start Task**

To complete your task  
for **TEST Grading PC 071823 : Grading Work**

## Task Instructions

Please pay initial payment Due.

### Initial Payment Verification ?

Add Comment

#### DISCUSSION COMMENT

Please come to the counter to pay initial plan check fees.

After you have completed in-person payment, please confirm payment online.

Click the Accept button to start task.

Tasks Projects

Refresh Save Settings Reset Settings Quick Filter: Select One All Overdue Priority Show

ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIP
Accept	Initial Payment Due	TEST_081822	Applicant	Pending	Medium	12/30/22 12:52 PM	11/18/22 12:52 PM	Streets

A new window will appear.

Click on Add Comment and input the MCT #.

### Initial Payment Verification ?

Comment: \*

Save

Cancel

Then, click on Initial Fees Paid to complete the task.

### Step 5: E-Plan Check Begins

After initial payment has been received, the Coordinator will start assigning reviewers to begin the e-plan check at the City.

You will receive an email notifying you the prescreen review has completed and that the e-plan check is in progress.



# PRESCREEN COMPLETED

---

Hello Test,

Congratulations, the next step in your review is beginning.

The prescreening of files uploaded for project - **TEST Grading PC 071823 : Grading Work** is completed.

You will be notified when the review is complete and if any additional response is required.

## Step 6: E-Plan Check Ends / Final Payment / Signatures / Permit Issuance

When the e-plan check has completed, you will receive an email to come to the City counter to pay final plan check fees.

## Final Payment

---

Hello Test,

You have an important task to complete by **8/29/2023 1:38:49 PM**.

To begin, please select "Start Task" below.

**Start Task**

To complete your task  
for **TEST Grading PC 071823 : Grading Work**

Tasks **Files** Status |

Refresh

Upload Files

Drawings (1 - 0 New)

Documents

Approved

Rejected

Final Version

IMPORTANT: Please keep track of the Miscellaneous Cash Transaction Number (MCT #) for payment verification purposes.

Please confirm payment online to receive digitally approved plans.

Click the Accept button to start task.

A window will appear with three steps:

- 1) Add comment regarding final payment
- 2) Confirm that all fees have been paid
- 3) Click Submit

**STEP 2 of 3:** Check the box to confirm you are ready to submit

Confirmation 

\*All fees have been paid \*Required

**STEP 3 of 3:** Click the "Submit" button below to complete your task

Submit

Save for Later

In the Comment section, input MCT # to confirm final payment.

**STEP 1 of 3:** Respond to comments, as needed

Discuss Final Payment 

Comment: \*

MCT #

Save

Cancel

Please be aware that it will take some time for the City to gather signatures. So, there will be a waiting period. We thank you for your patience and cooperation during the signature process.

After Final plan check fees have been paid in person you will receive a link via email, that will give you access to pay permit fees and obtain your permit electronically.

### Step 7: Approved Stamped Plans

You will receive an email stating that your approved plans are ready for download. These approved plans will have the required signatures in order to receive a grading permit from Planning and Building Agency and for work to begin.

To access the approve plans, go to the projects dashboard.

Click on the Approved link and a new window will appear.

You will be taken to the files section of the project.

The plans will be in the Approved folder.