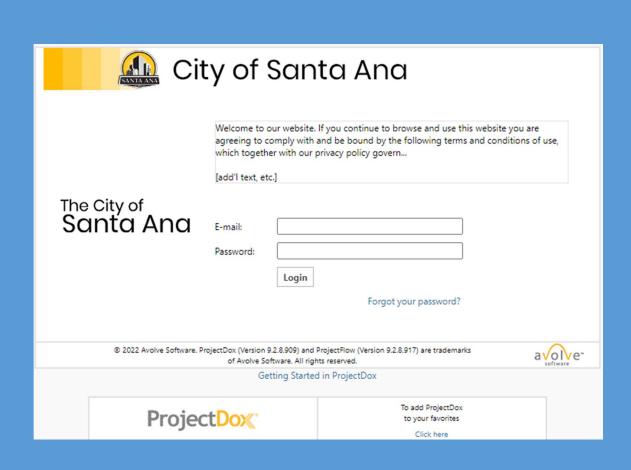


CITY OF SANTA ANA PUBLIC WORKS AGENCY DEVELOPMENT ENGINEERING

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



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

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

For grading, please make sure to include the following information and attach the following attachments:

- 1. Approval Memo from Planning
- 2. Grading Permit Application Worksheet from Building

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

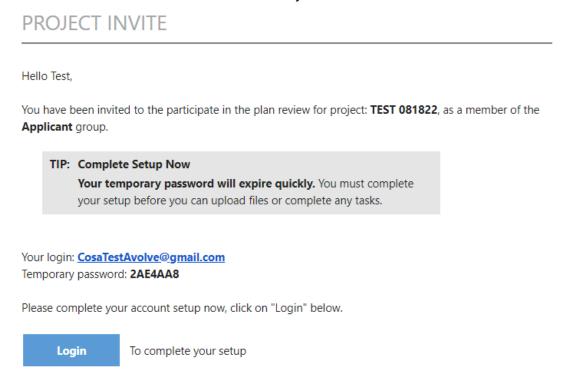
*If you do not have a Master ID and a 501 #, please reach out to the Planning and Building Agency to obtain that information.

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:	TEST Grading PC 071823		
Customer's Project Reference #:	TEST Grading PC 071823		
Project Description:	Grading Work		
Plan Check Type:	Grading		
Master ID from Planning:	Year – XXXXXX		
501 # from Building:	501 – XXXXX		

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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.



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

Profile Information

Welcome to ProjectDox.						
,	on and answer. This que	.,	· ·	sword and (if you have not done so ow, and will enable you to reset)	
Change Password:		Password Res	et Question & Answe	r:		
New passwor	New password:*		ion: *			
Confirm new password:*		Security ans	wer: *			
Password must contain at least one each of: uppercase letter, lowercase letter, number, special character from: \$@\$!%*#?& Password length: 10-15 characters.						
Contact Informatio	n User Metadata	Project Membership	Group Membership	User Activity		
* Required field						
First Name: * A	pplicant	Last Name: * Name	9			
Email: *	atestavolve@gmail.com					

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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 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.

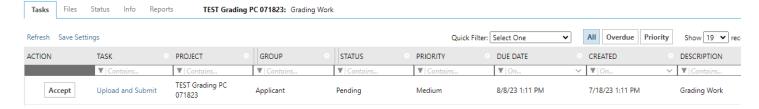


To submit your files

for TEST Grading PC 071823: Grading Work

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

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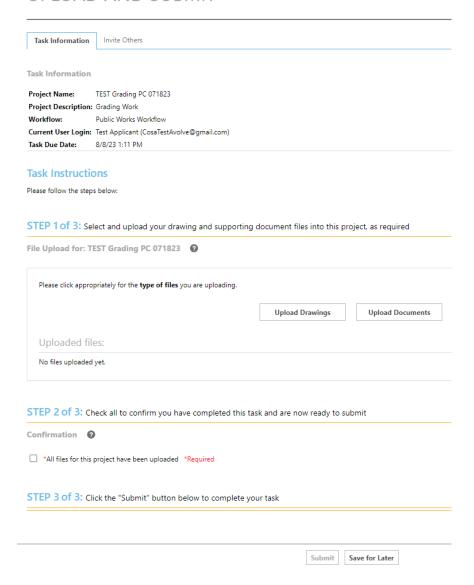


Click the Accept button to start the task of uploading and submitting your plans.

A new window will appear with three steps:

- 1) Upload your plans
- 2) Confirm plans have been uploaded
- 3) Click Submit

UPLOAD AND SUBMIT



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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.

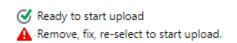
Start Upload



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)



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 the Coordinator has 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

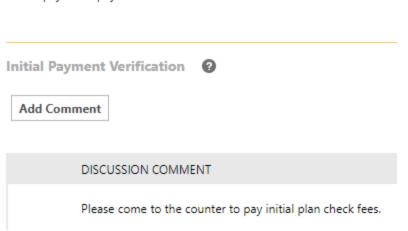
To complete your task

for TEST Grading PC 071823 : Grading Work

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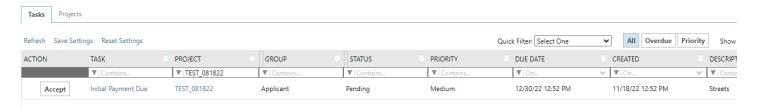
Task Instructions

Please pay initial payment Due.



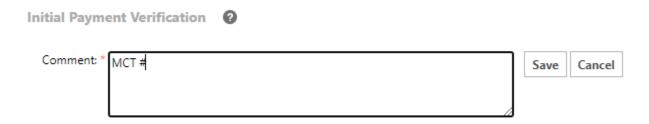
After you have completed in-person payment, please confirm payment online.

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

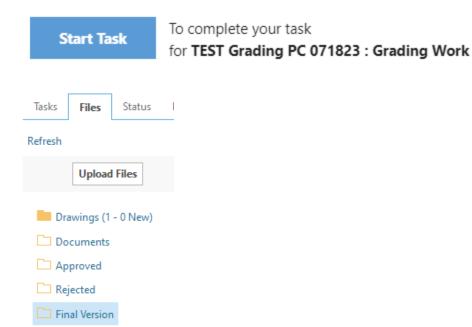
When the e-plan check has completed, you will receive an email to come to the City counter to pay final plan check fees.

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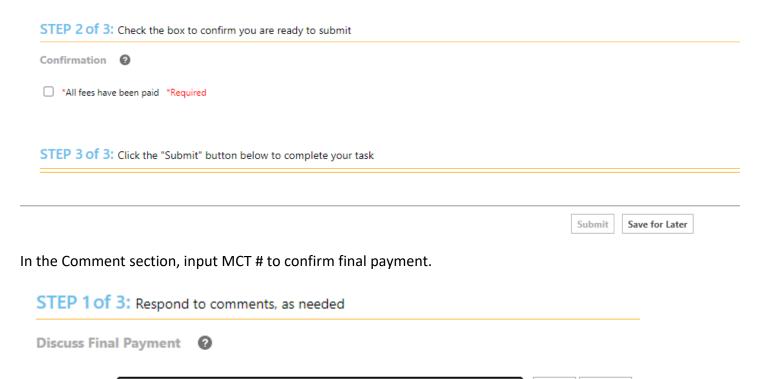
IMPORTANT: Please keep track of the Miscellaneous Cash Transaction Number (MCT #) for payment verification purposes.

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

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.

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

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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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