CITY OF SANTA ANA
PUBLIC WORKS AGENCY
DEVELOPMENT ENGINEERING

AVOLVE-PROJECTDOX ELECTRONIC PLAN CHECK APPLICANT USER GUIDE GENERAL OVERVIEW

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.

Please make sure to also include the following information.

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:	TEST General 071823
Customer's Project Reference #:	TEST General 071823
Project Description:	TEST General 071823
Plan Check Type:	Plan
Project Contractor, if known:	Contractor Name
Duration for Lane Closure Projects:	Time
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 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.

[**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: **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]   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 the participate in the plan review for project: **TEST General 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 click here and then select "forgot password".

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

| Start Task | To submit your files for **TEST General 071823 : TEST General 071823** |

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

Tasks	Files	Status	Info	Reports		**TEST General 071823:** TEST General 071823				

Refresh Save Settings   Quick Filter: Select One ⌄   All Overdue Priority   Show 19 ⌄ record

ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIPTION
▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	▼ On...	▼ On...	▼ Contains...
Accept	Upload and Submit	TEST General 071823	Applicant	Pending	Medium	8/8/23 4:27 PM	7/18/23 4:27 PM	TEST General 071823

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

Task Information	Invite Others

Task Information

Project Name:	TEST General 071823
Project Description:	TEST General 071823
Workflow:	Public Works Workflow
Current User Login:	Test Applicant (CosaTestAvolve@gmail.com)
Task Due Date:	8/8/23 4:27 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 General 071823 ❓

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

[Upload Drawings]   [Upload Documents]

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 General 071823\Drawings

| Browse For Files | or drag files into this area. | Start Upload |

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📄 001 General Title Sheet.PDF   0B/5.98MB ✕

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0 of 1 uploaded   Hide Details

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0B/5.98MB

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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 General 071823 : TEST General 071823**

Files received:

1. 001 General 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 4:33:55 PM**.

To begin, please select "Start Task" below.

Start Task   To complete your task
for **TEST General 071823 : TEST General 071823**

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	Files	Status	Info	Reports		**TEST General 071823:** TEST General 071823					

Refresh   Save Settings   Quick Filter: Select One ⌄ | All | Overdue | Priority | Show 19 ⌄ records

ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIPTION
▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	▼ On...	▼ On...	▼ Contains...
Accept	Initial Payment Due	TEST General 071823	Applicant	Pending	Medium	8/29/23 4:33 PM	7/18/23 4:33 PM	TEST General 071823

A new window will appear.

Click on Add Comment and input the MCT #.

Initial Payment Verification ❓

Comment: * | MCT # | 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 General 071823 : TEST General 071823** 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

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 4:37:57 PM**.

To begin, please select "Start Task" below.

Start Task   To complete your task
for **TEST General 071823 : TEST General 071823**

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 |

Step 7: Approved Stamped Plans

You will receive an email stating that your approved plans are ready for download.

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.