

CITY OF SANTA ANA PUBLIC WORKS AGENCY DEVELOPMENT ENGINEERING

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



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

<u>Important Note</u>: 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 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 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:	CosaTestAvolve@gmail.com		
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.

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Hello Test,

You have been invited to the 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

Temporary password: 2AE4AA8

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

cosatestavolve@gmail.com



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:** Password Reset Question & Answer: New password:* Security question: * Confirm new password:* 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 Name Last Name:

Step 3: Upload Your Plans

Email: *

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

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PROJECT INVITE

Hello Test,

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

Your login is: 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 <u>click here</u> and then select "forgot password".

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

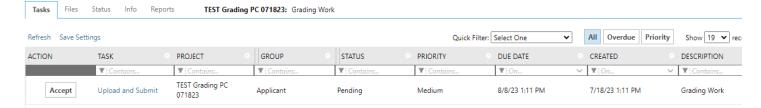
Start Task

To submit your files

for TEST Grading PC 071823 : Grading Work

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

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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

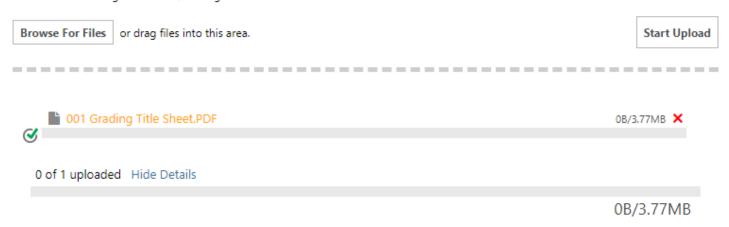
UPLOAD AND SUBMIT

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@e	gmail.com)			
Task Due Date:	8/8/23 1:11 PM				
T1-1					
Task Instruction	ons				
Please follow the step	s below:				
STEP 1 of 3: Se	lect and upload your drawing	and supporting o	focument files into this no	niect as required	
	· · · · ·	and supporting c	iocament mes into this pr	ojeco ao regamea	
File Upload for: T	EST Grading PC 071823				
Please click appro	priately for the type of files you a	re uploading.			
			Upload Drawings	Upload Documents	
Uploaded fil	es:				
No files uploaded	l yet.				
STEP 2 of 3: Check all to confirm you have completed this task and are now ready to submit					
Confirmation 6					
All files for this project have been uploaded *Required					
CTED 2 of 21 CT List IIC L 2011 III List List List List List List List List					
STEP 3 of 3: Click the "Submit" button below to complete your task					
			Submit	Save for Later	

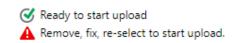
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When you click on Upload Drawings, a new window will appear.

Folder: TEST Grading PC 071823\Drawings



Orange files are new uploads
Blue files are new version uploads
Red files appear to be same as previously uploaded (will likely be discarded)



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.

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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

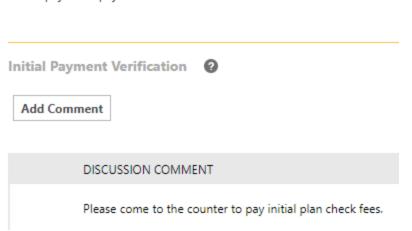
To complete your task

for TEST Grading PC 071823 : Grading Work

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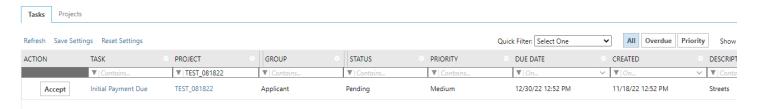
Task Instructions

Please pay initial payment Due.



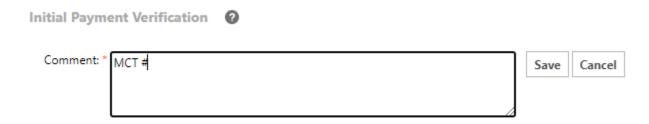
After you have completed in-person payment, please confirm payment online.

Click the Accept button to start task.



A new window will appear.

Click on Add Comment and input the MCT #.



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.

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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

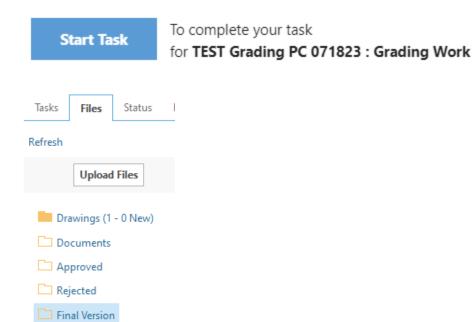
When the e-plan check has completed, you will receive an email to come to the City counter to pay final plan check fees.

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.



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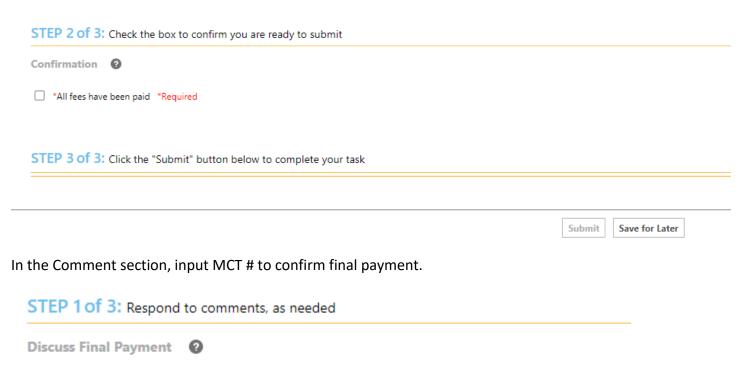
IMPORTANT: Please keep track of the Miscellaneous Cash Transaction Number (MCT #) for payment verification purposes.

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



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.

Cancel

Save

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

Comment: *

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.

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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.

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